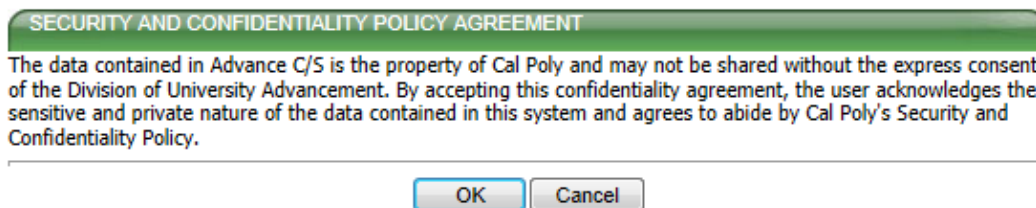


How To Navigate Through Advance

STEP ONE:

Log onto Advance Web through the following address: www.advancement.calpoly.edu. After you enter your log on information you will see the following message:

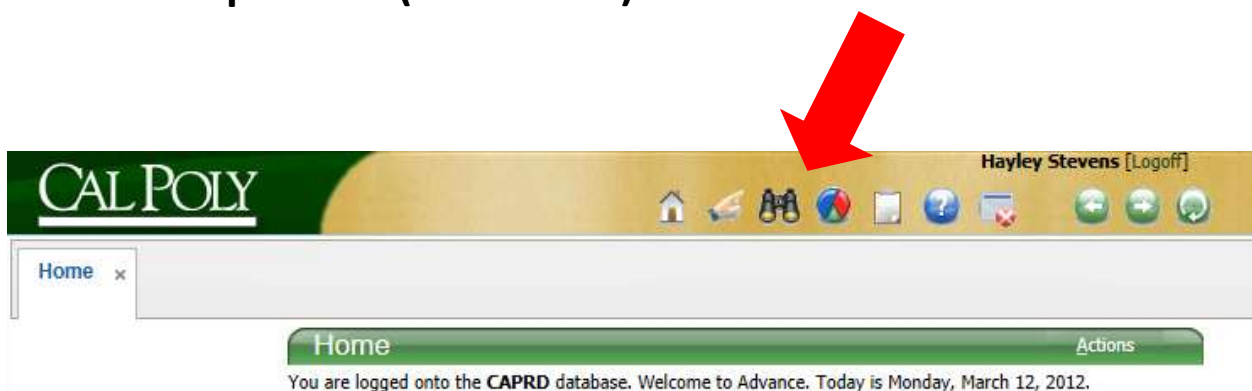


This is a routine privacy statement that ensures the confidentiality of this information. Go ahead and click "OK".

STEP TWO:

After you log onto Advance Web, the Home Screen appears. Some important shortcuts can be found in the upper left-hand corner. Each shortcut opens a new tab in Advance. Hold your cursor over each symbol to see what it represents. Note that Advance only allows ten tabs open at once. To close a single tab click the X on each tab. To close all tabs click “Close All”, the fourth symbol from the right. Basic Advance help can be found by clicking on the question mark. This will open a new internet tab taking you to Advance Online Help. To open the “Home” tab at any time, click on the house.

Now to do a basic lookup of an individual, entity, etc. click on the “Lookups” icon (Binoculars).



STEP THREE:

The following screen will appear. To get the most accurate results enter the Advance ID (1). If the Advance ID is not accessible, enter the Last Name and any other applicable information (2). Change the drop down from “Begins To” to “Contains”. If you are unsure about the spelling, change the drop down to “Like” (3). Lastly click “Search” (4).

The screenshot shows a web application interface with a breadcrumb trail: Home > Lookups - Bio - Entity. On the left is a sidebar with a 'Lookups' section containing a 'Saved Criteria...' link and a list of categories: Biographic, Event, Gift, Prospect Tracking, Membership, Miscellaneous, Add Person, and Entity Update. The main content area has a green header 'Lookups' with an 'Actions' link. Below this is a list of instructions: 1. Choose a template (optional) - Bio - Entity; 2. Select results format* - Entity Lookup List; 3. Select output type* - Display results/Open on exact match; 4. Select additional criteria from page tree (optional); 5. Enter criteria below and click Search. There are 'View Criteria' and 'Clear' buttons. A red arrow labeled '4' points to the 'Search' button. Below the instructions is the 'ID Lookup' section with 'ID' and 'Alt ID' fields, each with a dropdown set to '='. A red arrow labeled '1' points to the 'ID' dropdown. The 'Entity Lookup' section has a checkbox for ''Sounds Like'' and several dropdown menus. The first three are 'Last/Org Name', 'First', and 'Middle', all set to 'Begins with'. A red arrow labeled '3' points to the 'Last/Org Name' dropdown. A red arrow labeled '2' points to the 'First' dropdown. Below these are dropdowns for 'Name Type', 'Record Status', 'Primary Record Type', 'School', 'Class', 'Solicit Cntrl', 'Lookup', 'Affiliation Code', 'Affiliation Status', and 'Deleted', all set to '='. The 'Address Lookup' section has dropdowns for 'Preferred' (set to '='), 'Type' (set to '='), 'City', 'State' (set to '='), 'Country' (set to '='), and 'ZIP Code' (set to 'Begins with').

