

Advance Contact Reports

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Why are Contact Reports important?

History: Prospects are assigned to Development Officers, but the information yielded from those prospects is proprietary to the University of Arkansas. Contact Reports allow the University to keep a historic record of the communications between Development and its prospects.

Visibility: Contact Reports provide crucial information for the senior leadership of the University.

Performance: Contact Reports provide valuable information that facilitates professional growth opportunities for all Development Officers.



Viewing Contact Reports

An entity's Contact Reports can be viewed on the Entity Overview screen.

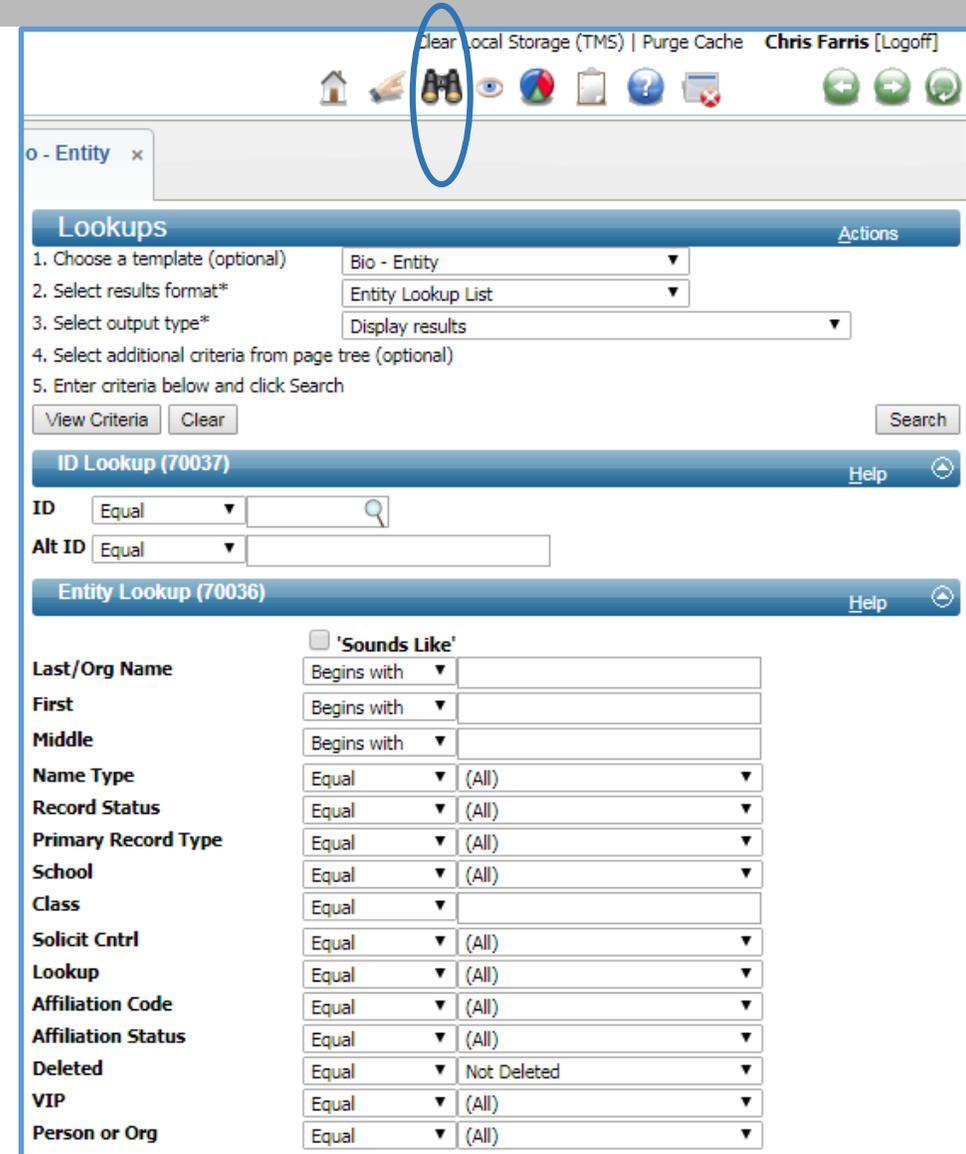
There are additional ways to view Contact Reports, but this is the best way to ensure you are viewing *all* existing Contact Reports for that entity.



