Standard Operating Procedure for Managing Constituent Interactions

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| --- | --- |
| **Business Process ID** | PROSP\_005 |
| **Business Process Title** | Managing Constituent Interactions |
| **Document ID** | PROSP\_005.V33 |
| **Status** | Need business user approval |
| **Business Units** | All Development Business Units  Alumni Relations  Prospect Research |
| **Training materials** | [Add an Interaction Video](https://mymedia.bu.edu/media/t/1_2p6m531k)  [Interaction Smart Query Video](https://mymedia.bu.edu/media/t/1_l1l46gnp)  [Interaction Definitions PDF](https://bushare.sharepoint.com/:b:/r/sites/DAR/darapps/Shared%20Documents/Interaction%20Definitions.pdf?web=1)  [Interactions Update FAQs PDF](https://bushare.sharepoint.com/:b:/r/sites/DAR/darapps/Shared%20Documents/Interaction%20Update%20FAQs.pdf?web=1) |

# Business User Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Business User** | **Role** | **Version** | **Date** |
| **Scott Rosensweig** | Director, Prospect Management, Advancement Services - Business Intel & Prospect Strategies |  |  |
| **Sarah Cormier** | Assistant Director, Prospect Management |  |  |
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# Software Functional Areas

|  |  |  |
| --- | --- | --- |
| **Software** | **Functional Areas** | **Tickets** |
| **Blackbaud CRM** | <http://bbec.bu.edu/>  Constituents > (search) Constituent record > Documentation and Interactions tab > Interactions  Constituents > (search) Constituent record > Documentation and Interactions tab > Spousal Interactions  Constituents > (search) Constituent record > Prospect tab > Contact Reports and Interactions  Marketing and Communications > Configuration section > Interaction Categories and Subcategories  DAR Custom Reports > Fundraisers section > DAR Contact Report Daily Log  DAR Custom Reports > Fundraisers section > DAR Contact Report Log by Actual Date |  |

# Process Description

Boston University Office of Development and Alumni Relations (DAR) is responsible for cultivating potential donors to the University (prospects) among the University constituents. A constituent interaction record is a documentation of any engagement between a BU faculty or staff member and a constituent.

## What is Interaction

This SOP (Standard Operating Procedure) explains the process of managing interaction records. Interactions records document ANY communications between BU staff and a constituent (prospect), and any face-to-face contacts, such as impromptu or scheduled meetings, all the phone calls, non-bulk correspondence, and emails to the constituent, and all the correspondence and emails, phone calls, text messages from the constituent. Prospects are described in more detail in [SOP Overview of Managing Prospects.](https://bushare.sharepoint.com/:w:/r/sites/DAR/darapps/Shared%20Documents/SOP%20Overview%20of%20Managing%20Prospects.docx?web=1)