STEP FOUR:

If your search was not specific enough, the following screen will appear. Either click “Continue” if you wish to pull such a general list or click “New Search” and reenter your search criteria.

The screenshot shows a web application interface. At the top, there are two tabs: 'Home' and 'Lookups'. Below the tabs, on the left, is a sidebar with the heading 'Lookups' and a list of categories: 'Saved Criteria...', 'Biographic', 'Event', 'Gift', 'Prospect Tracking', 'Membership', 'Miscellaneous', 'Add Person', and 'Entity Update'. The main content area has a green header with 'Lookups' and 'Actions'. Below the header, a message states: 'You have entered 2 criteria. Your search resulted in 806 records. The number of records may delay the time to display them. Consider selecting a different output type.' Below this message is a dropdown menu with the text 'Display results/Open on exact match'. At the bottom of the main content area, there are three buttons: 'New Search', 'Refine Search', and 'Continue'.

STEP FIVE:

The “Entity Overview” screen should now appear. Notice how there is an “ATTENTION” notice. Click on “ATTENTION” to view the notice.

Entity Overview

Rec Type: 136616
 Degree: Alumnus (1982 College of Engineering), Parent of Student
 BS 1982 College of Engineering (Major: Computer Science)
 ATTENTION
 Married: 349

Primary Address

Home (Preferred)
 Atherton, CA 94027-4033

Business
 Consultant
 San Mateo, CA 94404

Preferred Email
 gbloom@aol.com

Affiliations (1)

Affiliation	Status	Record Type	Affil Year
CP Univ Advancement Notable	Current		

Giving Summary

Credit	Gifts	Matching	Pledges	Balance
Annual	1,632,234.98	0.00	1,300.00	0.00
Other	0.00	0.00	0.00	0.00
Total	1,632,234.98	0.00	1,300.00	0.00

Last Transaction: 100,000.00 TR - Gift on Feb 07, 2012

Membership Summary

AL - Life Member
 First Year Overall: 2000
 Current Start: Mar 01, 2000
 Expires:

Prospect Summary (1/1)

Name	Major Prospect,	Start Date	Mar 01, 1999
Type	Married Couple	Stop Date	
Group		Stage	Stewardship
Program		Rating	\$1,000,000 +
Classification	Principal (\$500,000+)		
Unit			
Prospect Liaison	Ms. Deborah Read		

STEP SIX:

In this case the note is just saying that Donor Don is a member of the President's Cabinet and he should not be directly communicated with. IT IS VERY IMPORTANT TO CHECK THESE NOTICES!

Attention (1) Close

Urgency	Alert	Status	Active	Entity-based
Symbol	[Redacted]			
Description	[Redacted] is a member of the President's Cabinet and communications should be coordinated with the President's Office Chief of Staff or the Vice President for University Advancement's Office. Thank you.			
Comment	[Redacted]			
Source	Ms. Jonelle A. Thomson			
Start Date		Stop Date		

STEP SEVEN:

Click “Close” and return to the “Entity Overview” screen.

To view Biographic Information such as name, address, children and campus relations click “Biographic”.

