DONOR ENGAGEMENT

Working with Contact Records

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Meet your Trainer...

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Donor Engagement

EveryAction

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Agenda

1. Introduction to the Contact Record
2. Contact Record Layout
3. Features of the Contact Record
4. Q&A

Introduction to the Contact Record

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Contact Records:

A compilation of data about a particular **individual or organization**.

You can enhance this robust picture of your contacts by adding additional information and customizing your view.

Your contact record holds all the information that will enable strong returns on your outreach efforts.

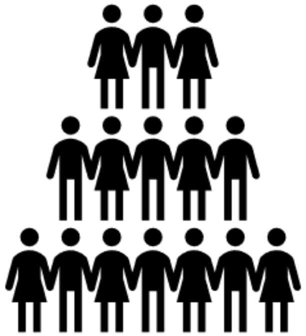
Individual/Person and Organization are the two types of contact records in your database. They largely function in the same way; however, some information is unique to each type of record.

- **Individual/Person** contact records contain fields for First Name and Last Name
- **Organization** records contain fields for Primary Contact and Official Name

Organization Contact Records

Organization contact records are created the same way **Individual** contact records are created.

You will see the option to create the Organization contact record on any of our **Add New Contact** screens.



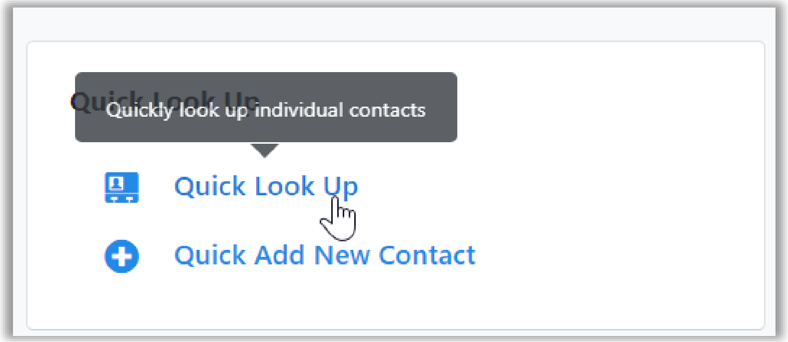
You will notice a few differences from typical individual records when you look at **Organization** contact records. These records have two new page sections named **Primary Contact** and (if you have a development package) **Grants.**

- **Primary Contact** is one person in the organization, but you can add relationships to link other individuals to the organization's contact record
- **Grants** can be viewed and edited from the Grants Section of the organization's contact record

