UNIVERSITY OF ARKANSAS

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

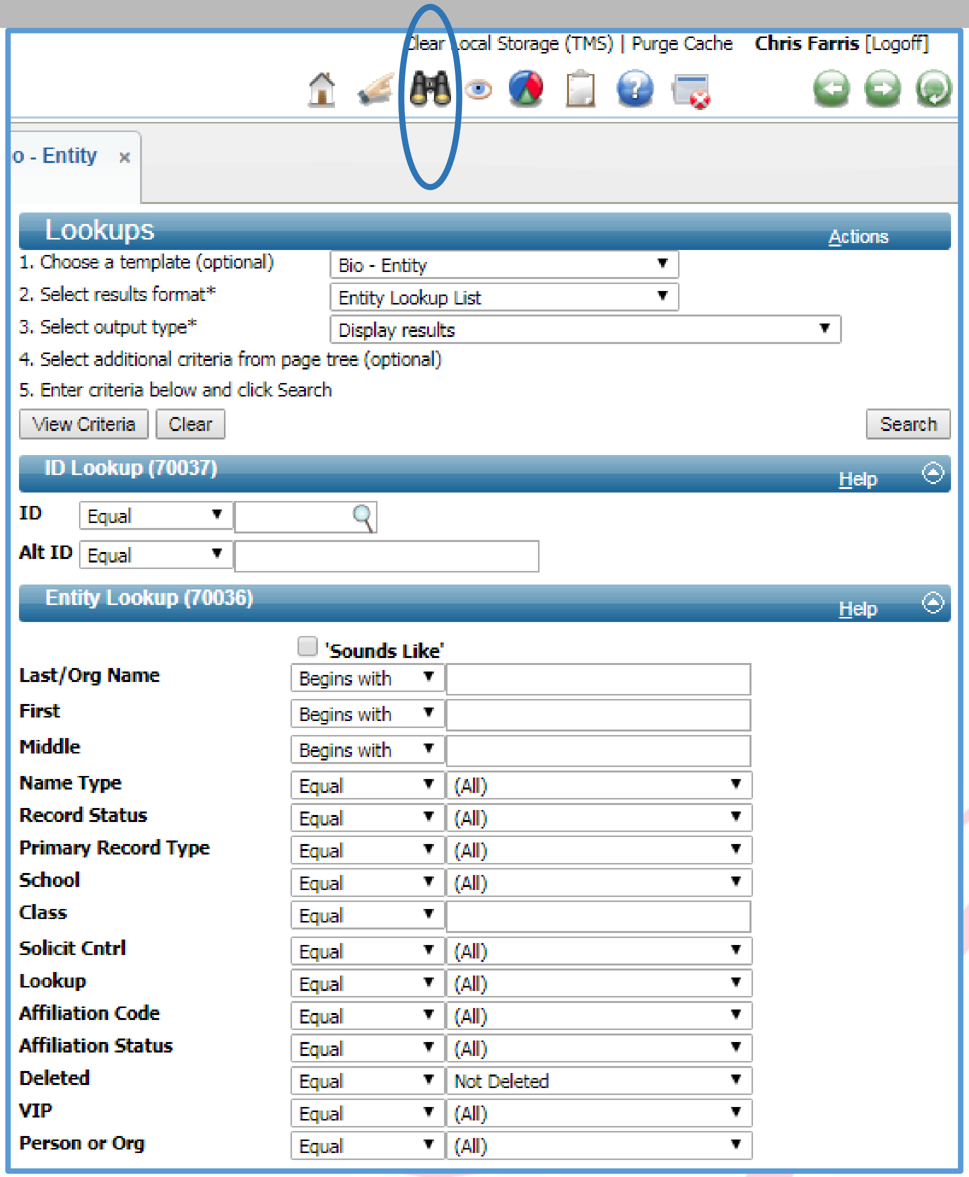
An entity's Contact Reports can be viewed on the Entity Overview screen.

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

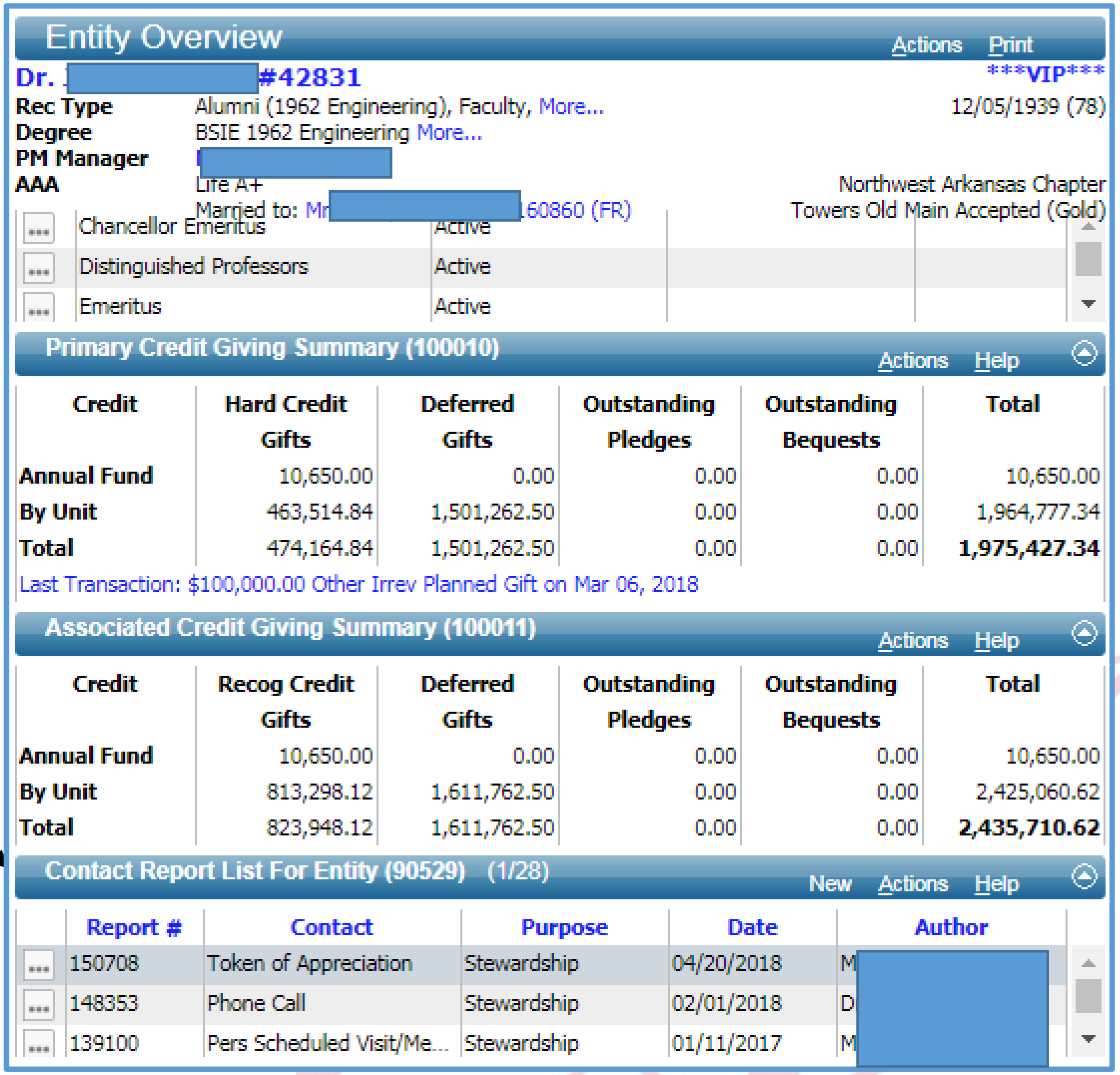
Perform a Lookup for the Entity.