Viewing Contact Reports

Perform a Lookup for the Entity.

Access the Entity Overview screen.



Clear local Storage (TMS) | Purge Cache | Chris Farris [Logoff]

o - Entity x

Lookups

1. Choose a template (optional) Bio - Entity
2. Select results format* Entity Lookup List
3. Select output type* Display results
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

View Criteria Clear Search

ID Lookup (70037)

ID Equal
Alt ID Equal

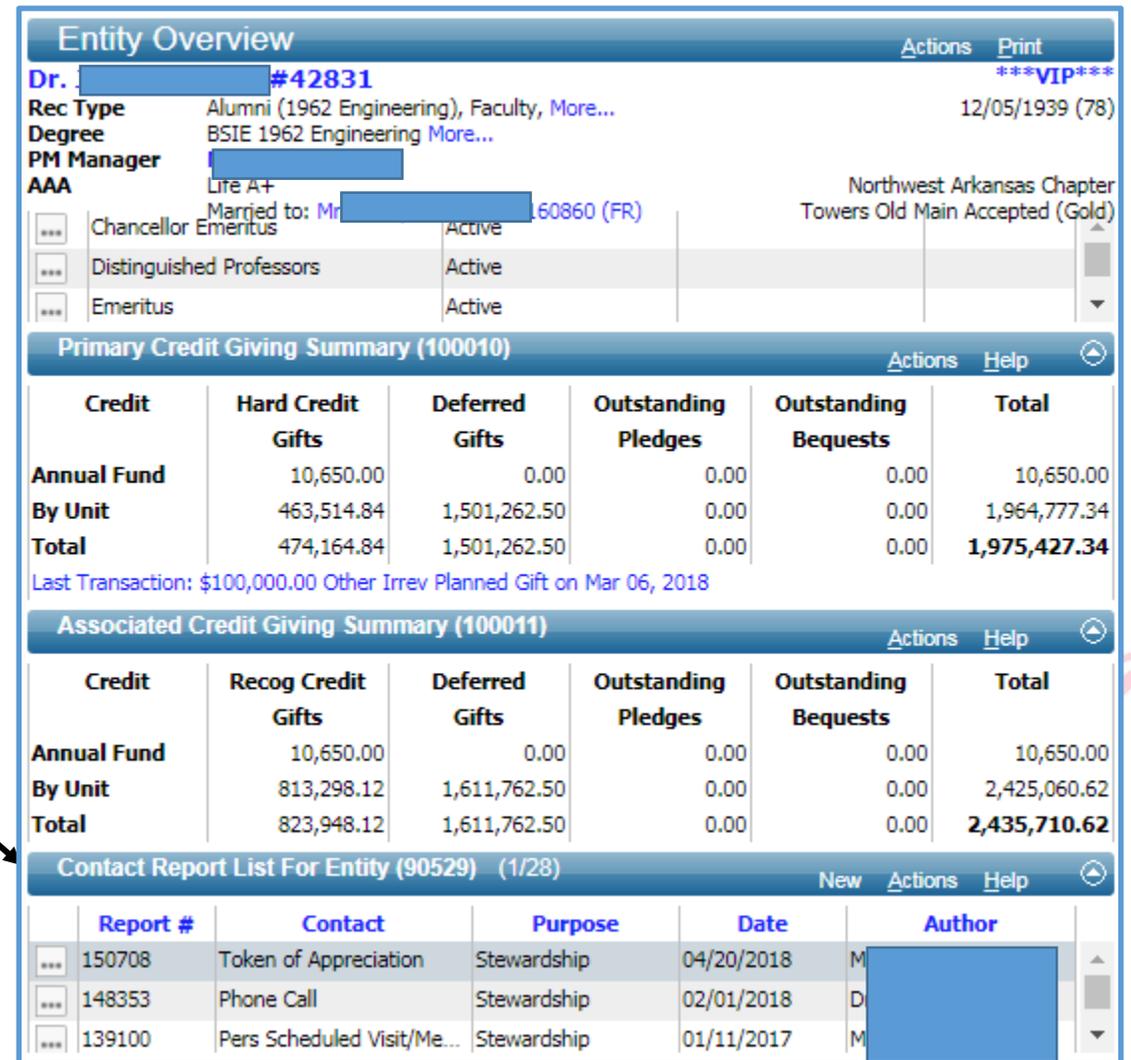
Entity Lookup (70036)

