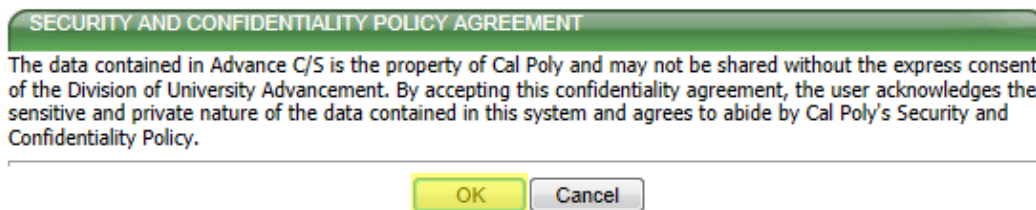


How To Pull Entity Giving History in Advance Web

STEP ONE:

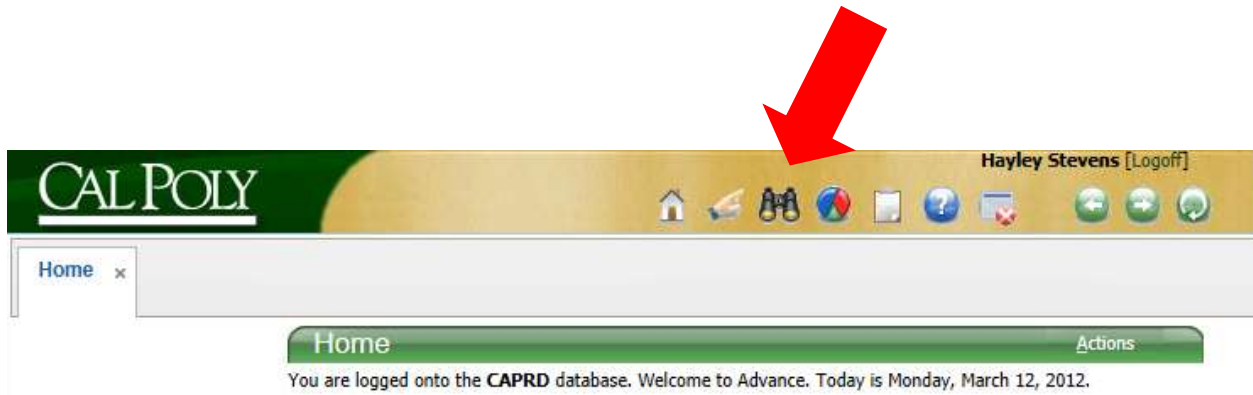
Log onto Advance Web through the following address: www.advancement.calpoly.edu. After you enter your log on information you will see the following message:



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, to do a “Lookup” click on the 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 'Lookups' and a tree view under 'Saved Criteria...' including Biographic, Event, Gift, Prospect Tracking, Membership, and Miscellaneous. The main content area has four sections: 'Lookups', 'ID Lookup', 'Entity Lookup', and 'Address Lookup'. The 'Lookups' section contains a list of steps: 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, and a 'Search' button. Red arrow 4 points to the 'Search' button. The 'ID Lookup' section has 'ID' and 'Alt ID' fields, each with a dropdown set to '='. Red arrow 1 points to the 'ID' dropdown. The 'Entity Lookup' section has a checkbox for ''Sounds Like'' and several fields: 'Last/Org Name', 'First', and 'Middle', each with a dropdown set to 'Begins with'; 'Name Type', 'Record Status', 'Primary Record Type', 'School', 'Class', 'Solicit Cntrl', 'Lookup', 'Affiliation Code', 'Affiliation Status', and 'Deleted', each with a dropdown set to '='. Red arrow 3 points to the 'Last/Org Name' dropdown. Red arrow 2 points to the 'First' dropdown. The 'Address Lookup' section has 'Preferred' and 'Type' dropdowns set to '=', 'City' text input, 'State' dropdown set to '=', 'Country' dropdown set to '=', and 'ZIP Code' dropdown set to 'Begins with'. Red arrow 1 points to the 'ID' dropdown in the 'ID Lookup' section.

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 the word 'Lookups' and an 'Actions' link. 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. Now click "Giving".

