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).
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.
STEP FIVE:

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

[Image of Entity Overview page]
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.
**STEP NINE:**

To close the Biographic Tab, click the arrow on the left.
STEP TEN:

From here, click on “Giving”.

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Click on "Giving".
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”.

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

From here, click “Prospect Tracking”.
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.
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.