'Sounds Like'

Last/Org Name	Begins with	
First	Begins with	
Middle	Begins with	
Name Type	Equal	(All)
Record Status	Equal	(All)
Primary Record Type	Equal	(All)
School	Equal	(All)
Class	Equal	
Solicit Cntrl	Equal	(All)
Lookup	Equal	(All)
Affiliation Code	Equal	(All)
Affiliation Status	Equal	(All)
Deleted	Equal	Not Deleted
VIP	Equal	(All)
Person or Org	Equal	(All)

Viewing Contact Reports

Contact Report List for Entity will appear beneath the Prospect Summary section on the Entity Overview page.



The screenshot displays the 'Entity Overview' page for a prospect. It includes sections for 'Primary Credit Giving Summary (100010)' and 'Associated Credit Giving Summary (100011)', both showing financial data. At the bottom, the 'Contact Report List For Entity (90529) (1/28)' is visible, listing reports with columns for Report #, Contact, Purpose, Date, and Author. An arrow from the text on the left points to this section.

Entity Overview [Actions](#) [Print](#)

Dr. [REDACTED] #42831 ***VIP***

Rec Type Alumni (1962 Engineering), Faculty, More... 12/05/1939 (78)

Degree BSIE 1962 Engineering More...

PM Manager [REDACTED]

AAA Life A+ Northwest Arkansas Chapter
Towers Old Main Accepted (Gold)

Chancellor Emeritus Married to: Mr [REDACTED] 60860 (FR) Active

Distinguished Professors Active

Emeritus Active

Primary Credit Giving Summary (100010) [Actions](#) [Help](#)

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	10,650.00	0.00	0.00	0.00	10,650.00
By Unit	463,514.84	1,501,262.50	0.00	0.00	1,964,777.34
Total	474,164.84	1,501,262.50	0.00	0.00	1,975,427.34

Last Transaction: \$100,000.00 Other Irrev Planned Gift on Mar 06, 2018

Associated Credit Giving Summary (100011) [Actions](#) [Help](#)

Credit	Recog Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	10,650.00	0.00	0.00	0.00	10,650.00
By Unit	813,298.12	1,611,762.50	0.00	0.00	2,425,060.62
Total	823,948.12	1,611,762.50	0.00	0.00	2,435,710.62

Contact Report List For Entity (90529) (1/28) [New](#) [Actions](#) [Help](#)

Report #	Contact	Purpose	Date	Author
150708	Token of Appreciation	Stewardship	04/20/2018	M [REDACTED]
148353	Phone Call	Stewardship	02/01/2018	D [REDACTED]
139100	Pers Scheduled Visit/Me...	Stewardship	01/11/2017	M [REDACTED]

Viewing Contact Reports

Contact Report List For Entity (90529) (1/28)						New	Actions	Help
	Report #	Contact	Purpose	Date	Author			
...	150708	Token of Appreciation	Stewardship	04/20/2018	Mr.			
...	148353	Phone Call	Stewardship	02/01/2018	Dr.			
...	139100	Pers Scheduled Visit/Me...	Stewardship	01/11/2017	Mrs.			



Click ellipsis button to view detail of Contact Report



Viewing Contact Reports



Lab #1 in Contact Reports Workbook



Questions?



Adding Contact Reports

Use Contact Reports to record any interaction (phone calls, visits, etc.) with an Entity or Prospect.



