

MBUG 2014

Query of Pledge and Gift Information

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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

AFACAMP

- 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.

AFACAMP

Oracle Fusion Middleware Forms Services: Open > AFACAMP

File Edit Options Block Item Record Query Tools Help



Campaign Detail AFACAMP 8.7 (H-TEST)

Campaign:

Base Information | Mail | Comments | Expenses | Designations | Solicitation Types | **Gifts** | Pledges

List | Detail

ID	Name	Amount	Gift Date	Gift Type	Description	Vehicle			
<input type="text" value="J00756424"/>	<input type="text" value="Mr James Love"/>	<input type="text" value="1,000.00"/>	<input type="text" value="05-SEP-2014"/>	<input type="text" value="CK"/>	<input type="text" value="1023"/>	<input type="text" value="TPPT"/>			
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Gift Number	Pledge Number	Class 1	Class 2	Class 3
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="15GIFTDOC"/>			<input type="text" value="0064963"/>	<input type="text" value="0000000"/>			

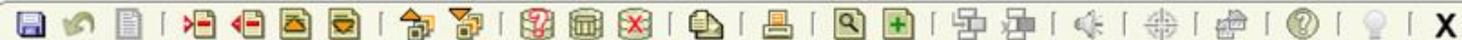
ID	Name	Amount	Gift Date	Gift Type	Description	Vehicle			
<input type="text" value="J00729706"/>	<input type="text" value="Ms. Johnyelle Lee"/>	<input type="text" value="175.00"/>	<input type="text" value="31-JUL-2014"/>	<input type="text" value="ET"/>	<input type="text" value="Electronic Funds Transfer"/>				
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Gift Number	Pledge Number	Class 1	Class 2	Class 3
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="14CHAP"/>			<input type="text" value="0064959"/>	<input type="text" value="0005538"/>			

ID	Name	Amount	Gift Date	Gift Type	Description	Vehicle			
<input type="text" value="J00729706"/>	<input type="text" value="Ms. Johnyelle Lee"/>	<input type="text" value="240.00"/>	<input type="text" value="31-JUL-2014"/>	<input type="text" value="CK"/>	<input type="text" value="Check 9999"/>				
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Gift Number	Pledge Number	Class 1	Class 2	Class 3
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="14GIFTDOC"/>			<input type="text" value="0064958"/>	<input type="text" value="0000000"/>			

Query Amount: Total Amount: Total Number of Gifts:

AFACAMP

File Edit Options Block Item Record Query Tools Help



Campaign Detail AFACAMP 8.7 (H-TEST)

Campaign: Annual Fund 2014-2015

Base Information Mail Comments Expenses Designations Solicitation Types Gifts **Pledges**

List Detail

ID	Name	Amount	Pledge Date	Status	Vehicle	Pledge Type	Description			
J00756423	Ms Jane Greenfield	2,200.00	05-SEP-2014	A		RP	Regular Pledge			
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Pledge	Category	Conditional	Class 1	Class 2	Class 3
<input type="checkbox"/>	<input type="checkbox"/>	15GIFTDOC			0005539	AFUND	<input type="checkbox"/>			
ID	Name	Amount	Pledge Date	Status	Vehicle	Pledge Type	Description			
J00729706	Ms. Johnyelle Lee	175.00	31-JUL-2014	P		RP	Regular Pledge			
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Pledge	Category	Conditional	Class 1	Class 2	Class 3
<input type="checkbox"/>	<input type="checkbox"/>	14CHAP			0005538	AFUND	<input type="checkbox"/>			
ID	Name	Amount	Pledge Date	Status	Vehicle	Pledge Type	Description			
Third Party	Hard Credit	Solicitation Type	Organization	Solicitor	Pledge	Category	Conditional	Class 1	Class 2	Class 3
<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>			

Query Amount:

Total Amount:

Total Number of Pledges:

Extract of Gifts and Pledges

AFACAMP

- ▶ 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

File Edit Options Block Item Record Query Tools Help



Designation Gifts ADAGIFT 8.7 (H-TEST)

Designation: AGUNREST00 Excellence Fund
 Status: A Active

ID	Name	Amount	Date	Campaign	Campaign Name	Gift Type	Description
J00756424	Mr James Love	1,000.00	05-SEP-2014	AF15	Annual Fund 2014-2015	CK	1023
Vehicle	Third Party	Hard	Gift	Pledge	Class 1	Class 2	Class 3
TPPT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0064963	0000000			
Solicitation Type: 15GIFTDOC		Organization:		Solicitor:			

