

Introduction to Advance for the Web

UNIVERSITY OF ARKANSAS

A large, multi-story brick building with a prominent clock tower on the right side. The building features numerous windows, some with arched tops, and a dark roof with dormer windows. The building is surrounded by lush green trees and a well-maintained lawn. A paved path curves through the foreground. The sky is a clear, bright blue with a few wispy clouds.

OBJECTIVES

- Learn how to navigate the web interface of the Advance database
- Learn how to do lookups to find entity Biographic, Gift/Pledge, and Prospect information

WHAT IS ADVANCE FOR THE WEB?

- Thin-Client, i.e. no install required, any machine can run application
- Data divided into five subsystems: Biographic, Gift/Pledge, Prospect, Membership, and Events.
- All users have inquiry rights (unless text is secured by end-user who entered the data)
- Remember, all data in the system is **confidential**.

CONFIDENTIAL

WHAT IS CONFIDENTIALITY?

Advance is a licensed database system used to maintain alumni and donor records at the University of Arkansas at Fayetteville and Agricultural Development Council. Advance is the sole property of the Division of Advancement at the University of Arkansas and University System Division of Agriculture. These divisions reserve the right to authorize or deny access to Advance to ensure confidentiality of the data contained therein. Users of Advance are expected to abide by the Code of Computing Practices for the University of Arkansas. **Supplying your ID and password to enter the Advance system indicates that you have read and understand the Code of Computing Practices and that you will use Advance for only lawful and intended administrative purposes.**



WHAT IS IN EACH ADVANCE SUBSYSTEM?

- **Biographic:** Categorize and describe entities based on interests, locations, affiliations, etc.
- **Giving:** Create and maintain giving history and allocation (account) details; generate receipts and acknowledgements.
- **Prospect Tracking:** Maintain and monitor major prospect activity and contacts. (Fundraisers)
- **Membership:** Manage Alumni memberships and maintain member history.
- **Events:** Maintain event planning information and event invitation lists. (Alumni and Colleges)

THE ENTITY

- Starting point for all tracking and management in Advance.
- Advance term for a person or organization in the database.
- An entity can be any type, e.g. Alumni, Friends, Parents, Students, Corporation, etc. (Distinguished by Record Type codes, more on that later)
- Each entity is assigned a unique identifier called an Entity ID. For entities converted from Ascend into Advance, their ISN number became their Entity ID number.
- Entities who are identified as Prospects will also have at least one unique Prospect ID number.

LET'S GET STARTED...



**Logging into
Advance**

THE LOGIN URL

aits.uark.edu

The screenshot shows a web browser window displaying the University of Arkansas Information and Technology Services website. The browser's address bar shows the URL <http://aits.uark.edu>. The website header includes the University of Arkansas logo, the text "University Advancement", and a search bar. Below the header, the page title is "Information and Technology Services". The main content area features a paragraph describing the services, a "Quick Links" section with a list of links, a "Request Forms" section with a list of links, and a "Training Documents" section with a list of links. At the bottom, there is a "STAFF" section listing six individuals with their titles, contact information, and email addresses. The footer contains contact information for University Advancement, social media links, and information about the Campaign Arkansas program.

U of A / University Advancement / Offices / Information and Technology Services

Information and Technology Services is responsible for University Advancement information data systems and user computing hardware and software.

The information or data side includes all on-line system maintenance, security, training, and data retrieval. Its main duties include ID setup, security, and training for on-line systems including Advance, Crystal Reports Server, NOS and Blackbaud; database and on-line system upgrades and enhancements for Advance, CRS, and the NOS; data imports and exports to and from other systems; and data retrieval and distribution from all data systems involved. We are here to help.

Quick Links

- [Advance for General Users](#)
- [Advance for Central Development Users](#)
- [Advance for Alumni Association Users](#)
- [Advance TRAIN \(For Training Purposes\)](#)
- [Crystal Reports on the EDGE Server](#)
- [Blackbaud](#)

Request Forms

- [Report Request Form](#)
- [Advance/Crystal Reports ID Request Form](#)
- [NOS- Notice of Student Support ID Request Form](#)
- [Blackbaud ID Request Form](#)

Training Documents

- [Advanced](#)
- [BlackBaud](#)
- [Crystal](#)
- [How to files](#)
- [Notice of Student Support](#)
- [Training Overview](#)

STAFF

Jamie Dixon Director jamiee@uark.edu 479-575-6745	Tate Neyman Systems Analyst tneyman@uark.edu 479-575-5626	Caleb Mikes Report Writer jmikes@uark.edu 479-575-3520	Daniel V. McClelland Systems Analyst dvmccle@uark.edu 479-575-3530	Joshua Tipton Report Writer tjpton@uark.edu 479-575-3516	Christopher M. Farris Trainer & Security Officer cmfarris@uark.edu 479-575-4135
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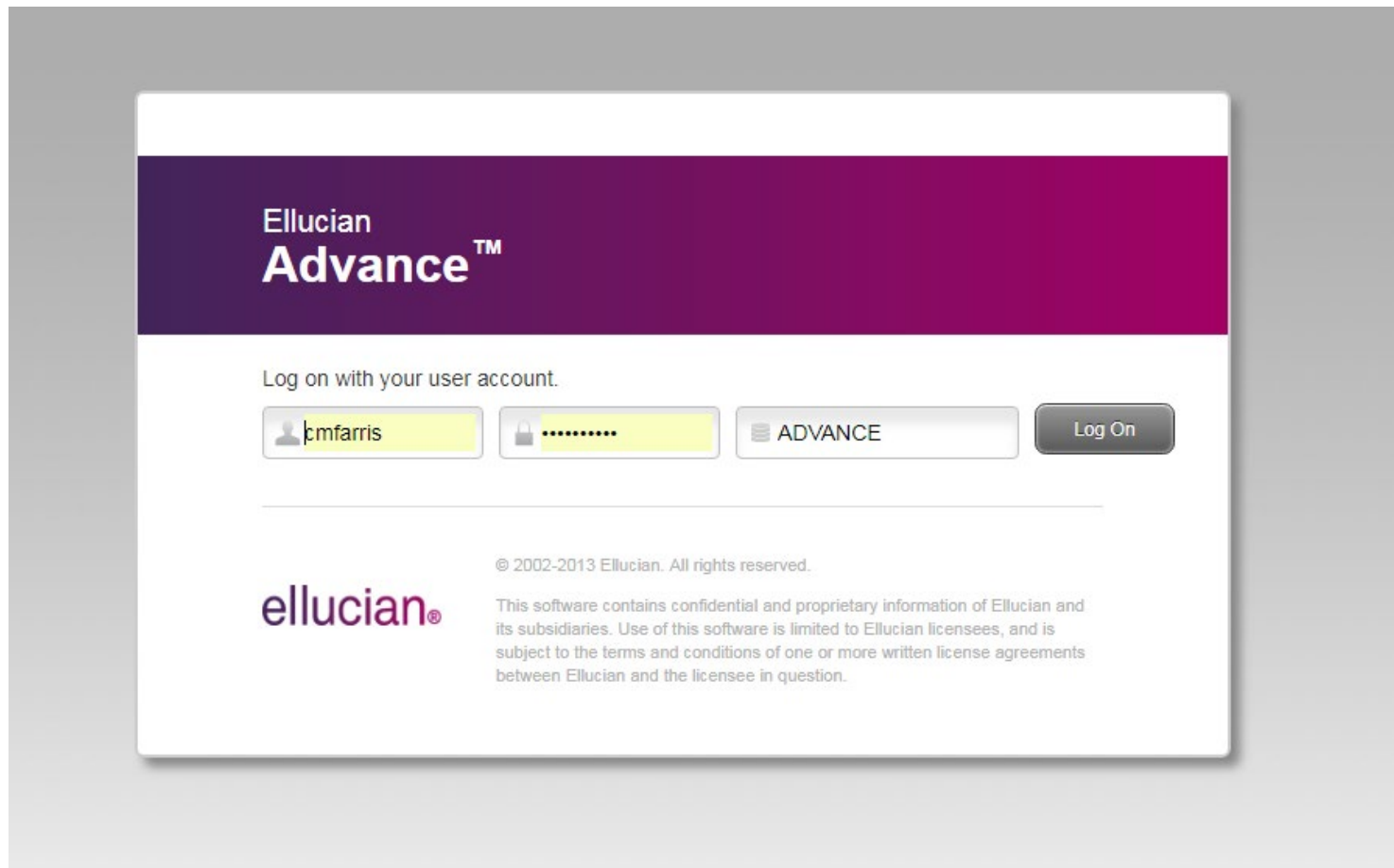
University Advancement
ADMN 416
University of Arkansas
Fayetteville, Arkansas 72701
P 479-575-6800