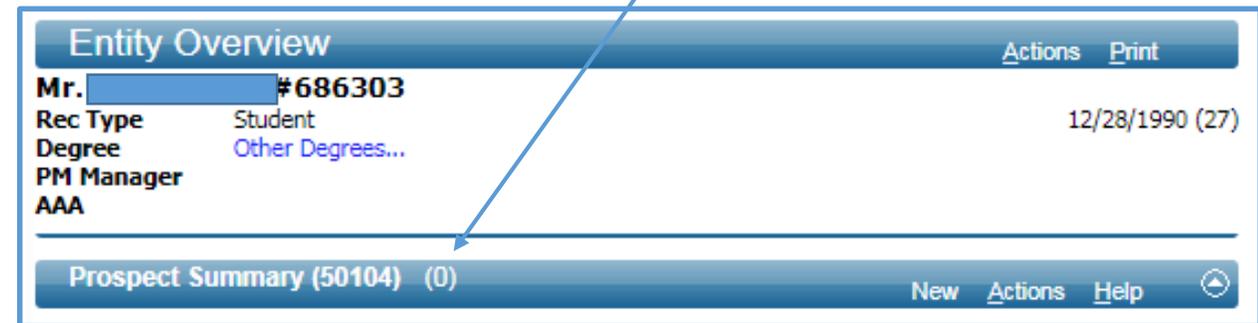
Adding Contact Reports

You can ascertain whether or not a Prospect Record exists by checking the Prospect Summary form on the Entity Overview screen.

If no Prospect Record exists for the Entity, then the Prospect Summary section will be blank.

Entities that require Prospect Records should be requested immediately from **Jason Selle** at selle@uark.edu.

Note the (0) Prospect Records.



The screenshot displays the 'Entity Overview' interface. At the top, there is a header bar with 'Entity Overview' on the left and 'Actions' and 'Print' on the right. Below this, the entity details are listed: 'Mr. [redacted] #686303', 'Rec Type Student', 'Degree Other Degrees...', 'PM Manager', and 'AAA'. On the right side, the date '12/28/1990 (27)' is shown. A horizontal line separates the entity details from the 'Prospect Summary (50104) (0)' section at the bottom. The 'Prospect Summary' section has a 'New' button, 'Actions', and 'Help' links, along with a refresh icon. A blue box with an arrow points to the '(0)' in the 'Prospect Summary' section, indicating that there are no records.

Entity Overview		Actions	Print
Mr. [redacted]	#686303		
Rec Type	Student		12/28/1990 (27)
Degree	Other Degrees...		
PM Manager			
AAA			
Prospect Summary (50104) (0)			
	New	Actions	Help

Adding Contact Reports

To record a Contact Report for an Entity, select the “New” button on the Contact Report List on the Entity Overview screen

The screenshot displays the 'Entity Overview' interface. At the top, it shows the entity name 'Mr. 686303' and details like 'Rec Type: Student', 'Degree: Other Degrees...', 'PM Manager: AAA', and a date '12/28/1990 (27)'. Below this are several summary sections: 'Prospect Summary (50104) (0)', 'Affiliations (50103) (0)', and 'Primary Credit Giving Summary (100010)'. The 'Primary Credit Giving Summary' includes a table with columns for Credit, Hard Credit Gifts, Deferred Gifts, Outstanding Pledges, Outstanding Bequests, and Total. Below this table is a note: 'Last Transaction: \$20.00 Outright Gift on Apr 08, 2014'. Further down is the 'Associated Credit Giving Summary (100011)' with a similar table. At the bottom, the 'Contact Report List For Entity (90529) (0)' section is visible, with a 'New' button circled in red. A blue arrow points from the text on the left to this 'New' button.

Credit	Hard Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	20.00	0.00	0.00	0.00	20.00
Total	20.00	0.00	0.00	0.00	20.00

Credit	Recognized Credit Gifts	Deferred Gifts	Outstanding Pledges	Outstanding Bequests	Total
Annual Fund	0.00	0.00	0.00	0.00	0.00
By Unit	20.00	0.00	0.00	0.00	20.00
Total	20.00	0.00	0.00	0.00	20.00

Adding Contact Reports

All Contact Reports are visible at the Entity level because **all** Contact Reports **must** contain an Entity ID. NOTE*** “Joint” is checked by default but may be changed at your discretion.

The presence of a Prospect ID associates this Contact Report with the Entity’s Prospect Record.

Sometimes Contact Reports are added for an Entity before that Entity is identified as a Prospect; thus, in the earliest record of contact, there would have been no Prospect ID on the Contact Reports.