ID	Name	Amount	Date	Campaign	Campaign Name	Gift Type	Description
J00702341	IBM Matching Grants Program	850.00	01-AUG-2014	AF14	Annual Giving 2014	MG	Matching Gift 5555
Vehicle	Third Party	Hard	Gift	Pledge	Class 1	Class 2	Class 3
	<input type="checkbox"/>	<input type="checkbox"/>	0064962	0000000			
Solicitation Type: 14MATCH		Organization:		Solicitor:			

ID	Name	Amount	Date	Campaign	Campaign Name	Gift Type	Description
J00729706	Ms. Johnyelle Lee	850.00	01-AUG-2014	AF14	Annual Giving 2014	CK	Check 2222
Vehicle	Third Party	Hard	Gift	Pledge	Class 1	Class 2	Class 3
	<input type="checkbox"/>	<input type="checkbox"/>	0064960	0005521			
Solicitation Type: 14CC		Organization:		Solicitor:			

Query Amount: 2,700.00 Total Amount: 4,706,863.83 Total Number of Gifts: 31,429

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



Designation Pledges ADAPLDG 8.7 (H-TEST)

Designation: AGUNREST00 Excellence Fund
 Status: A Active

ID	Name	Amount	Pledge Date	Campaign	Status	Vehicle	Pledge Type	Description
J00756423	Ms Jane Greenfield	2,200.00	05-SEP-2014	AF15	A		RP	Regular Pledge
Third Party: <input type="checkbox"/> Hard: <input type="checkbox"/> Pledge: 0005539 Solicitation Type: 15GIFTDOC		Category: AFUND	Conditional: <input type="checkbox"/>	Class 1: <input type="checkbox"/>		Class 2: <input type="checkbox"/>	Class 3: <input type="checkbox"/>	Solicitor: <input type="checkbox"/>
Organization: <input type="text"/>								
J00307691	Ms. Eldna D. Bates	365.00	02-APR-2014	AF14	U		TL	Telethon Pledge
Third Party: <input type="checkbox"/> Hard: <input type="checkbox"/> Pledge: 0005522 Solicitation Type: 14CC		Category: AFUND	Conditional: <input type="checkbox"/>	Class 1: <input type="checkbox"/>		Class 2: <input type="checkbox"/>	Class 3: <input type="checkbox"/>	Solicitor: <input type="checkbox"/>
Organization: <input type="text"/>								
J00104905	Ms Clemeteen C Morris	48.00	10-MAR-2014	AF14	A		PD	Payroll Deduction
Third Party: <input type="checkbox"/> Hard: <input type="checkbox"/> Pledge: 0005477 Solicitation Type: <input type="text"/>		Category: AFUND	Conditional: <input type="checkbox"/>	Class 1: <input type="checkbox"/>		Class 2: <input type="checkbox"/>	Class 3: <input type="checkbox"/>	Solicitor: <input type="checkbox"/>
Organization: <input type="text"/>								

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

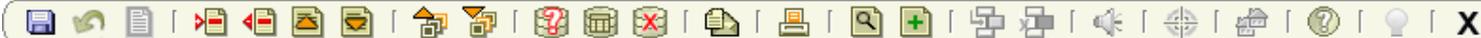
Scenario 3

- ▶ 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

Oracle Fusion Middleware Forms Services: Open > AOAIDEN

File Edit Options Block Item Record Query Tools Help



Advancement Individual Search AOAIDEN 8.6.1 (H-TEST)

Last Name	First Name	Middle	Prefix	Suffix	ID	Gender	Change	Name Type	Class
Greenfield	Jane		Ms		J00756423	F	<input type="checkbox"/>		0000
Category: FRND	College: 00	City: Greensboro	State or Province: NC		ZIP or Postal Code: 27405				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Category: <input type="text"/>	College: <input type="text"/>	City: <input type="text"/>	State or Province: <input type="text"/>		ZIP or Postal Code: <input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Category: <input type="text"/>	College: <input type="text"/>	City: <input type="text"/>	State or Province: <input type="text"/>		ZIP or Postal Code: <input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Category: <input type="text"/>	College: <input type="text"/>	City: <input type="text"/>	State or Province: <input type="text"/>		ZIP or Postal Code: <input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Category: <input type="text"/>	College: <input type="text"/>	City: <input type="text"/>	State or Province: <input type="text"/>		ZIP or Postal Code: <input type="text"/>				

Case Sensitive Query?

No 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
 - ▶ AOAIIDEN – Query by first and last name, city, state, and class year
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Questions



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