



Creating a Contact Report

A contact report is a record of a meeting, conversation, and/or correspondence between development staff and a prospect. Typically, a contact report documents two-way communication that moves the prospect further along the Donor Continuum towards making a gift; however, you may have other contact reports recording other activities, such as phone call or an email.

1. From the Home page tree, under CUF Lookups, click **Entity**.
2. In the **ID Number** box, type the Entity ID and click **Run Report**.
3. Click the link to the Entity record. The Entity Overview page appears.
4. From the Entity page tree, click **Contact Rpts**. The Contact Reports page appears.
5. From the Contacts that Move a Donor form header, click **New**. The Contact Report (New) page appears.
6. In the **Date** field, enter or select the date of the actual contact. It is preferable to have contact reports entered no later than two weeks after the actual contact.
7. Select the **Joint/2nd ID** checkbox. If there is an ID for another entity, such as a spouse, the system will supply it.
8. If the discussion with the prospect affected cultivation so as to move the donor closer to making a gift, select the **Contact Moves Donor Towards a Gift** check box. When viewing contact reports, these contacts are listed first.
9. From the **Contact Type** list, select the type of contact that occurred:
 - **Visits**, either personal or as a group (included other team members or faculty and was not an event)
 - **Mail**, either postal or electronic
 - **Phone calls**, may be direct calls, conference calls or messages left
 - **3rd Party Contact**, or contact with a person who is facilitating your relationship with the prospect.

Take a Shortcut:



1. Click **My Prospects** shortcut.
2. Click the Prospect Name link.

Note: Asterisks indicate contacts that were not specifically two-way communication directly with the prospect. These types of contacts are not included in productivity reporting.

10. From the **Purpose** list, select a value reflecting the objective of the contact

<ul style="list-style-type: none"> • Ask: use with Proposal CRs • Close Gift: get commitment on a gift later than the original Ask • Complaint: record negative feedback or criticism • Cultivate: work toward gift • Direct Mail: direct mail solicitation • Disqualify: prospect should no longer be considered for giving (enter details in Text box) • Diversity Project: discuss CU/CUF Diversity initiative • ESR: discuss donor's Endowment Status Report • Follow-up • Matching Gift: Created when HEP sheets are sent to donors • Negotiation: discussion of gift changes • Other: only when no other purpose applies 	<ul style="list-style-type: none"> • Planned Giving: discuss planned gift • *Pre-call/Appointment: introductory letter or call • Processing: used by Processing only • Qualify: determine inclination or capacity for giving • Report: create report per donor's request • SJMC Transition: discuss Journalism school transition • Stewardship: post-gift activity immediately following a gift and no expectation of future gift. Use cultivation if working toward next gift. • Suspense: Yet to be defined. • *Thank You: capture an acknowledgement letter • Trustee Call: Do not use – can be used to pull a report of trustee calls to your prospects • Volunteer Involvement: inviting someone to be on a board or committee
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11. From the **Attitude** list, indicate the feeling or emotion of the donor reflected during this contact.
12. From the **Initiated By** list, indicate who initiated the contact.
13. From the **Author** list, select the staff member who actually met with or spoke to the prospect.



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14. In the **Description** box, type a specific and concise description of what this contact report is about. This description is pulled by and displayed in some reports.
15. If you are linking this contact report to a proposal, select the **Prospect ID** and the **Proposal ID** from the corresponding list boxes.
16. In the **Text** box, type details about the contact. Include the next move you will be pursuing.
17. Click **Save** from the form header. The Contact Report is displayed at the top of the list. Advance sends an email to the Prospect Manager and the Prospect Team Members that a Contact Report has been created.

After Saving a Contact Report...

Attach Documentation

If you would like to attach a document to this report:

1. Scroll down to the Attachments form, point to **Actions** and click **New Doc**.
2. Click **Browse** to locate and select the file containing your documentation.
3. Click **Attach File**.

Distribute the Contact Report to Other Staff

After you save your Contact Report, the Prospect Manager and any additional Prospect Team Members will be notified. If you want to notify other CUF staff:

1. From the Contact Report page tree, click **Distribution List**.
2. Click **New**.
3. From the **Staff** drop down list, select the staff member you would like to add.
4. Click **Save** from the form header.

Add Your Representative Information (Support Staff)

If you are support staff entering this contact report on behalf of another staff member, you can supply your information:

1. From the Contact Report page tree, click **Rep Information**.
2. Type your **Rep ID** into the appropriate box.
3. From the **Rep Type** list box, select **Staff on Behalf of Author**.
4. Click **Save** from the form header.

Add Staff Credit to the Contact

You can share credit on this contact with another staff member, including University staff:

1. From the Contact Report page tree, click **Staff Credit**.
2. Click **New**.
3. From the **Staff** drop down list, select the staff member you would like to add.
4. From the **Credit Type** list, select the type of contact the staff member performed.
5. Click **Save** from the form header.