Access the Entity Overview screen.

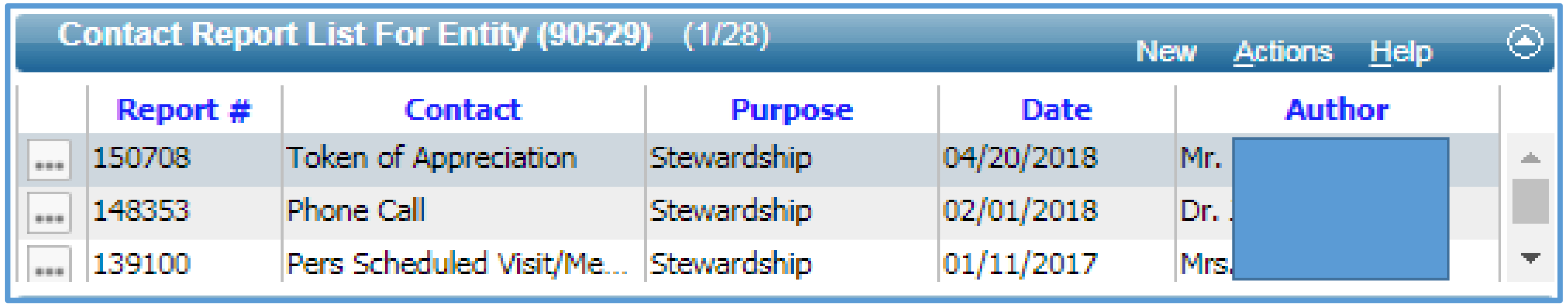


Viewing Contact Reports

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



Viewing Contact Reports

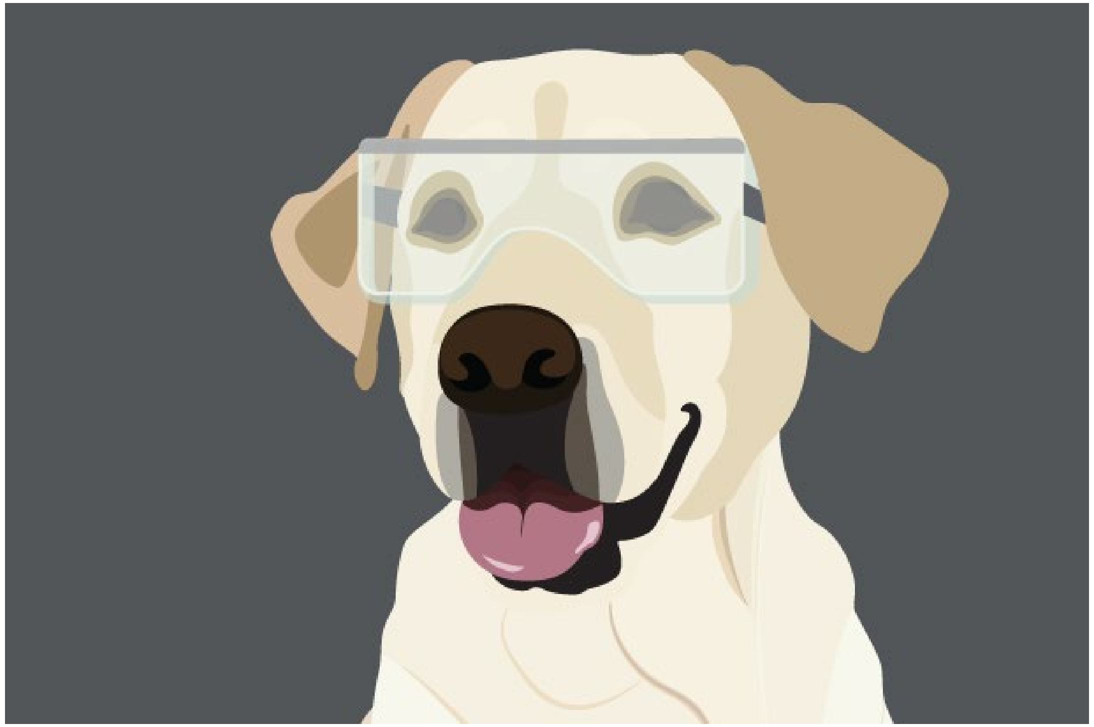


Contact Report List For Entity (90529) (1/28) New Actions Help

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

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.

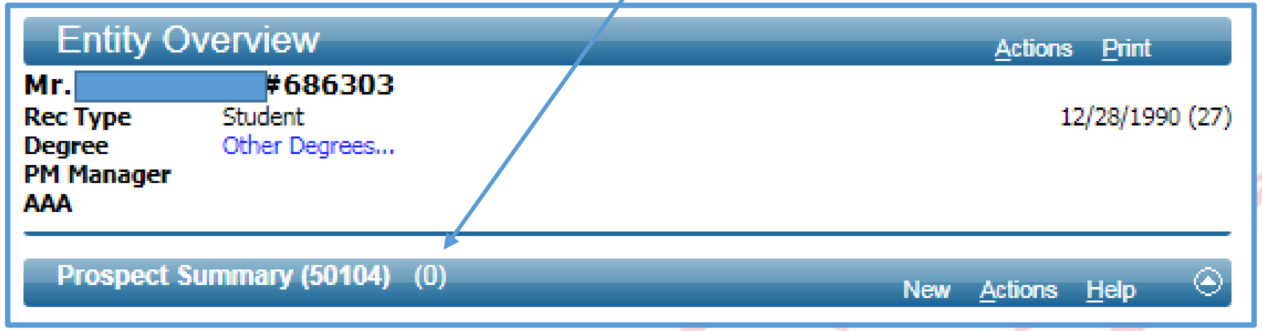
Adding Contact Reports

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.



