




Creating a Note

Notes are used to record information about an entity. There are many types of Notes used in Advance, the most common types used by Development are Overall Strategy and Team Member Strategy.

1. From the Home page tree, under CUF Lookups, click **Entity**.
2. In the **ID Number** box, type the Entity ID and click **Run Report**.
3. Click the link to the Entity record. The Entity Overview page appears.
4. From the Entity page tree, click **Notes/Strategies**. The Entity Notes page appears.
5. From the Notes form header, click **New**. Fields appear for you to create a note.
6. From the **Type** drop down list, click the appropriate type for your note. The following types of notes are most common for development staff:
 - **DO Development-Overall Strategy:** Encompasses all efforts directed at a prospect, including whether across multiple schools, programs, and/or campuses. You will be asked to ensure that you have an overall strategy for all your managed prospects.
 - **TS Development-Team Member Strategy:** Describes the efforts by a team member focusing on a specific area (program or school) of the overall strategy. Conversations with your manager and/or Chancellor should help determine whether a Team Member Strategy is necessary. The only report designed to retrieve the Team Member Strategy is the Top Donor Matrix report which is run off of a clipboard.
7. In the **Description** field, enter a few words describing the strategy. This description is displayed in several reports. Depending on the report, you may see the first few words or a little more of the description displayed. Enter a description that the Prospect Manager would like to see on reports in reference to the strategy.
8. From the **Author** list, select the author of this strategy, usually the Prospect Manager.
9. You can skip the Data Src list and the Brief Note box. This information is not typically used in strategy notes.
10. In the **Text** box, enter details of the strategy using the guideline of: Project, Amount, Team, and Timing, where:
 - **Project** describes what the prospect is being solicited for.
 - **Amount** indicates how much money the prospect will be solicited for through the remainder of the campaign. If you are not certain of the duration of the campaign, contact your manager.
 - **Team** indicates who all is working with the prospect, including university partners.
 - **Timing** reflects details of the amount broken down, such as a certain amount in this fiscal year and another amount in the next fiscal year.

Take a Shortcut:



1. Click **My Prospects** shortcut.
2. Click the Prospect Name link.

Consider using these words, or their initials, as a template for strategy details in the Text box. For example:

```
P-UCB - Leeds Faculty
A-$1.5M
T-L. Siedzick, Leeds Dean
T-FY2012
```

When creating a Team Member Strategy, these details will be more specific to the school or program as it relates to the Overall Strategy.

11. Click **Save** from the form header. The note is displayed at the top of the list. Advance sends an email to the Prospect Manager and the Prospect Team Members that a note has been created.