If this happens, the number of Contact Reports appearing on the Entity Overview screen vs. the Prospect Overview screen may differ.

The screenshot shows a web form titled "Contact Report (80086)" with a menu bar containing "Save", "Actions", and "Help". The form fields are as follows:

- Report ID: 0
- Date*: 08/09/2018
- Contacted ID: 42831
- Joint:
- Spouse ID: 160860
- Contact Type*: [dropdown]
- Purpose*: [dropdown]
- Unit: UDE (University Development)
- Author*: [dropdown]
- Description*: [text area]
- Text: [text area]
- Program: [dropdown]
- Prospect ID: 2662 (Fayetteville Campus)
- Proposal ID: [dropdown]
- Name*: Dr. [text field]
- Sort Name*: [text field]
- Title/Addr: [text area]

Two arrows point from the text on the left to the "Contacted ID" and "Prospect ID" fields in the form.

Adding Contact Reports

Contacted ID defaults to current entity ID/Name.

The Date field is used to record the **actual date of contact**. **NOTE**: It will default to today's date and will remain that way unless it is edited.

Enter a Contact Type (Personally Scheduled, Letter, Phone Call, etc.)

Enter the Purpose of the contact.

If this is the first time any Director of Development (DOD) has contacted this entity on U of A business, select **"1st Time Contact"** from the drop-down on the Purpose field.

The screenshot shows a web-based form titled "Contact Report (80086)". The form contains several fields and dropdown menus. The "Purpose" field is highlighted with a red circle, showing the value "I" and the dropdown menu open to "1st Time Cnt". Other fields include "Report ID" (0), "Date*" (08/09/2018), "Contacted ID" (42831), "Spouse ID" (160860), "Contact Type*" (S), "Unit" (UDE), "Author*", "Description*", "Text", "Program", "Prospect ID" (2662), "Proposal ID", "Name*" (Dr.), "Sort Name*", and "Title/Addr".

Report ID	0	Date*	08/09/2018
Contacted ID	42831	Dr.	
<input checked="" type="checkbox"/> Joint			
Spouse ID	160860	Mrs.	
Contact Type*	S	Pers Scheduled Visit/Meeting	
Purpose	I	1st Time Cnt	
Unit	UDE	University Development	
Author*			
Description*			
Text			
Program			
Prospect ID	2662		Fayetteville Campus
Proposal ID			
Name*	Dr.		
Sort Name*			
Title/Addr			

Adding Contact Reports

Enter the ID of the DOD who made the contact in the Author field (additional staff persons can be recorded after the Contact Report has been saved).

Be as specific as possible in the Description.

Try to answer the following in Text:

- Who
- What
- When
- Where
- Why

Link the contact report to Proposal, if applicable.

Enter Contact Reports no later than the 5th of the next month.

The screenshot shows a web-based form for adding a contact report. The form is titled "Contact Report (80086)" and has a blue header bar with "Save", "Actions", and "Help" buttons. The form fields are as follows:

- Report ID:** 0
- Date*:** 08/09/2018
- Contacted ID:** 42831
- Joint**
- Spouse ID:** 160860
- Contact Type*:** S (Pers Scheduled Visit/Meeting)
- Purpose*:** I (1st Time Cnt)
- Unit:** UDE (University Development)
- Author*:** 667652
- Description*:** Meeting to discuss Campus Bounce Houses
- Text:** I met [redacted] at McDonalds to discuss the recent Bounce House initiative...
- Program:** [empty]
- Prospect ID:** 2662 (Fayetteville Campus)
- Proposal ID:** 19408 (Fayetteville Campus - - Outright Gift)
- Name*:** [redacted]
- Sort Name*:** [redacted]
- Title/Addr:** [empty]

Annotations with arrows point from the text on the left to the following fields in the form:

- From "Enter the ID of the DOD who made the contact in the Author field..." to the Author* field.
- From "Be as specific as possible in the Description." to the Description* field.
- From "Try to answer the following in Text:" to the Text field.
- From "Link the contact report to Proposal, if applicable." to the Proposal ID field.
- From "Enter Contact Reports no later than the 5th of the next month." to the Date* field.

