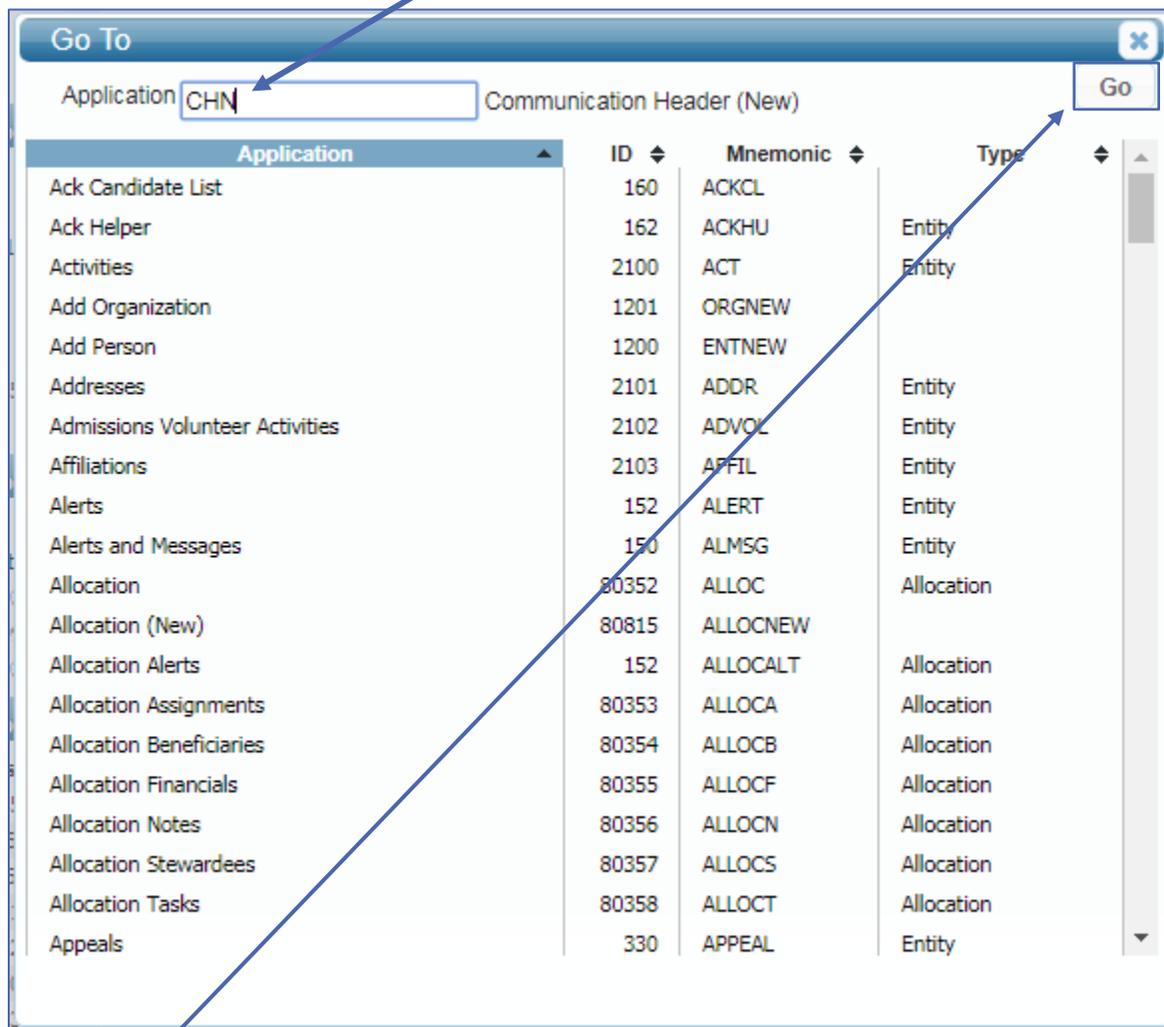


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1. Log in to Advance.
2. Click [Go To](#)  from the [Main Menu](#).
3. In the [Go To](#) window, type [CHN](#) in the Application Box.



