At-A-Glance: Contact Report Entry

Entering Contact Reports

Contact Reports are records of the university's substantial interaction with an entity. A contact report should be created any time a CWRU representative speaks with an entity and an important piece of information is exchanged (i.e. discussion about a possible gift, interest in joining a committee, etc). Contact Reports are also used to detail a Development Officer's visit with a prospect. Ensure all contact reports are factual, clear, and free of errors. If a contact report needs to be deleted for some reason, please email uris-pros@case.edu with the explanation for deletion. Make sure to include the entity ID & contact report ID.

The Contact Reports Entry Screen can be found by searching on an entity, scrolling down to Contact Report List for Entity and clicking New.

Required Fields (Highlighted)

Date	Date of contact/visit
Contact Type	Type of contact
Purpose	Reason for contact
Initiated By	Who initiated the contact
Author	Name of CWRU employee who made the contact (If a DA is making appointment attempt phone calls for a DO they support, the DO's name should be listed as author to ensure the contact is reflected on their performance report).
Description	Subject/headline of the contact report
Text	Detail of the contact report

Additional Fields

Joint Button	Clicking "Joint" will link contact rept. to spouse's entity record
2nd ID	Inserting a 2nd ID links the contact report to another entity's record such as a Foundation or Corporation. (i.e. If the entity is associated with a family foundation the user would want to ensure the contact report is also visible from the family foundation's entity record).
Prospect ID	If the entity has a prospect record, make sure to select the Prospect ID. This will ensure the contact report shows up on the Entity view as well as the Prospect Summary view.
Proposal ID	If the contact report pertains to an active proposal on the prospect's record, make sure to select the appropriate Proposal ID. This will ensure the contact report is visible from the Proposal screen.

Contact Report List For Entity (90529) (1/41)   New Actions Help

	Report #	Contact	Purpose	Date	Author
...	267770	Visit - Campus	Major Gift Ask	01/17/2013	Mr. David Pratt
...	264220	Visit - Home/Office	Cultivation	12/04/2012	Mr. David Pratt
...	264210	Visit - Home/Office	Stewardship	11/07/2012	Mr. David Pratt

Contact Report (New)   Actions

New Contact Report

Use this page to enter a new Contact Report, following the guidelines provided below.
- Enter details about recent activity using the Contact Report form below. When you have finished entering details press Save.
  2) You can enter Staff Credit details to identify who gets credit for this activity.   3) You can tie one or more follow-up Tasks to this Contact Report.   4) Use Entity Update to record updated biographic information for contacted entities.

Contact Report (80086)   Save Actions Help

Field	Value	
Report ID	0	Date* 02/22/2013
Contacted ID	19911	Mr. John Albert Krebs
	☐ Joint	
2nd ID		
Contact Type*	V	Visit - Home/Office
Purpose*	C	Cultivation
Initiated By*	STAFF	Staff/Adm Initiated
Outcome		
Attitude		
Author*	0000255802	Mr. David Pratt
Description*	Meeting to Discuss Endowment Entrepreneurship Support Proposal	
Text	Enter details from the meeting here.	
Prospect ID	3777	Mr. John Albert Krebs - WSOM Prospect
Proposal ID	32556	Mr. John Albert Krebs - WSOM Prospect - Entrepreneurship Support - Endowment
Name*	Mr. John Albert Krebs	
Sort Name*	KREBS,JOHN,ALBERT	

Clicking "Joint" will add this contact report to the spouse's entity record. Entering a "2nd ID" will attach it to another person, corporation or foundation's entity record.

Make sure to populate "Prospect ID" if the entity has an active prospect record and "Proposal ID" if the contact report pertains to an active proposal on the prospect's record.