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# How To Look Up Gifts using COMMENTS

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		Solicitation Plan	Cancelled

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

Last Fiscal Year	This Fiscal Year
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3. Choose Gift 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, Prospect Tracking, Membership, Resource, and Miscellaneous. The 'Gift' option is circled in green, and a green arrow points from the text above to it. The main content area shows 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.

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4. Change **Select results format\*** to Gift Transactions Lookup List.

The screenshot shows the ADVANCE software interface. The top navigation bar includes 'Home', 'Lookups - Gift', 'Allocation Stewardesses', 'Giving Views', and 'Gift Overview'. The user is logged in as Chris Farris. The 'Lookups' sidebar on the left lists various categories, with 'Gift' expanded. The main area shows the 'Gift' configuration page with a list of criteria and their values. A dropdown menu is open for the 'Select results format\*' field, showing a list of options. 'Giving Transactions Lookup List' is highlighted in blue. A green arrow points from the instruction text to this option.

Criteria	Value
Allocation Code	Equal
Allocation Account	Equal
Allocation School	Equal
Special	Equal
Campus	Equal
Anon	Equal
Pledge Payment	Equal
Type	Equal
Tender	Equal
Fee	Equal
Entity Type	Equal
Assoc Code	Equal
Department	Equal
Sub Dept	Equal

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5. Change search box from Equal to Contains.

The screenshot shows the 'Gift' 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 'Gift' and contains various fields with dropdown menus. A green arrow points to the 'Comment' field, which has a dropdown menu open showing options: 'Equal', 'Greater Than', 'Less Than', 'Not Equal', 'Greater Than Equal', 'Less Than Equal', 'Like', 'Begins with', 'Ends with', 'Contains', and 'Equal'. The 'Contains' option is highlighted in blue.

Field	Dropdown	Input
Allocation Code	Equal	
Allocation Account	Equal	
Allocation School	Equal	
Special	Equal	
Campus	Equal	
Anon	Equal	
Pledge Payment	Equal	
Type	Equal	
Tender	Equal	
Fee	Equal	
Entity Type	Equal	
Assoc Code	Equal	
Department	Equal	
Sub Dept	Equal	
Receipt Number	Equal	
Batch #	Equal	
Check #	Equal	
Appeal	Equal	
Giving Appeal	Equal	
Memb Appeal	Equal	
Amount	Equal	
Assoc Credit Amt	Equal	
Year of Giving	Equal	
Date of Record	Equal	
Date Added	Equal	
Deposit Date	Equal	
Transmit	Greater Than	
Reporting	Not Equal	
LM	Greater Than Equal	
Rec Project	Like	
Reference 1	Begins with	
Reference 2	Ends with	
Comment	Contains	

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6. Enter your search string in the **Comment** field. Below we search for “maturity.” Use any other search blocks necessary to limit your results.

The screenshot shows the 'Gift' lookup interface. On the left is a 'Lookups' sidebar with a tree view including categories like 'Biographic', 'Event', 'Gift', 'Prospect Tracking', 'Membership', 'Resource', and 'Miscellaneous'. The 'Gift' category is expanded. The main area is titled 'Gift' and contains a list of search criteria. Each criterion has a dropdown menu set to 'Equal' and a text input field. The 'Comment' field at the bottom is highlighted with a green box and contains the text 'maturity'. Above the criteria list are instructions 1-5 and buttons for 'View Criteria', 'Clear', and 'Search'. Below the criteria list is a 'Help' button.

Field	Operator	Value
Allocation Code	Equal	
Allocation Account	Equal	
Allocation School	Equal	
Special	Equal	
Campus	Equal	
Anon	Equal	
Pledge Payment	Equal	
Type	Equal	
Tender	Equal	
Fee	Equal	
Entity Type	Equal	
Assoc Code	Equal	
Department	Equal	
Sub Dept	Equal	
Receipt Number	Equal	
Batch #	Equal	
Check #	Equal	
Appeal	Equal	
Giving Appeal	Equal	
Memb Appeal	Equal	
Amount	Equal	
Assoc Credit Amt	Equal	
Year of Giving	Equal	
Date of Record	Equal	
Date Added	Equal	
Deposit Date	Equal	
Transmit	Equal	
Reporting	Equal	
LM	Equal	
Rec Project	Equal	
Reference 1	Equal	
Reference 2	Equal	
Comment	Contains	maturity

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7. Click **Search**.



8. Review search results.

**Lookup Results** Actions

Items  to 5 of 6

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**Gift Transaction Lookup List (1/6)** Actions Help

<b>Receipt #</b> 20164531 <b>Batch #</b> 49397	<b>Allocation</b> [redacted] ritable Gift
<b>Donor</b> [redacted]	<b>Year of Giving</b> 2011
<b>Date</b> 11/12/2010	<b>Amount</b> 110,000.00
<b>Type</b> PG Life Income	<b>Soft Credit</b> 110,000.00
<b>Tender</b> Cash or Check	<b>Alloc School</b> Fulbright College of Arts & Sciences
<b>Receipt #</b> 20305128 <b>Batch #</b> 59035	<b>Allocation</b> [redacted] No. 12
<b>Donor</b> [redacted]	<b>Year of Giving</b> 2013
<b>Date</b> 10/04/2012	<b>Amount</b> 20,000.00
<b>Type</b> PG Life Income	<b>Soft Credit</b> 20,000.00
<b>Tender</b> Cash or Check	<b>Alloc School</b> Fulbright College of Arts & Sciences
<b>Receipt #</b> 20164531 <b>Batch #</b> 49397	<b>Allocation</b> A [redacted] Gift
<b>Donor</b> [redacted]	<b>Year of Giving</b> 2011
<b>Date</b> 11/12/2010	<b>Amount</b> 0.00
<b>Type</b> PG Life Income	<b>Soft Credit</b> 110,000.00
<b>Tender</b> Cash or Check	<b>Alloc School</b> Fulbright College of Arts & Sciences
<b>Receipt #</b> 20214515 <b>Batch #</b> 49491	<b>Allocation</b> E [redacted] No. 6
<b>Donor</b> [redacted]	<b>Year of Giving</b> 2012
<b>Date</b> 08/22/2011	<b>Amount</b> 0.00
<b>Type</b> PG Life Income	<b>Soft Credit</b> 80,000.00
<b>Tender</b> Cash or Check	<b>Alloc School</b> Vice Chancellor for Advancement
<b>Receipt #</b> 20214515 <b>Batch #</b> 49491	<b>Allocation</b> E [redacted] No. 6
<b>Donor</b> [redacted]	<b>Year of Giving</b> 2012
<b>Date</b> 08/22/2011	<b>Amount</b> 80,000.00
<b>Type</b> PG Life Income	<b>Soft Credit</b> 80,000.00
<b>Tender</b> Cash or Check	<b>Alloc School</b> Vice Chancellor for Advancement

Items  to 5 of 6