

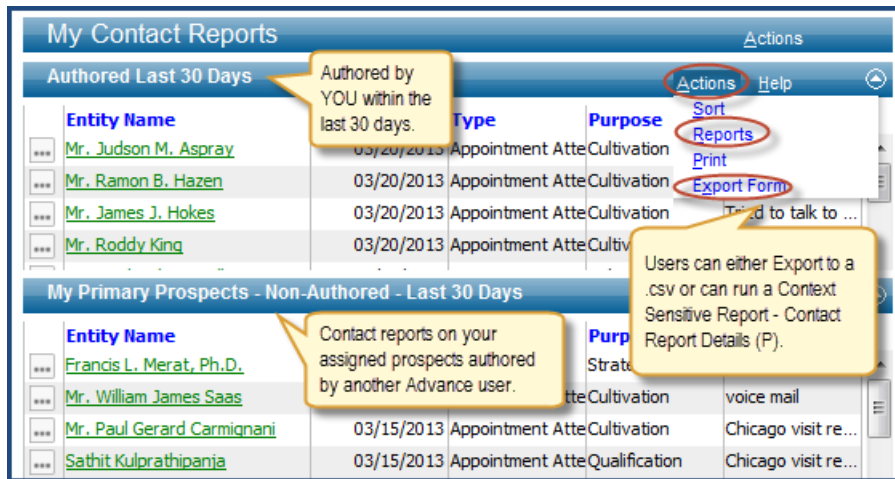
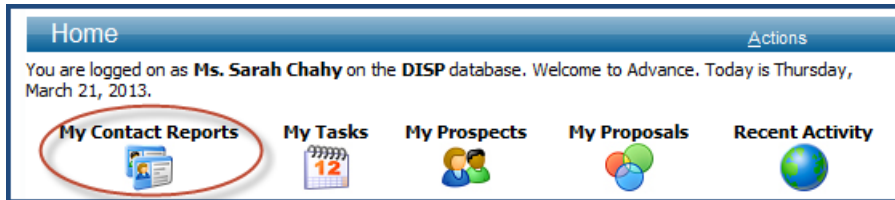
AT-A-GLANCE: REPORTING ON CONTACT REPORTS

REPORTING ON CONTACT REPORTS

Contact Report information can be extracted various ways from Advance. This At-A-Glance will cover two ways to pull this information from Advance.

1) MY CONTACT REPORTS ICON - HOME SCREEN

Development Officers can view contact reports they have authored in the last 30 days by navigating to their Home screen and clicking on My Contact Reports. This view also displays contact reports for your assigned prospects authored by other Advance users. From the My Contact Reports screen click Actions - Export to send the contact reports to a spreadsheet. An additional option is to select Actions - Reports and run the Contact Report Details (P) context sensitive report which will produce a .pdf. This process would need to be performed twice, once from the form header "Authored Last 30 days" and also from the form header "My Primary Prospects - Non-Authored Last 30 Days".



2) A LIST OF EVERY CONTACT REPORT - LOOKUP

If users are interested in running a report of every contact report they have authored (not just the last 30 days) they can perform a Lookup. Navigate to Lookups, change the template to Prospect-Contact Report, enter the Author's ID and a Start and Stop date and click Search. On the results screen, select "Display Results" and "Continue". From there users can Export to a .csv or send results to a Clipboard.