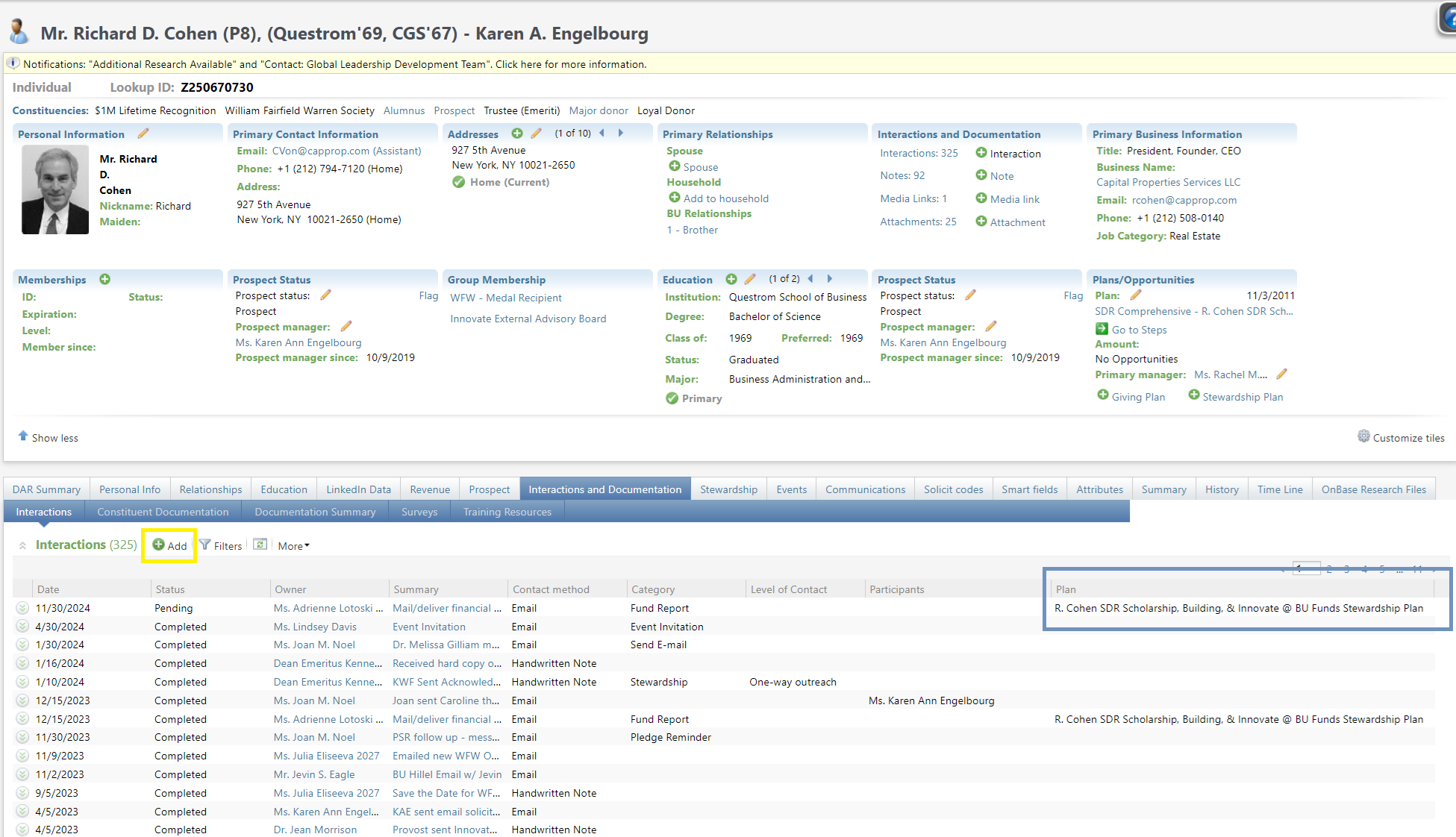
The [SOP for Requesting Fundraising Staff Travel](https://bushare.sharepoint.com/:w:/r/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Requesting%20Fundraising%20Staff%20Travel.docx?web=1) outlines the process for DAR staff to request and obtain approval for travel related to in-person prospect interactions. For information on tracking visit data and reviewing fundraising metrics, see the [SOP for Overviewing Fundraiser Activity and Reviewing Fundraiser Metrics](https://bushare.sharepoint.com/:w:/r/sites/DAR/darapps/Shared%20Documents/SOP%20Overview%20of%20Fundraiser%20Activity%20and%20Reviewing%20Fundraiser%20Metrics.docx?web=1). Finally, the [SOP for Itineraries for Prospect Meetings and Events](https://bushare.sharepoint.com/:w:/r/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Itineraries%20for%20Prospect%20Meetings%20and%20Events.docx?d=w2a3146c034e74ca4b8972c743c312449&csf=1&web=1&e=oYehnC) details itinerary creation and management using tool called [Itinerator](https://darinsight.bu.edu/itinerator).

The [SOP for Managing Constituent Interactions via Outlook](https://bushare.sharepoint.com/:w:/r/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Managing%20Constituent%20Interactions%20via%20Outlook.docx?web=1) outlines the process for documenting constituent interactions using the Microsoft Outlook email client. While interaction records are stored in Blackbaud CRM (BBEC), they can be submitted directly from Outlook through an add-in developed by the Zuri Group.

**NOTE:** Contact Report is a term used to reference the documentation a prospect manager completes after a visit. While DAR no longer uses the DAR Contact Report attribute in BBEC to indicate prospect visits from gift officers, with the interaction user interface updates, the Contact Report template have been incorporated into the Comments field on Interaction form to encourage gift officers to use a standardized format of what they are required to enter after a prospect visit.

## Documenting Interactions

DAR staff documents interactions and any other constituent information using BBEC (Blackbaud Enterprise CRM). Primarily DAR staff adds interactions on *Documentation and Interactions tab* in constituent records. Interaction may or may not be associated with a prospect plan. When it does, the interaction becomes a plan step as described this SOP and in [SOP for Adding Steps to Prospect Plan](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Adding%20Steps%20to%20a%20Prospect%20Plan.docx?web=1). If the interaction occurs at a Boston University event, then staff associates the event record in BBEC with the interaction record. Event records are described in [SOP Overview of Events Management](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20Overview%20of%20Events%20Management.docx?web=1). After opening a constituent record in BBEC, DAR staff selects *Interactions* sub tab from the *Documentation and Interactions tab* to review, add, edit, or delete interaction records.



Alternatively on prospect constituent record in BBEC DAR staff selects *Prospect* sub tab and from the *Prospect Summary sub tab > Contact Reports & Interactions* to review, add or edit interaction records.

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Alternatively on prospect constituent record in BBEC DAR staff selects *Prospect* sub tab and from the *Plan sub tab > select plan link under “Plan name” and add or edit a plan step record*.

