
How To Look Up Allocations

Ver. 1.1

2/6/2019

1. Log in to Advance.
2. Click on the Binoculars (Lookup Tool.)

ADVANCE Clear Local Storage (TMS) | Purge Cache **Chris Farris** [Logoff]

Home x

Home

▶ Annual Fund
▶ Gift & Bio
Alerts/Messages
Change Password

Home Actions

You are logged on as **Mr. Christopher Farris** on the **ADVTRAIN** database. Welcome to Advance. Today is Monday, February 04, 2019.

Tasks (50402) Actions Help

Scheduled	Name	Task	Status
10/18/2018		Solicitation Plan	Cancelled

Undergraduate Giving Statistics (100516) Actions Help

Last Fiscal Year	This Fiscal Year
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3. Change Choose a template (optional) to Gift - Allocation.

The screenshot shows the ADVANCE software interface. At the top, there is a navigation bar with 'Home' and 'Lookups - Bio - Entity' tabs. Below this, a sidebar on the left lists 'Saved Criteria...' and various categories like 'Biographic', 'Event', 'Gift', 'Prospect Tracking', 'Membership', 'Resource', and 'Miscellaneous'. The main area is titled 'Lookups' and contains a list of steps: '1. Choose a template (optional)', '2. Select results format*', '3. Select output type*', '4. Select additional criteria from page', and '5. Enter criteria below and click Search'. A dropdown menu is open for step 1, showing a list of templates. 'Gift - Allocation' is highlighted in blue. A green arrow points from the instruction above to this option. Below the dropdown, there are sections for 'ID Lookup (70037)' and 'Entity Lookup (70036)', each with input fields for 'ID' and 'Alt ID' and a 'Search' button. The 'Entity Lookup' section also has fields for 'Last/Org Name', 'First', 'Middle', and 'Name Type'.

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4. Use template blocks to search for Allocation. Some hints follow.

Lookups Actions

1. Choose a template (optional)

2. Select results format*

3. Select output type*

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

Allocation Lookup (70040) Help

Allocation	Equal	<input type="text"/>	<input type="text" value="A"/>
Status	Equal	<input type="text" value="A"/>	<input type="text" value="Active"/>
Account	Equal	<input type="text"/>	
ISIS ItemType	Equal	<input type="text"/>	<input type="text" value="B"/>
Short Name	Contains	<input type="text" value="C"/>	
Long Name	Contains	<input type="text"/>	
CFAE Purpose	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Restriction	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Department	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Sub Dept	Equal	<input type="text"/>	<input type="text" value="(all)"/>
School	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Campus	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Agency	Equal	<input type="text"/>	<input type="text" value="(all)"/>
User Group	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Acct School	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Acct Dept	Equal	<input type="text"/>	<input type="text" value="(all)"/>
Acct Code	Equal	<input type="text" value="(All)"/>	

- A. This will be the assigned Allocation ID. In Blackbaud this would be called a Project ID. In BASIS it will be an Account.
 - a. This number will start with one of the following two digit numbers and will be 8 digits long:
 - i. 30
 - ii. 31

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iii. 40

iv. 50

v. 70

vi. 90

- B. Use the ISIS Item Type number here. This is the ISIS number that's used in UAConnect. It will always start with 901100. HOWEVER! You must not use the 901100 to search, only use the second half of the Item Type.
 - a. Ex. ISIS Item Type is 901100511701
 - b. Only use 511701 in the search field.
- C. Short Name and Long Name can both be used to search for an allocation by its name.
- D. Department, Sub Dept, Campus, School and Agency are drop downs that allow you to search for all allocations assigned to a particular area.
 - a. Ex. Change the School drop-down to School of Architecture and the report will show all Allocations for the School of Architecture.

ALL OTHER FIELDS ARE ALSO USEABLE. YOU MAY ALSO USE THE FIELDS IN CONJUNCTION TO NARROW THE SEARCH.

SEE NEXT PAGE FOR AN EXAMPLE OF THE SEARCH FIELDS ON A REAL ALLOCATION.

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Epley Razorback Marching Band Scholarship the Detail Screen.

Allocation Actions Print

Epley Razorback Marching Band Schol. (30009621)

Account	30009621	Agency	Foundation
School	Fulbright College of Arts & Sciences	Campus	UAF
Department	Music		

Use this page to update allocation details. To add related information about this allocation, follow the guidelines provided below.

- You can enter [Assignment](#) details for this allocation.
- You can update the [Financials](#) for this allocation.
- You can update the list of [Stewardees](#) associated with this allocation.
- You can update the list of [Beneficiaries](#) associated with this allocation.
- You can set up one or more follow-up [Tasks](#) for this allocation.
- You can enter [Notes](#) for this allocation.