Social Media
[Facebook](#)
[Twitter](#)
[YouTube](#)
[Instagram](#)

CAMPAIGN *Arkansas*
Explore ways you can contribute to the success of the University through [Campaign Arkansas](#)

Gift or tax receipt questions?
Contact Laura Cate in University Development at 479-575-5507 or lcate@uark.edu

ADVANCE SYSTEM LOGIN



The screenshot shows the login interface for the Ellucian Advance system. At the top, there is a dark purple header with the text "Ellucian Advance™" in white. Below the header, the instruction "Log on with your user account." is displayed. The login form consists of four input fields: a user ID field containing "cmfarris", a password field with masked characters "*****", a dropdown menu currently showing "ADVANCE", and a "Log On" button. At the bottom left is the "ellucian®" logo, and at the bottom right is the copyright notice "© 2002-2013 Ellucian. All rights reserved." followed by a paragraph of legal disclaimer text.

Ellucian
Advance™

Log on with your user account.

ellucian®

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This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.

IDS AND PASSWORDS

- Your Advance ID should be your UARK ID (the part of your email address that comes before the @)
- Your Advance Password is uark01
- For example, jsmith@uark.edu would be setup with a username of jsmith and a password of uark01

HOME PAGE

- Quick access to key areas of Advance
- Configured to meet the needs of the majority of people in your profile group.

PAGE ARCHITECTURE

Page
Tree

Also called
“Navigation
Tree” or
“Nav Tree”

Main Menu

The screenshot displays the ADVANCE web application interface. At the top, the word "ADVANCE" is on the left, and "Chris Farris [Logoff]" is on the right. A "Main Menu" label with a blue arrow points to a horizontal bar containing several icons: a house, a hand pointing, binoculars, an eye, a globe, a clipboard, a question mark, and a red X. Below this bar is a breadcrumb trail "Home x". On the left side, a "Page Tree" (Navigation Tree) is visible, listing "Home", "Annual Fund", "Gift & Bio", and "Prospect Management", with sub-items "Alerts/Messages" and "Change Password". The main content area features a "Home" section with a welcome message for Mr. Christopher Farris on the ADVPROD database as of Tuesday, July 24, 2018. Below this are sections for "Tasks", "Undergraduate Giving Statistics", and "UA Giving Summary".

Last Fiscal Year		This Fiscal Year	
Undergraduate Donors	1,597	Undergraduate Donors	0
Total Undergraduates	107,074	Total Undergraduates	106,782
% of Undergraduate Giving	1.49%	% of Undergraduate Giving	0%
Young Alumni Donors	283	Young Alumni Donors	0
Total Young Alumni	33,625	Total Young Alumni	35,410
% of Young Alumni Giving	.84%	% of Young Alumni Giving	0%

Fiscal Year	Gift/Payments Received	Pledges/Bequests Outstanding	Total Commitment
2019			
AFund	\$100,265.16	\$50,000.00	\$150,265.16

The Main Menu



- **Home** – Quick link to the home page
- **Go To** – Quick access to other forms/pages in Advance
- **Lookups** – Find a person or account (allocation)
- **Last Viewed** – Most recent screens searched
- **Reports** – Links to standard Advance reports
- **Help** – Links to on-line “help” for instructions on the use of applications and forms.
- **Close All** – Closes all currently open applications
- **Back/Forward** – Application navigation
- **Refresh** – Refreshes current page
- **Logoff** – Logoff the current session

HOME PAGE — PAGE TREE SHORTCUTS

The Page Tree on the Home Page has Shortcuts to frequently accessed applications and reports lists.

Home

- Annual Fund Reports
- Gift & Bio
 - Add New Allocation
 - Add New Entity
 - Entity Update
 - DataLoader
 - Gift Batch Add/Mod
 - Gift Processing Rpts
 - Gift & Recs Reports
- Prospect Management
 - Research Suspects
 - New Contact Rpt
 - Reports
 - Alerts/Messages
 - Change Password

Home [Actions](#)

You are logged on as **Mr. Christopher Farris** on the **ADVPROD** database. Welcome to Advance. Today is Tuesday, July 24, 2018.

Tasks [Actions](#) [Help](#)

Undergraduate Giving Statistics [Actions](#) [Help](#)

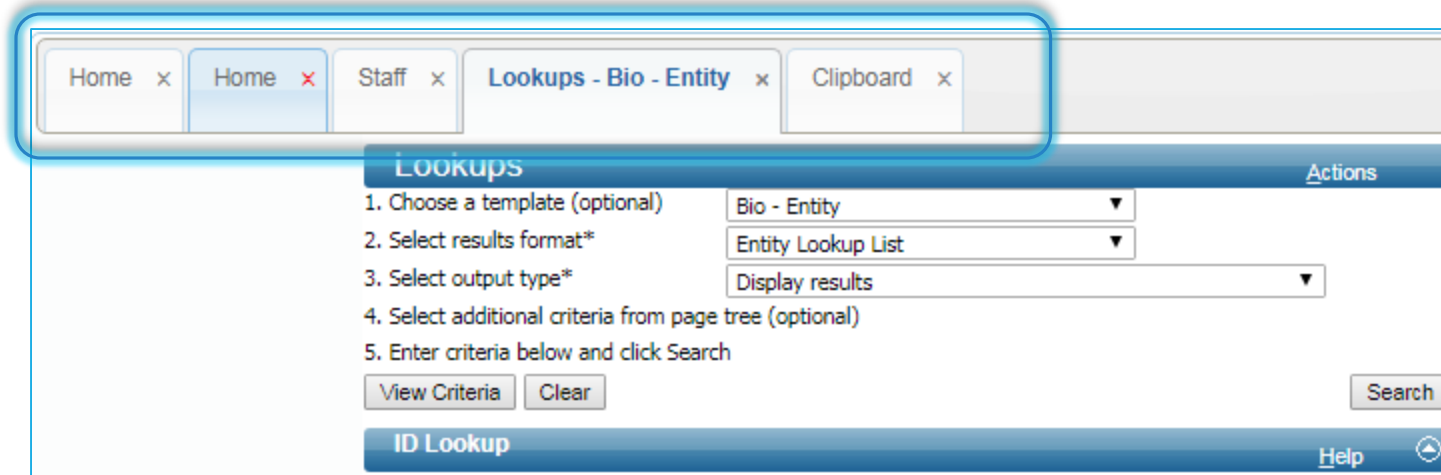
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UA Giving Summary [Actions](#) [Help](#)

Fiscal Year	Gift/Payments Received	Pledges/Bequests Outstanding	Total Commitment
2019			

CURRENTLY OPEN APPLICATIONS

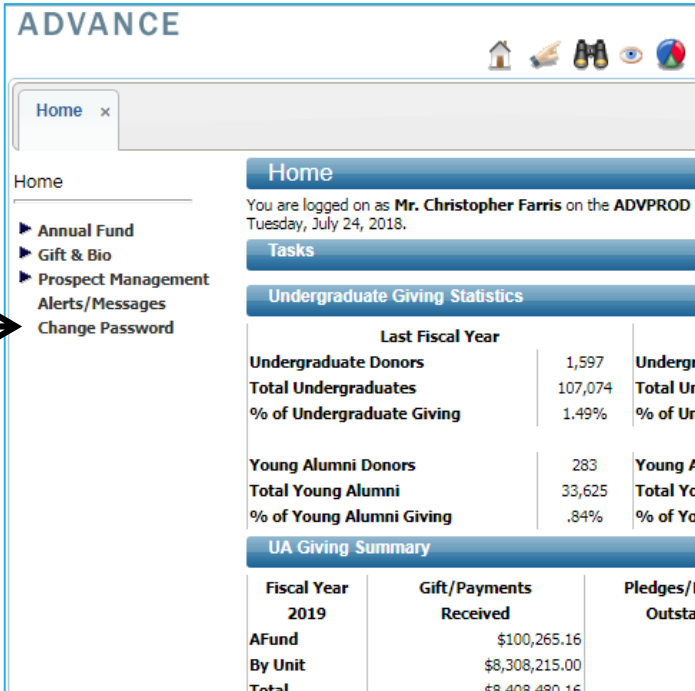
- For easy access to previously viewed screens, you may have up to **eight** tabs open along the top of your page.