Adding Contact Reports

After saving your Contact Report, the navigation tree will contain links that enable you to record additional information.

Contact Report

Mr. [REDACTED] 686303

Contact Type Pers Scheduled Visit/Meeting (Aug 09, 2018)

Purpose 1st Time Cnt

Add details to this Contact Report, following the guidelines provided below.

- You can attach a Document to a Contact Report.
- You can enter [Staff Credit](#) details to identify who gets credit for this activity.
- Identify those on the [Distribution List](#) for receiving a copy of this Contact Report.
- You can tie one or more follow-up [Tasks](#) to this Contact Report.
- Use [Entity Update](#) to record updated biographic information for contacted entities.

Save completed successfully

Contact Report (80086) Save New Actions Help

Report ID	151854	Date*	08/09/2018
Contacted ID	686303		[REDACTED]
	<input type="checkbox"/> Joint		
Spouse ID			
Contact Type*	S		Pers Scheduled Visit/Meeting
Purpose*	I		1st Time Cnt

Adding Contact Reports

If more than one DOD should receive credit for this contact report, then click on the Staff Credit link in the navigation tree to add the other Directors of Development.

The screenshot shows a web application interface for adding contact reports. On the left, a navigation tree is visible with the following items: 'Contact Report', 'Detail', 'Staff Credit 1', and 'Tasks'. An arrow points from the text on the left to the 'Staff Credit 1' link. The main content area displays a 'Contact Report' form. The form has a header bar with 'Contact Report' and 'Actions Print'. Below the header, the contact information is displayed: 'Mr. [redacted] 686303', 'Contact Type: Pers Scheduled Visit/Meeting (Aug 09, 2018)', and 'Purpose: 1st Time Cnt'. A yellow message bar indicates 'Save completed successfully'. Below the message bar, there is a section for 'Contact Report (80086)' with a 'Save New Actions Help' bar. The form fields are: 'Report ID: 151854', 'Date*: 08/09/2018', 'Contacted ID: 686303', 'Spouse ID: [redacted]', 'Contact Type*: S', and 'Purpose*: I'. The 'Contacted ID' field is linked to 'Mr. [redacted]'. The 'Contact Type*' dropdown is set to 'S' and 'Pers Scheduled Visit/Meeting'. The 'Purpose*' dropdown is set to 'I' and '1st Time Cnt'. There is also a 'Joint' checkbox which is unchecked.

Adding Contact Reports

Select "New" on the Contact Report Credit form.

Contact Report Credit Actions

Mr. [redacted] #686303
Contact Type Pers Scheduled Visit/Meeting (Aug 09, 2018)
Purpose 1st Time Cnt

Contact Report Credit (80080) (1/1) Save New Actions Help

Person Credited	Author	Credit	Participation
M [redacted]	<input checked="" type="checkbox"/> Author	Visits	

Staff* 667652 Mrs. [redacted] Author

Credit Type* 3 Visits

Participation

Unit

Comment

Adding Contact Reports

Select the DOD or other staff person who should receive credit for this contact from the drop-down menu on the 'Staff' field.

Select a Credit Type and Participation code.

Click 'Save' on the form header.

The screenshot shows a web form titled "Contact Report Credit" with an "Actions" button in the top right. The form contains the following fields:

- Mr. [redacted] #686303**
- Contact Type:** Pers Scheduled Visit/Meeting (Aug 09, 2018)
- Purpose:** 1st Time Cnt

Below these fields is a table with the following columns: **Person Credited**, **Author**, **Credit**, and **Participation**. The first row contains: **Mrs. [redacted]**, **Author**, **Visits**, and an empty cell. The table has a vertical scrollbar on the right.

At the bottom of the form, a dropdown menu is open for the **Staff*** field. The dropdown list includes:

- (none)
- Mrs. [redacted] 932)
- Ms. [redacted]
- Ms. [redacted] s (599300)
- Mrs. [redacted] 64004)

Other fields visible in the form include **Credit Type***, **Participation**, **Unit**, and **Comment**. A "Save" button is located in the header of the table area.

Adding Contact Reports



Lab #2 in Contact Reports Workbook



Questions?



