



*Last Updated: September 2007*

## **I.2 Policy on Contact Reports in Raisers Edge**

In order to facilitate reporting of actions taken with constituents, all contacts and contact reports should be recorded in the actions tab. These contacts can include but are not limited to: phone conversations, mailings, emails, and personal visits.

At a minimum, the following fields should be completed:

- Category
- Action Type
- Action Date
- Status
- Date Action Completed (if applies)
- Any Notes

Please also make sure you add the solicitors for this contact, which should include anyone involved with this particular contact only. If the person is not marked as a solicitor, please go to their record and mark them as a solicitor.

If you are discussing specific campaigns, funds, or proposals, this should also be noted in the appropriate fields. The notes should include the reason for the contact, and any information that could be pertinent to another contact with the constituent.

Please refer to the procedure on “Actions and Action Tracks” for additional information on the uses of this feature.