Entity Overview [Actions] [Print]

136616
 Rec Type: Alumnus (1982 College of Engineering), Parent of Student
 Degree: BS 1982 College of Engineering (Major: Computer Science)
 ATTENTION
 Married: [Redacted] 349

Primary Address [Actions] [Help]

Home (Preferred)
 [Redacted]
 Atherton, CA 94027-4033
 [Redacted]

Business
 Consultant
 [Redacted]
 San Mateo, CA 94404
 [Redacted]

Preferred Email
 gbloom@aol.com
 MAPQUEST Google

Affiliations (1) [Actions] [Help]

Affiliation	Status	Record Type	Affil Year
CP Univ Advancement Notable	Current		

Giving Summary [Actions] [Help]

Credit	Gifts	Matching	Pledges	Balance
Annual	1,632,234.98	0.00	1,300.00	0.00
Other	0.00	0.00	0.00	0.00
Total	1,632,234.98	0.00	1,300.00	0.00

Last Transaction: 100,000.00 TR - Gift on Feb 07, 2012

Membership Summary [Actions] [Help]

AL - Life Member
 First Year Overall: 2000
 Current Start: Mar 01, 2000
 Expires:

Prospect Summary (1/1) [New] [Actions] [Help]

Name	[Redacted] Major Prospect,	Start Date	Mar 01, 1999
Type	Married Couple	Stop Date	
Group		Stage	Stewardship
Program		Rating	\$1,000,000 +
Classification	Principal (\$500,000+)		
Unit			
Prospect Liaison	Ms. Deborah Read		

STEP EIGHT:

A basic Bio Summary appears. Notice the list on the left side under “Biographic”. These tabs are extremely helpful in learning basic information about the prospect. If you have updated verified information (i.e., employment, address) that is not here, send updates to gift-bio-updates@calpoly.edu .

Entity

- Overview
- Detail
- ▼ **Biographic**
 - Activities 27
 - Addresses 11
 - Affiliations 1
 - Awards/Honors 2
 - Children 1
 - Comments 4
 - Comm Particip 2
 - Cvr Accounts
 - Degrees 1
 - Email 2
 - Employment 5
 - Fmr Spouses
 - IDs 2
 - Interests
 - Mail Control
 - Mailing Lists
 - Marital Info 1
 - Names 1
 - Record Types 2
 - Relationships 3
 - Salutations 3
 - Spec Handling 1
 - Sports
 - Stu Activities 1
- Giving
- Membership
- Prospect Tracking
 - Alerts 1
 - Messages
 - Add Person
 - Entity Update

Bio Summary 36616 Actions Print

Rec Type Alumnus (1982 College of Engineering), Parent of Student
 Degree BS 1982 College of Engineering (Major: Computer Science)
 ATTENTION
 Married: 217349

Biographic Detail Actions Help

Salutation		Status Chg Date
Status	Active	Solicit Chg Date
Solicit Ctrl		
Solicit Comment		
Gender	Male	
Children	1	
Source	Alumni Development System	
Added	Sep 04, 1990	
Bio Comment		

Biographical Detail (Birth & Death) Actions Help

Birth Related Data			
Birth Date		Ethnicity	No Response
Birth Place		Ethnic Src.	Alumni Development System
Death Related Data			
Death Date		Religion	
Notified		Children	1
Confirmed		Citizenship 1	
Death Place		Citizenship 2	
Obituary		Political Int.	
Pub Date		Language	
Letter 1		Research Date	
Letter 2			

STEP NINE:

To close the Biographic Tab, click the arrow on the left.

The screenshot shows a web application interface with a sidebar on the left and a main content area on the right. The sidebar contains a list of tabs, with 'Biographic' highlighted by a red square and a downward arrow. The main content area shows the 'Bio Summary' and 'Biographic Detail' sections.

Entity

- Overview
- Detail
- Biographic**
- Activities 27
- Addresses 11
- Affiliations 1
- Awards/Honors 2
- Children 1
- Comments 4
- Comm Particip 2
- Cvr Accounts
- Degrees 1
- Email 2
- Employment 5
- Fmr Spouses
- IDs 2
- Interests
- Mail Control
- Mailing Lists
- Marital Info 1
- Names 1
- Record Types 2
- Relationships 3
- Salutations 3
- Spec Handling 1
- Sports
- Stu Activities 1
- ▶ Giving
- ▶ Membership
- ▶ Prospect Tracking
- Alerts 1
- Messages
- Add Person
- Entity Update

Bio Summary [Actions] [Print]

36616
Rec Type Alumnus (1982 College of Engineering), Parent of Student
Degree BS 1982 College of Engineering (Major: Computer Science)
ATTENTION
Married: 217349

Biographic Detail [Actions] [Help]

Salutation		
Status	Active	Status Chg Date
Solicit Ctrl		Solicit Chg Date
Solicit Comment		
Gender	Male	
Children	1	
Source	Alumni Development System	
Added	Sep 04, 1990	
Bio Comment		

Biographical Detail (Birth & Death) [Actions] [Help]

Birth Related Data

Birth Date		Ethnicity	No Response
Birth Place		Ethnic Src.	Alumni Development System
		Religion	
		Children	1
		Citizenship 1	
		Citizenship 2	
		Political Int.	
		Language	
		Research Date	

Death Related Data

Death Date	
Notified	
Confirmed	
Death Place	
Obituary	
Pub Date	
Letter 1	
Letter 2	

STEP TEN:

From here, click on "Giving".