Entity Overview

Entity

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

Entity Overview

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

Home (Preferred)

Atherton, CA 94027-4033

Business Consultant

San Mateo, CA 94404

Preferred Email

gbloom@aol.com

MAPQUEST Google

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

STEP SIX:

This is the Giving Summary. It gives a list of recent gifts and pledges. It also lists the “Total Credit” and “Total Actual”. These may not be accurate as they do include pledges that have not yet been completed. Now click on “Views”.

The screenshot shows a web application interface with a breadcrumb trail: Home > Giving Summary. The main content area is titled "Giving Summary" and includes a sub-section with the following details:

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

Below this is another "Giving Summary" section with a table of financial data:

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

Next is the "Annual Giving Totals (18)" table:

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

Finally, the "All Other Giving Totals (18)" table:

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

The left-hand navigation menu includes: Overview, Detail, Biographic, Giving (selected), Views (highlighted with a red arrow), Appeals, Gift Clubs (5), Membership, Prospect Tracking, Alerts (1), Messages, Add Person, and Entity Update.

STEP SEVEN:

This brings up the “Simple Transaction List”. This list details the total gift, allocation of the gift and the specific date the gift was received. To view specific information on one gift, click the receipt number.

Home x
Views x

Entity

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

Views
Actions Print

Rec Type [REDACTED] 516
Degree Alumnus (1982 College of Engineering), Parent of Student
 BS 1982 College of Engineering (Major: Computer Science)
ATTENTION
 Married: [REDACTED] 349

Context
Actions

Context	Name	Description
	Donor Totals - 5 Year Totals	Donor Totals - 5 Year Totals
	Donor Totals - 5 Year Totals Detail	Donor Totals - 5 Year Totals Detail
	Donor Totals - By Year	Donor Totals - By Year
	Giving Totals	Giving Summary - Giving Totals
w/Spouse	Giving Totals with Spouse	Giving Summary - Giving Totals...
	Matching Claims	Giving Summary - Matching Claims

Simple Transaction List (1/44)
Actions Help

Items 1 to 20 of 44

Date of Record	Receipt #	Trans Type	Legal Amt.	Credit Amt.	Alloc Code
Feb 07, 2012	0001001617	TR - Gift	0.00	100,000.00	5627
Nov 30, 2011	0000994462	TR - Gift	0.00	36,178.00	4599
Nov 30, 2011	0000994461	TR - Gift	0.00	30,000.00	5476
Nov 03, 2010	0000955673	TR - Gift	0.00	300,000.00	4396
Apr 27, 2010	0000934654	TR - Gift	0.00	30,000.00	5239
Apr 26, 2010	0000934371	TR - Gift	0.00	200,000.00	4396
Apr 08, 2010	0000932806	TR - Gift	0.00	5,080.00	3578
Apr 08, 2010	0000932805	TR - Gift	0.00	24,920.00	4599
Feb 26, 2010	0000929587	TR - Gift	0.00	10,000.00	5141
Aug 11, 2009	0000908729	TR - Gift	0.00	200,000.00	4396
Jun 24, 2009	0000905606	TR - Gift	0.00	8,902.00	4599
Jun 24, 2009	0000905604	TR - Gift	0.00	11,098.00	3578
May 20, 2009	0000900585	TR - Gift	0.00	20,000.00	4599
Dec 31, 2008	0000885598	TR - Gift	0.00	10,000.00	4599
Dec 31, 2008	0000885597	TR - Gift	0.00	6,000.00	3578
Jan 23, 2008	0000846587	TR - Gift	0.00	20,000.00	3578
Oct 01, 2007	0000828530	TR - Gift	0.00	175,000.00	4396
Jan 17, 2007	0000803179	TR - Gift	125,006.98	125,006.98	4367
Oct 25, 2006	0000788451	TR - Gift	0.00	20,000.00	3578
Oct 25, 2005	0000742494	TR - Gift	0.00	80,000.00	1259

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STEP EIGHT:

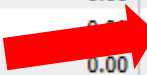
To export the list of all gifts to Excel click “Export Form” under the Actions tab.