FIRST THINGS FIRST...

Change your password

- Click “Change Password” from the Home Page Navigation Tree.



ADVANCE

Home x

Home

- ▶ Annual Fund
- ▶ Gift & Bio
- ▶ Prospect Management
- Alerts/Messages
- Change Password**

You are logged on as **Mr. Christopher Farris** on the **ADVPROD** c
Tuesday, July 24, 2018.

Tasks

Undergraduate Giving Statistics

Last Fiscal Year		
Undergraduate Donors	1,597	Undergr
Total Undergraduates	107,074	Total Un
% of Undergraduate Giving	1.49%	% of Un
Young Alumni Donors	283	Young Al
Total Young Alumni	33,625	Total Yo
% of Young Alumni Giving	.84%	% of Yo

UA Giving Summary

Fiscal Year	Gift/Payments Received	Pledges/B Outstar
2019		
AFund	\$100,265.16	
By Unit	\$8,308,215.00	
Total	\$8,408,480.16	

TASK TIME

Login and Change your Password

*Password cannot be longer than 12 characters

Task 1

The screenshot shows a web application interface for changing a password. At the top, there is a tab labeled 'Change Password' with a close button (x). Below the tab is a navigation menu with the following items: Home, Annual Fund, Gift & Bio, Prospect Management, Alerts/Messages, and Change Password. The main content area is titled 'Change Password' and contains the following text: 'Passwords must meet the following requirements:' followed by a bulleted list: '• Minimum length: 6 characters'. Below this, there is a sub-header 'Change Password' with a 'Help' link and a dropdown arrow. The form consists of three input fields: 'Old Password', 'New Password', and 'Password Confirmation'. A 'Change Password' button is located at the bottom right of the form.

Change Password x

Home

- ▶ Annual Fund
- ▶ Gift & Bio
- ▶ Prospect Management
- Alerts/Messages
- Change Password

Change Password

Passwords must meet the following requirements:

- Minimum length: 6 characters

Change Password Help

Old Password

New Password

Password Confirmation

Change Password

LOOKUP BASICS

- Allows users to query the database for a *single* record based on entered criteria.
- Based on the criteria, a list of records will be retrieved and displayed.

LOOKUPS, CONT.

Accessed by clicking the **Lookups** icon on the Main Menu

The screenshot displays the 'ADVANCE' software interface. At the top right, the user 'Chris Farris' is logged in, with a 'Logoff' link. A navigation bar contains several icons, with the 'Lookups' icon (binoculars) highlighted by a red box. Below the navigation bar, there are two tabs: 'Change Password' and 'Lookups - Bio - Entity'. The 'Lookups' tab is active, showing a configuration page 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. There are 'View Criteria' and 'Clear' buttons, and a 'Search' button. Below this, there are two sections: 'ID Lookup' and 'Entity Lookup'. The 'ID Lookup' section has 'ID' set to 'Equal' and a search input field. The 'Entity Lookup' section has a checkbox for ''Sounds Like'' and two input fields for 'Last/Org Name' and 'First', both set to 'Begins with'.

ADVANCE Chris Farris [Logoff]

Change Password x Lookups - Bio - Entity x

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 [Search]

Alt ID Equal []

Entity Lookup Help

'Sounds Like'

Last/Org Name Begins with []

First Begins with []

LOOKUP DEFAULTS

Default selections (shown in image) for:

- Template
- Results Format
- Output Type

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

•Use these defaults or select different values using the drop-down arrow on that field

•**Note:** The template is what “drives” your search, meaning that it determines which search criteria display in the lookup and the format in which it will return results. When you select a different template, the results format and search criteria fields will change accordingly.

LOOKUPS, CONT.

The image shows three stacked lookup forms. The top form is 'Entity Lookup' with a 'Help' button and a 'Sounds Like' checkbox. It contains 14 fields: Last/Org Name, First, Middle, Name Type, Record Status, Primary Record Type, School, Class, Solicit Cntrl, Lookup, Affiliation Code, Affiliation Status, Deleted, VIP, and Person or Org. Each field has a dropdown menu with 'Equal' and '(All)' options. The middle form is 'Address Lookup' with a 'Help' button and contains 7 fields: Preferred, Type, City, State, Country, ZIP Code, and Current. Each field has a dropdown menu with 'Equal' and '(All)' options. The bottom form is 'Geo Code Lookup' with a 'Help' button and contains 2 fields: Type and Geo Code. Each field has a dropdown menu with 'Equal' and '(All)' options.

Field	Operator	Value
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)
Affiliation Code	Equal	(All)
Affiliation Status	Equal	(All)
Deleted	Equal	Not Deleted
VIP	Equal	(All)
Person or Org	Equal	(All)

Field	Operator	Value
Preferred	Equal	(All)
Type	Equal	(All)
City	Equal	
State	Equal	(All)
Country	Equal	(All)
ZIP Code	Begins with	
Current	Equal	(All)

Field	Operator	Value
Type	Equal	(All)
Geo Code	Equal	

Some Lookups can query multiple forms.

For example, the Entity Lookup includes three forms:

- Entity
- Address
- Geo Code

LOOKUP OPERATORS

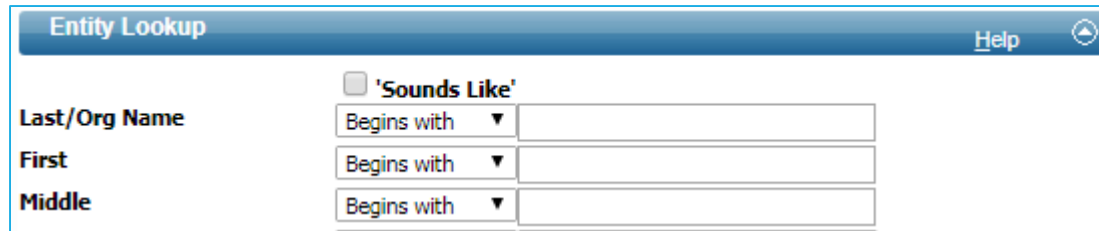
Operator	Definition
Equal	Data must be equal to the entered value e.g. <i>State = Arkansas</i>
Greater than	Data must be greater than the entered value e.g. <i>Amount > 1,000</i>
Less than	Data must be less than the entered value e.g. <i>Date of Record < 1/1/2001</i>
Not Equal	Data not equal to the entered value e.g. <i>Allocation Annual Indicator NOT= 'Annual'</i>
Greater than Equal	Data must be greater than or equal to the entered value e.g. <i>Class Year >= 1996</i>

LOOKUP OPERATORS, CONT.