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

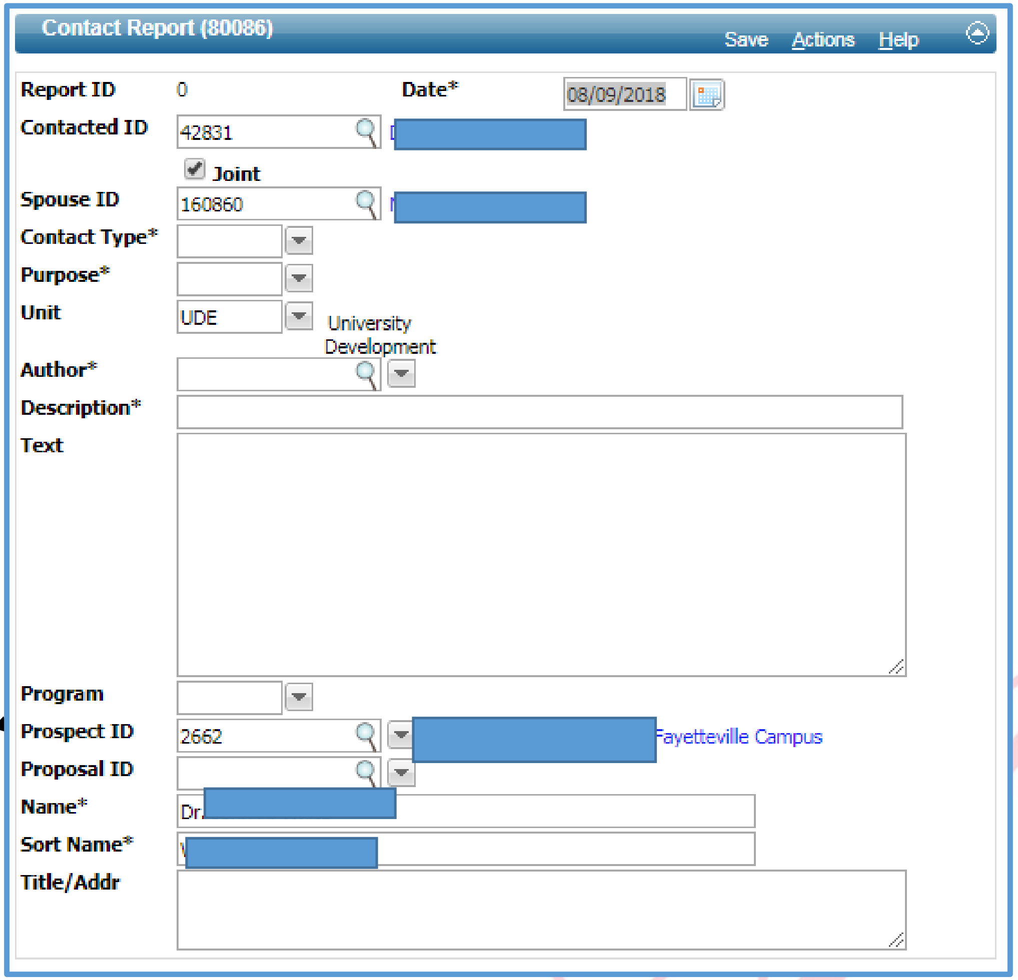
Adding Contact Reports

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.



Adding Contact Reports

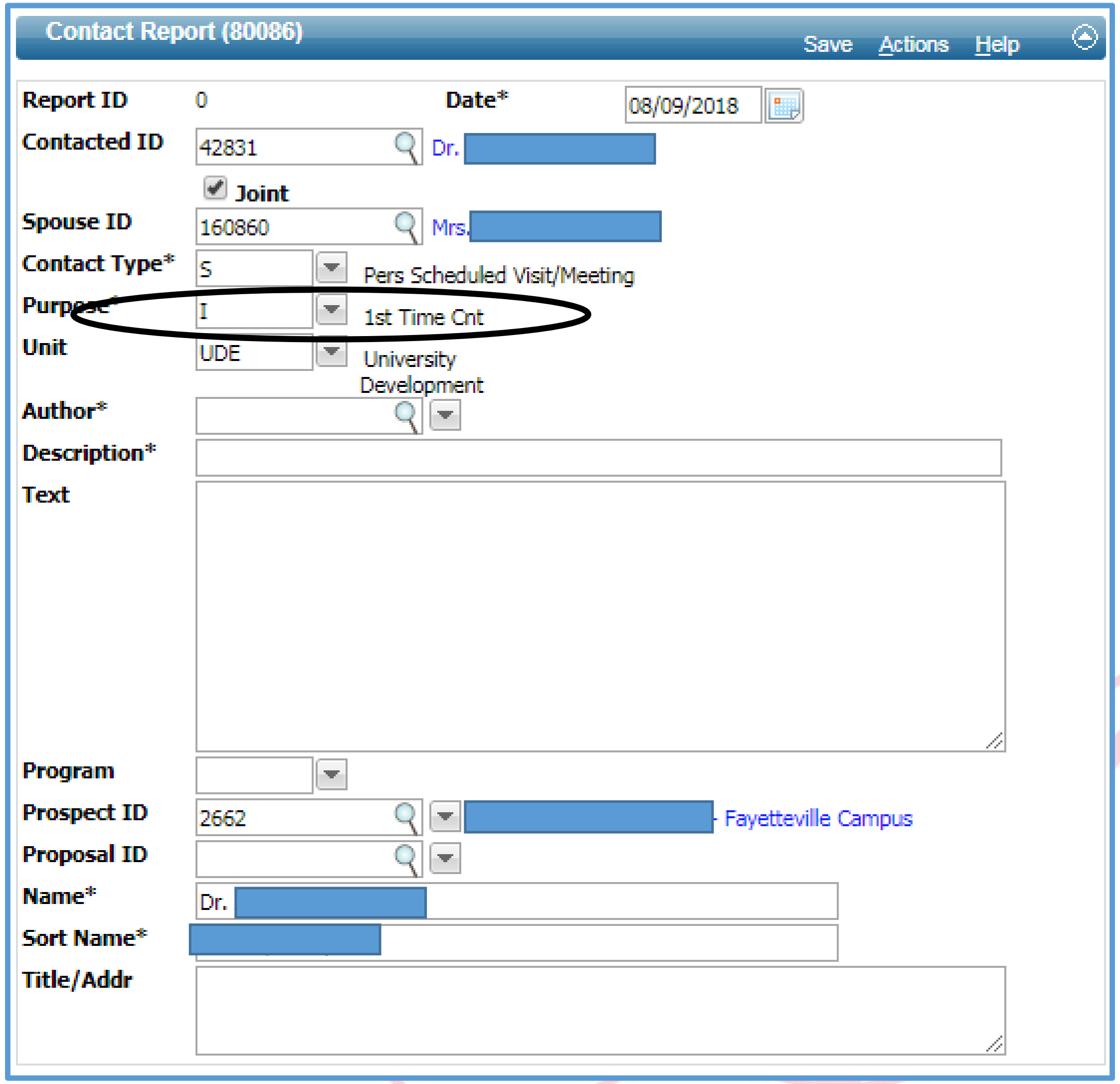
Contacted ID defaults to current entity ID/Name.

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.



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).