Reports & Tricks



Reports & Tricks

Contact Reports at the Entity Level

Access the “Contact Report” hyperlink in the Nav Tree under Prospect Tracking at the Entity Level.

Change the results format defaults to “Contact Report Lookup List.”

Lookups

- Saved Criteria...
- ▶ Biographic
- ▶ Event
- ▶ Gift
- ▼ Prospect Tracking
 - Assignment
 - Beneficiary
 - Category
 - Contact Person
 - Contact Rpt**
 - Cntract/Grant
 - Demographic
 - Evaluation
 - Interest
 - Note
 - Phil Affnty
 - Program
 - Proposal
 - Proposal Purpose
 - Prospects
 - Security

Contact Report Actions

1. Choose a template (optional)
2. Select results format*
3. Select output type*
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Contact Report (90048) Help

Contacted	Equal	<input type="text"/>
Name	Contains	<input type="text"/>
Contact Type	Equal	(All) <input type="text"/>
Purpose	Equal	(All) <input type="text"/>
Unit	Equal	(All) <input type="text"/>
Contact Credit ID	Equal	<input type="text"/>
Program	Equal	(All) <input type="text"/>
Author	Equal	<input type="text"/>
Joint	Equal	(All) <input type="text"/>
2nd ID	Equal	<input type="text"/>
Contact Date	Equal	<input type="text"/>

Reports & Tricks

Contact Reports at the Prospect Level

To search for all Prospects you have contacted:

1. Change “Choose a Template (optional)” to Prospect – Contact Report
2. Change “Select Results Format” to Prospect Lookup List
3. Enter your ID in the “Contact Credit ID” field of the search

Lookups Actions

1. Choose a template (optional)

2. Select results format*

3. Select output type*

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

Contact Report Lookup (70047) Help

Contacted	Equal	<input type="text"/>
Contact Type	Equal	(All)
Purpose	Equal	(All)
Unit	Equal	(All)
Contact Credit ID	Equal	667652
Contact Start Date*	Greater Than I	<input type="text"/>
Contact End Date	Less Than Equ	<input type="text"/>
Contact Credit Unit	Equal	(All)

Assignment Lookup (70100) Help

Assignment Type	Equal	(All)
Assign Status	Equal	(All)
Assign ID	Equal	<input type="text"/>
Priority	Equal	(All)
Unit	Equal	(All)