Operator	Definition
Less than Equal	Data must be less than or equal to the entered value <i>e.g. Date of Record <= 1/1/2001</i>
LIKE	Data compares partially to the entered value <i>Uses wildcards like % or *</i>
Begins with	Data begins with the entered value <i>e.g. begins with Ferg to search for Ferguson</i>
Ends with	Data ends with the entered value <i>e.g. ends with ville to search for Fayetteville</i>
Contains	Data must contain the entered value <i>e.g. contains belle</i> <i>Try using contains if 'Begins With' returns no results</i>

ENTITY LOOKUP BY NAME

Consider the following when searching by Name



The screenshot shows a window titled "Entity Lookup" with a "Help" button in the top right corner. Below the title bar, there is a checkbox labeled "'Sounds Like'". Underneath, there are three rows of search criteria:

Last/Org Name	<input type="checkbox"/> 'Sounds Like'	Begins with ▼	<input type="text"/>
First		Begins with ▼	<input type="text"/>
Middle		Begins with ▼	<input type="text"/>

- Last, First, and Middle name fields look for that name element to appear in that field
- If you perform a search using the “first name” field, and it returns no results...
 1. Try an alternate spelling (e.g. instead of Bill, try William)
 2. Try inputting the first name in the middle name field. It is common for people to use their middle name as a first name, and unless we have it recorded in the system as a *first name*, Advance will be unable to find it.
 3. Try a combination of #1 and #2 above (i.e. input an alternate spelling in the middle name field)

ENTITY LOOKUP USING ADDRESS CRITERIA

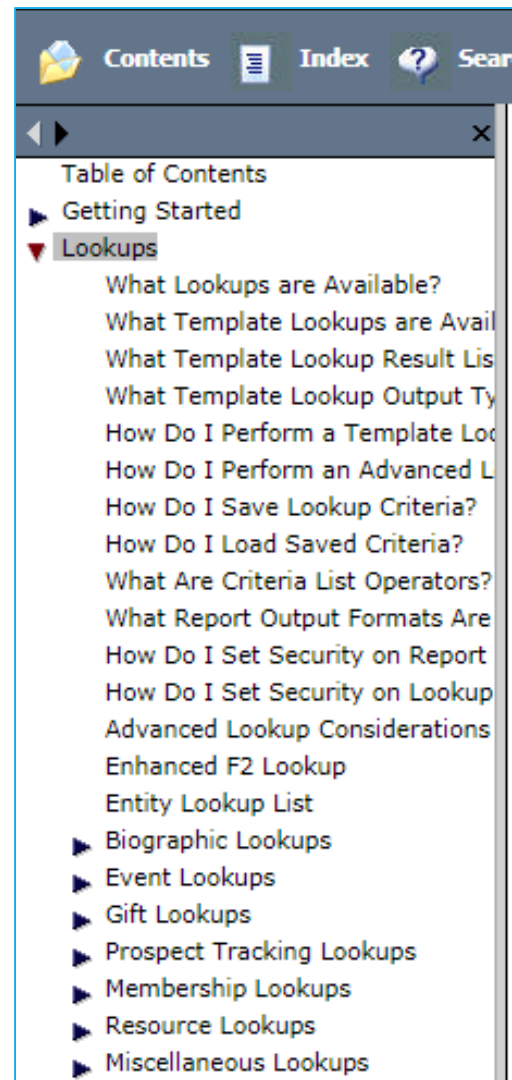
Consider the following when using Address search criteria

- Advance will search all *active* addresses for the search criteria you input
- If the address you are using is the entity's "past" address, it is *inactive*, and therefore will not pull the entity in a search.
- All deceased entities should have only inactive addresses, so do not use address criteria if you are looking for a deceased person.
- Selecting "Preferred" will only pull entities whose *preferred* mailing address match the other address criteria input.

Address Lookup		Help
Preferred	Equal	(All)
Type	Equal	(All)
City	Equal	
State	Equal	(All)
Country	Equal	(All)
ZIP Code	Begins with	
Current	Equal	(All)

LOOKUP QUICK TIPS IN HELP

Consult the Help system for more Lookup tips



RESULTS DISPLAY NOTES

Address displayed in Entity Lookup list will always be the *preferred* address, but...

- An entity with *any* active address row (whether seasonal, business, home, etc.) that meets the entered criteria (e.g. state=New York) will be returned.
- May appear to have incorrect results, but the selected entity has another address row with state=New York.
- The data qualifying the entity to be in the results set *may not* be the data that *displays* in the results set.

ENTITY LOOKUP RESULTS

Number of records returned displays along the Lookup Results header

VCR controls allow you to scan through all the records





The screenshot displays a software interface for viewing search results. At the top, a header bar labeled 'Lookup Results' shows 'Items 1 to 7 of 143'. Below this, a set of VCR controls (play, stop, first, last) is visible. The main area is titled 'Entity Lookup List (1/143)' and contains a table of records. A large blue vertical bar obscures the first column of the table.

...
Mr. (Former Faculty)	08/28/1937 (80)	...
913 ...	Fay		
...	John (Former Parent)	07/10/1950 (68)
954 ...	Karl		
...	Mr. ...	end)	
200 ...	Wy		
...	John (Former Parent)	
362 ...	Karl		
...	John (Former Parent)	02/06/1963 (55)
110 ...	Par		
...	Mr. ...	ent)	01/18/1965 (53)
370 ...	Am		
...	Mr. ...	end)	
701 ...	Col		

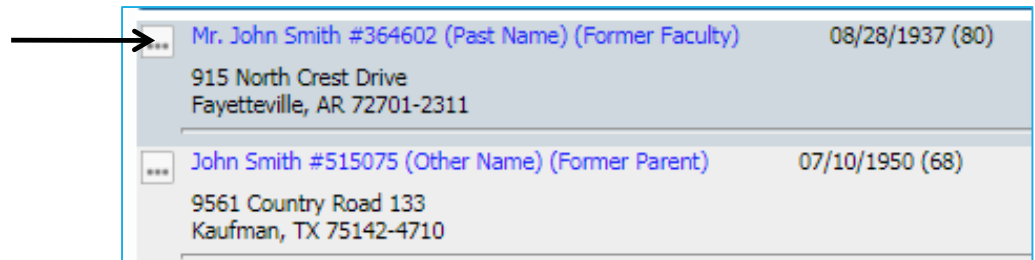
RESULTS LIST NAVIGATION

Navigate to a specific record by typing the corresponding item number into the VCR controls



-  Advance forward one page
-  Move backward one page
-  Jump to the first page
-  Jump to the last page

Click the ellipsis or hyperlink to navigate to the Entity Overview screen



...	Mr. John Smith #364602 (Past Name) (Former Faculty)	08/28/1937 (80)
	915 North Crest Drive Fayetteville, AR 72701-2311	
...	John Smith #515075 (Other Name) (Former Parent)	07/10/1950 (68)
	9561 Country Road 133 Kaufman, TX 75142-4710	



ENTITY OVERVIEW

- The Entity Overview screen is the first screen accessed from an Entity Lookup.
- The gateway screen that connects you to any additional “attributes” that an Entity may have.
- Attributes can be located in any of the subsystems, i.e. Biographic, Gift, Prospect, Membership, or Events.

THE ENTITY OVERVIEW

Entity Overview		Actions	Print
Dr. [REDACTED]	#20798		***VIP***
Rec Type	Alumni (1978 Law), Staff, More...		06/09/1952 (66)
Degree	ID 1978 Law, EDD 1989 Education More...		
PM Manager	[REDACTED]ks		
AAA	Life A+		Northwest Arkansas Chapter
	Married to: Mrs [REDACTED] 799 (AL)		Towers Old Main Accepted (Gold)

Entity Overview header shows:

- Preferred name and Entity ID

Each entity can have only one preferred name. This is the name is displayed throughout Advance and pulled for any mailings sent to this entity.

- Record Type

An entity can have more than one Record Type. The value that displays first is based on the Record Type hierarchy. Alumni is the highest value in this hierarchy. Refer to Help system for more information.

- UA degree(s)

- Primary Affiliation

There are six affiliations considered “primary.” Refer to Help system for more information.

- Alumni Membership and Chapter

- Hyperlink to Spouse’s Record

- VIP code if applicable

See Help for definition

- ADC code if applicable

ADC is the Agricultural Development Council

ENTITY OVERVIEW, CONT.

Home and Business addresses, which are hyperlinked to the Addresses application. Only one mailing address is marked "Pref."

Preferred Email address, clicking here will launch Outlook to generate an email to the entity in view.