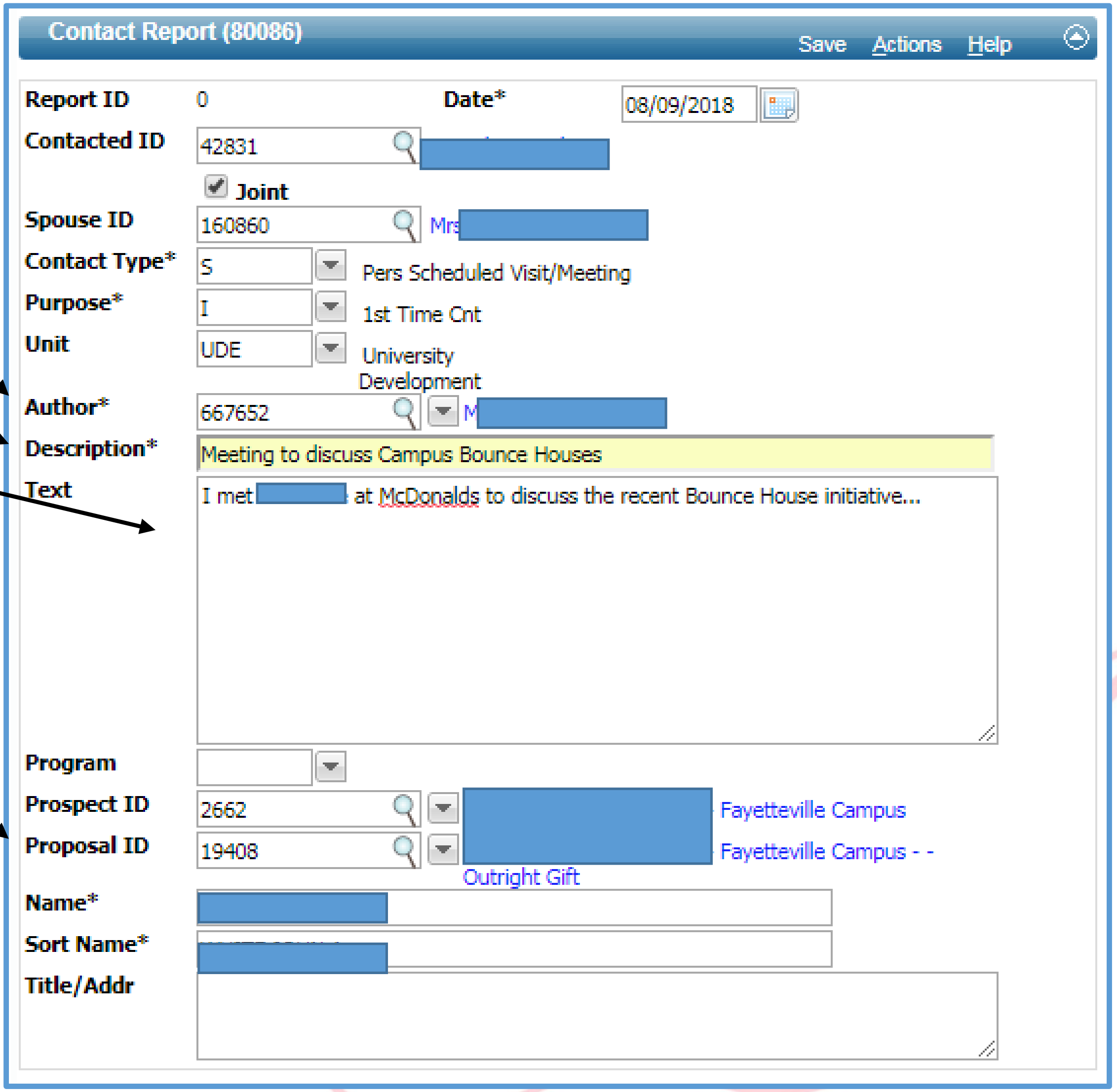
Be as specific as possible in the Description.

Try to answer the following in Text:

- Who
- What
- When
- Where
- Why

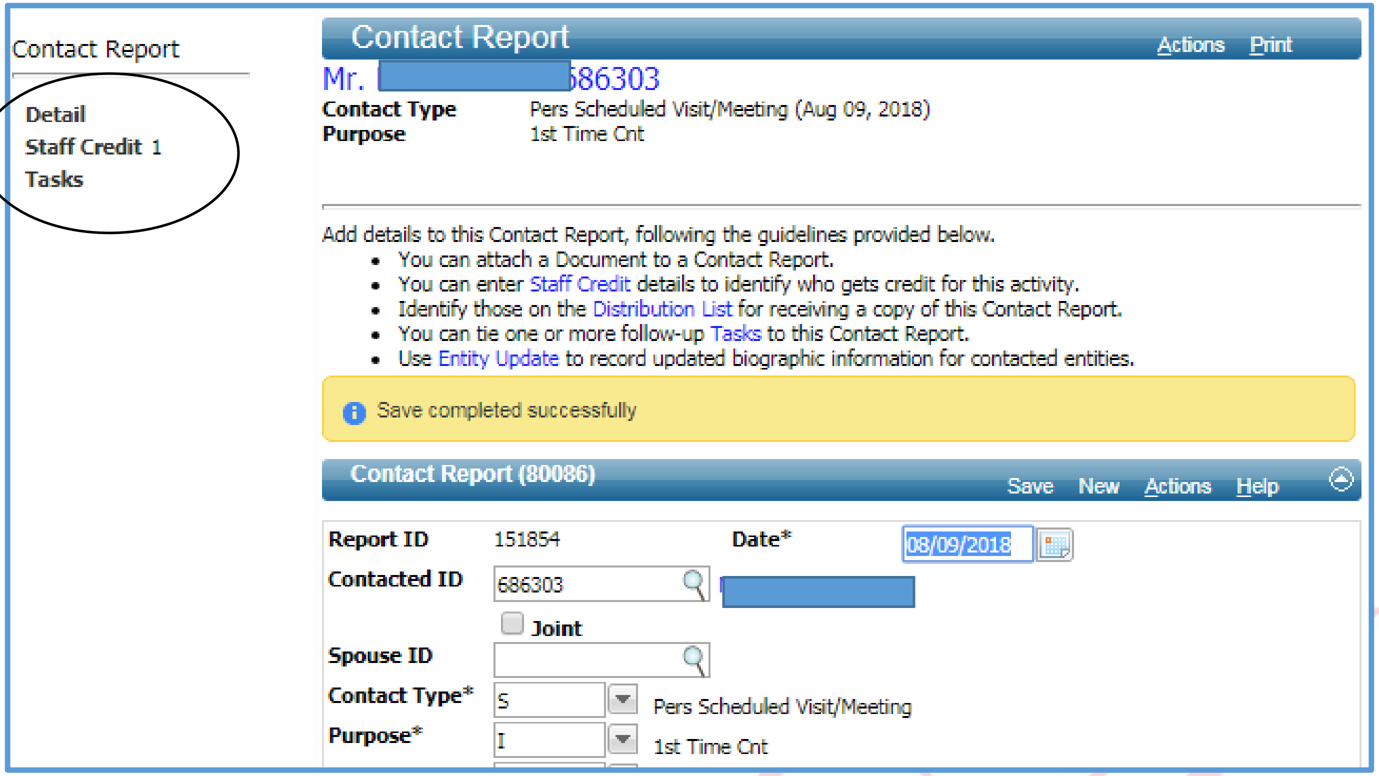
Link the contact report to Proposal, if applicable.