Go To

Application Communication Header (New)

Application	ID	Mnemonic	Type
Ack Candidate List	160	ACKCL	
Ack Helper	162	ACKHU	Entity
Activities	2100	ACT	Entity
Add Organization	1201	ORGNEW	
Add Person	1200	ENTNEW	
Addresses	2101	ADDR	Entity
Admissions Volunteer Activities	2102	ADVOL	Entity
Affiliations	2103	AFFIL	Entity
Alerts	152	ALERT	Entity
Alerts and Messages	150	ALMSG	Entity
Allocation	80352	ALLOC	Allocation
Allocation (New)	80815	ALLOCNEW	
Allocation Alerts	152	ALLOCALT	Allocation
Allocation Assignments	80353	ALLOCA	Allocation
Allocation Beneficiaries	80354	ALLOCB	Allocation
Allocation Financials	80355	ALLOCF	Allocation
Allocation Notes	80356	ALLOCN	Allocation
Allocation Stewardees	80357	ALLOCS	Allocation
Allocation Tasks	80358	ALLOCT	Allocation
Appeals	330	APPEAL	Entity

4. Click [Go](#).

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5. This will open the **Communication Header (New)** window.

The screenshot shows a software window titled "Communication Header (New)" with a sub-header "Communication Header (100376)". The window contains several input fields and sections:

- Comm Code*:** A text box containing "A".
- Description*:** A text box containing "B".
- Sort Name:** An empty text box.
- Medium*:** A dropdown menu with "C" selected.
- Type*:** A dropdown menu with "D" selected.
- Content:** A dropdown menu with "E" selected.
- On Behalf Of:** A dropdown menu with "F" selected.
- Date Scheduled:** A date picker with "G" entered.
- Date Sent:** A date picker with "H" entered.
- Organization*:** A search field with "I" entered.
- Contact*:** A search field with "J" entered.
- Unit Responsible*:** A dropdown menu with "K" selected.
- Comment:** A large text area containing "L".
- Tracking Section (M):** A grid of input fields for tracking metrics:
 - Pieces Sent
 - Bounced/Returned
 - email Click Throughs
 - Postal Cost
 - Staffing Cost
 - Vendor Cost
 - Total Cost
 - Individuals Touched
 - emails Unopened
 - emails Forwarded
 - Phone Cost
 - Supply Cost
 - Other Cost
- Association Section (N):** Three search fields:
 - Assoc Event
 - Assoc Memb Appeal
 - Assoc Gift Appeal

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- A. **Comm Code*** - Required field. Enter the code you would like to use in order to keep track of this particular communication.
- B. **Description*** - Required field. Enter the description of the communication here.
- C. **Medium*** - Required field. Drop-down for below options.
- **Email (E)**
 - **Snail Mail (P)**
 - **Social Media (S)**
 - **Telephone (T)**
- D. **Type*** - Required field. Drop-down for below options.
- **Acknowledgement (A)**
 - **General Information (G)**
 - **Invitation (I)**
 - **Letter (L)**
 - **Magazine (M)**
 - **Newsletter (N)**
 - **Special Occasion (O)**
 - **Survey (S)**
- E. **Content** - Non-required field. Drop-down for below options.
- **Beneficiary (J)**
 - **Bequest (I)**
 - **Life Income (O)**
 - **Outright Planned Gift (U)**
 - **Affinity Programs (P)**
 - **Alumni Tours (T)**
 - **Athletics (A)**
 - **Benefits (B)**
 - **Career (C)**
 - **Chancellor's Society (S)**
 - **Class Gift (L)**
 - **Event (E)**
 - **Faculty/Staff (Z)**
- F. **On Behalf Of** - Non-required field. Drop-down to choose the department or unit responsible for sending the communication.
- G. **Date Scheduled** - Non-required field. When the communication is scheduled to run.
- H. **Date Sent** - Non-required field. The date the communication was actually sent.

