MBUG 2014

Query of Pledge and Gift Information

Johnyelle Lee, Director of Advancement Services at Jackson State University

September 15, 2014



Queries of Gifts and Pledges

- Banner contains various options to query information
- Queries
 - Pledge Number
 - Gift Number
 - Gift/Pledge Date
 - Gift/Pledge Amount
 - Gift/Pledge Type
 - Designation

Search Options in Banner

AFACAMP

- Contains Detail about Campaign
- ADAGIFT
 - Displays all gifts by designation
- ADAPLDG

• Displays all pledges by designation

AOAIDEN

Displays Banner Constituent IDs

- Base Information About Campaign
- Mail
- Comments
- Expenses
- Designation
- Solicitation Types
- Gifts
- Pledges

Example of Pledge and Payment

Pledge

• ID: J00756423

- Name: Jane Greenfield
- Pledge Number: 0005539
- Pledge Amount: \$2,200
- Pledge Date: 09/05/14
- Designation: AGUNREST00 (Excellence Fund)
- Pledge Payment (Gift)
 - ID: J00756424 Spouse ID: J00756425
 - Name: Mr. & Mrs. James & Kathy Love

• Gift Number: 0064963

Query Example

Scenario 1

- A donor calls to inquire about his/her pledge or gift. The donor gives you the pledge or gift number only.
- Search Form AFACAMP
 - NOTE: Make sure to enter the correct campaign code in order to find the pledge or gift number in question.

Querying Information in Banner

- Click "Query" from the menu row at the top; then click "Enter" from the drop down options. Or click on the "Enter Query" quick key.
- Type in the information to search:
 - Gift/Pledge Number, Date, Amount, Type, Etc.
- Click "Query" from the menu row at the top; then click "Execute" from the drop down options. Or click on the "Execute Query" quick key.

실 Oracle Fusion I	Middleware Forms Services: Open >	AFACAMP	The second se	Automatical Property and	and then we will be
Eile Edit Optior	ns <u>B</u> lock Item <u>R</u> ecord Query <u>T</u> o	ools <u>H</u> elp			
🖉 📳 [🔎 🖷 🖻 🖻 í 🎓 🏹 í 🔮) 🗟 i 🔁 i 📇 i 🖻 🖬	<mark>₽₽ @ @ </mark>	♀ 「 X	
🧟 Campaign De	tail AFACAMP 8.7 (H-TEST)				
Campaign:	AF15 Annual Fund 2014-2	015			
Base Informatio	n Mail Comme	ents Expenses Design	ations Solicitation Types	lifts Pledges	
List Detail				- Hougeo	
ID	Name	Amount	Gift Date Gift Type	Description	Vehicle
J00756424	Mr James Love	1,000.00	05-SEP-2014 CK 1023		ТРРТ
Third Party	Hard Credit Solicitation	Type Organization Solicito	r Gift Number Pledge Number	Class 1 Class 2	Class 3
	✓ 15GIFTDOC		0064963 💌 0000000	•	•
ID	Name	Amount	Gift Date Gift Type	Description	Vehicle
J00729706	Ms. Johnyelle Lee	175.00	31-JUL-2014 ET Electronic Fi	unds Transfer	
Third Party	Hard Credit Solicitation	Type Organization Solicito	r Gift Number Pledge Number	Class 1 Class 2	Class 3
L .			00064959		
ID	Namo	Amount	Giff Date Giff Type	Description	Vehicle
100729706		240.00	31-111-2014 CK Check 9999	Description	
Third Party	Hard Credit Solicitation	Type Organization Solicito	r Gift Number Pledge Number	Class 1 Class 2	Class 3
			0064958 0000000		
— ·					
Query Amour	nt: 1,415.00	Total Amount:	1,415.00	Total Number of Gifts:	3

se Informat	tion Mail Comme	its Expenses D	Designations Solicitation Ty	pes Gif	ts	Pledges	
ist Detai	1						
ID	Name	Amount	Pledge Date Stat	tus Vehicle	Pledge Type	Descri	iption
J00756423	Ms Jane Greenfield	2,200.00	05-SEP-2014 A		RP	Regular Pledge	
hird Party	Hard Credit Solicitation Typ	e Organization Solicit	tor Pledge Category	Conditional	Class 1	Class 2	Class 3
D ID	15GIFTDOC	Amount	0005539 AFUND	US Vehicle	Pledge Type	Descri	intion
ID J00729706		Amount 175.00	Pledge Date Stat	us Vehicle	Pledge Type	Descri Regular Piedge	iption
ID J00729706 hird Party	ISGIFTDOC Name Ms. Johnyelle Lee Hard Credit Solicitation Typ I4CHAP	Amount 175.00 POrganization Solicite	O0005539 AFUND Pledge Date Stat 31-JUL-2014 P tor Pledge Category 0005538 AFUND	tus Vehicle	Pledge Type RP Class 1	Descri Regular Piedge Class 2	iption Class 3
ID J00729706 hird Party	Name Name Ms. Johnyelle Lee Hard Credit Solicitation Typ I 14CHAP Name	Amount 175.00 e Organization Solicito Amount	Pledge Date Stat	tus Vehicle Conditional Conditional Vehicle	Pledge Type RP Class 1 Pledge Type	Descri Regular Pledge Class 2	iption Class 3
ID J00729706 hird Party ID hird Party	Name Ms. Johnyelle Lee Hard Credit Solicitation Typ I 14CHAP Name Hard Credit Solicitation Typ	Amount 175.00 e Organization Solicite Amount e Organization Solicite	Pledge Date Stat 31-JUL-2014 P tor Pledge Category 0005538 AFUND Pledge Date Stat Pledge Date Stat	tus Vehicle Conditional To Conditional Conditional Conditional	Pledge Type RP Class 1 Pledge Type Class 1 Class 1	Descri Regular Piedge Class 2	iption Class 3

Extract of Gifts and Pledges

- Click on Help from the Menu Options
- Select "Extract Data with Key"
- Result: An excel file that lists all of the viewable information displayed on your screen.





