

Activity Center Contact Reports

How does Activity Center make it easier to enter and manage contact reports?

Users are able to add a new contact report from the Fundraiser Performance Management (FPM) Platform via the Activity Center drawer, Console layer or the Relationship Profile. Contact reports have an enhanced workflow that guides the Gift Officer through the process while capturing the information in a structured form to ensure consistency and completeness of contact reports.

In addition, you are able to link contact reports to future contact reports, proposals, and tasks, allowing you to see what has occurred in the past and what is planned for the future. This gives you complete insight into your interactions with a prospect, leading to easier, more efficient management of your portfolio.

Where do I create, view and find contact reports?

You can **create** contact reports from several locations:

- Console Page / Contact Report viewport by clicking on the Add Contact Report button
- Drawer (right hand side of the page) by clicking on the + Contact Report button
- Relationship Profile / Activities Viewport by clicking on the Add Contact Report button
- On an existing contact report, related contact reports are created by clicking on Create Contact Report
- On an existing Proposal, related contact reports are created by clicking on Create Contact Report

You can **search** for a specific contact report:

- Console Page / Contact Report Viewport
- Relationship Profile / Activities Viewport
- Major Giving Layer / Contact Reports

You can **view** contact reports from several locations:

- Console Page / Contact Report Viewport
- Drawer (right hand side of the page) in the list of activities
- Drawer / Calendar
- Relationship Profile / Activities Viewport
- Major Giving Layer / Contact reports (Only completed Contact Reports are visible)

Can a contact report be edited?

Ability to edit a contact report is based on the user's profile and permissions.

Contact reports can be edited by clicking on the Edit links throughout the view of the contact report with the appropriate permissions.

Why can't I edit a contact report that wasn't created in the FPM Platform?

Video

[Introduction to Contact Reports](#)

Create Contact Report

Participants

Primary Entity * Secondary Entity(ies)

Primary Officer * Other Staff

Contact Details

Contact Title * 112 Characters Remaining Contact Type *

Date * Start End

Purpose

Contact Purpose * Project of Interest School/Unit

Goals(s) & Strategy for Contact

Summary

Summary

The foundation has approximately \$50,000 that they are interested in donating for the business school. Will & Ann will discuss it with the foundation members and determine the total amount for the athletics & business school, as well as the timing.

Completed & Editable Contact Report

Western UNIVERSITY

Visit with James and Mary

Visit-1

ID: 08721 Start: 08:00 am End: 09:00 am Contact Date: 02/27/2016 Contact Report Status: Completed

☒ Contact Report Status "Completed" Outcome: N/A

Entities

James "Jim" Stockslager
Primary Entity

Preferred Phone: 123-456-7890 Lifetime Giving: \$169,751

Prospect Stage: Identification Net Worth: Greater than \$2,999,999

MG EVI: 99 Preferred Email: james.stocksla...

Mary Stockslager (Stobbs)
Secondary Entity

Officers

Primary Staff: George Snyder Other Staff: N/A

Purpose

Contact Purpose: Solicitation

Goals(s) & Strategy for Contact: N/A

Project of Interest: N/A

School/Unit: School of Health Sciences

Summary

Met with James Stockslager and Mary Stockslager over dinner while in town to go over their future relationships with Western and possibly giving to more than just the Annual Fund in the future. Seemed like a great dinner and James and Mary looked very thankful for dinner and open to donating to Western in the future. When I mentioned the growing number of alumni donors, they seemed to be very interested. Will follow up in the coming weeks to talk about donor and

Contact Report Filtering

Filters

Contact Type Primary Officer Other Staff

Date Type From To

School/Unit Contact Report Status Contact Purpose

Project of Interest

Contact reports created in your database (i.e. Banner, Advance, Raiser's Edge) cannot be updated in the FPM Platform, because the updates would then be out of sync with the data in your database. As a result, the Platform does not allow those contacts reports created outside of the FPM Platform to be edited.

How do I view contact reports for a specific peer group or list of Gift Officers?

Visibility to Gift Officers' contact reports is based on the user's profile and permissions. If you have rights to see other Gift Officers' contact reports, you can view them from two perspectives:

- Console: By selecting the Gift Officers and/or Peer Group you can see all contact reports associated with the selected individuals.
- Major Giving: By selecting the Gift Officer you are able to see the completed contact report information specific to that individual.

How do I filter contact reports?