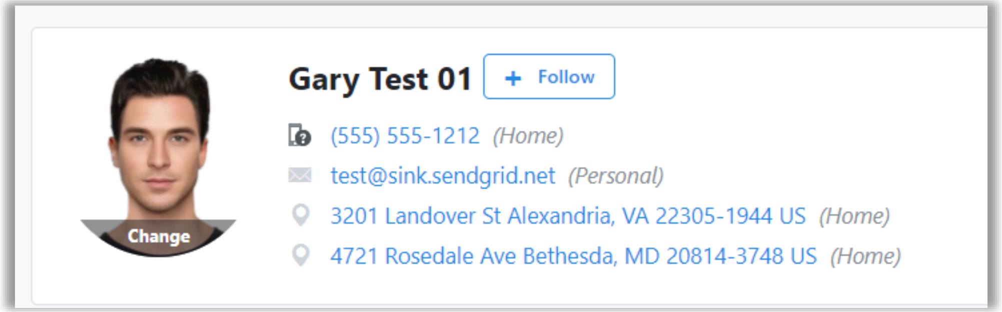
Contact Record Layout

Contact Record Layout-All Details

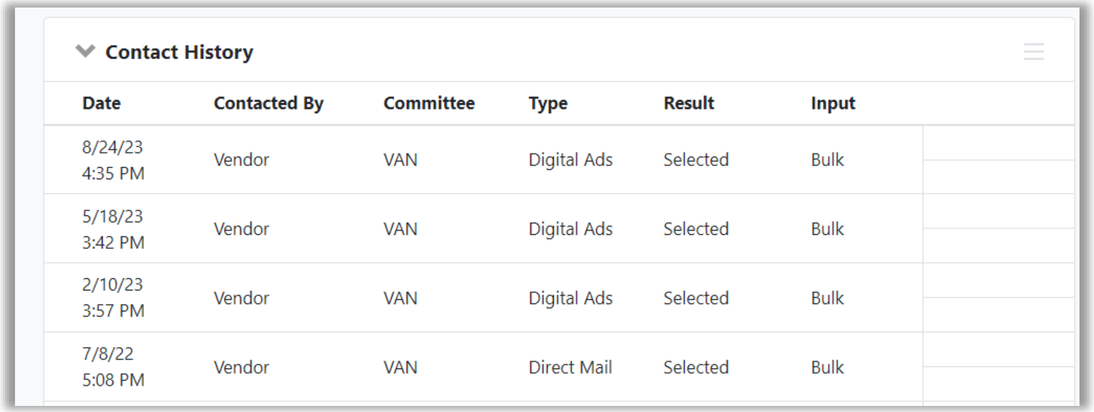
You can access the Contact Records through many redirection points in the database, but the QLU is the easiest way to quickly find an individual contact record. Using the input boxes and filters, there are countless ways to identify your contact record search with ease.



Once your record is found, you will see a record overview at the top of your screen.



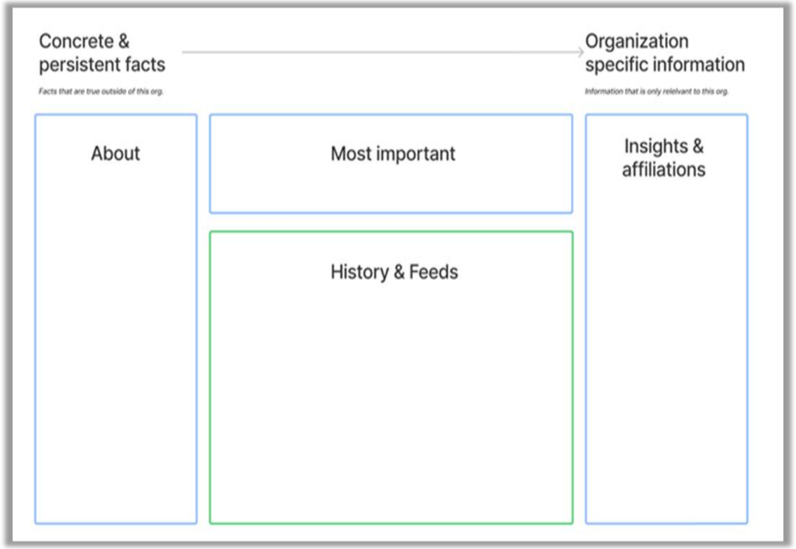
Underneath the contact overview, you will see a wide range of titled drawers that organize your contact records information. These drawers are visible based on the preset user profiles and roles assigned, so one user may not see the same information as another user.

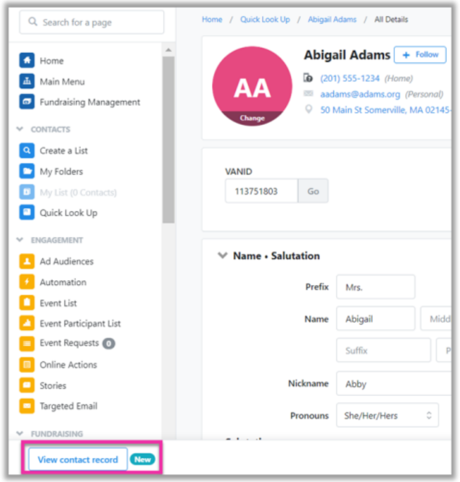

Contact History

Date	Contacted By	Committee	Type	Result	Input
8/24/23 4:35 PM	Vendor	VAN	Digital Ads	Selected	Bulk
5/18/23 3:42 PM	Vendor	VAN	Digital Ads	Selected	Bulk
2/10/23 3:57 PM	Vendor	VAN	Digital Ads	Selected	Bulk
7/8/22 5:08 PM	Vendor	VAN	Direct Mail	Selected	Bulk

Some common drawers include Activist Codes, Contact History, and Contributions.

