Advancement Officer Searches

From the main **Advancement** **Officers** menu, click **Advancement** **Officer** **Searches.**

Machine generated alternative text:
Advancement Offcers 
Manage My Prospects 
Add a Contact 
Volunteer 
Preferences 
Advancement Officer 
Searches 
Moves Management 
View/Edit Contacts 

There are several types of Advancement Officer Searches available.

Note: we will not be using Population Selection Search.

Machine generated alternative text:
Advancement Officers Searches 
Ad—t Offi 
Adv—t Offw 
SäCh 
SäCh 
Ll pdate 
Sea 
creat 
Sea r c h 

# ID Search

Allows you to search on an ID number. Wild cards may be used. You can choose to limit the search to people only.

# Name Search

Results will be a list of people matching the search criteria. All of the matching profiles can be accessed.

If using Name Search to search for a business, use the Last Name field for the business name.

Machine generated alternative text:
Name Search 
Display a SeMCh page 
the criteris LIE tr. key to multi* 
within list tr. Fir' It to tr. 
To Tr. 
Search Values 
First N 
Middle N 
to 
of 10 
Start Another Sear ch 

# Wild Cards

Use of wild cards is highly recommended for Name Searches.

Banner SSB uses the percent sign as a wild card. This can be used to return more results in a search. For best results, use the wildcard at the beginning and the end of a name, e.g. %John%. This will return matches such as John, Johnston, Johnson, etc.

Click **Go Find It!** to execute the search and view the results.

Machine generated alternative text:
Search Values 
First N 
Middle N 
to 
N of 10 
Start Another Search 
To 

# Name Search Results

Machine generated alternative text:
Name Search Results 
Home Execute tie Custorn Search 
Search Results 
Short Constituent 
Long Constituent 
Alternate Names.'lÜ•s 
Add a Contact 
Short Constituent 
Long Constituent 
Alternate 
Add a Contact 
Short Constituent 
Long Constituent 
Alternate Names./lDs 
Giving Histc•ry 
Add a Contact 
Category: 
College: 
Confidential: 
Primary Staff 
Category: 
College: 
Confidential: 
Primary Staff 
Assignrnent: 
Category: 
Confidential: 
Deceased: 
Primary Staff 
Assignrnent: 
pasha Abdul 
2015 
Alumna/us 
Graduate School 
Mr. Bashar 
2015 
Alumna/us 
Business Administration 
cooc 
Mrs. La'Tasha 
2010 
Alumna/us 
Liberal Arts 

These results show the first three matches on the first name search %asha%

# Links

The links associated with each Contact in the Name Search Results will vary depending upon what the prospects is. A Constituent will have different links than a prospect. Every Contact will have Constituent links, but only prospects will have prospect links.

# Short Constituent Profile & Long Constituent Profile

Long and short profiles are currently the same information. There will be additional functionality later.

All of the red links at the top jump to other locations on this screen. There are "go to the top of page" links throughout the profile screens so that you don't have to scroll back to the top of the screen.

Machine generated alternative text:
Constituent Short Profile 
Home Constituent Short Profile 
Return to ID List 
Return to My Prospects 
Advancement Individual Information 
ID 
Name 
Addresses I Internet Addresses I Employment History I Cross References I Degrees I C 
I External Ratings I Ratings I Staff Assignments I Additional Phone Numbers I Giving 
Addresses 
Go to top of page 
Addresses 
Advancement Mailing 
Date Range Status Address and Phone 
Mar 21, 201S Active 
Present 
Lafayette, LA 70503 
Lafayette Parish, LA (County) 
MaiEng Add ress 
Date Range Status Address and Phone 
sep 21, 2015 Activ, 
To 
Present 
•arayette, / USUS 
Lafayette Parish, LA (County) 
United States 
Preferred 
Internet Addresses 
Go to top of page 
Current Internet Addresses 
Type 
Add ress 

A link that will return you to the main Manage My Prospects screen is at the top of the profile page.

Machine generated alternative text:
Constituent Short Profile 
Stwt Profile 
to ID List 
to "y 
Advancement Individual Information 

# Employment history

This may have links if the Employer has an ID in our system.

# Cross References

This will include relationships such as Spouse and Sibling.

Machine generated alternative text:
Employment History 
Employer ID Employer Name Links 
co 
Position: 
Member 
Constituent Short Profile v 
Name 
Degree 
Cross References 
Go to top of page 
Cross References 
Relationship ID 
Parent-in-Law COO: 
Deceased Links 
Constituent Short Profile v 
Constituent Short Profile v 
Constituent Short Profile v 
Constituent Short Profile v 
Sibling 
Sibling 
Spouse 
Degrees 
coco. 
Honors Majors 
Year Campus 
Go to top of page 
Degrees 
I nstitution 
Univ of Louisiana at Lafayette 
Bachelor of Science 
Psychology 1997 
Links 
Children 
Go to top of page 
Children Information 
ID Name 
Biographic Information 
Birthday Gender Deceased 
2002 Female 

Cross References with IDs in our system may have a drop-down list under links.