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



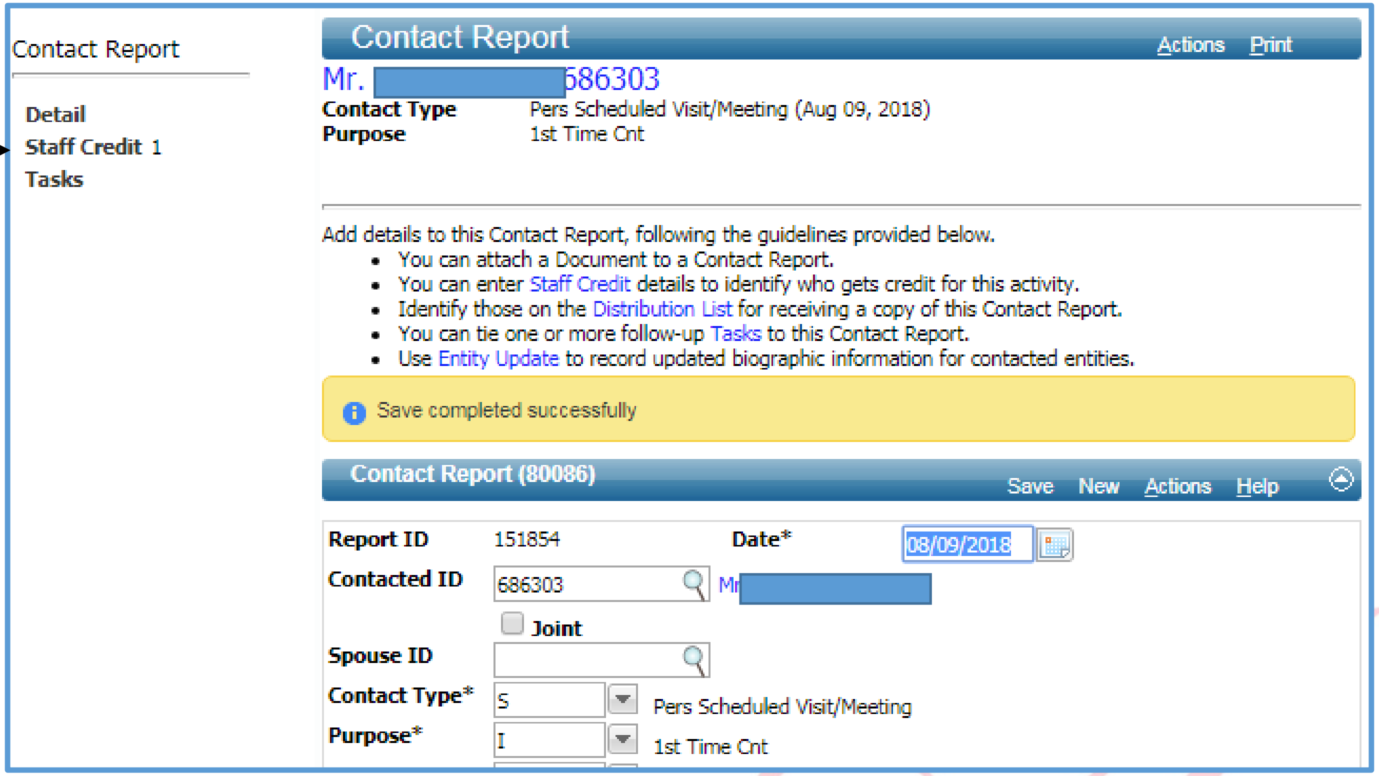
Adding Contact Reports

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



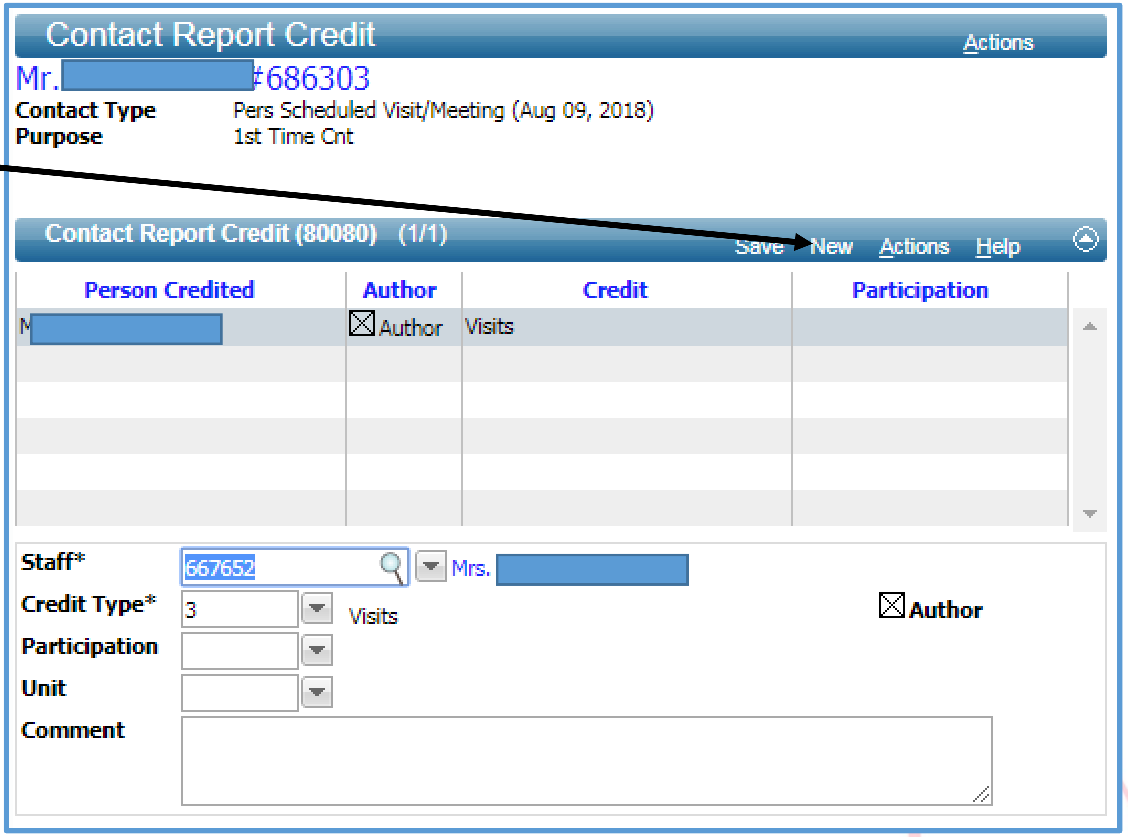
Adding Contact Reports

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.



Adding Contact Reports

Select “New” on the Contact Report Credit form.