Query Example

Scenario 2

- You are unsure of the spelling of the donor's name, or you are unsure of how the gift/pledge is entered. You know the designation of the gift/pledge.
- Search Forms ADAGIFT and ADAPLDG
 - Query on Designation Code

ADAGIFT

atus:	Active	llence Fund						
ID	Name		Amount	Date	Campaign	Campaign Name	Gift Type	Description
00756424 Mr James	s Love		1,000.00	05-SEP-2014	AF15	Annual Fund 2014-2015	СК	1023
Vehicle 1	Third Party	Hard	Gift	Pledge	Class 1	Class 2		Class 3
TPPT	~	▼.▼	0064963 💌	0000000	-			-
Solicitation Type:	15GIFTDOC		Organization:		Sc	olicitor:		
ID	Name		Amount	Date	Campaign	Campaign Name	Gift Type	Description
00702341 IBM Matc	hing Grants Program		850.00	01-AUG-2014	AF14	Annual Giving 2014	MG	Matching Gift 5555
Vehicle 1	Third Party	Hard	Gift	Pledge	Class 1	Class 2		Class 3
			0064962	0000000			1	
Solicitation Type:	14MATCH		Organization:		Sc	olicitor:		
ID	Name		Amount	Date	Campaign	Campaign Name	Gift Type	Description
100729706 Ms. John	velle Lee		850.00	01-AUG-2014	AF14	Annual Giving 2014	СК	Check 2222
Vehicle 1	Third Party	Hard	Gift	Pledge	Class 1	Class 2		Class 3
			0064960	0005521			1	

Extract of Gifts By Designation

ADAGIFT

Click on Help from the Menu Options

Select "Extract Data with Key"

Result: An excel file that lists all of the viewable information displayed on your screen.





ADAPLDG

File Edit Options Block Item Record Query Tools Help

🖬 🖉 📄 🕪 🖷 🖻 📄 1 🎓 🍞 I 🎯 📾 I 🏝 I 🟝 I 🖳 🖻 🕒 I 😓 I 🕀 I 🕀 I 🕀 I 💮 I 🙄 I 🗙

Designation: AGL Status: A	Active	ellence Fund				
ID J00756423 Ms Jane G Third Party Solicitation Type:	Name ireenfield Hard 	Pledge 0005539	Amount 2,200.00 Category AFUND Organization:	Pledge Date 05-SEP-2014 Conditional	Campaign Sta AF15 Class 1	atus Vehicle Pledge Type Description A RP Regular Pledge Class 2 Class 3 Solicitor:
ID J00307691 Ms. Eldna Third Party Solicitation Type:	Name D. Bates Hard 	Pledge 0005522	Amount 365.00 Category AFUND Organization:	Pledge Date 02-APR-2014 Conditional .	Campaign Sta AF14 Class 1	atus Vehicle Pledge Type Description U TL Telethon Pledge Class 2 Class 3 Solicitor:
ID J00104905 Ms Clemet Third Party Solicitation Type:	Name een C Morris Hard 	Pledge 0005477	Amount 48.00 Category AFUND Organization:	Pledge Date 10-MAR-2014 Conditional .	Campaign Sta AF14 Class 1	A PD Payroll Deduction Class 2 Class 3 Solicitor:
Query Amount:		2,613.00	Total Amount:		2,166,438.45	Total Number of Pledges: 4,562

Extract of Pledges By Designation

ADAPLDG

Click on Help from the Menu Options

Select "Extract Data with Key"

Result: An excel file that lists all of the viewable information displayed on your screen.





Query Example

Scenario 3

- You know the donor's name, but there are multiple records in Banner with the same name.
- Search Form AOAIDEN
 - Allows searches of constituent records with first name, last name, city, state, and class year.

AOAIDEN

Source Fusion Middleware Forms Services	: Open > AOAIDEN		A second on the State of the
Eile Edit Options Block Item Record	Query <u>T</u> ools <u>H</u> elp		
🕒 🖉 🗎 🖊 🧎 🗍 👘	🎦 і 😰 📾 😣 і 📥 і 📙	🖻 🕒 🔁 🖓 🎼 🏶 🖉 🔞	X 1 🝚 1 (
🙀 Advancement Individual Search AOAIDEI	N 8.6.1 (H-TEST) 00000000000	**********************************	$\simeq \simeq$
Last Name	First Name M	iddle Prefix Suffix ID	Gender Change Name Type Class
Greenfield	Jane	Ms J00756423	F 0000
Category: FRND College:	00 City: Greensboro	State or Province: NC	ZIP or Postal Code: 27405
		State or Dravingat	
Category. College:		state of Province.	
Category: College:	City:	State or Province:	ZIP or Postal Code:
Category: College:	City:	State or Province:	ZIP or Postal Code:
Category: College:	City:	State or Province:	ZIP or Postal Code:
Category: College:	City:	State or Province:	ZIP or Postal Code:
Category: College:		State or Province:	ZIP of Postal Code:
Case Sensitive Query? 🛛 🔍 🔍 🔍	Yes Search using sounds like	Name:	First Name: Search:

Summary of Query Options

- AFACAMP Query by gift, pledge, type, amount, and date
- ADAGIFT Query by gift designation code
- ADAPLDG Query by pledge designation code
- AOAIDEN Query by first and last name, city, state, and class year

Questions



Johnyelle Lee Director of Advancement Services Jackson State University PO Box 17144 Jackson, MS 39217 601.979.2282 johnyelle.lee@jsums.edu



MBUG