The screenshot shows a contact information window titled "Contact Information" with "Actions" and "Help" links. It displays two address entries: "Home (Preferred)" and "Business". The Home address is 3789 East Natchez Trace, Fayetteville, AR 72703-4822, with a cell phone number (479) 601-3320. The Business address is for a Professor at the University of Arkansas, located at GRAD 155, Fayetteville, AR 72701-1201. Below the addresses is a preferred email address: [redacted]@uark.edu (Business, Pref). At the bottom, there are two Google Maps links: "Google Maps Home" and "Google Maps Business".

Home (Preferred)	Business
3789 East Natchez Trace Fayetteville, AR 72703-4822 (479) 601-3320 (Cell Phone, Pref)	Professor University of Arkansas Rehab, Human Resources, & Comm.Disorders GRAD 155 Fayetteville, AR 72701-1201
	[redacted]@uark.edu (Business, Pref)

Clicking Google links will display map for Home and Business address.

ENTITY OVERVIEW, CONT.

Prospect Summary Form

Hyperlink to Prospect record for this entity.

The screenshot shows a 'Prospect Summary (1)' form with a blue header bar containing 'New', 'Actions', and 'Help' menus. The form fields are as follows:

Name	[Redacted] Active), Current Prospect - Active		
Type	Couple	Start Date	09/12/2007
Group	Fayetteville Campus	Stop Date	
Stage	Active Cultivation		
Trans GR			
Primary Manager	Mrs. [Redacted]		

Annotations: A downward arrow points from the text 'Hyperlink to Prospect record for this entity.' to the 'Active)' link in the Name field. An upward arrow points from the text 'Hyperlink to Entity Overview for the Primary Manager assigned to this Prospect.' to the 'Mrs.' link in the Primary Manager field.

Hyperlink to Entity Overview for the Primary Manager assigned to this Prospect.

ENTITY OVERVIEW, CONT.

Giving Summary Forms

Primary Credit Giving Summary shows totals for all gifts for which this entity received legal credit.

Associated Credit Giving Summary shows all soft credit gifts for this entity.

Primary Credit Giving Summary						Actions	Help	⬆
Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total			
Annual Fund	16,129.00	0.00	0.00	0.00	16,129.00			
By Unit	64,432.00	118,293.08	0.00	953,296.29	1,136,021.37			
Total	80,561.00	118,293.08	0.00	953,296.29	1,152,150.37			
Last Transaction: \$32,998.08 Realized Bequest on May 14, 2018								

Associated Credit Giving Summary						Actions	Help	⬆
Credit	Recognized Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total			
Annual Fund	18,129.00	0.00	0.00	0.00	18,129.00			
By Unit	74,472.00	124,898.71	19,894.37	953,296.29	1,172,561.37			
Total	92,601.00	124,898.71	19,894.37	953,296.29	1,190,690.37			

Clicking hyperlink on Last Transaction will take you to the Primary Gift Overview for this Gift transaction.

ENTITY OVERVIEW, CONT.

Membership Summary Form

Membership Summary (1)

[Actions](#) [Help](#)



Member Since: 1978

Life A+ **Life Member Number:** **6165** Start: 04/01/2001 Expires:

Displays Member Since year and current start date of current membership type.

If the entity has a Life membership, the Life Member Number will display towards the right of the form.

ENTITY OVERVIEW, CONT.

Contact Report List

List shows all Contact Reports regarding this entity.

Contact Report List For Entity (1/47)							New	Actions	Help
	Report #	Contact	Purpose	Date	Author				
...	148967	Pers Scheduled Visit/Me...	Cultivation	02/09/2018	Dr.				
...	150020	Pers Scheduled Visit/Me...	Alumni Relations	01/24/2018	Ms				
...	147729	Phone Call	Cultivation	01/10/2018	Ms				

Clicking the ellipsis takes you to the Contact Report detail screen for this Contact Report.

VIEWING ADDITIONAL BIO ATTRIBUTES

Expand the Biographic menu to view a list of entity attributes in the Biographic subsystem.

Numbers next to the attribute name indicate that this entity has X number of records on that form.

The screenshot shows a software interface for viewing biographic attributes. On the left is a sidebar menu titled 'Entity' with a list of attributes and their corresponding record counts. An arrow points to the 'Biographic' menu item. The main content area is titled 'Bio Summary' for entity #20798. It includes a 'Biographic Detail' section with fields like Salutation, Status, Gender, and Children. Below that is a 'Biographical Detail (Birth & Death)' section with fields like Birth Date, Birth Place, Ethnicity, and Death Date.

Entity		Attribute	Count
Overview			
Detail			
▼ Biographic			
Views			
Activities			25
Addresses			13
Affiliations			14
Alloc Beneficiary			
Awards/Honors			3
AWC Directory			
Bank Cards			
Bio Detail			1
Children			7
Class Notes			1
Comments			2
Committees			9
Comm Tracking			254
Cvr Accounts			
Degrees			3
Documents			373
eContact			
Email			2
Employment			2
Fmr Spouses			
IDs			11
Interests			1
Mail Control			1
Mailing Lists			45

Bio Summary #20798			
Rec Type	Alumni (1978 Law), Staff, More...		06/09/1952 (66)
Degree	JD 1978 Law, FDD 1989 Education More...		
PM Manager	Mrs. [REDACTED]		
AAA	Life A+ Married to: M. [REDACTED] (AL)		Northwest Arkansas Chapter Towers Old Main Accepted (Gold)

Biographic Detail			
Salutation	[REDACTED]	Status	Active
Status Chg Date		Status Chg Date	08/10/2011
Solicit Ctrl		Solicit Comment	
Solicit Comment		Gender	Male
Gender		Children	7
Children		Source	Research Office
Source		Added	06/02/1989
Added		Bio Comment	Name tag field below should always read [REDACTED] 2010
Bio Comment			

Biographical Detail (Birth & Death)			
Birth Related Data			
Birth Date	06/09/1952	Ethnicity	Caucasian
Birth Place		Ethnic Src	
		Religion	
Death Related Data			
Death Date		Children	7
Notified		Citizenship	
Confirmed		Legacy	
Death Place		Political Int	Yes
Obituary		Language	
Pub Date		Research Date	
Letter 1			
Letter 2			

DOCUMENTS SCANNED FOR ENTITIES

The screenshot shows a software interface for managing documents. On the left is a sidebar with a tree view under 'Entity', including 'Overview', 'Detail', and 'Biographic' (expanded). The 'Documents' link is highlighted. The main area has a header 'Documents' with 'Actions' and 'Print' buttons. Below the header is a summary for 'Dr. [redacted] 20798' with fields for 'Rec Type', 'Degree', 'PM Manager', and 'AAA'. A 'Documents List (373)' table follows, with columns for 'View', 'Doc Type', 'Description', and 'Doc Date'. The table contains 15 rows of document entries. An arrow points to the 'View' icon in the first row.

View	Doc Type	Description	Doc Date
...	Research Correspo...	LETTER JES THANK YOU DELTA DELTA DELTA CHAPTE...	02/09/2018
...	Research Media In...	ADG LEADING A STUDY ON THE ROLE OF COLLEGE PR...	01/22/2018
...	Admin Correspond...	STUDENT THANK YOU LETTER	11/14/2017
...	Admin Correspond...	STUDENT THANK YOU LETTER	11/10/2017
...	Admin Correspond...	ANNUAL ENDOWMENT REPORT MEP	10/24/2017
...	Research Media In...	UA NEWS REL TO SERVE ON FULBRIGHT ASSOCIATION...	10/03/2017
...	Research Correspo...	LETTER KG THANK YOU GENERAL SCHOLARSHIP FUND	07/19/2017
...	Research Correspo...	LETTER MEP THANK YOU WOMENS GIVING CIRCLE	07/18/2017
...	Research Correspo...	LETTER SL THANK YOU SPPARK	07/18/2017
...	Research Correspo...	LETTER KN THANK YOU MULLINS LIBRARY SPECIAL CO...	05/26/2017
...	Research Correspo...	CARD UA TOWERS AFTER EVENT POST CARD	05/10/2017
...	Research Bio Sum...	TOWERS BIO	04/29/2017
...	Research Media In...	UA NEWS REL CAREER & TEACHING ROLE AT UA	04/28/2017
...	Research Correspo...	LETTER PC LAW SCHOOL SCHOLARSHIP LUNCHEON	04/19/2017
...	Research Correspo...	LETTER AL TOWERS OF OLD MAIN EVENT DIRECTIONS	04/12/2017
...	Research Correspo...	LETTER KG THANK YOU SCHOOL OF ARCHITECTURE	04/11/2017
...	Research Correspo...	LETTER KG THANK YOU SIGMA CHI ENDOWED SCHOLA...	03/21/2017
...	Research Correspo...	LETTER MEP THANK YOU APPAREL STUDIES	03/16/2017

The Documents link under the Biographic subsystem contains a list of all scanned documents that you have rights to view.