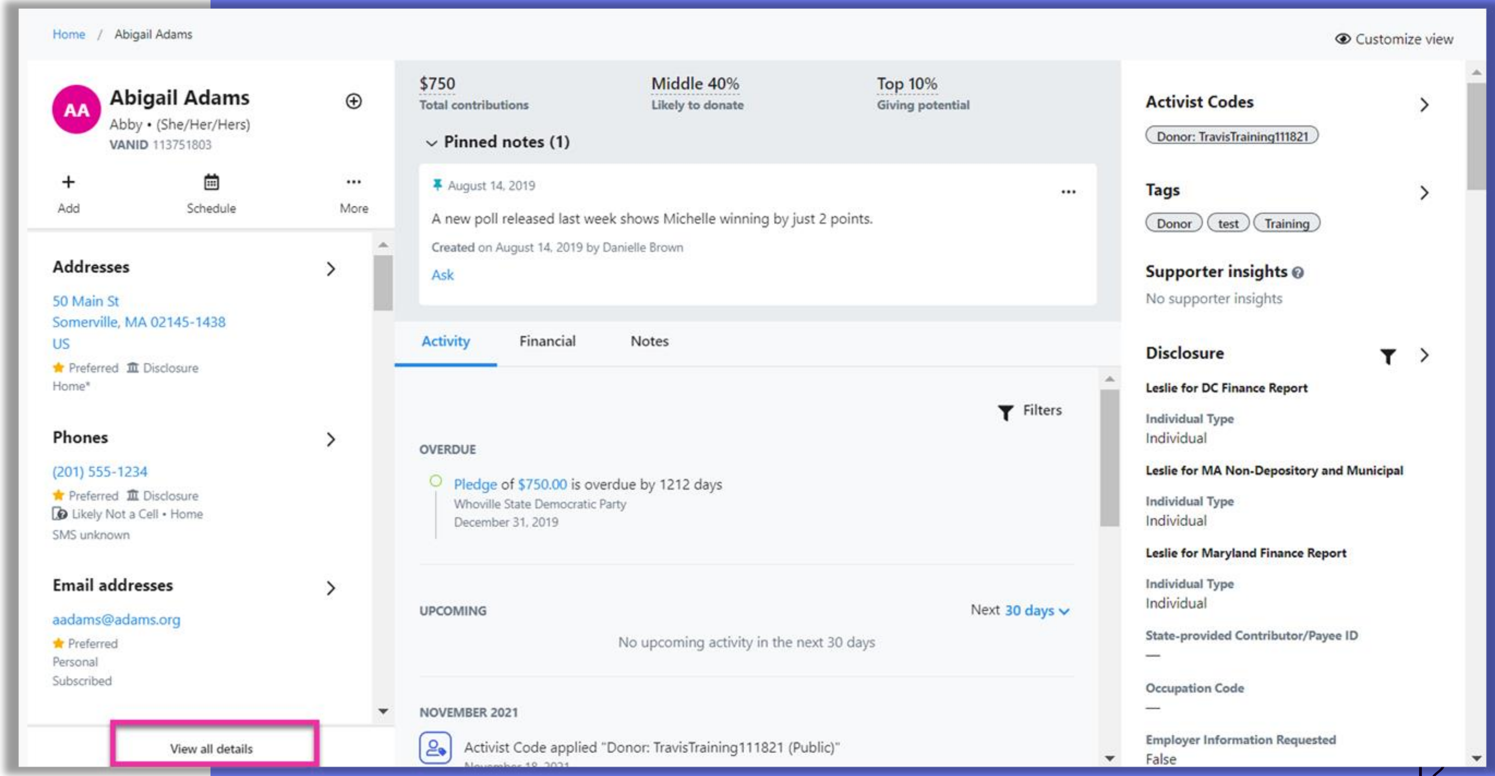
Contact Record Layout- New Contact Record





