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# How To Look Up Contact Reports by TEXT

Ver. 1.1

2/5/2019

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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	Co.	Solicitation Plan	Cancelled

**Undergraduate Giving Statistics (100516)** Actions Help

Last Fiscal Year	This Fiscal Year
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2/5/2019

3. Choose **Prospect Tracking** from the Navigation Tree.

The screenshot shows the ADVANCE software interface. At the top, the user is logged in as Chris Farris. The navigation tree on the left includes categories like Biographic, Event, Gift, and Prospect Tracking, which is circled in green. The main area displays the 'Lookups' section with a list of steps: 1. Choose a template (optional) - Bio - Entity; 2. Select results format\* - Entity Lookup List; 3. Select output type\* - Display results; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. Below this are sections for 'ID Lookup' and 'Entity Lookup' with various search criteria and dropdown menus.

**Lookups** Actions

1. Choose a template (optional) Bio - Entity
2. Select results format\* Entity Lookup List
3. Select output type\* Display results
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

View Criteria Clear Search

**ID Lookup** Help

ID Equal [ ]

Alt ID Equal [ ]

**Entity Lookup** Help

'Sounds Like'

Last/Org Name	Begins with	[ ]
First	Begins with	[ ]
Middle	Begins with	[ ]
Name Type	Equal	[ ] (all)
Record Status	Equal	[ ] (all)
Primary Record Type	Equal	[ ] (all)
School	Equal	[ ] (all)
Class	Equal	[ ]
Solicit Cntrl	Equal	[ ] (all)
Lookup	Equal	[ ] (all)

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4. Change results format to **Contact Report Lookup List**.

The screenshot shows the 'ADVANCE' software interface. The main window title is 'Lookups - Prospect Tracking - Contact Rpt'. The left sidebar lists various lookup categories, with 'Prospect Tracking' expanded. The main area is titled 'Contact Report' and contains a configuration form. A dropdown menu is open, showing a list of lookup list options. The option 'Contact Report Lookup List' is highlighted in blue. A green arrow points from the text in step 4 to this highlighted option.

**Contact Report** Actions

1. Choose a template (optional)
2. Select results format\* **Contact Report Lookup List**
3. Select output type\*
4. Select additional criteria from page
5. Enter criteria below and click Search

View Criteria Clear Search Help

<b>Contacted</b>	Equal	
<b>Name</b>	Contains	
<b>Contact Type</b>	Equal	
<b>Purpose</b>	Equal	
<b>Unit</b>	Equal	
<b>Contact Credit ID</b>	Equal	
<b>Program</b>	Equal	
<b>Author</b>	Equal	
<b>Joint</b>	Equal	(all)
<b>2nd ID</b>	Equal	
<b>Contact Date</b>	Equal	
<b>Initiated By</b>	Equal	(all)
<b>Outcome</b>	Equal	(all)
<b>Attitude</b>	Equal	(all)
<b>Description</b>	Equal	
<b>Rep ID</b>	Equal	
<b>Rep Name</b>	Contains	
<b>Rep Type</b>	Equal	(all)
<b>Comment</b>	Equal	
<b>Text</b>	Contains	

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Ver. 1.1

2/5/2019

5. Choose **Contact Rpt** from Navigation Tree.

The screenshot shows the 'ADVANCE' software interface. At the top, there's a user profile for 'Chris Farris [Logoff]' and a navigation bar with 'Home' and 'Lookups - Prospect Tracking - Contact Rpt'. The left sidebar, titled 'Lookups', contains a 'Navigation Tree' with categories like 'Biographic', 'Event', 'Gift', 'Prospect Tracking', 'Assignment', 'Beneficiary', 'Category', 'Contact Person', 'Contact Rpt', 'Contract/Grant', 'Demographic', 'Evaluation', 'Interest', 'Note', 'Phil Affnity', 'Program', 'Proposal', 'Proposal Purpose', 'Prospects', 'Security', 'Stewardship', 'Task', 'Wealth/Assets', 'Membership', 'Resource', and 'Miscellaneous'. 'Contact Rpt' is highlighted with a green circle and an arrow. The main content area is titled 'Contact Report' and includes instructions: '1. Choose a template (optional)', '2. Select results format\*' (set to 'Entity Lookup List'), '3. Select output type\*' (set to 'Display results'), and '4. Select additional criteria from page tree (optional)'. Below these are 'View Criteria' and 'Clear' buttons, and a 'Search' button. A second 'Contact Report' section shows a list of search criteria with dropdown menus for operators and values:

Field	Operator	Value
Contacted	Equal	
Name	Contains	
Contact Type	Equal	(all)
Purpose	Equal	(all)
Unit	Equal	(all)
Contact Credit ID	Equal	
Program	Equal	(all)
Author	Equal	
Joint	Equal	(all)
2nd ID	Equal	
Contact Date	Equal	
Initiated By	Equal	(all)
Outcome	Equal	(all)
Attitude	Equal	(all)
Description	Equal	
Rep ID	Equal	
Rep Name	Contains	
Rep Type	Equal	(all)
Comment	Equal	
Text	Contains	

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Ver. 1.1

2/5/2019

6. Enter your search string in either the **Text** or **Comment** fields. (One will search the Text, the other will search Comments.) Below we search for “awards luncheon.” Use any other search blocks necessary to limit your results.

The screenshot shows the 'ADVANCE' software interface. At the top, there is a user profile for 'Chris Farris [Logoff]' and a navigation bar with 'Home' and 'Lookups - Prospect Tracking - Contact Rpt'. A left sidebar lists various search categories, with 'Prospect Tracking' expanded. The main area is titled 'Contact Report' and contains a search configuration form. The form includes a list of criteria with dropdown menus for operators and input fields for values. The 'Text' field is highlighted with a green box and contains the search string 'awards luncheon'. Other criteria include 'Contacted', 'Name', 'Contact Type', 'Purpose', 'Unit', 'Contact Credit ID', 'Program', 'Author', 'Joint', '2nd ID', 'Contact Date', 'Initiated By', 'Outcome', 'Attitude', 'Description', 'Rep ID', and 'Rep Name'. A 'Search' button is located at the bottom right of the form.

7. Click **Search**.

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Ver. 1.1

2/5/2019



## 8. 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

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

Items 1 to 5 of 36 New Search Refine Search