Home x Entity Overview x

Entity

- Overview
- Detail
- ▶ Biographic
- ▶ **Giving**
- ▶ Membership
- ▶ Prospect Tracking
- Alerts 1
- Messages
- Add Person
- Entity Update

Entity Overview Actions Print

136616
Rec Type Alumnus (1982 College of Engineering), Parent of Student
Degree BS 1982 College of Engineering (Major: Computer Science)
*****ATTENTION*****
 Married: 349

Primary Address Actions Help

Home (Preferred)
 Atherton, CA 94027-4033

Business
 Consultant
 San Mateo, CA 94404

Preferred Email
 gbloom@aol.com

Affiliations (1) Actions Help

Affiliation	Status	Record Type	Affil Year
CP Univ Advancement Notable	Current		

Giving Summary Actions Help

Credit	Gifts	Matching	Pledges	Balance
Annual	1,632,234.98	0.00	1,300.00	0.00
Other	0.00	0.00	0.00	0.00
Total	1,632,234.98	0.00	1,300.00	0.00

Last Transaction: 100,000.00 TR - Gift on Feb 07, 2012

Membership Summary Actions Help

AL - Life Member
 First Year Overall: 2000
 Current Start: Mar 01, 2000
 Expires:

Prospect Summary (1/1) New Actions Help

Name	Major Prospect,	Start Date	Mar 01, 1999
Type	Married Couple	Stop Date	
Group		Stage	Stewardship
Program		Rating	\$1,000,000 +
Classification	Principal (\$500,000+)		
Unit			
Prospect Liaison	Ms. Deborah Read		

STEP ELEVEN:

This is the Giving Summary. It gives a list of recent gifts and pledges. It also lists the “Total Credit”, “Total Actual”, “Largest Gift” and the “Overall Balance”.

Entity

- Overview
- Detail
- Biographic
- ▼ **Giving**
 - Views
 - Appeals
 - Gift Clubs 5
- Membership
- Prospect Tracking
- Alerts 1
- Messages
- Add Person
- Entity Update

Giving Summary [Actions] [Print]

6616
 Rec Type Alumnus (1982 College of Engineering), Parent of Student
 Degree BS 1982 College of Engineering (Major: Computer Science)
 ATTENTION
 Married: 7349

Giving Summary [Actions] [Help]

Lifetime Giving		Annual Giving	
Total Actual	226,356.98	Number of Years	18
Total Credit	1,633,534.98	Annual Credit	1,633,534.98
Largest Gift	125,006.98	Largest Annual Gift	125,006.98
Overall Balance	0.00	Total Credit 2	0.00

Annual Giving Totals (18) [Actions] [Help]

Year	Pledge Credit	Gift Credit	Received	Matched
2012	0.00	166,178.00	0.00	0.00
2011	0.00	300,000.00	0.00	0.00
2010	0.00	470,000.00	0.00	0.00
2009	0.00	56,000.00	0.00	0.00
2008	0.00	195,000.00	0.00	0.00
2007	0.00	145,006.98	125,006.98	0.00

All Other Giving Totals (18) [Actions] [Help]

Year	Pledge Credit	Gift Credit	Received	Matched
2012	0.00	0.00	0.00	0.00
2011	0.00	0.00	0.00	0.00
2010	0.00	0.00	0.00	0.00
2009	0.00	0.00	0.00	0.00
2008	0.00	0.00	0.00	0.00
2007	0.00	0.00	0.00	0.00

To further understand entity giving view the tutorial, “How to Pull Entity Giving History in Advance Web”.

STEP TWELVE:

From here, click "Prospect Tracking".