Reports & Tricks

Crystal Reports also allows you to pull a list of all of your Report of Contacts

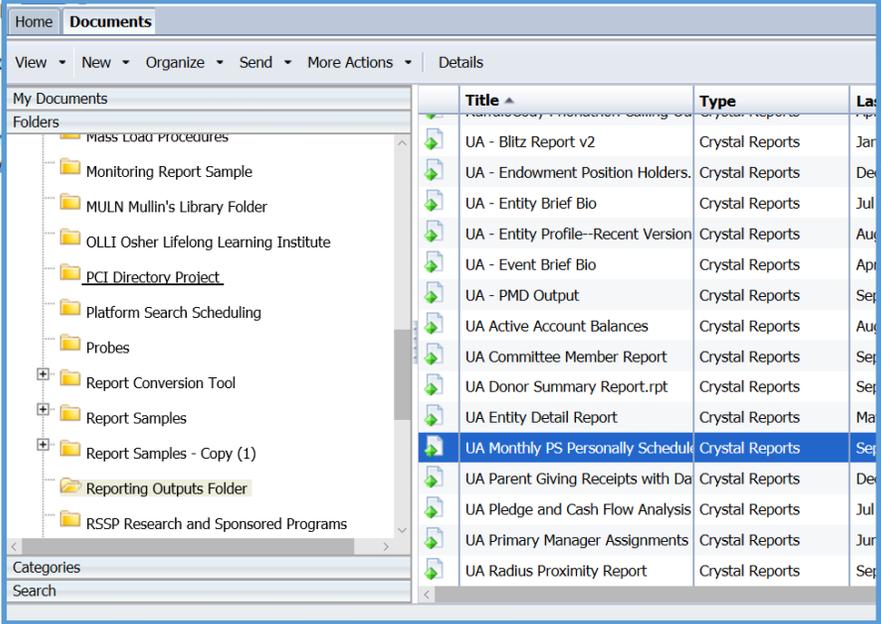


University of Arkansas Advance System Report
Report of Contacts by DOD Reports

August 03, 2017

<u>Contact ID and Name</u>	<u>Contact Date</u>	<u>Contact Description</u>	<u>Top</u>	<u>Contact Type</u>	<u>Call Report Summary</u>
Name		PM Manager	PrspStage	Rpt Purpose	AS GS
0000220193 Mr. J. [REDACTED] Mrs. [REDACTED]	03/02/2016 Dallas TX	Meeting in Dallas [REDACTED]	N	Pers Scheduled Visit Active Cultivati	Wants stronger Cultivation

Page 1 of 4



Located in: Reporting Outputs Folder of Crystal.

Report Name: UA Monthly PS Personally
Schedule Contacts

Reports & Tricks



Lab #3 in Contact Reports Workbook



Questions?



How Are They Used?

DOD Metrics Summary Reports are delivered to Development Leadership every month on the 6th

Contact Reports provide the information necessary to track DOD activity

Active Prospects are Reported

As are Wealth Engine Possible Prospects

And...the Contact Reports Entered

And...finally...the Proposals Entered

Print Date: 6/6/20

University of Arkansas Goal Tracker
Fiscal Year 2017 07/01/2016 -- 05/31/2017

GIVING		PROSPECT PORTFOLIO									
PROPOSAL DETAILS											
				Ask Amount	Granted Amt	Description					
Current Fiscal Year											
Level 1											
WE Data											
		23644	F VPR	500,000.00	500,000.00	09/02/2016	Br				
JIT PROSPE	& Everett	23801	D WCB	800,000.00	0.00	12/14/2016	S				
		23807	E D WCB	100,000.00	0.00	03/06/2017	Ac				
Top Re		23796	D WCB	1,500,000.00	0.00	07/08/2016	Er				
Alumni	rust	23650	F VPR	100,000.00	100,000.00	09/02/2016	Br				
Friend	m Market	23642	S WCB	50,000.00	0.00	09/29/2016	FI				
Former Pare		23515	E F WCB	25,000.00	25,000.00	10/14/2016	G				
Staff		23812	E D WCB	100,000.00	0.00	03/08/2017	R				
Former Staff		23849	E S WCB	200,000.00	0.00	04/07/2017	T				
Former Fac				3,375,000.00	625,000.00						
Alumni No-d											
Level 2											
JIT PROSPE		23869	F WCB	12,000.00	12,000.00	09/01/2016	A				
		23735	F WCB	12,000.00	12,000.00	10/18/2016	A				
		23665	F VPR	10,000.00	10,000.00	07/27/2016	E				
P20	ulting, LLC	23740	F WCB	12,000.00	12,000.00	10/18/2016	A				
Excellent		23804	F WCB	12,000.00	8,000.00	09/01/2016	A				
Above Avera	Logistics	23709	F WCB	10,000.00	10,000.00	11/10/2016	S				
				68,000.00	64,000.00						
Other											
JIT PROSPE		23742	F WCB	10,000.00	10,000.00	11/10/2016	S				
		23356	F WCB	25,000.00	25,000.00	07/01/2016	E				
		23389	F WCB	10,000.00	10,000.00	07/01/2016	In				
		23745	F WCB	10,000.00	10,000.00	11/10/2016	S				
		23859	F WCB	10,000.00	10,000.00	11/10/2016	S				
				65,000.00	65,000.00						
Giving Cap				3,508,000.00	754,000.00						
Previous Years outstanding as of 07/01/2016											
Level 1											
\$5MM+											
\$1MM - \$5M											
\$500K - \$1MM											
\$300K - \$500K											
				29							
				83							

Mr. Sam Pittman 05/23/2017 Visit in Dallas

Mrs. Missy Pittman Pers Scheduled Visit / Meeting General Cultivation Planning

Sam is still struggling financially due to the bond market in Texas. He has not yet sold his lake house. Next step: Ask him to make his annual gift to Molly Rapert scholarship a pocket gift for All in for Arkansas

Contact Info