Three Column Design Structure

Left Column: About Section
Center Column: History, Feeds, and Most Important Pinned Notes
Right Column: Planning and Insights



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Features of the Contact Record

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Contact Records Features

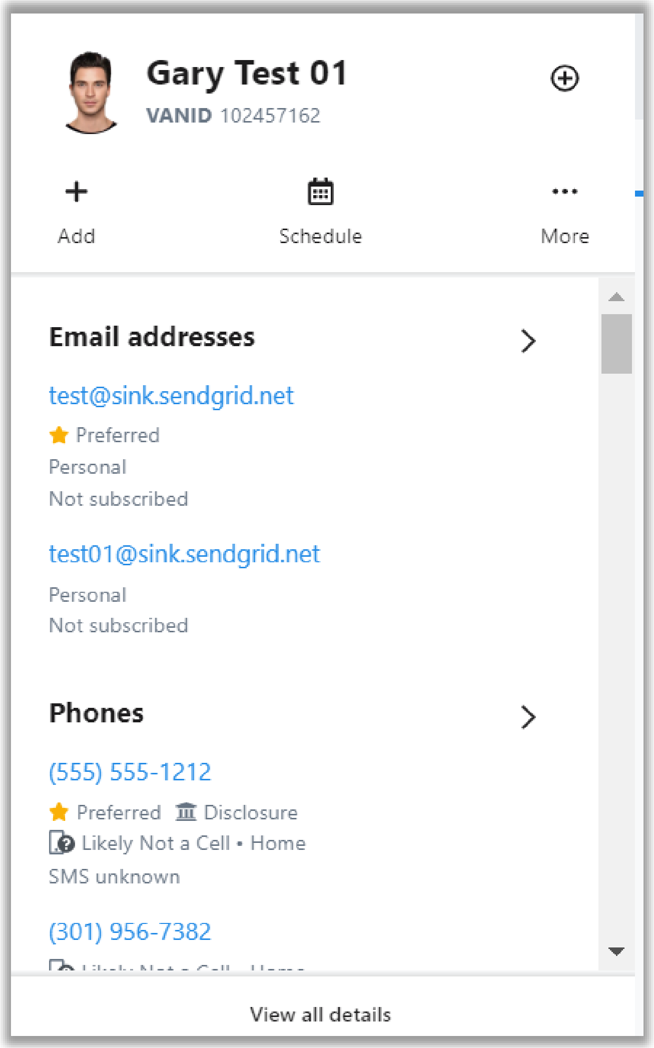
The **About** section of the contact record is on the left side and houses all of the factual data about the contact, including their name, phone number and email address.

Select the **Add** button under the name to add additional information to the contact record.

Select the **Schedule b**utton to add a follow up.

