# Advance Tips and Reminders

1.  Advance works best in Internet Explorer.  Advance Web Homepage: www.advancement.calpoly.edu

2.  You have two passwords.  One password is to enter Advance Web (this will be provided to you during Advance Training).  Your second password is what you use to create an Output Request, Donor Acknowledgments and retrieving Advance emails.  This password can be retrieved by clicking "Forgot Password" on the Advancement homepage.

3.  To change your Advance Web password you would first log into Advance and then select "change password" on the left hand side.  To change your second password you would select "Change Password" in the navigation bar on the Advancement homepage (bottom left).

4.  Output Request:  These are used to retrieve large amounts of information for mailings (to invite donors to a banquet, etc.) or to retrieve giving information for a department or college.  To create an Output Request click on the link in the navigation bar on the Advancement homepage, then fill out the form.  You may contact Jonelle Thomson in Advancement Services for assistance at 756-5860 or jthomson@calpoly.edu.

5.  Donor Acknowledgements:  You would use this when sending letters to donors to acknowledge a gift.  Please review the information provided on the Donor Acknowledgement page (in the navigation bar on the Advancement homepage) before sending any letters.

6.  FAQ:  This is a great resource for password information and other basic questions regarding Advance.

7.  Advance logs out frequently, to retrieve information regarding your last search you can find links at the bottom of the Advance Web homepage.

8.  Alerts:  Be mindful when you see ***ATTENTION***.  This indicates donors who may not be contacted or solicited without approval from the President's office.

9.  You are permitted to have a maximum of 10 windows active in Advance.  Once you hit your tenth you will receive a warning.  At that point you can either close all windows using the icon with the red X or individually close windows by clicking on the x within the tab.

10.  You may jump back and forth between search windows in Advance by selecting the desired tab across the top of Advance (below menu bar).

11.  The binocular icon is the most commonly used tool in Advance.  To open a new search window click on the binoculars and enter information in to the desired fields.

12.  The return arrows within Advance will cause you to lose any specific search information you placed in the search fields.  To move back a page and keep that information use the Internet Explorer back arrow (in blue).

13.  All Lookups results and information viewable on any form can be exported to Excel through the Actions menu.  The Export will usually contain more information than what you viewed in Advance.  This information is not to be used for mailings!  Not all access levels are permitted to export information.

14.  Use the Help link on form (green bar) to go directly to help page for that form.  The Help link in the menu is general help and searchable.

15.  Click Entity Update on the left side to send corrections and updates to Advancement Services Staff. This should be done if you have confirmation from a reliable source that the information in Advance Web is incorrect.
      Common examples: incorrect address or contact information, incorrect employment status, incorrect relationship links.

16.  If a form (green bar) column header is highlighted, that field can be sorted.  For example, if you are viewing an entities giving history, you may click on the amount to sort lowest to highest gifts or highest to lowest.

17.  Populated forms are indicated by a number in the left side menu.  For example, if you select Biographic within an entity and notice a number next to relationships, that means the entity has a relationship with other entities within Advance.  Click on the word relationship to view who the other entities are.

18.  Auto log-off after 30 minutes of inactivity.