Columns can be sorted by clicking on the column header.

Click on the icon in the View column to open the document.

EMPLOYMENT RECORDS

Employment information can be “linked” to the employer’s entity record, if one exists in the database, or with the employer’s name only, if no ID exists for the company.

Employment
Actions Print

Dr. [redacted] #20798 ***VIP***

Rec Type Alumni (1978 Law), Staff, More... 06/09/1952 (66)

Degree JD 1978 Law, EDD 1989 Education More...

PM Manager Mrs. [redacted]

AAA Life A+ Northwest Arkansas Chapter
Towers Old Main Accepted (Gold)

Married to: Mrs. [redacted] 799 (AL)

Employment (1/2)
Save New Delete Actions Help

Employer	Job Type	Job Status	Job Title	Start	Stop
University of Arkansas #...	Employer	Current	Professor	06/22/1996	
University of Arkansas #...	Employer	Former	Chancellor	06/22/1996	

Employer* University of Arkansas

Emp Name 1*

Emp Name 2

Start / /

Stop / /

Primary Employment
 Self Employed

NAME RECORDS

Advance allows you to track a variety of Name types, including:

- **Primary Name*** (This is the preferred mail name that is used in Mailings and displayed throughout the Advance system. This is the name type that is created when entering a new entity into the system.)
- **Complete***
- **Joint Combined Mailing Name*** (If Married)
- **Maiden Name**
- **Nickname**
- **Past Name**
- **Other Name**

Name types noted by an asterisk (*) are required when adding a new Entity Record.

RECORD TYPES

- An entity’s “Record Type” tells you what “kind” of entity it is.
- An entity can have multiple record types.
- There is a hierarchy of Record Types, which determines the Record Type that displays first in the Overview header. The Record Type hierarchy is:

Record Type Code	Description
AL	Alumni
AD	Alumni No-degree
PT	Parent
FC	Faculty
SF	Staff
GA	Graduate Assistant
SD	Student
FZ	Former Faculty
FS	Former Staff
FP	Former Parent
FR	Friend
ES	Estates
CO	Corporation
FD	Foundation
FF	Family Foundation
TR	Trust
MG	Matching Gift Company
OO	Other Organizations

RELATIONSHIP RECORDS

A variety of familial (and other) Relationships can be stored as Entity attributes in Advance. Some common examples include:

- Marital relationships
- Parent/ Child relationships
- Sibling relationships
- Former Spouse relationships

Although all relationship types can be viewed on the Relationships application, the Marital and Child relationships must be maintained with special applications.

Special note: If the Child is not an Entity in the database, then the Child relationship will not be visible on the Relationships screen.

GIFTS, PLEDGES, AND ALLOCATIONS



THE GIVING SUBSYSTEM

An Entity's Giving Summary screen can be accessed from the Entity Overview screen by clicking "Giving" on the Navigation Tree.

Entity

- Overview
- Detail
- ▶ Biographic
- ▶ Events
- ▼ Giving
 - Views
 - Appeals 86
 - Documents
 - Gift Clubs 27
 - Rec Listings
 - Segments 9
 - ▶ Membership
 - ▶ Prospect Tracking
 - Alerts 2
 - Add Person
 - Add Organization
 - Deceased Entity
 - Entity Merge
 - Restrict Merge/Purge
 - emPower

Giving Summary
Actions Print

Dr [REDACTED] #20798 ***VIP***

Rec Type Alumni (1978 Law), Staff, More... 06/09/1952 (66)

Degree JD 1978 Law, EDD 1989 Education More...

PM Manager Mrs. [REDACTED]

AAA Life A+ Northwest Arkansas Chapter

Married to: Mrs. [REDACTED] (AL) Towers Old Main Accepted (Gold)

Giving Summary
Actions Help

Lifetime Giving			Lifetime AF Giving		
Total Hard Credit	80,561.00		Last Annual Fund Year Given	2012	
Total Recognition Credit	92,601.00		Last Appeal Type	Other	
Total Household Recg	93,676.00		Annual Fund Hard Credit	16,129.00	
Largest Gift or Pledge	900,000.00		Largest Annual Fund Gift	3,000.00	
Outstanding Pledges	0.00		Outstanding Phone Pledges	0.00	
Largest Deferred Gift	78,195.00				

Annual Fund Giving Totals (22)
Actions Help

Year	Annual Fund Giving				Total
	Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	
2012	1,244.00	0.00	0.00	0.00	1,244.00
2011	1,000.00	0.00	0.00	0.00	1,000.00
2010	2,250.00	0.00	0.00	0.00	2,250.00
2008	500.00	0.00	0.00	0.00	500.00
2007	1,600.00	0.00	0.00	0.00	1,600.00
2005	1,250.00	0.00	0.00	0.00	1,250.00

By Unit Giving Totals (30)
Actions Help

Year	By Unit Giving				Total
	Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	
2018	0.00	34,598.08	0.00	0.00	34,598.08
2017	50.00	4,000.00	0.00	0.00	4,050.00
2016	2,050.00	1,500.00	0.00	853,296.29	856,846.29
2015	426.00	0.00	0.00	0.00	426.00

GIVING VIEWS

Additional information can be accessed by clicking "Views" from the Giving Summary screen.

The screenshot displays the 'Giving Views' interface. On the left is a sidebar menu with the following items: Overview, Detail, Biographic, Events, Giving, Views (highlighted with an arrow), Appeals (86), Documents, Gift Clubs (27), Rec Listings, Segments (9), Membership, Prospect Tracking, Alerts (2), Add Person, Add Organization, Deceased Entity, Entity Merge, Restrict Merge/Purge, and emPower.

The main content area is titled 'Giving Views' and includes 'Actions' and 'Print' buttons. It shows the following information:

- Dr. [REDACTED] #20798** (with a '***VIP***' badge)
- Rec Type:** Alumni (1978 Law), Staff, More...
- Degree:** JD 1978 Law, EDD 1989 Education More...
- PM Manager:** Mrs. [REDACTED]
- AAA:** Life A+ Northwest Arkansas Chapter Towers Old Main Accepted (Gold)
- Married to:** Mrs. [REDACTED] #20799 (AL)

Below this is a 'Views' section with 'Actions' and 'Help' buttons, containing a table:

Context	Name	Description
	Giving Totals	Giving Summary - Giving Totals
w/Spouse	Giving Totals with Spouse	Giving Summary - Giving Totals ...
	Matching Claims	Giving Summary - Matching Claims
	Matching Gift	Giving Summary - Matching Gift
	Matching Gift with Audit	Giving Summary - Matching Gift ...
	One-Line - Simple Transaction List	Giving Summary - One-Line - Si...

Below the table is a 'Simple Transaction List (1/372)' section with 'Actions' and 'Help' buttons. It shows a pagination control: 'Items 1 to 20 of 372' and navigation icons. The table below has the following columns: Date of Record, Receipt #, Legal Amt., Credit Amt., Alloc Name, and Alloc C.

