

Please fill out this form to request a report or data associated with the Advance database. Please provide as much detail as you can about the request and include attachments as needed. By submitting this request, you agree that this does not in any way violate the university policies for appropriate use of the data.

Provide Your Contact Information

Full Name:

E-mail:

Phone:

School / Unit / Department:

Request Criteria

Request Delivery Date:

Please use 00/00/0000 format

Please note: Advancement Services cannot guarantee delivery of data prior to 20 business days after receipt of all information required. Additional time may be needed for complex projects, formatted reports, etc.

This is a repeat request:

Yes

WO #

Comments

Mode of Communication:

Mail

E-mail

Phone

N/A - Internal use only

This information will be used for a:

Solicitation

Letter

Survey

Newsletter / Magazine

Prospect Research

Thank You / Donor List

Event Invitation

Regional Visit

Honor Roll

Other

If Solicitation

Request Appeal Code

Apply new appeal code to populated entities

Date Communication
will be sent to vendor or
used by dept

Please use 00/00/000 format

List more than two weeks old must be re-pulled to allow for constituent opt-outs. Please plan accordingly.

Please provide a detailed description of how this information will be used.

What to Include:

Please note: e-mail addresses for 250 entities or over require written / e-mailed approval from the office of the Vice Chancellor of Development and CAAA. Please include authorization as needed.

Which Types of Constituents:

Individuals
Organizations

Do you need Campaign reporting?

The Campaign for UC Davis
N/A

Exclude the following Special Handling Codes:

Do Not Contact	Do Not Solicit	Do Not Invite
Do Not Mail	Do Not Mail - Solicit	Do Not Mail - Invite
Do Not E-mail	Do Not E-mail - Solicit	Do Not E-mail - Invite
Do Not Phone	Do Not Phone - Solicit	

What to Exclude:

Information You Wish to Receive

Use "valid address" in most cases, as this is the highest ranking address based on the following hierarchy / order: Preferred, Home, Business, Parent, Additional Home, Additional Business. This will most likely return all entities with an address.

Mailing Address

Valid Address
Preferred Address

Additional Address

Home Address
Business Address
Foreign Address

Addressee and Salutation

Formal Individual
Formal Joint

Phones and E-mail

Preferred Phone
Home Phone
Business Phone
E-mail Address (with permissions)

Alumni Information

Degree
Preferred School / College
Preferred Class Year

Delete Duplicates

Yes No N/A

Filter by Household

Yes No N/A

Anticipated number of
resulting entities

What Giving Information is Needed

This information will be used to calculate both inclusion / exclusion criteria, and as a guide to requested data you'd like to receive.

Please state what gift information you'd like to receive, including: matching gifts, soft credits, funds, date ranges, amounts, etc.

For type of donor in searching for Giving History, choose one:

Primary Donor Only

Primary Donor and Joint / Spouse

Primary, Joint / Spouse and associated entities and organizations

Type of Gifts - if applicable

Optional Gift Types

Include Bequest Expectancy

Include Conditional Pledge

Donor Credit for Gifts - if applicable

Systems Available to You

I pulled information using the following systems

Query / Lookup Information:

Advance Windows

Advance Web

Michelangelo

Reeher

I did not attempt to use a system for this information lookup

My attempt to pull this information did not work due to:

E-mail Approvals

If applicable - I've included an approval from the following:

Vice Chancellor - Shaun Keister

Assistant Vice Chancellor - Rich Engel

Send this completed form to devarhelpdesk@ucdavis.edu and keep a copy for your own records. Please attach any additional supporting documentation to the e-mail. You can expect an e-mail or phone acknowledgement of your request within two working days. If you do not hear from us within that timeframe, please call the help desk at (530) 754-1106 or send a follow up e-mail. [Please fill out our Customer Survey to let us know how we're doing.](#)