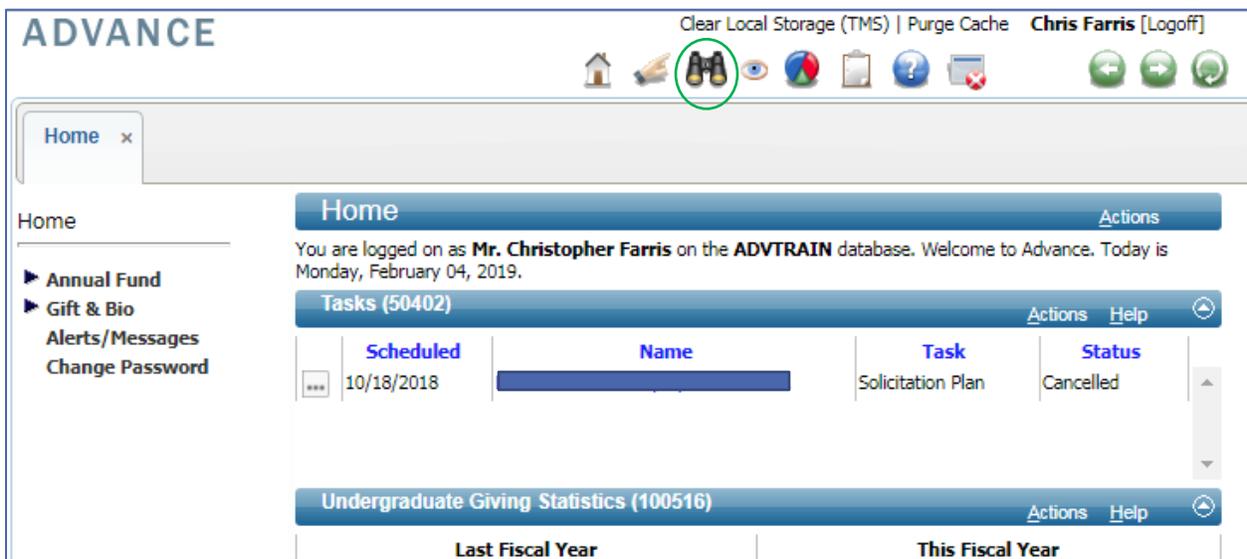


How To Look Up Entities by eMAIL

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



The screenshot shows the ADVANCE web application interface. At the top, the word "ADVANCE" is displayed on the left, and "Clear Local Storage (TMS) | Purge Cache Chris Farris [Logoff]" is on the right. Below this is a navigation bar with several icons: a home icon, a hand icon, a binoculars icon (circled in green), an eye icon, a globe icon, a folder icon, a question mark icon, and a red 'X' icon. To the right of these icons are three green circular buttons with arrows. Below the navigation bar is a "Home" tab. The main content area is divided into sections. The "Home" section includes a welcome message: "You are logged on as Mr. Christopher Farris on the ADVTRAIN database. Welcome to Advance. Today is Monday, February 04, 2019." Below this is a "Tasks (50402)" section with a table. The table has columns for "Scheduled", "Name", "Task", and "Status". One row is visible with the date "10/18/2018", a redacted name, "Solicitation Plan", and "Cancelled". Below the table is an "Undergraduate Giving Statistics (100516)" section with columns for "Last Fiscal Year" and "This Fiscal Year".

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3. Choose **Biographic** 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 has 'Biographic' selected and circled in green. The main panel shows the 'Lookups' configuration for 'Bio - Entity'. The configuration includes a list of steps: 1. Choose a template (optional) set to 'Bio - Entity'; 2. Select results format* set to 'Entity Lookup List'; 3. Select output type* set to 'Display results'; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. Below the steps are 'View Criteria' and 'Clear' buttons, and a 'Search' button. The 'ID Lookup' section has 'ID' set to 'Equal' and a search input field. The 'Entity Lookup' section has a 'Sounds Like' checkbox and several criteria fields: Last/Org Name, First, Middle, Name Type, Record Status, Primary Record Type, School, Class, Solicit Cntrl, and Lookup. Each field has a dropdown menu and an input field.

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4. Choose **Email** from the **Navigation Tree**.

The screenshot displays the ADVANCE application interface. At the top, there is a navigation bar with the text "ADVANCE" and user information "Chris Farris [Logoff]". Below this is a breadcrumb trail showing "Home" and "Lookups - Biographic". The left sidebar contains a "Navigation Tree" with various categories, and the "Email" option is circled in green. The main content area is titled "Lookups" and shows a search configuration for "ID (90257)". The search criteria are as follows:

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

Buttons for "View Criteria", "Clear", and "Search" are present. Below the search criteria, the "ID (90257)" section shows the following fields:

- ID: Equal [Dropdown] [Input]
- Alt ID: Equal [Dropdown] [Input]
- Type: Equal [Dropdown] [Input] (all)
- 'Sounds Like' checkbox [Unchecked]
- Type: Equal [Dropdown] [Input] (all)
- Last: Begins with [Dropdown] [Input]
- First: Begins with [Dropdown] [Input]

At the bottom of the page, there is a status bar with the following information:

App ID: 90257
Page ID: 50009
User: cmfarris
Database: ADVANCE
User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)
License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)
App(90257)(6): Security(Off)
Profile 0 (Base) Form 80716 (Lookup Header) Security(Off) DataClump 0 db 1
Profile 0 (Base) Form 90257 (ID Tab) Menu 50006 Security(Off) DataClump 0 db 1

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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 criteria with dropdown menus for operators and values. The 'Email Address' criterion is highlighted with a blue box, and a green arrow points to its 'Equal' operator dropdown. A callout box on the right contains the following 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.'

Criteria	Operator	Value	Additional
Preferred	Equal		(all)
Email Address	Equal		
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	[REDACTED]	Purpose	Stewardship
	Credit	[REDACTED]	Unit	Walton College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	Urban League Awards Luncheon		
...	Date	04/24/2018	Type	Events
	Contacted	[REDACTED]	Purpose	Stewardship
	Credit	[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	[REDACTED]	Purpose	Cultivation
	Credit	[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	[REDACTED]	Purpose	Cultivation
	Credit	[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	[REDACTED]	Purpose	Cultivation
	Credit	[REDACTED]	Unit	Honors College
	Prospect Name	[REDACTED]	Author	[REDACTED]
	Description	AFP Little Rock Award Lunch for [REDACTED] Family		

Items 1 to 5 of 36 New Search Refine Search