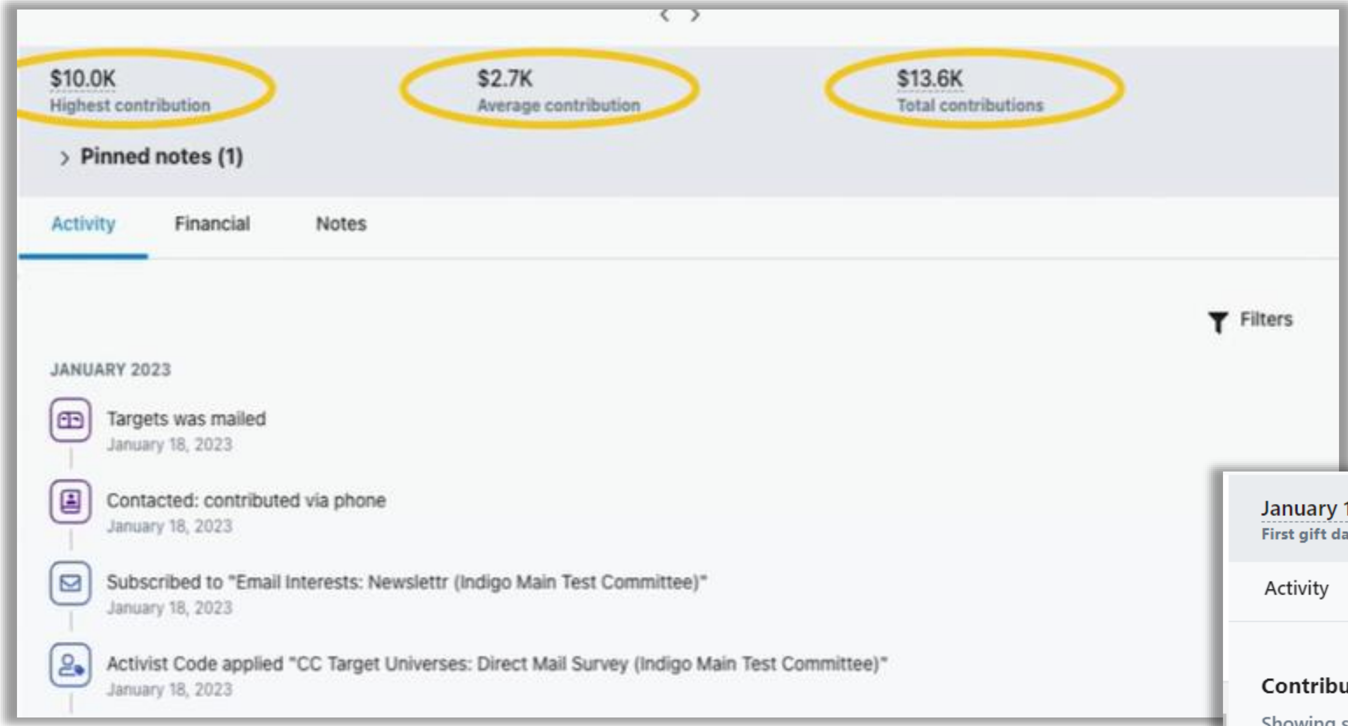
Select the **three dots** will allow you to add additional basic information, print a call sheet, generate a letter, merge a contact, or even delete a contact.

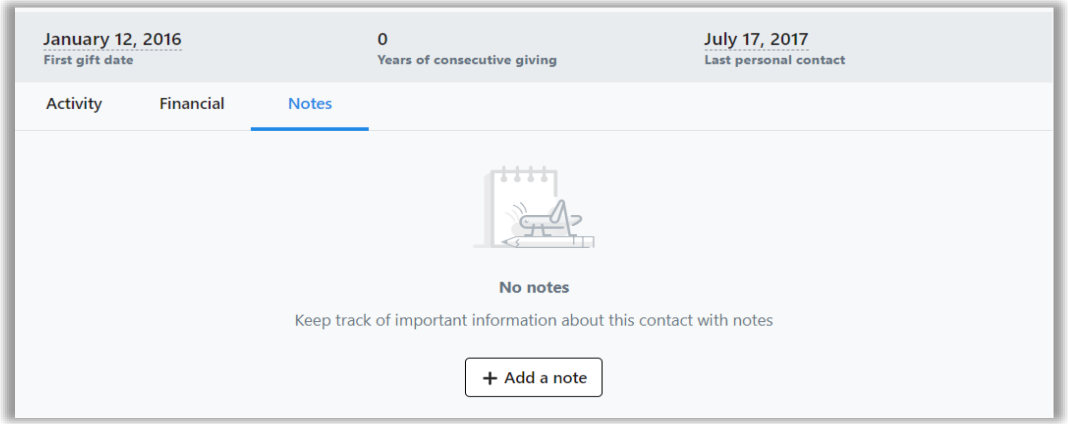
Selecting the arrows open the drawers for features where you can add or edit information.



Contact Records Features

The **Middle Column** focuses on the contact records activity and financial history. This section is broken into two parts. Important statistics are listed at the top along with pinned notes. The three stats listed are customizable in the Customize section. The bottom section highlights the contact's activity history, their financial history, and any notes that have been pinned to the record.