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- I. **Organization*** - Required field. Choose the organization who is creating the Communication Header, may or may not be the same as the **On Behalf Of**.
- J. **Contact*** - Required field. Enter the person who is responsible for this communication.
- K. **Unit Responsible*** - Enter the unit responsible for this communication.
- L. **Comment** - Enter any comments necessary to clarify the communication.
- M. **Optional Tracking Information** - This area is used to track the details of a communication. (i.e. pieces of mail sent, how much postage cost, how many bounced emails, etc.)
- N. **Associated Events and Appeals** - Use these blocks to track that the communication is associated with either an event or other appeals.

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EXAMPLE OF COMPLETED FORM

The screenshot shows a web-based form titled "Communication Header (New)". The form is filled with the following data:

- Comm Code*:** CMFARR
- Description*:** Chris F. Testing of the Comm Header Tool
- Sort Name:** (empty)
- Medium*:** E (email)
- Type*:** L (Letter)
- Content:** Y (Young Alumni)
- On Behalf Of:** UA (University of Arkansas)
- Date Scheduled:** 3/6/19
- Date Sent:** 3/6/19
- Organization*:** 0000357615 (Development)
- Contact*:** 532188 (Mr. [redacted])
- Unit Responsible*:** ADV (Advancement)
- Comment:** This is an example of how a Communication header is created.

Below the main form fields, there are two columns of tracking metrics, each with an empty input box:

- Pieces Sent**
- Bounced/Returned**
- email Click Throughs**
- Postal Cost**
- Staffing Cost**
- Vendor Cost**
- Total Cost**
- Individuals Touched**
- emails Unopened**
- emails Forwarded**
- Phone Cost**
- Supply Cost**
- Other Cost**

At the bottom of the form, there are three fields for associations, each with a search icon:

- Assoc Event**
- Assoc Memb Appeal**
- Assoc Gift Appeal**

A blue arrow points from the text "CLICK SAVE" at the bottom of the page to the "Save" button in the top right corner of the form.