Machine generated alternative text:
Deceased 
constit 
uent Short profile 
Constitu 
ent Long profile 
Name/ IDS 
Giving History 
Add a Contact 
Constituent pmfil• 

You can view information about a Cross Reference by choosing a link value and clicking Go.

Other links on Name Search Results

Machine generated alternative text:
Search Results 
Category: 
Coflege: 
Confidential: 
co 
2001 
Alumna/us 
General Studies _ 
coo 
Mrs. 
Alumna/us 
Short Constituent 
Long Constituent 
Short Prospect 
Long Prospect 
Alternate_ Names.' I 
Giving History 
Add a Cont3ct 
Primary Staff Sasha A. Rodriguez 
Records 1 - 1 of 1 
New Search 

# Short Prospect Profile & Long Prospect Profile

These two Prospect profiles currently have the same information. However, the Prospect profile differs in some ways from Constituent Profile.

# Alternate\_Names/IDs

Use to view preferred names or AKAs, if these are part of the contact's record. Can also use this link to view legacy ID information, such as CLIDs.

Click Return to ID list to return to search results.

Machine generated alternative text:
Alternate Names and IDs 
Date 
Mar 10, 2017 
Home Alternate N ames and IDs 
coc 
Alternate Names 
0000: 
cool 
Return to ID List 
Name Type 
Legacy CLID from Conversion Nov 16, 
2015 
Nov 16, 2015 

# Giving History

This screen offers 8 different view types, which are selected at the **Giving History Area** drop-down list.

Machine generated alternative text:
Giving History 
Giving H istO" 
This is of tr. giving history ty tr. 
to ID List 
to "y 
partially paid in counts and totals of 
Histwy : 
Go to Total Giving 

The default view is **Totals by Fiscal Year**, which summarizes all giving by year.

Machine generated alternative text:
Giving History 
Giving H istO" 
This is of tr. giving history ty tr. tr. list to of Giving History 
to ID List 
to "y 
partially paid in totals of pledge 
Histwy : 
Totals Y 
Go to Total 
Tota Is Sy g 
Advancement Indiv an 
All Existing Gifts 
All Existing pledges 
All Existing Gifts and pledges 
COOOS8422 
All planned Gifts 
Combined Giving 
Fiscal Year Giving Ov 
Giving 
2017 
O No @ Full A —t 
O paid 

All of the available views include the same gifts and pledges, but offer different ways to view the information.

* Total by fiscal year
* Total by campaign and fiscal year: Breaks out giving by campaign for the particular person
* Total by designation and fiscal year: Breaks out giving designation and fiscal year ( **designation** is what we called an account number or fund number in Millenium)
* All existing gifts: all gifts on the record. Does not include planned gifts.
* All pledges: all pledges on the record
* All gifts and pledges: combines gifts and pledges
* All planned gifts: planned gifts on the record
* Combined Giving: allows you to combine this contact's record with another entity IF they have a cross reference on their record by selecting a relationship from the drop down list and clicking Go.

Machine generated alternative text:
Include partiaUy paid pledges in counts and totals regardless of pledge status: 
Giving Histwy Area: 
Combined Giving 
Cross Reference Name; Select a cross reference 
Select a cross reference 
Cross Reference Type; 
Go to Total Combin 
Advancement Indiv- 
• Employer 
• Parent 
S use 

You can also refine results on Combined Giving by choosing a Cross Reference Type and clicking Go.

.

Machine generated alternative text:
I nclude partially paid in totals of pledg 
Histwy Aru: 
Sel 
Go to Total ComSin 
Advancement Indiv- 

Overall Giving is summary information on recent and largest pledges and gifts. This is not a combined value of all giving.

Machine generated alternative text:
Include partially paid pledges in counts and totals regardless of pledge status: C) No @ Include Fuu Amound 
Giving Area: 
Overall Giving 
Advancement Individual Information 
Balance 
Paid 
Type 
Gift 
Payment 
Gift 
Gift 
Year 
2015 
2015 
2015 
2015 
Balance 
Year 
2017 
2017 
2017 
2015 
coo 
Pledge Summary 
Largest: 
Date 
Feb 19, 2015 
Feb 19, 2015 
2015 
Amount 
Pledged 
Amount 
Most Recent Recognized: Feb 19 r 
Largest Recognized: 
Total: 
Gift Summary 
Host Recent: 
Feb 19, 2015 
Number of Pledges 
Date 
Jul 
Most Recent Recognized: Jan 
Largest Recognized: 
Total: 
Giving Level: 
Jun 
Number of Gifts 
24 
Outright Gifts 
Hard Payment Credit Total Hard Credit 
Matching and Soft Gift Summary 
Thw Party Credit Waiting Match Hatch Credit Payment Credit Soft Credit Total Soft Credit Total 
Yes 
Go to top of page 
Return to D List 
$0.00 
$0.00 

# Add a Contact

This is one of several places where you can add contact reports in SSB.