Allocation Detail (80552) Save New Actions Help

Allocation*	30009621	<input checked="" type="checkbox"/> Active
Account*	30009621	<input type="checkbox"/> Inactive Compare Exclude
ISIS 901100	511701	<input checked="" type="checkbox"/> Notify Dpt
Fiscal Year	D Development	<input type="checkbox"/> Athletics
Agency*	F Foundation	<input checked="" type="checkbox"/> Write to Ledger
Acct School*	RBD Razorback Band	<input type="checkbox"/> AF Tax or CC Fee
Acct Dept*	GN Razorback Band	<input checked="" type="checkbox"/> Use for AWC
Campus*	02 UAF	
Dept*	2194 Music	
Sub Dept	2035 Band	
School*	2027 Fulbright College of Arts & Sciences	
Short Name*		
Long Name*		
Long Name 2		
Description		
Program		
Camp Purpose*	SS Scholarship	
CFAE*	LR Capital - Endowment Restricted	
CFAE Sub*	26 Student Financial Aid	
Restriction*	B UG Scholarship	
Comment		
Alpha Sort*		
Endow Type	P Permanent	
Match Xref		
Univ Ref		
Start Date*	01/11/2006	Trans Group* FA Fayetteville Group
Stop Date		Goal 1,000,000.00
Acct Code		

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5. Enter your search string in either the **Email Address** field. Below we search for Jamie Dixon. Use any other search blocks necessary to limit your results.

The screenshot shows the 'Email' search interface. At the top, there are instructions: '1. Choose a template (optional)', '2. Select results format*', '3. Select output type*', '4. Select additional criteria from page tree (optional)', and '5. Enter criteria below and click Search'. Below these are buttons for 'View Criteria', 'Clear', and 'Search'. The main search area is titled 'Email (80905)' and contains a list of search criteria. The 'Email Address' field is highlighted with a blue box and contains the text 'ja'. A green arrow points from the text 'Jamie Dixon' in the instructions to the 'ja' in the 'Email Address' field. Another green arrow points from the 'Equal' dropdown menu for 'Email Address' to a callout box. The callout box contains the text: 'Note: Because this is set to Equal, your search stream must be perfect. You can change this setting to Contains if you only know part of the eMail address.'

Field	Operator	Value	Scope
Preferred	Equal		(all)
Email Address	Equal	ja	
Email Status	Equal		(all)
Status Date	Equal		
Email Type	Equal		(all)
Email Format	Equal		(all)
Email Code	Equal		(all)
Original Source	Equal		(all)
Change Source	Equal		(all)
Change Src Date	Equal		
Failed Reason	Equal		(all)
# Bouncebacks	Equal		
Fwds To Email	Equal		
Comment	Equal		
Start	Greater Than		
Stop	Less Than Eq.		
Date Added	Equal		
Date Modified	Equal		

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6. Click **Search**.

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7. Review search results.

ADVANCE Chris Farris [Logoff]

Home x Lookup Results x

Lookups

- Saved Criteria...
- ▶ Biographic
- ▶ Event
- ▶ Gift
- ▶ Prospect Tracking
- ▶ Membership
- ▶ Resource
- ▶ Miscellaneous
- Add Person
- Add Organization

Lookup Results Actions

Items 1 to 5 of 36 New Search Refine Search

Contexts: Entity Proposal Prospect

Contact Report Lookup List (1/36) Actions Help

...	Date	12/05/2018	Type	Events
	Contacted	Mr. [REDACTED]	Purpose	Stewardship
	Credit	Ms. [REDACTED]	Unit	Walton College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	Urban League Awards Luncheon		
...	Date	04/24/2018	Type	Events
	Contacted	Dr. [REDACTED]	Purpose	Stewardship
	Credit	Mrs. [REDACTED]	Unit	Graduate School/Intl Educ
	Prospect Name	Lucas D. & Janet H. Parsch(7723; Fayetteville Campus)	Author	[REDACTED]
	Description	visit at GSIE Geren Awards luncheon		
...	Date	11/20/2017	Type	Events
	Contacted	Dr. [REDACTED]	Purpose	Cultivation
	Credit	Dr. [REDACTED]	Unit	Honors College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	AFP Little Rock Award Lunch for [REDACTED] Family		
...	Date	11/16/2017	Type	Events
	Contacted	Dr. J [REDACTED]	Purpose	Cultivation
	Credit	Dr. J [REDACTED]	Unit	Honors College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	AFP Little Rock Award Lunch for [REDACTED] Family		
...	Date	11/16/2017	Type	Events
	Contacted	Mr. [REDACTED]mer	Purpose	Cultivation
	Credit	Dr. [REDACTED]	Unit	Honors College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	AFP Little Rock Award Lunch for [REDACTED] Family		

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