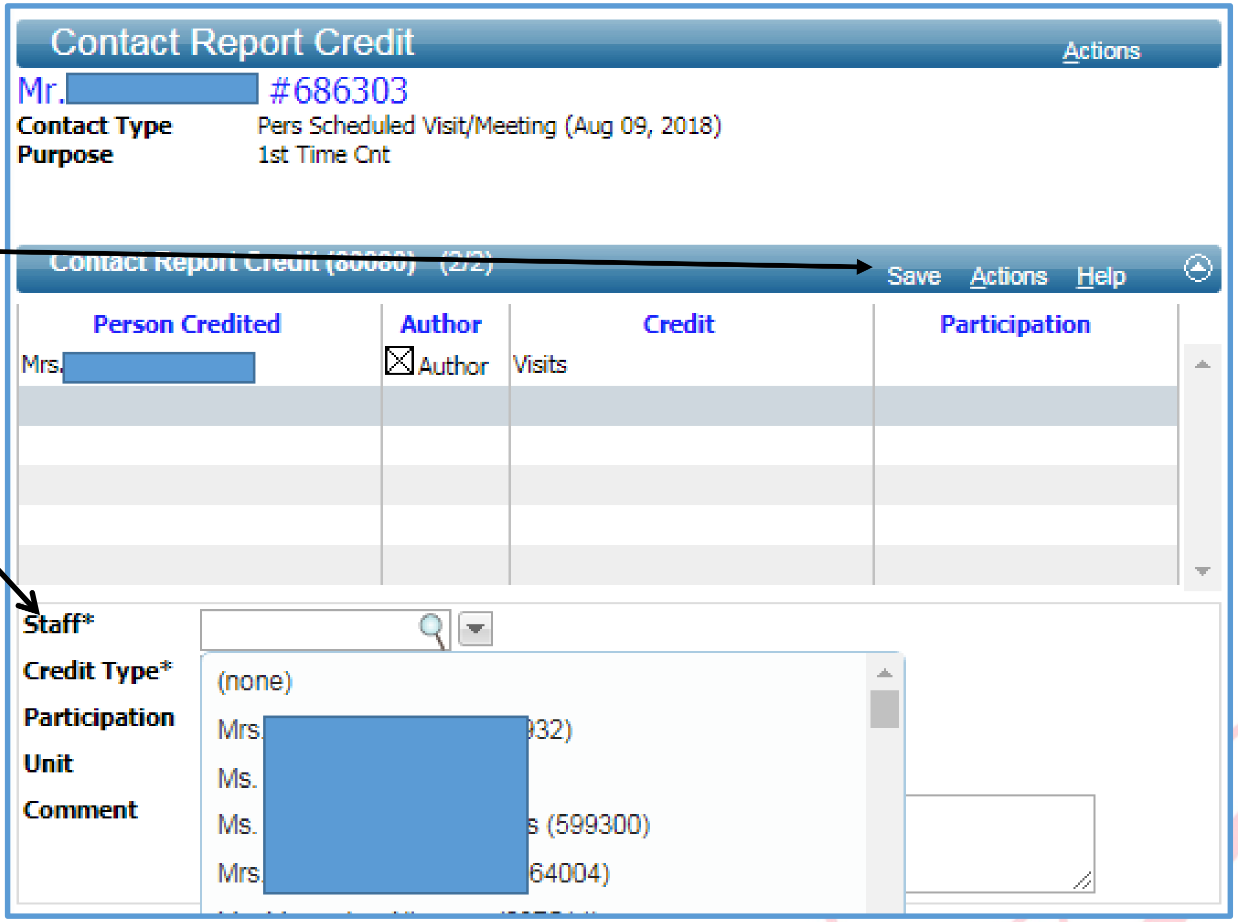


Adding Contact Reports

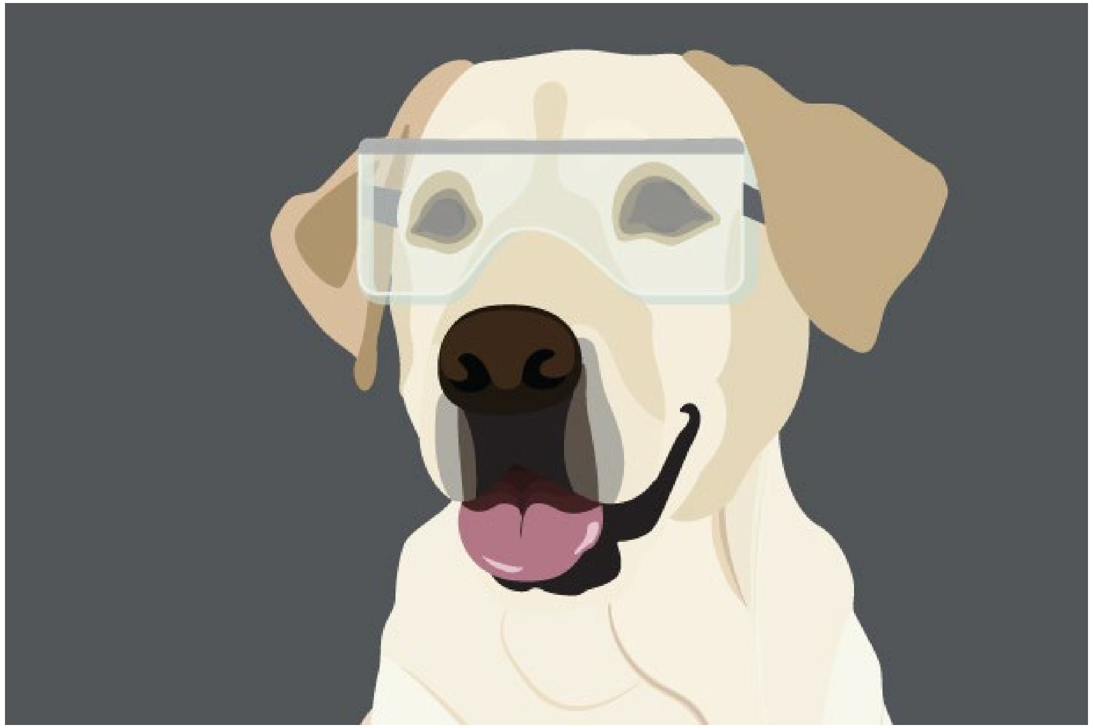
Select the DOD or other staff person who should receive credit for this contact from the drop-down menu on the 'Staff' field.

Select a Credit Type and Participation code.

Click 'Save' on the form header.



Adding Contact Reports



Lab #2 in Contact Reports Workbook

Questions?

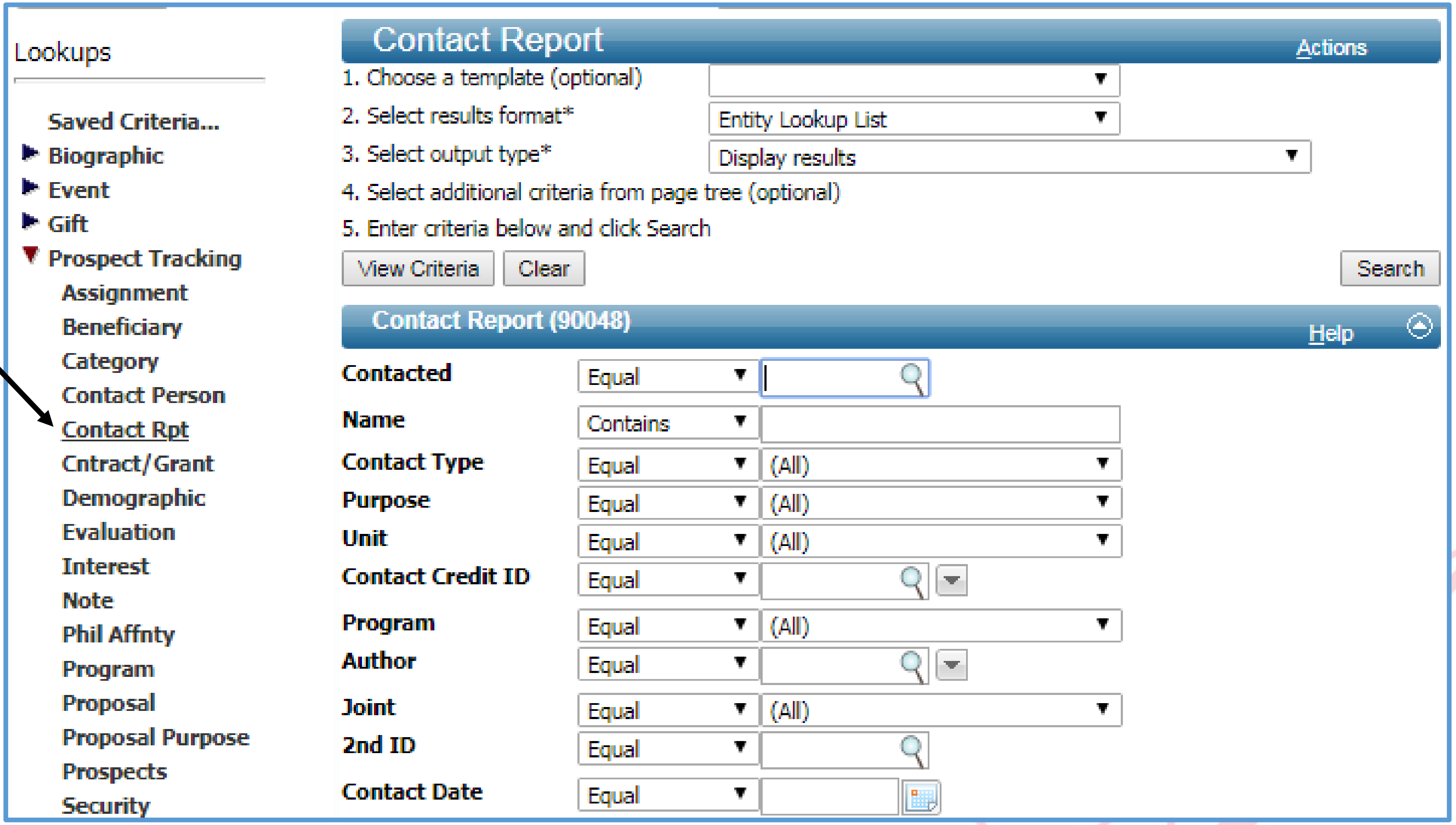
Reports & Tricks

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."