CLICK SAVE

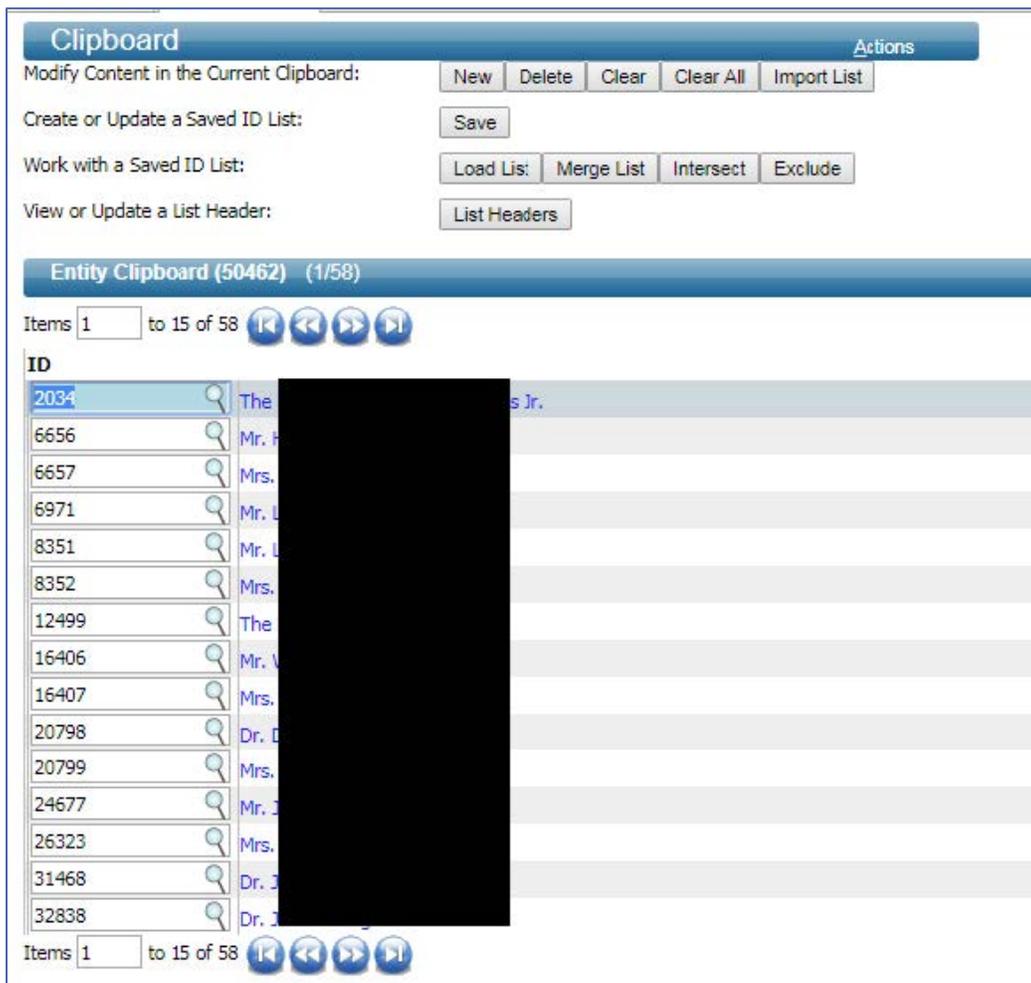
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4. Now that you have a communication header it is time to apply the **Communication Header** to the entities that have been contacted.
7. In **Advance**, open your **Clipboard** from the **Main Menu**. 
8. Either manually enter or Import from a .csv file the list of Entity IDs that need to be updated. (See [Presentation - Advance Clipboard](#) on aits.uark.edu for assistance.)

IT SHOULD LOOK LIKE THIS WHEN COMPLETE.



Clipboard Actions

Modify Content in the Current Clipboard:

Create or Update a Saved ID List:

Work with a Saved ID List:

View or Update a List Header:

Entity Clipboard (50462) (1/58)

Items to 15 of 58 

ID	
2034	The ... s Jr.
6656	Mr. P
6657	Mrs.
6971	Mr. L
8351	Mr. L
8352	Mrs.
12499	The
16406	Mr. V
16407	Mrs.
20798	Dr. D
20799	Mrs.
24677	Mr. J
26323	Mrs.
31468	Dr. J
32838	Dr. J

Items to 15 of 58 

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9. Choose **Actions**, then **Reports** from the blue bar on the right side of the screen.

The screenshot shows the 'Entity Clipboard (50462) (1/58)' interface. At the top, there are several sections: 'Clipboard' with buttons for 'New', 'Delete', 'Clear', 'Clear All', and 'Import List'; 'Create or Update a Saved ID List:' with a 'Save' button; 'Work with a Saved ID List:' with buttons for 'Load List', 'Merge List', 'Intersect', and 'Exclude'; and 'View or Update a List Header:' with a 'List Headers' button. Below these is a table of entities with columns for 'ID' and 'Name'. The 'ID' column contains values like 2034, 6656, 6657, 6971, 8351, 8352, 12499, and 16406. The 'Name' column contains names like 'The H...', 'Mr. H...', 'Mrs. P...', 'Mr. L...', 'Mr. L...', 'Mrs. J...', 'The H...', and 'Mr. W...'. On the right side, there is a blue bar with 'Actions' and 'Help' buttons. A dropdown menu is open under 'Actions', showing 'Reports' as the selected option. Other options in the menu include 'Mess Invite', 'Export Form', 'Mess Add', 'Mess Modify', and 'Export to Excel'. Two blue arrows point from the text 'Choose Actions, then Reports' to the 'Actions' button and the 'Reports' option in the dropdown menu.