The screenshot shows a web application interface with a sidebar on the left and a main content area on the right. The sidebar, titled 'Entity', contains a list of navigation options: Overview, Detail, Biographic, Giving, Membership, Prospect Tracking (highlighted with a red box), Alerts (1), Messages, Add Person, and Entity Update. The main content area is titled 'Bio Summary' and contains several sections: 'Bio Summary' (with 'Rec Type' and 'Degree' information), 'Biographic Detail' (with 'Salutation', 'Status', 'Gender', etc.), and 'Biographical Detail (Birth & Death)' (with 'Birth Date', 'Death Date', etc.).

Bio Summary

Rec Type: [Redacted] 516
Degree: Alumnus (1982 College of Engineering), Parent of Student
BS 1982 College of Engineering (Major: Computer Science)
ATTENTION
Married: [Redacted] 49

Biographic Detail

Salutation	[Redacted]	Status Chg Date
Status	Active	Solicit Chg Date
Solicit Ctrl		
Solicit Comment		
Gender	Male	
Children	1	
Source	Alumni Development System	
Added	Sep 04, 1990	
Bio Comment		

Biographical Detail (Birth & Death)

Birth Related Data	
Birth Date	[Redacted]
Birth Place	[Redacted]
Death Related Data	
Death Date	
Notified	
Confirmed	
Death Place	
Obituary	
Pub Date	
Letter 1	
Letter 2	

Ethnicity	No Response
Ethnic Src.	Alumni Development System
Religion	
Children	1
Citizenship 1	
Citizenship 2	
Political Int.	
Language	
Research Date	

STEP THIRTEEN:

Notice a list appears under Prospect Tracking. Under the “Demographic” tab there are Wealth Screenings and Campaign Capacity. To view these click on “Demographic”. Under “Notes” there are short biographies and other various notes. Remember that not every entity has a note. To view the Prospect click on “PROSPECT”. If no prospects are listed, click the box “Show Inactive Prospects & Proposals”. Remember that once again not all entities will have prospects.

The screenshot shows a web application interface. At the top, there are browser tabs for 'Home' and 'Prospect Tracking Sum.'. Below this is a navigation sidebar on the left under the heading 'Entity'. The sidebar lists various sections: Overview, Detail, Biographic, Giving, Membership, and Prospect Tracking. Under 'Prospect Tracking', there are sub-sections: Views, Alloc Stewardship, Assignments, Contacts, Contact Rpts (39), Demographic (5), Evaluations (2), Interests, Notes (3), Tasks, Alerts (1), Messages, Add Person, and Entity Update. The main content area is titled 'Prospect Tracking Summary' and includes buttons for 'POP', 'Actions', and 'Print Form'. It displays details for a specific prospect: 'Rec Type: Alumnus (1982 College of Engineering), Parent of Student', 'Degree: BS 1982 College of Engineering (Major: Computer Science)', and a red warning '***ATTENTION***'. Below this is a 'Prospect Information' section with a checkbox for 'Show Inactive Prospects & Proposals' and a list of prospects. One prospect is highlighted with a red box: 'PROSPECT (#1466)'. Other details for this prospect include 'Married Couple (Joint):' and 'Expectation: \$500,000.00'.

STEP FOURTEEN:

This is the prospect screen “Overview, which lists a summary of pertinent information such as start date, classification, stage, etc. Listed under “Assignments” are all current and past Liaisons. “Contact Reports” detail all recent contact with the prospect. Lastly, “Entities” list all parties involved. This is often the spouse to the prospect or if the prospect is a corporation, the entities are all child companies. Make sure that the main prospect or parent company is listed as the main entity.

The screenshot shows a web application interface for prospect management. At the top, there are browser tabs for 'Home', 'Prospect Tracking Sum...', and 'Prospect'. Below the tabs is a navigation menu on the left with the following items: Overview, Detail, Assignments 14, Categories 2, Contact Rpts 39, Contacts, Entities 2, Evaluations, Interests, Notes, Proposals 2, Stages 2, and Tasks 10. The main content area is titled 'Prospect' and contains a form for editing prospect details. The form includes fields for Name, Sort Name, Type (Married Couple), Unit, Group, Classification (Principal), Maj. Prospect, Rating (A), Rating Status, Expectation (500,000.00), Result, Result Amt. (0.00), Result Date, and Comment (Bay Area Engagement Group 5/10). There are also checkboxes for Active, PG Prospect, and Major Prospect, and a dropdown for Stage (Stewardship). The form is surrounded by a green header with 'Prospect' and 'Actions Print' buttons, and a bottom header with 'Save New Actions Help' buttons.