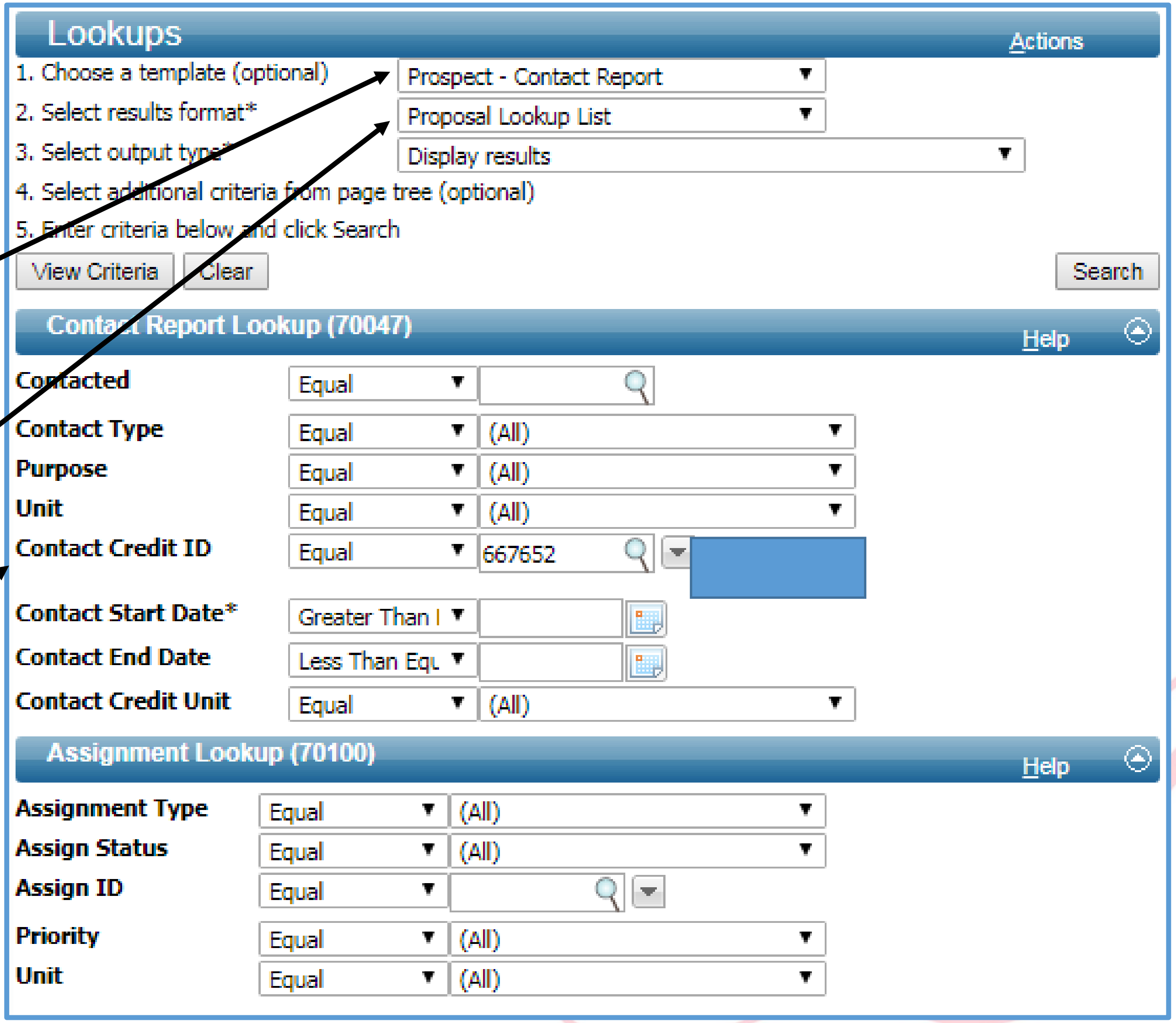


Reports & Tricks

Contact Reports at the Prospect Level

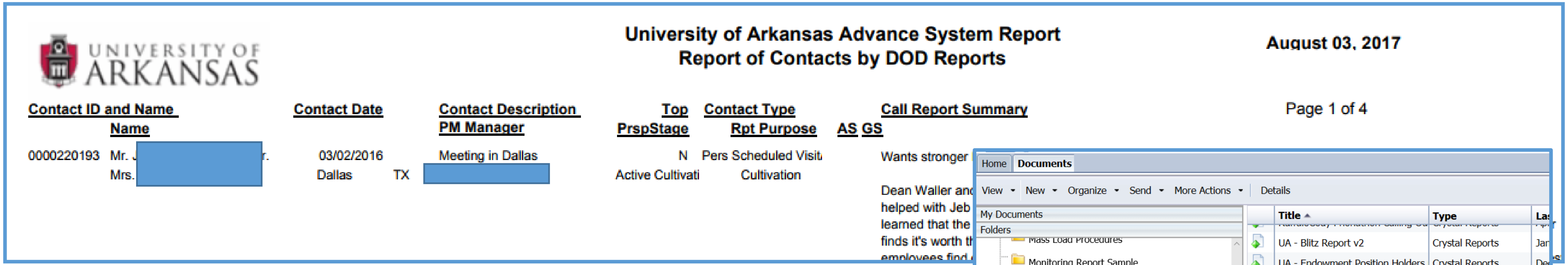
To search for all Prospects you have contacted:

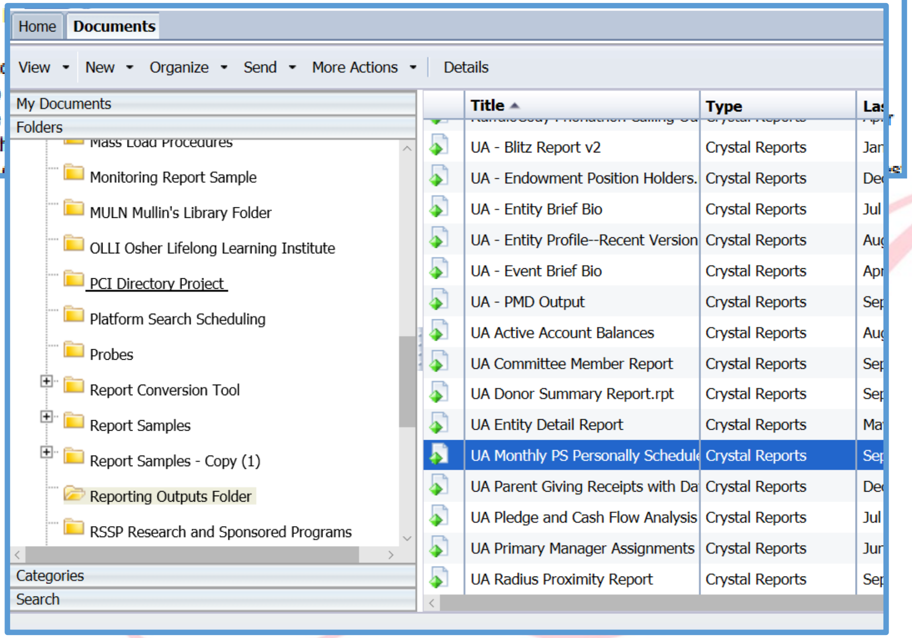
1. Change "Choose a Template (optional)" to Prospect – Contact Report
2. Change "Select Results Format" to Prospect Lookup List
3. Enter your ID in the "Contact Credit ID" field of the search