10. Choose the ellipses **...** by the UA Comm Mass Load from the Report List.

The screenshot shows the 'Report List (50457)' interface. At the top, there is a header 'Report List' with an 'Actions' button. Below the header is a description: '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 description is a table with columns for 'Context', 'Name', and 'Description'. The table contains the following data:

Context	Name	Description
...	Entity	Appeal Assignment
...	Entity	Entity Profile Report
...	Entity	Google Entities
...	Entity	Labels
...	Entity	Merge
...	Entity	NameTag and TentCard
...	Entity	UA Comm Mass Load
...	Entity	UA Entity Brief Bio
...	Entity	UA Entity Profile v2
...	Entity	UA Entity Wealth Report
...	Entity	UA One Line Per Entity
...	Entity	UA Session ID

The 'UA Comm Mass Load' report is highlighted in blue. An ellipsis icon (three dots) is visible to the left of the 'Context' column for this report.

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11. Under **Comm Code*** find your new Communication Header. (This is in alphabetical order.)

Report Detail Actions

Please enter parameters, if necessary, for running this report in the form below. When you have entered all criteria for the report, press Run Report.
You may need to disable your browser's pop-up blocker to view the report.

Report Header (50451) Help

Description Utility to Mass Load Communication Codes onto Entity Records
Type Reports
Comment Select Communication Code to load onto entity records on clipboard.
If this is an old list that is being loaded please select **Yes** for Past Data list. This will not load a Chapter, Territory, or State on the mass comm record.

Comm Code* Chris F. Testing of the Comm Header Tool

Response

Past Data List? Yes No

[Run Report](#)

12. Click **Run Report**. (This may take a few moments to run.)
13. You will get a result back like this:

Report Viewer Actions Export Print

58 record(s) mass loaded for communication code CMFARR - Chris F. Testing of the Comm Header Tool

App ID: 100289
Page ID: 50032
User: cmfarris
Database: ADVANCE
User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)
License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)
App(100289)(6): Security(On)
Profile 1 (AWA Web Site) Form 100381 (Communication Mass Load) Security(On) DataClump 100353 db 1

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14. You can confirm that the update worked by going to the [Comm Tracking Screen](#) under [Biographic](#) in the [Nav Tree](#) of one of the communication recipients. Here is an example:

The screenshot displays a user interface for managing communications. On the left is a navigation tree with 'Biographic' selected. The main content area shows a communication header for 'Mr. [REDACTED] #8351' with details like 'Rec Type: Alumni (1964 Walton)', 'Degree: BSBA 1964 Walton, MBA 1965 Walton', and 'AAA: Life'. Below this is a table of communications with columns for 'Comm', 'Medium', 'Date Sent', and 'Unit Code'. The first row, 'Chris F. Testing of the Comm Header Tool', is highlighted with a blue box. An arrow points from the text 'IT WORKED!' below to this row.

Comm	Medium	Date Sent	Unit Code
Chris F. Testing of the Comm Header Tool	email	03/06/2019	ADV
Honors College Gray Lecture Reminder	email	09/08/2018	ALU
From Your Home on the Hill FULL BASE VERSION September	email	09/05/2018	ALU
AAA Colorado State Razorback Events 2018	email	08/10/2018	ALU
From Your Home on the Hill FULL BASE	email	08/01/2018	ALU
AAA Event Newsletter PRIDE VERSION	email	07/18/2018	ALU
AAA Event Newsletter FULL BASE	email	07/18/2018	ALU
AAA Arkansas July 2018	email	07/11/2018	ALU
AAA Event Newsletter PRIDE VERSION	email	07/04/2018	ALU
AAA Event Newsletter FULL BASE	email	07/04/2018	ALU

IT WORKED!