Date of Record	Receipt #	Legal Amt.	Credit Amt.	Alloc Name	Alloc C.
05/14/2018	0020800065	32,998.08	32,998.08	[REDACTED]	30009186
04/16/2018	0020795514	500.00	500.00	[REDACTED]	30007413
04/10/2018	0020792375	0.00	500.00	[REDACTED]	30011483
03/14/2018	0020784821	250.00	250.00	[REDACTED]	30003192
01/12/2018	0020773595	0.00	5,105.63	[REDACTED]	90000087
01/01/2018	0020773252	0.00	19,894.37	[REDACTED]	90000087

Default view is a 'simple transaction list.'

USING SIMPLE TRANSACTION LIST

Simple Transaction List (1/372) Actions Help

Items to 20 of 372 ⏪ ⏩ ⏴ ⏵

Date of Record	Receipt #	Legal Amt.	Credit Amt.	Alloc Name	Alloc Code
05/14/2018	0020800065	32,998.08	32,998.08		30009186
04/16/2018	0020795514	500.00	500.00		30007413
04/10/2018	0020792375	0.00	500.00		30011483
03/14/2018	0020784821	250.00	250.00		30003192
01/12/2018	0020773595	0.00	5,105.63		90000087
01/01/2018	0020773252	0.00	19,894.37		90000087
12/31/2017	0020773251	250.00	250.00		30012280
10/30/2017	0020753305	500.00	500.00		30011504
10/26/2017	0020752873	0.00	0.00		30012762
09/11/2017	0020741432	0.00	0.00		30012762
07/11/2017	0020724140	100.00	100.00		30002964
07/06/2017	0020723405	0.00	1,000.00		30006995
06/29/2017	0020722712	250.00	250.00		30003640
06/15/2017	0020718534	100.00	100.00		30013412
05/22/2017	0020711035	150.00	150.00		30009186
05/15/2017	0020727032	25.00	25.00		30003046
04/25/2017	0020705957	0.00	0.00		30012762
04/06/2017	0020698031	250.00	250.00		30012074
04/05/2017	0020697977	100.00	100.00		30003610
03/29/2017	0020696364	250.00	250.00		30003192

Receipt #
hyperlink
takes you to
the Primary
Gift
overview
for this
transaction.

Allocation
Code
hyperlink
takes you
to the
Allocation
Overview
for the
Allocation
associated
with this
Gift.

VIEWING ALLOCATIONS

- Allocations can be easily accessed from an Entity's Giving history by clicking on the allocation hyperlink in any of the giving views or on the gift profile application.
- Allocations can also be found with the Gift-Allocation Lookup.

ALLOCATION LOOKUP TEMPLATE

Change the template to Gift-Allocation Lookup

Use Short Name or Long Name fields to find an account by its name

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 Help

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

ALLOCATION (ACCOUNT) OVERVIEW

Allocation

Overview [Actions](#) [Print](#)

Award (30008518)

Account 30008518 **Agency** Foundation
School Fulbright College of Arts & Sciences **Campus** UAF
Department Music

Allocation Overview [Actions](#) [Help](#)

Long Name Award
Univ XRef 039262390810000
Fiscal Year Development
Endowed
Restriction UG Award
Start Date 03/23/2004
Stop Date

Allocation Financials [Actions](#) [Help](#)

Valuation Date	Financial	Cash	Invested	Pledge	Balance
05/23/2018	Principal	1,146.70	0.00	0.00	1,146.70
05/23/2018	University XRef	0.00	0.00	0.00	0.00

Matching Allocation Financials [Actions](#) [Help](#)

Overview
Detail
Assignments
Attributes 2
Beneficiaries 6
Documents 10
Financials 2
Notes 2
Stewardees 1
Tasks
Transactions 11
Allocation User Group emPower

Allocation Overview header shows most information previously held on the L3 screen.

Allocation Financials displays information previously held on L11.

ALLOCATION (ACCOUNT) DETAIL

Allocation Detail:

Displays ISIS Item Type and additional Constituent Unit and Account information

For Spending account, the cost center number will display towards the bottom of this page

Allocation		Allocation		Actions	Print
Overview		Award (30008518)			
Detail		Account	30008518	Agency	Foundation
Assignments		School	Fulbright College of Arts & Sciences	Campus	UAF
Attributes	2	Department	Music		
Beneficiaries	6	Use this page to update allocation details. To add related information about this allocation, follow the guidelines provided below.			
Documents	10	<ul style="list-style-type: none">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.			
Financials	2	Allocation Detail Save New Actions Help			
Notes	2	Allocation*	<input type="text" value="30008518"/>	<input checked="" type="checkbox"/> Active	
Stewardees	1	Account*	<input type="text" value="30008518"/>	<input checked="" type="checkbox"/> Notify Dpt	
Tasks		ISIS 901100	<input type="text" value="512764"/>	<input type="checkbox"/> Athletics	
Transactions	11	Fiscal Year	<input type="text" value="D"/> Development	<input checked="" type="checkbox"/> Write to Ledger	
Allocation User Group	emPower	Agency*	<input type="text" value="F"/> Foundation	<input type="checkbox"/> AF Tax or CC Fee	
		Acct School*	<input type="text" value="RBD"/> Razorback Band	<input checked="" type="checkbox"/> Use for AWC	
		Acct Dept*	<input type="text" value="GN"/> Razorback Band		
		Campus*	<input type="text" value="02"/> UAF		
		Dept*	<input type="text" value="2194"/> Music		
		Sub Dept	<input type="text" value="2035"/> Band		
		School*	<input type="text" value="2027"/> Fulbright College of Arts & Sciences		
		Short Name*	<input type="text"/>		
		Long Name*	<input type="text"/>		

ALLOCATION DOCUMENTS

The Documents link in the Allocation nav tree is where you will find a scanned copy of the Gift Agreement (if one exists and has been scanned for the allocation)

Allocation

- Overview
- Detail
- Assignments
- Attributes 2
- Beneficiaries 6
- Documents 10**
- Financials 2
- Notes 2
- Stewardees 1
- Tasks
- Transactions 11
- Allocation User Group emPower

Documents Actions

Account [redacted] rd (30008518)

Agency Foundation

School Fulbright College of Arts & Sciences Campus UAF

Department Music

Documents List (10) Actions Help

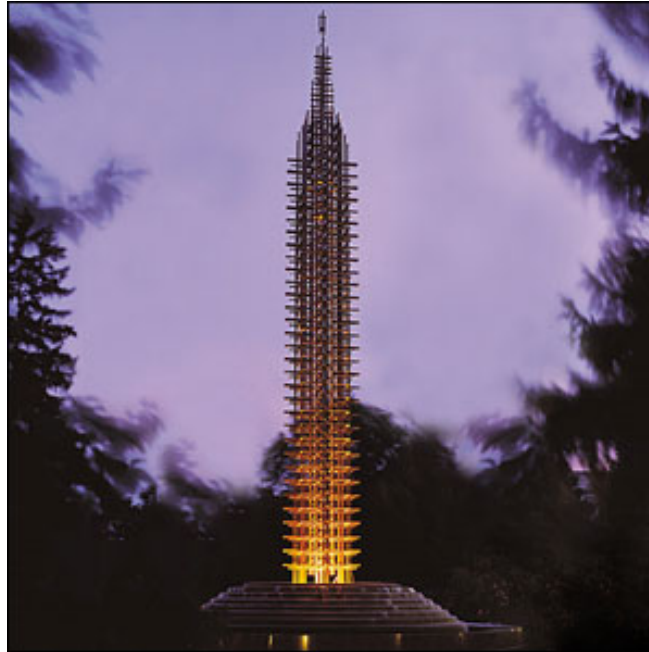
	View	Doc Type	Description	Doc Date
...		Admin Correspond...	STUDENT THANK YOU LETTERS	11/13/2014
...		Admin Correspond...	STUDENT THANK YOU LETTER	11/05/2013
...		Admin Correspond...	STUDENT THANK YOU LETTER	08/22/2012
...		Admin Correspond...	LETTER A EPLEY AWARD CRITERIA REQUEST	08/03/2012
...		Allocations Corres...	E-MAIL ES NEED SPENDING ACCOUNT ESTABLISHED	10/13/2006
...		Allocations Corres...	E-MAIL DCW NEED DISTRIBUTION GUIDELINES	01/22/2006
...		Allocations Corres...	MEMO UA AWARD FUND INFO	03/23/2004
...		Admin Gift Agree...	ALAN D. AND SHERRY EPLEY AWARD	11/29/2003
...		Admin Correspond...	FAX LE REVIEW DRAFT ENDOWMENT AGREEMENT	10/03/2003
...		Admin Correspond...	FAX UA DRAFT GIFT AGREEMENT REVISIONS	07/08/2003

Click the icon in the View column to view the document

LABWORK

- Advance Introduction Workbook
- Lab 9

THE PROSPECT TRACKING SUBSYSTEM



THE PROSPECT TRACKING SUBSYSTEM

While active on the Entity Overview Screen, click “Prospect Tracking” to view the Prospect Tracking Summary application. Can also be accessed using “Go To” PTSUM and the Entity ID.