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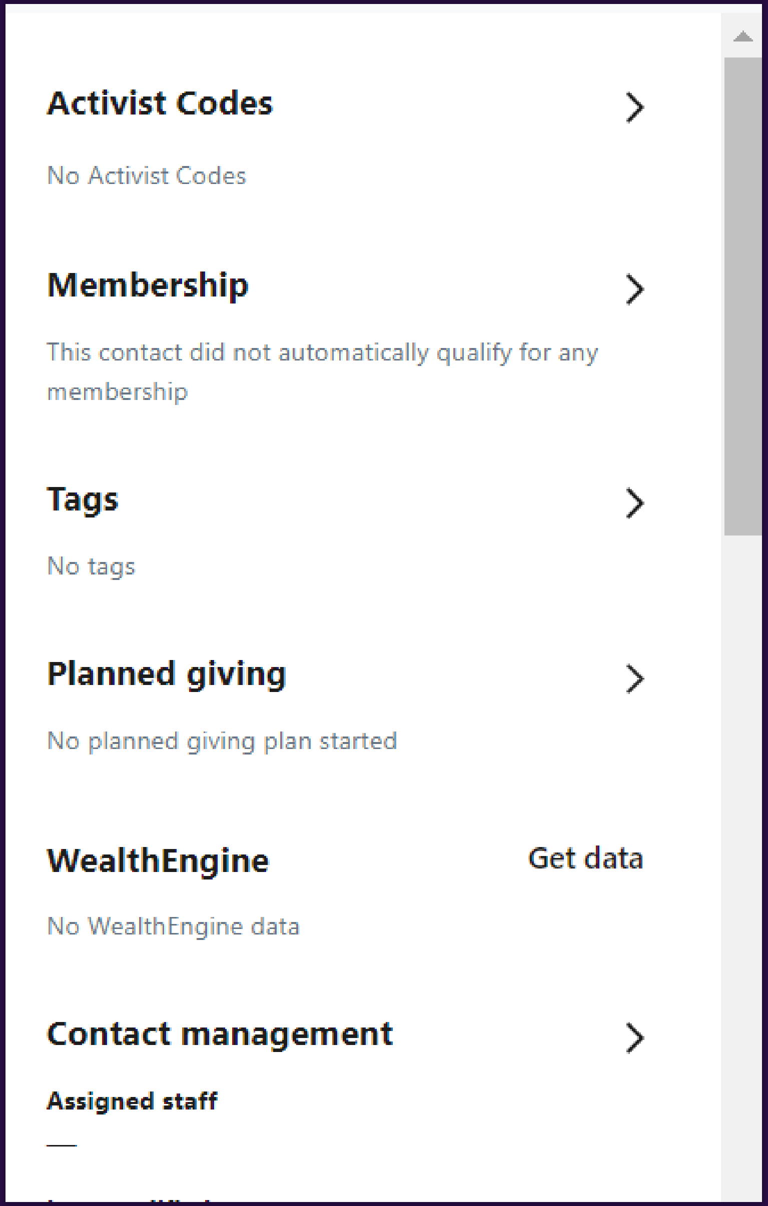
Contact Records Features

The **Insights** column is on the right side of the page. This section provides information on a contact record that is relevant to your organization, such as Activist Codes and Tags.

Just like the About column, you can open a drawer to edit the information listed in the Insights column.

Some features you can quickly add include:

- Applying an Activist Code
- Assigning staff for contact management
- Adding Planned Giving dedications