Simple Transaction List (1/44) Actions Help

Items 1 to 20 of 44 ⏪ ⏩ ⏴ ⏵

Date of Record	Receipt #	Trans Type	Legal Amt.		Alloc Code
Feb 07, 2012	0001001617	TR - Gift	0.00		
Nov 30, 2011	0000994462	TR - Gift	0.00		
Nov 30, 2011	0000994461	TR - Gift	0.00		
Nov 03, 2010	0000955673	TR - Gift	0.00		
Apr 27, 2010	0000934654	TR - Gift	0.00		
Apr 26, 2010	0000934371	TR - Gift	0.00		
Apr 08, 2010	0000932806	TR - Gift	0.00		
Apr 08, 2010	0000932805	TR - Gift	0.00		
Feb 26, 2010	0000929587	TR - Gift	0.00		
Aug 11, 2009	0000908729	TR - Gift	0.00		
Jun 24, 2009	0000905606	TR - Gift	0.00		
Jun 24, 2009	0000905604	TR - Gift	0.00		
May 20, 2009	0000900585	TR - Gift	0.00		
Dec 31, 2008	0000885598	TR - Gift	0.00		
Dec 31, 2008	0000885597	TR - Gift	0.00		
Jan 23, 2008	0000846587	TR - Gift	0.00		
Oct 01, 2007	0000828530	TR - Gift	0.00		
Jan 17, 2007	0000803179	TR - Gift	125,006.98		
Oct 25, 2006	0000788451	TR - Gift	0.00		

- Sort
- Copy
- Copy/Replace
- Copy All
- Copy All/Replace
- Reports
- Print Form
- Export Form
- Audit Info



STEP NINE:

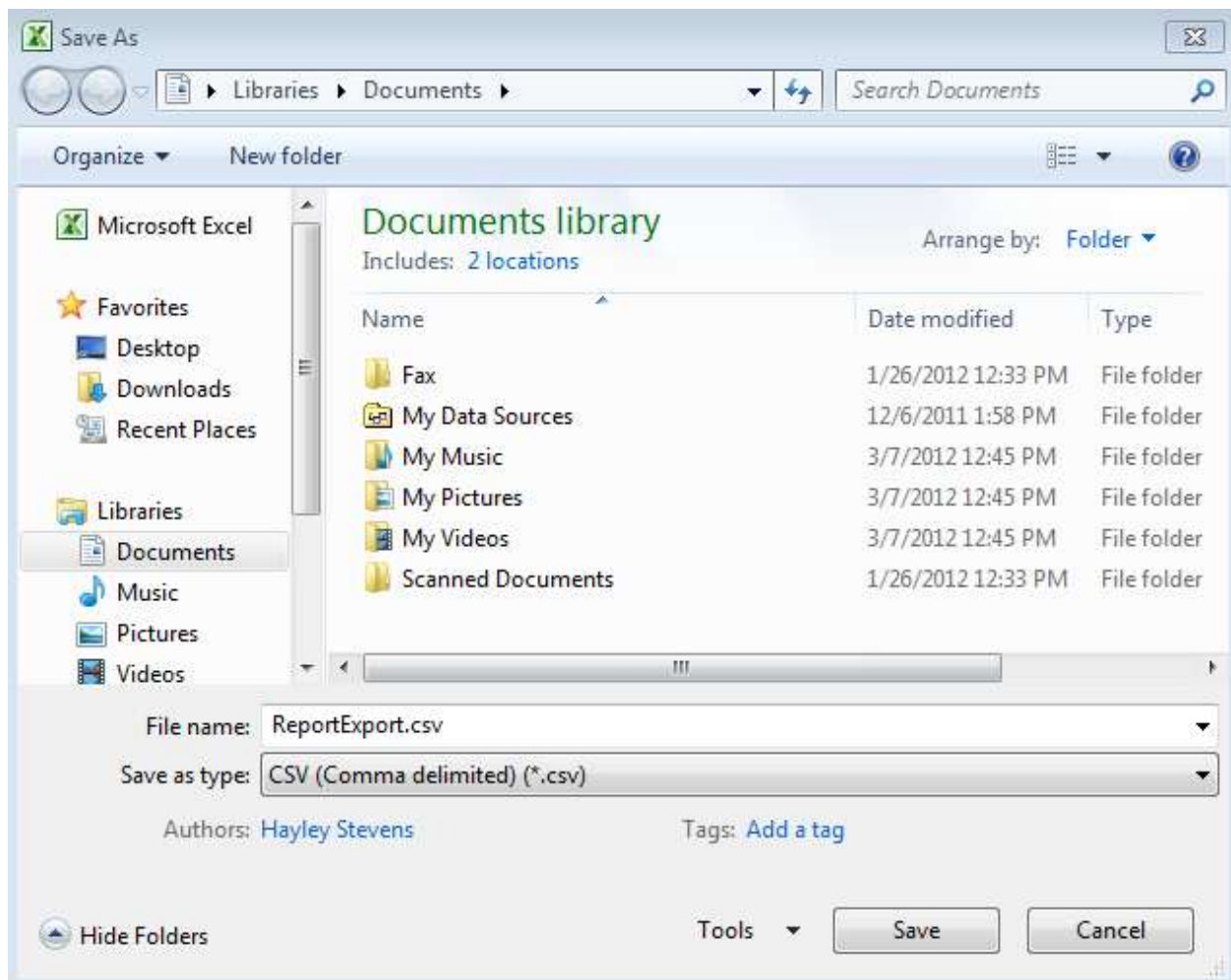
If you are using Internet Explorer, the following will pop up at the bottom of the screen. Click "Open".