The screenshot displays the 'Prospect Tracking Summary' interface. On the left is a navigation menu under the 'Entity' header, with 'Prospect Tracking' selected. The main area shows prospect details for Mr. [redacted] #1931, including Rec Type (Alumni (1961 Law)), Degree (JD 1961 Law, BSPA 1961 Walton More...), PM Manager (Mr. [redacted]), and AAA (Life A+). A 'Prospect Information' section includes a checkbox for 'Show Inactive Prospects & Proposals' and a list item for 'Fayetteville Campus PROSPECT (#1345)' with group and expectation details. An arrow points to the prospect ID number 1345.

Notice the Prospect ID number appears here.

THE PROSPECT TRACKING SUBSYSTEM

Many, but not all, Prospect attributes are visible when you expand the Prospect Tracking subsystem menu.

That's because...

There are Entity level prospect attributes. →

▼ Prospect Tracking	
Views	
Alloc Stewardship	
Assignments	41
Contacts	
Contact Rpts	460
Cntrcts/Grnts	
Demographic	3
Evaluations	
Interests	
Notes	5
Phil Affnties	
Phil Intrsts	
Stewardship	
Wealth/Assets	
Wealth Engine	

And there are Prospect level prospect attributes. →

Prospect	
Overview	
Detail	
Assignments	11
Categories	
Contact Rpts	461
Contacts	
Entities	3
Evaluations	2
Notes	
Programs	1
Proposals	18
Stages	20
Tasks	13
Transactions	9

ENTITY-LEVEL PROSPECT ATTRIBUTES

For example, all Assignments can be viewed at the Entity level.

Demographic screenings and other Evaluations are also Entity-level Prospect attributes.

Entity Assignments Actions Print

Mr. [redacted] Jr. #1931 ***VIP***

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

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

PM Manager M [redacted]

AAA Life A+ Northwest Arkansas Chapter

Married to: [redacted] 1469 (FR) Towers Old Main Accepted (Ruby)

Assignments (1/41) Save New Delete Actions Help

Assigned	Office	Type	Status	Priority
M [redacted]	Planned Giving Office	Solicitation Manager	<input type="checkbox"/> Active	
M [redacted]	Planned Giving Office	Solicitation Manager	<input type="checkbox"/> Active	
M [redacted]	LAW DOD Office	Associate Manager	<input type="checkbox"/> Active	
M [redacted]	Vice Chan Advancement	Solicitation Manager	<input type="checkbox"/> Active	
M [redacted]	Planned Giving Office	Solicitation Manager	<input type="checkbox"/> Active	
M [redacted]	AFLS DOD Office	Associate Manager	<input type="checkbox"/> Active	

ACCESSING ADDITIONAL ATTRIBUTES

The screenshot displays a software interface for prospect tracking. On the left is a navigation menu with categories like Overview, Detail, Biographic, Events, Giving, Membership, and Prospect Tracking. The Prospect Tracking section is expanded to show Views, Alloc Stewardship, Assignments (41), Contacts, Contact Rpts (460), Cntrcts/Grntrs, Demographic (3), Evaluations, Interests, Notes (5), Phil Affnties, and Phil Intrsts.

The main content area is titled "Prospect Tracking Views" and shows details for "Mr. [redacted] Jr. #1931". Attributes include Rec Type (Alumni (1961 Law)), Degree (JD 1961 Law, BSPA 1961 Walton More...), PM Manager (Mr. [redacted]), and AAA (Life A+). It also shows a date (04/28/1936 (82)) and membership information (Northwest Arkansas Chapter Towers Old Main Accepted (Ruby)).

Below this is the "Prospect Tracking Summary" section, which contains a table with three columns: Context, Name, and Description.

Context	Name	Description
w/Spouse	Interests - Combined	Prospect Tracking Interests - Inc...
	Notes	Prospect Tracking Notes
w/Spouse	Notes - Combined	Prospect Tracking Notes - Includ...
	Programs	Prospect Tracking Programs
w/Spouse	Programs - Combined	Prospect Tracking Programs - In...
	Proposals	Prospect Tracking Proposals

At the bottom is the "Prospect Information" section, which includes a checkbox for "Show Inactive Prospects & Proposals" and a list of prospects. One prospect is highlighted: "Fayetteville Campus PROSPECT (#1345)". An arrow points to this hyperlink. Other information shown includes "Group (Joint): [redacted] Jr. & Ltd Co." and "Expectation: \$0.00".

Click the Prospect hyperlink from the PTSUM application to view Prospect-level prospect attributes.

THE PROSPECT TRACKING SUBSYSTEM

The Navigation Tree on the Prospect detail screen shows all Prospect-level Prospect attributes, such as Proposals and Stages.

Prospect

Overview
Detail
Assignments 11
Categories
Contact Rpts 461
Contacts
Entities 3
Evaluations 2
Notes
Programs 1
Proposals 18
Stages 20
Tasks 13
Transactions 9

Prospect Actions Print

[Redacted] & Ltd Co. (Prospect #1345)

Prospect Type Group

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

- You can enter [Assignment](#) details for this prospect
- You can establish the list of [Entities](#) that comprise this prospect relationship.
- You can set up one or more follow-up [Tasks](#) for this prospect.
- You can enter a [Contact Report](#) for this prospect.
- Use [Entity Update](#) to record updated biographic information for this prospect.
- Create a [Program Prospect](#) record if this prospect is associated with a particular program.
- Create a [Proposal](#) if this prospect has a proposal to record.

Prospect Save New Actions Help

Name*	[Redacted] Jr. & Ltd Co.	Start	02/06/2002
Sort Name*	[Redacted]	Stop	
Type*	G Group	Stage*	C Active Cultivation
Major Prospect Status	A Current Prospect - Active	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> PG Prospect
Group	FA Fayetteville Campus		
Continuum			
Trans GR	\$5M - \$9.9 M		
Rating Status	Active		
Comment	<input type="text"/>		

THE PROSPECT-ENTITY SCREEN

The Entity form on the Prospect menu shows the Entity ID for all associated Entities.

The screenshot displays the 'Prospect Entities' interface. On the left is a navigation menu for the 'Prospect' section, listing various categories and their counts. The main area shows the details for 'Lewis E. & Donna Epley Jr. & Ltd Co. (Prospect #1345)'. Below this, there is a table of 'Prospect Entities (1/3)' with columns for 'Entity' and 'Primary'. A search form at the bottom allows for finding entities by ID and name, with a 'Primary Entity' checkbox.

Entity	Primary
[Redacted] Ltd. #175314	<input type="checkbox"/> Primary
[Redacted] 91469	<input type="checkbox"/> Primary
[Redacted] r. #1931	<input checked="" type="checkbox"/> Primary

Entity*
 Primary Entity

LABWORK

- Advance Introduction Workbook
- Lab 10

TRAINING CLASSES WE OFFER

Advance Introduction

Advance Contact Reports

Advance Events

Advance Codes

Crystal Reports Server

Notice of Student Support (NOSS)

using Perceptive Content

UPDATES TO ADVANCE

All updates to biographical
information can be sent to
records@uark.edu

CONTACT INFORMATION



Remember my contact info:
Joshua Tipton
479-575-3516
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Contact me if you forget your
password and need it reset.

Contact me if you would like to
request additional training.