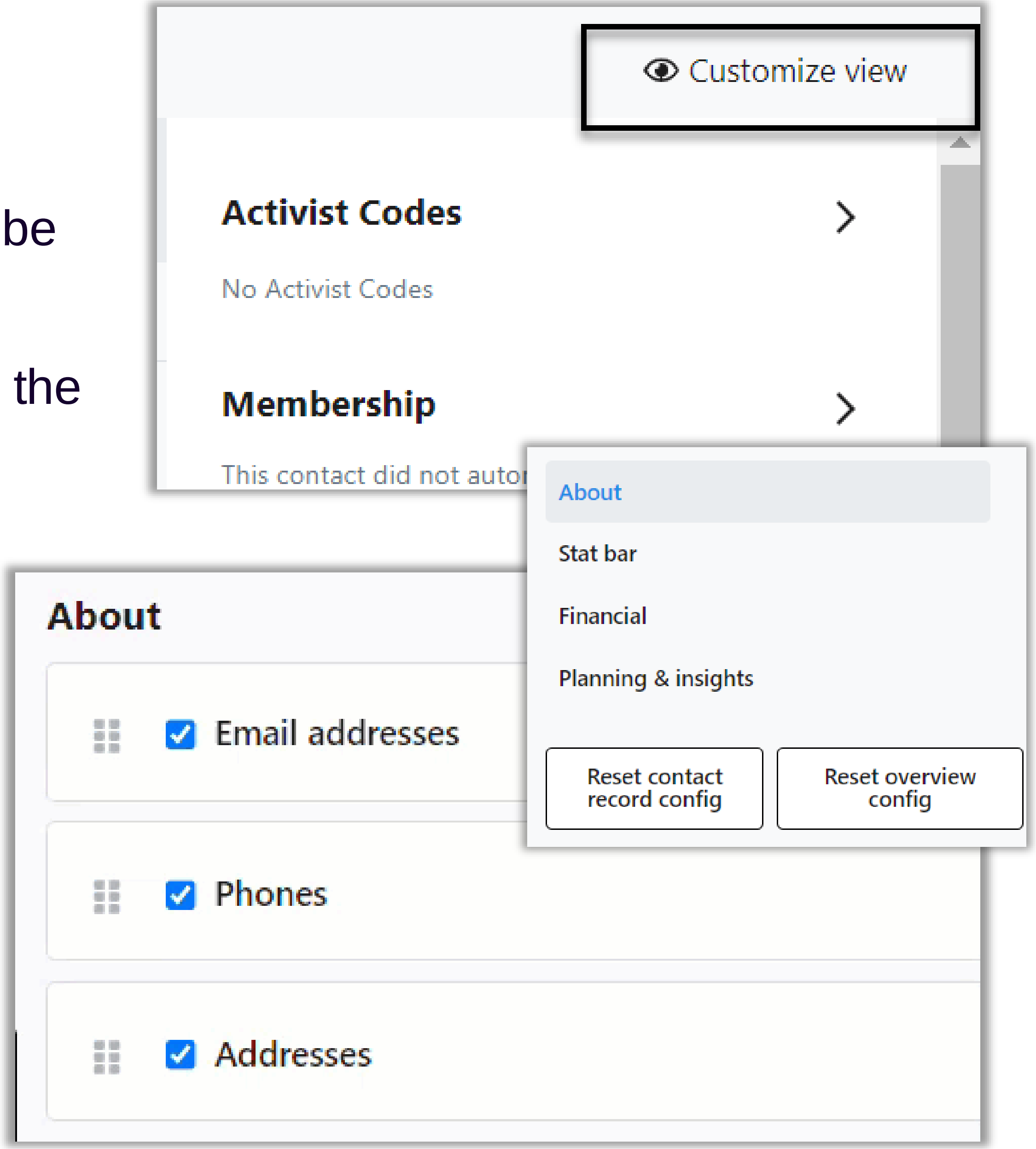
Contact Records Customization

When you select the **Customize view** button, you will be taken to the customize view contact page.

To the left of the page is a menu that corresponds with the columns for your contact records page.

Customization options include:

- Hiding information from the contact record be deselecting the checkbox next to the name.
- Reordering the way information is presented in each section by grabbing the information bar and moving it up and down.
- The cogwheel indicates additional customization options.



Q&A

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Additional Resources

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Help Center Resources

- Contact Record Overview
- Understanding Your Contact Record Tutorial
- Finding Contact Records
- Contact Records Updates Workshop

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Additional Training

- Bonterra Academy:

https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup

  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

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Thank You for Attending!

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