You can filter contact reports on the Console page by clicking on the COG (upper right hand corner of the viewport) and click on Filters. You will be able to filter contact report reports on the following criteria:

- Contact report Type
- Date / Date Type
- Primary Officer
- Other Officer(s)
- School/Unit
- Contact Report Status
- Contact Report Purpose
- Project of Interest

The filters remain in place until they are cleared or you logout of your session. All filters are cleared when you log out of the FPM Platform.

Can a user export a list of contact reports?

A list of contact reports can be exported from several locations:

- Console: By clicking on the gear icon (upper right hand corner of the viewport) you are able to export the entire list or if the list is filtered, only those contact reports that are included in the filtered list.
- Major Giving Layer: By clicking on the gear icon (upper right hand corner of the viewport) you are able to export the entire list of contact reports

How do I create a new contact report from an existing contact report?

By clicking on the Create Contact Report button within a contact report, found at the bottom of the screen, you are able

Create a Contact Report, Proposal or Task from Contact Report

The screenshot shows the Western University FPM Platform interface. At the top, there's a navigation bar with tabs: CONSOLE, ADVANCEMENT, ANNUAL GIVING, MAJOR GIVING, and TARGETING. The user is logged in as 'Reether Customer Care'. The main content area is divided into two columns. The left column shows a list of contact reports, with 'Mary Stocklager (Stocks)' selected. The right column displays the details of the selected contact report. It includes fields for Prospect Stage (Identification), Net Worth (Greater than \$2,999,999), MG EVI (95), Preferred Email (james.stockla...), Goals & Strategy for Contact (N/A), Project of Interest (N/A), and School/Unit (School of Health Sciences). Below these fields is a 'Summary' section with a detailed narrative of the meeting. At the bottom of the right column, there are three sections: 'Related Tasks' with a 'Create Task' button, 'Related Contact Reports' with a 'Create Contact Report' button, and 'Related Proposals' with a 'Create Proposal' button.

to schedule and document future contacts with the entity. This allows you to link and track the progress of your interactions with an entity over time.

In addition, creating the contact report from an existing contact report allows the system to pre-populate many of the fields based on the existing contact report, reducing the time and effort to complete the process. You are able to edit any pre-populated fields at any time to ensure the new contact report is accurate and complete.

How do I create a task from an existing contact report?

By clicking on the Create Task button within a Contact report, found at the bottom of the screen, you are able to enter a task. This allows you to link and track the progress of your interactions with an entity over time.

In addition, creating the task from an existing contact report allows the system to pre-populate many of the fields based on the existing contact report, reducing the time and effort to complete the process. You are able to edit any pre-populated fields at any time to ensure the new task is accurate and complete.

How do I create a proposal from an existing contact report?

By clicking on the Create Proposal button within a contact report, found at the bottom of the screen, you are able to enter a proposal. This allows you to link and track the progress of your interactions with an entity over time.

In addition, creating the proposal from an existing contact report allows the system to pre-populate many of the fields based on the existing contact report, reducing the time and effort to complete the process. The Gift Officer is able to edit any pre-populated fields at any time to ensure the new proposal is accurate and complete.

How does a user create a contact report from an e-mail?

You are able to send or forward e-mails you wish to have converted into contact report reports to: contactreport@performancemanagement.blackbaud.com. You enter this e-mail address in the "To", "cc" or "bcc" fields of an e-mail. The e-mail is then sent directly to the e-mail address or forwarded depending on your institution's practices. NOTE: The e-mail address you use must match the e-mail address found in the Platform,

The FPM Platform receives the e-mail and transforms it into the framework of a contact report. The content of the e-mail automatically populates as many of the appropriate fields in Activity Center's contact report form as possible. By giving Gift Officers a head start in completing their contact report reports you are able to more quickly and efficiently complete your contact reports.

Why don't I see the attachments/pictures that were included in my e-mail?

At this time, there is no accommodation for attachments or embedded pictures to be included as part of a contact report. As a result, when you send an e-mail to be converted to a contact report, all attachments and embedded pictures are removed. Only the text of the e-mail is included in the framework of the contact report.

You are able to save all attachments related to an entity on the Relationship Profile, if you would like to be able to reference attachments in the future.

Where do I find and complete the e-mail contact report after I send it?

In the drawer found on the right hand side of the screen, there is the symbol of a bell. When the system has received an e-mail that has been directed to contactreport@performance.management.blackbaud.com a number will appear in a red circle indicating there is a pending contact report.

Click on the notification and the contact report form will open for you to complete. Once the contact report required fields have been completed, the contact report will move to the contact report viewport, will be added to the calendar and will appear in the activities due if dated in the future.