

RUNNING CONTACT SENSITIVE REPORTS IN ADVANCE WEB (Such as PF-001 and PF-003)

1. Go to UCD Entity Lookup on the left toolbar

The screenshot shows the 'Home' page of the Advance web interface. On the left, a navigation menu includes 'Home', 'Favorites', 'UCD Custom Lookups' (with 'UCD Entity Lookup' selected), 'DO Metrics', and 'User Preferences'. The main content area features a 'Home' header with an 'Actions' link. Below it, a message states 'You are logged on as [blank] on the AISPROD database. Welcome to Advance. Today is [blank]'. A series of menu items follows: 'Messages (0)', 'Tasks', 'My Contact Reports', 'My Prospects', and 'My Prospect Summary', each with 'Actions' and 'Help' links. At the bottom, a table is partially visible with columns for 'Stage', 'Curr Year Amt', 'Next Year Amt', and 'No Year Amt', and a row for 'TOTAL'.

2. Search for an entity by name or ID number

The screenshot shows the 'Lookups' page in the Advance web interface. The left sidebar lists 'Lookups' with 'Saved Criteria...' and several categories: 'Biographic', 'Event', 'Gift', 'Prospect Tracking', and 'Membership'. Under 'Membership', there are links for 'Add Person' and 'Add Organization'. The main content area has a 'Lookups' header with an 'Actions' link. It contains a numbered 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, and a 'Search' button. Below this is the 'ID Lookup' section with input fields for 'ID' and 'Alt ID'. The 'Entity Lookup' section includes a checkbox for ''Sounds Like'' and input fields for 'Last/Org Name', 'First', and 'Middle', each with a 'Begins with' dropdown menu.

3. In Entity Overview top header bar, Go to Actions, Reports

The screenshot shows the 'Entity Overview' page. The top navigation bar includes tabs for 'Home', 'Entity Overview', 'Report List', and another 'Entity Overview'. On the left, there is a sidebar menu with options like 'Overview', 'Detail', 'Biographic', 'Giving', 'Membership', and 'Prospect Tracking'. The main content area has a header 'Entity Overview' with 'Actions' and 'Print' buttons. A dropdown menu is open under 'Actions', showing options: 'VCR', 'To Spouse', 'Reports' (highlighted), 'Copy', 'Copy/Replace', and 'Enter New ID'. Below this, there are sections for 'Contact Information' (with 'Home (Preferred)' and 'Business' links), 'Preferred Email', 'Active eContact Information (0)', and 'Affiliations (1)'. Each of these sections has its own 'Actions' and 'Help' buttons.

4. PF-001 and PF-003 are located here. Pull them up by clicking on the ellipse (“...” icon”).

The screenshot shows the 'Report List' page. The top navigation bar includes tabs for 'Home', 'Entity Overview', 'Report List', and another 'Entity Overview'. On the left, there is a sidebar menu with options like 'Reports'. The main content area has a header 'Report List' with 'Actions' and 'Help' buttons. Below this, there is a text block: 'This is the list of reports that apply to your current context. When you run a report from this list, the report generated will be for the specific records you are viewing.' Below the text is a table with the following data:

	Context	Name	Description
...	Entity	Entity Profile Report	Profile reports about entities
...	Entity	Labels	Create mailing labels
...	Entity	pf001 test	pf001 - Basic Profile
...	Entity	pf003 test	pf003 test