The screenshot displays a web application window titled "Simple Transaction List (1/44)". The window contains a table with the following columns: Date of Record, Receipt #, Trans Type, Legal Amt., Credit Amt., Alloc Code, Association, Pledge Status, and Alloc N. The table lists 20 transactions, all of which are "TR - Gift" transactions. The "Credit Amt." column shows values ranging from 0.00 to 125,006.98. The "Alloc Code" column shows values such as 5627, 4599, 5476, 4396, 5239, 4396, 3578, 4599, 5141, 4396, 4599, 3578, 4599, 4599, 3578, 4396, 4367, 3578, and 1259. The "Association" column lists various donors and organizations, including "3rd-Party Donor", "Koob Endow", "Loyal Order", "HCI Lab Cha", "CSM Building", "Baker Excell", "CSM Building", "G/J Bloom C", "Loyal Order", "M Robert Lei", "CSM Building", "Loyal Order", "G/J Bloom C", "Loyal Order", "Loyal Order", "G/J Bloom C", "G/J Bloom C", "CSM Building", "CSM Building", "G/J Bloom C", and "Computer Sc".

At the bottom of the window, a dialog box is displayed with the text: "Do you want to open or save ReportExport.csv from advance-web.calpoly.edu?". The dialog box has three buttons: "Open", "Save", and "Cancel". A red arrow points to the "Open" button.

STEP TEN:

An Excel document will now open. Before anything else click “File” then “Save As”. Then choose a file name and location. Lastly change the type from a CSV file (.csv) to an Excel file (.xlsx).



STEP ELEVEN:

Scroll to the left until you reach columns “O” and “P”. Column “O” represents the Associated Amount” whereas column “P” represents the “Associated Credit Amount”. Total these columns to assure that they are the same as the totals on the Giving Summary (STEP SIX). Make sure when totaling these gifts that you **DO NOT DOUBLE COUNT the pledges AND pledge payments**. Pledge payments are multiple payments given over a period of time to fund a previously declared pledge. Counting both will double the pledge, thus producing an incorrect giving total.

O	P
ASSOCIATED_ AMOUNT	ASSOCIATED_C REDIT_AMT
\$ -	\$ 100,000.00
\$ -	\$ 36,178.00
\$ -	\$ 30,000.00
\$ -	\$ 300,000.00
\$ -	\$ 30,000.00
\$ -	\$ 200,000.00
\$ -	\$ 5,080.00
\$ -	\$ 24,920.00
\$ -	\$ 10,000.00
\$ -	\$ 200,000.00
\$ -	\$ 8,902.00
\$ -	\$ 11,098.00
\$ -	\$ 20,000.00
\$ -	\$ 10,000.00
\$ -	\$ 6,000.00
\$ -	\$ 20,000.00
\$ -	\$ 175,000.00
\$ 125,006.98	\$ 125,006.98
\$ -	\$ 20,000.00
\$ -	\$ 80,000.00
\$ -	\$ 20,000.00
\$ -	\$ -
\$ -	\$ 20,000.00
\$ -	\$ 80,000.00
\$ 20,000.00	\$ 20,000.00
\$ 60,000.00	\$ 60,000.00
\$ 20,000.00	\$ 20,000.00
\$ 500.00	\$ 500.00
\$ 500.00	\$ 500.00
\$ 250.00	\$ 250.00
\$ 250.00	\$ 250.00
\$ 250.00	\$ 250.00
\$ 250.00	\$ 250.00
\$ 250.00	\$ 250.00
\$ 100.00	\$ 100.00