Reports & Tricks

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

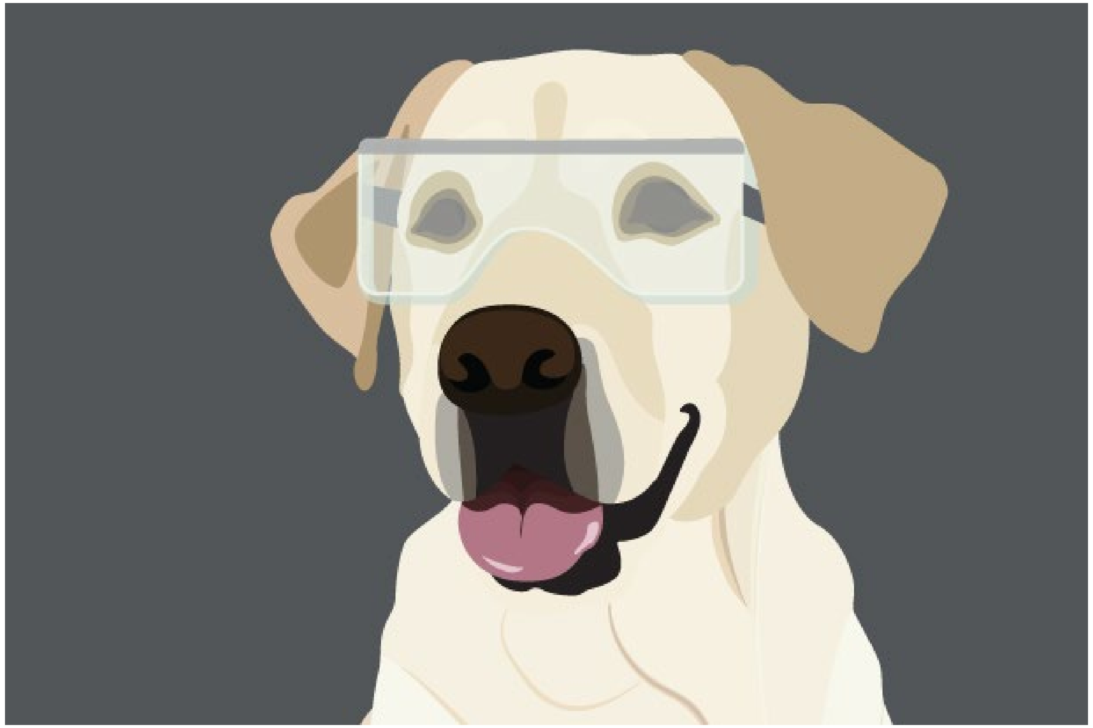




Located in: Reporting Outputs Folder of Crystal.

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

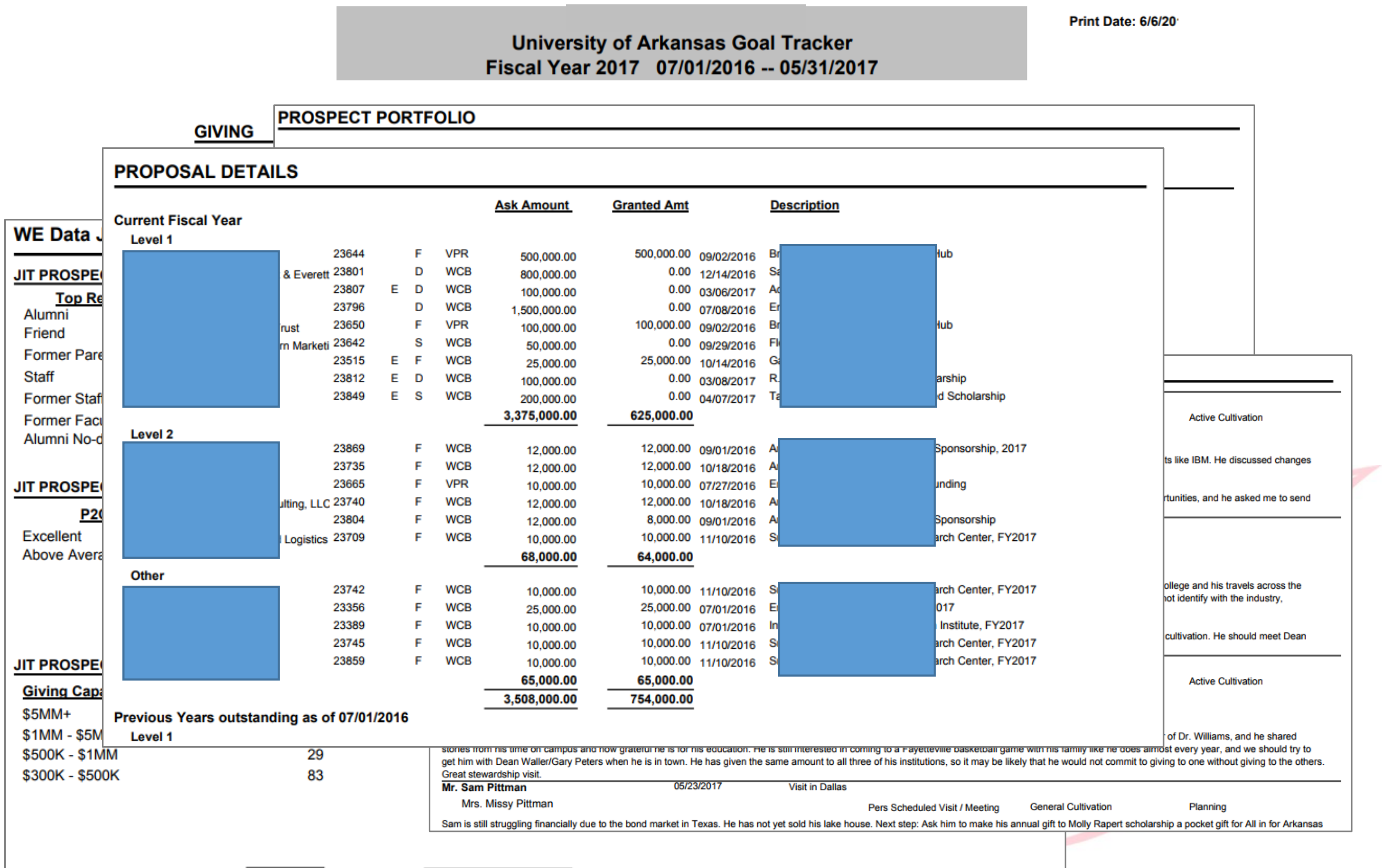
Contact Reports provide the information necessary to track DOD activity

Active Prospects are Reported

As are Wealth Engine Possible Prospects

And…the Contact Reports Entered

And…finally…the Proposals Entered



Contact Info