
How To Find the Wealth Engine Information for a Prospect

Ver. 1.1

3/8/2019

1. Log in to **Advance**.
2. Use the **Lookup** tool  for find the **Entity** in question.

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

ID Lookup (70037) Help

ID

Alt ID

Entity Lookup (70036) Help

'Sounds Like'

Last/Org Name

First

Middle

Name Type (all)

Record Status (all)

Primary Record Type (all)

School (all)

Class

Solicit Cntrl (all)

Lookup (all)

Affiliation Code (all)

Affiliation Status (all)

Deleted

VIP

Person or Org

Address Lookup (70031) Help

Preferred (all)

Type (all)

City

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3. Go to the Entity's **Entity Overview** page.
4. Click on **Prospect Tracking** in the Nav Tree.

Entity Overview Actions Print

VP

Rec Type Alumni (1961 Law) 04/28/1936 (82)

Degree JD 1961 Law, BSPA 1961 Walton [More...](#)

PM Manager

AAA Life A+ Northwest Arkansas Chapter

Married to: [REDACTED] Towers Old Main Accepted (Ruby)

Contact Information (50100) Actions Help ↕

Home (Preferred) Business (Retired)

3620 North Brodie Station
Fayetteville, AR 72703-3104
Modified: 05/08/2009
(479) 251-8288 (H, Pref)
(479) 251-8288 (HF)

[REDACTED]
President

Other Active Telephone Info (100503) (1) Actions Help ↕

Number
*** (479) 251-8288 (HF)

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5. Click **Wealth Engine** in the Nav Tree.

The screenshot displays the 'Wealth Engine' interface. On the left is a navigation tree with categories like Overview, Detail, Biographic, Events, Giving, Membership, Prospect Tracking, Views, Alloc Stewardship, Assignments, Contacts, Contact Rpts, Cntrcts/Grnts, Demographic, Evaluations, Interests, Notes, Phil Affnties, Phil Intrsts, Stewardship, Tasks, Wealth/Assets, and Wealth Engine. The main area shows prospect details: Rec Type (Alumni (1961 Law)), Degree (JD 1961 Law, BSPA 1961 Walton More...), PM Manager, AAA (Life A+), and marital status (Married to: [redacted]). Below this is the 'Screening Results (100521)' section with fields for P2G Combo Score (11), Major Gift Decile (1), Planned Gift Decile (1), Gift Capacity Rating (20, \$5MM+), Outcome (NR), Potential Unit, Potential Assignment, Author, and Comment. To the right are fields for Likely to Give Decile (1), Next Ask Decile (1), and Next Ask Range (\$10000-\$24). A bottom status bar shows App ID: 100407, Page ID: 50002, User: cmfarris, Database: ADVANCE, and various license modules and profiles.

- P2G Combo Score** - The P2G score means PROPENSITY TO GIVE. 1 is the highest, 10 (or 0) the lowest. There are 2 scores here. The first is desire, the second is capacity.
- Major Gift Decile** - The highest gift given. 1 to 10. 1 is the highest.
- Planned Gift Decile** - The highest gift planned to be given. 1 to 10. 1 is the highest.
- Gift Capacity Rating** - The amount Wealth Engine has determined is the total gift capacity for the Prospect.

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- E. **Next Ask Range** - The amount Wealth Engine suggests as the next ask based upon Prospect's previous giving pattern.