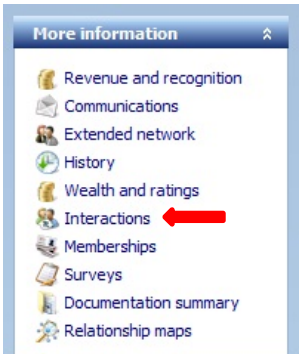
Common Issues with Interactions & Contact Reports

An **interaction** is any contact or activity related to a constituent. (An example of activity is a personally scheduled visit.) When that activity is specifically related to a prospect plan, it's a **contact report** and filed from the prospect plan record.



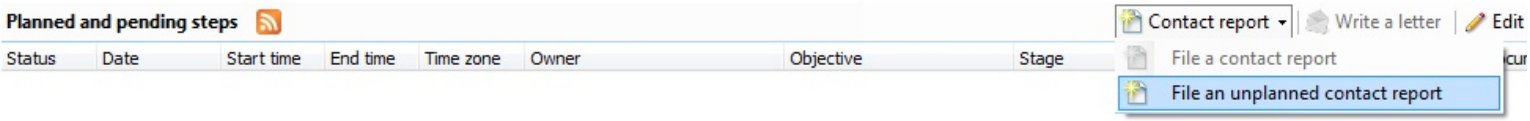
Where do I start?

***Ask yourself this question: did the activity have to do with an active prospect plan?** If no, file from the constituent's Interactions page (see #1). If yes, file from the plan page (see #2).

1. Interactions: go to the **Interactions** page for the constituent, click Add

Note: at the moment, there is an issue with the Add Interaction form, when accessed from a prospect group record, preventing you from adding additional contactors. To avoid this issue, and until this is fixed, file general interactions from an individual record, not the group.

2. Contact Reports: Go to the **Plan** page and click Contact report. Then select "File an unplanned contact report" (unplanned just means that you're entering it after it is completed). Remember that you can go directly to specific plans from your My Fundraiser page.



Who are PARTICIPANTS?

Participants include only those contacted. If you met with both Jane and John Doe, they are both participants. You only need to add participants if they include someone other than the record from which you are filling out the form. If you are on a group record, you must include all participants. Other DOs and staff from Ohio State are not participants and should not be entered in this field.

Who is the "OWNER?"

The "Owner" of the interaction is the primary contactor, or the person primarily responsible for carrying out the activity.

What if you're not the only one that attended the visit from Ohio State?

Record your colleagues' involvement this way:

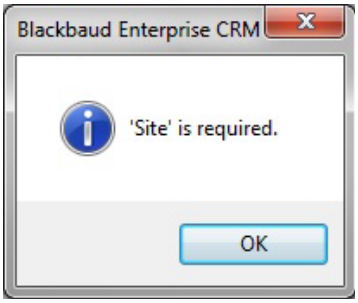
Interactions: enter their record(s) on the "Additional Contactors" tab of the Add Interaction form.

Contact Reports: enter their record(s) in the "Additional Solicitors" field of the Add Contact Report form.

"Gotchas"

Expected Date

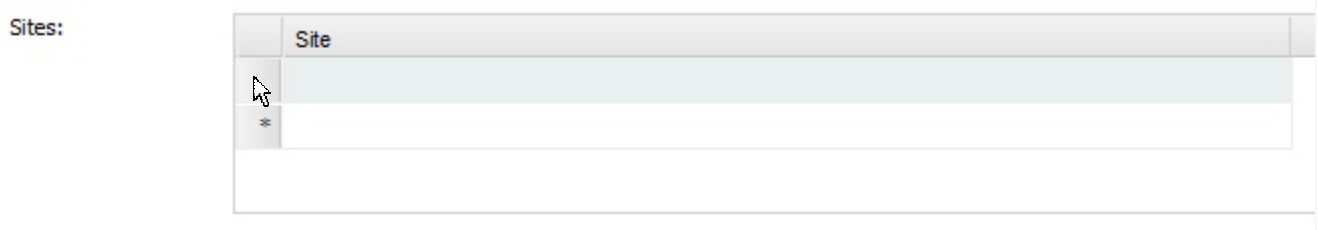
The Add Interaction form will require you to add both an expected date and the actual date for the activity. If you're filing this after the activity is complete, both are the date of the activity.



Sites

Sites are an unused feature in TAS. However, if you happen to click into the field, it creates a blank line and the form will not allow you to save. If this happens, you need to delete any blank lines under Sites. When ready to save, there will be only one line left under Sites that has an '*' to the left.

1. Click in the empty square on the left of the blank line.



2. Press the "Delete" key on your keyboard.
3. Confirm deletion.
4. Repeat for any lines under sites that don't start with the '*'.
5. When it's ok to save, there will only be the one line with '*' on the left.

Prospect Management Terms

Impact	TAS
Contact Report	Interaction
	Contact Report or Step (Interaction in a prospect plan)
Project	Plan
Project Proposal/Response	Opportunity (within the Plan)
Project Manager	Primary Manger
Assistant Project Manager	Secondary Manager or Secondary Solicitor
Fund / Project Fund	Designation