# Individual or Organization Constituent Search

Offers a large variety of criteria to choose from.

Machine generated alternative text:
Individual or Organization 
Home Display a Custom Search page 
Constituent Search 
Select or enter the desired search criteria. Use the control key to select nultiple values within a selection list Selec 
d Like Nam 
To B Fly e I first 
All States 
Alabama 
Alaska 
All Nations 
united States 
Afghanistan 
All Re ions 
Baton Rouge & Surrounding Area 
CENLA (Central LA) 
All Re ion Divisions 
Advancement Services 
Alumni Association 
Search Values 
First Name: 
Middle Name: 
Last Name: 
State: 
Zip or Postal Code: 
Nation: 
Geographic Region: 
Geographic Region Division: 
Degree Year, College, 
and Major: 
All Years 
All Majors 
v and All Colleges 

Machine generated alternative text:
Geographic Region Division: 
Degree Year, College, 
and Major: 
Degree Institution: 
Preferred Class Year: 
Preferred College: 
Donor Category: 
Job Category: 
Income Code: 
Donor Hard Credit: 
Donor Soft Credit: 
Donor Overall Credit: 
Activity Code: 
All Re ion Divisions 
Advancement Services 
Alumni Association 
All Years 
All Majors 
Select 
Select 
Select 
Select 
All Institutions 
V 
V 
V 
and All Colleges 
and Select 
and Select 
MXOOII 
(use 5260)LJniv of th - 
* Use 6551 - TX0021 
All Years 
gggg 
2016 
All Colle es 
Academic Affairs, VP 
Agri & Human Resources 
All Cate ories 
Alumna/us 
Business Associate 
All Cate ories 
Accounting 
Administration 
All Income Codes 
$10,000 - $20,000 
Total Credit based on gift transactions posted as of 
All Types 
All Activities 
V 
and All Categories 

Machine generated alternative text:
Donor Soft Credit: 
Donor Overall Credit: 
Activity Code: 
Variable Purpose Code: 
All Types 
V 
and All Categories 
All Activities 
Academic Disciplinary Committe 
Acadiana Engineer 
All Variable Pu oses 
Business Administration 
Special Purpose Type and Code: All Special Types 
Prospect Status: 
Prospect Rating: 
Project or Interest: 
Staff ID Number: 
Staff Identification Code: 
Membership Code: 
Membership Type: 
Records to Include: 
Number of records per page: 
Go Find It! 
Reset All Fields 
All Statuses 
Prospect Active 
Prospect Inactive 
All Ratin s 
AG $1,000 - $2,499 
AG $10,000 - $14,ggg 
All Pro •ects 
Adopt a Professor 
Annual Givin 
All Staff 
All Staff 
Aaron C. Martin 
Aline Forestier 
All Membershi s 
All T 
10 V 
es 

# Staff Identification Code

If you choose Staff Identification Code as one of the criteria, results will be limited to prospects only

# Zip Code

Allows a search on a single zip code or a range of codes. Useful if a development officer is visiting an area and wants to look for contacts in that region.

# Prospect Search

Machine generated alternative text:
Prospect Search 
Display a SeMCh page 
the criteriy LIE tr. key to multi* within 
Search Values 
ic Reg : 
Ragin 
Cajun clus 
Pro Statu s : 
Pro Rating : 
AG $1,000 - $2,499 
AG $10,000 - $14,999 
Adopt prof 
Annual Giving 
Staff ID 
Staff Code : 
to 
r of 10 
Start Another Sear ch 
C. Martin 

# Create a New Custom Search

If you search on the same values often, you can save that query as a custom search.

Machine generated alternative text:
Create a New Custom 
Create a SeMCh 
Search 
Th. of is Step is to tr. 
Search Header Information 
Disp18Y 
Limit —eh to 
to : 
of : 10 

Search name and Search title can have the same value.

Choose Display search on menu to share with other users

If you choose to limit a saved custom search to Prospect records only, be sure to include "prospect" in the search title.

Choose to Save Header information to proceed to next step.

Choose desired search criteria. To remove items, click each undesired item individually.

Machine generated alternative text:
Update a Custom 
a SeMCh 
Search 
to the list tb 
y—fu'ty 
Search Header Information 
to : 
of : 
Detail Search Options 
My Zip C.C. 7CSC: 
Limit —eh to 
10 
Display 
Zip 
Postal 
ic Reg 
Div is 
YeM, College 
In 
Class YeM 
Co I lege 
G iving Credit 

Machine generated alternative text:
Pro Statu s 
Pro Rating 
Staff ID 
Staff Code 
sh ip 
sh ip 
I Statu s 
update Options 
Delete this 
Return to Menu 
Re„t All Fields 
Sea rc h 

Click Update options to save your custom search.