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Alternatively on fundraising constituent (gift officer) record in BBEC DAR staff selects *Fundraising* sub tab and from the *Pending Activity sub tab select activity and in Objective Column select link to edit plan step record.*

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## Email Notification about Interactions

As a part of the interaction record creation process BBEC sends an email notification to gift officers when interaction record is entered on their prospect constituent record in BBEC as described in [SOP for Assigned Prospect Interactions Notifications](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Assigned%20Prospect%20Interactions%20Notifications.docx?web=1).

## Prospect Audit Report

Designated DAR staff with subscription receives emails with links to Prospect Audit Report described in [SOP for Prospect Auditing](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Prospect%20Auditing.docx?web=1) and to DAR Contact Report Daily Log described in [Business Steps for DAR Contact Report Daily Log](#_Business_Steps_for). The reports are based on interaction records data in BBEC and accessible in BBEC at DAR Custom Reports > Fundraisers section. Report email subscriptions mechanism is described in [SOP Overview of DAR Custom Reports](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20Overview%20of%20DAR%20Custom%20Reports.docx?web=1).

## Interactions Smart Query

Interactions Smart Query is Smart Query type in BBEC that allows to create a list of interactions and one of the search fields is Comment, where users can search for a word's inclusion in the interaction comment. Below is an image of an example criteria that users can search by. Smart Queries are documented in [SOP for Using BBEC Smart Queries](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Using%20BBEC%20Smart%20Queries.docx?web=1).

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# Business Rules

## Business Rules for Documenting Interactions with Prospects

* When BU faculty or staff interact with prospects either via mail, phone, computer or by meeting the prospects in person (face-to-face interactions) they must create a unique record for each interaction on the prospects BBEC constituent record.
* To add or edit an integration record in BBEC DAR staff must have active BBEC user account and proper group access rights and be familiar with updating BBEC constituent records.
* A constituent record must exist to add and interaction***.*** Staff must perform a constituent search in BBEC to find constituent record as described in [SOP for Searching for Constituent Records in BBEC](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Searching%20for%20Constituent%20Records%20in%20BBEC.docx?web=1). If staff cannot find the constituent record in BBEC, they need to work with Gifts & Records staff to add it. The staff must reach out to Gifts & Records staff as described in [SOP for Requesting Gifts & Records Related Updates](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Requesting%20Gifts%20&%20Records%20Related%20Updates.docx?web=1).
* After every single interaction BU Gift officer/fundraiser (or fundraiser’s staff) must use BBEC to create an interactionwithprospect record as a step record in the prospect plan record. For major gift prospects this must happen within 48 hours after interaction.
* Interactions must be understood as different from other constituent documentation, which did NOT result from communication with the constituent as described in [SOP for Managing Constituent Documentation](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Managing%20Constituent%20Related%20Documentation.docx?web=1)
* When editing an interaction DAR staff must use extreme caution not to overwrite information that does not need editing.
* While creating interaction record Fundraiser (or fundraiser’s staff) must update the following other information in BBEC:
  + biographical and relationships on constituent record sometimes by collaborating with Alumni Relations department.
  + business and biographical information as described in [SOP for Managing Constituent Documentation](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Managing%20Constituent%20Related%20Documentation.docx?web=1)
  + wealth and ratings as described in [SOP for Capacity and Inclination Ratings](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Capacity%20and%20Inclination%20Ratings.docx?web=1)
  + solicitations and discussions about potential gift or gift amount as new opportunity in prospects plan or existing opportunity changes as described in Business Rules for Documenting Prospect Plans and Business Rules for Documenting Opportunities.
* To protect prospect confidentiality and ensure compliance with privacy laws, DAR staff must follow the guidelines below for what information may and may not be included, such as:
  + Racial or ethnic origin
  + Religion
  + Sexual orientation
  + Political views and/or trade union membership
  + Criminal conviction
  + Personal health information
  + Disabilities
  + FERPA-protected information
  + Sensitive or embarrassing information (like comments on relationship status, divorce.)

For questions about this rule contact Assistant Vice President, Advancement Services (currently Kerri Saucier)

* Alumni Relations department staff must record in-person interactions with constituent visiting Boston University DAR offices.
* Alumni Relations department is responsible for maintaining relationships on constituent record as described in [SOP](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Adding%20or%20Updating%20Constituent%20Relationships%20or%20Household%20Information.docx?web=1) for Adding or Updating Constituent Relationships and Households. This includes constituent relationships to organizations and linking relatives to the constituent.
* .
* All Interactions are expected to be reflected in the database within two weeks of the communication occurring (or within two weeks of returning from the relevant trip).
* All interactions regarding the cultivation, solicitation or stewardship of a prospect must be connected to an active Prospect Plan.
* DAR staff must ensure that interaction documents converted from other data sources are stored under Documentation sub tab, and not under Interactions sub tab. DAR gift officers and researchers must not substitute interactions documentation for proper prospect research or for producing prospect biographical information by research.

## Business Rules for Interaction and Plan Step Form Fields

Interaction form fields must be filled in based the following rules (\* - required):

|  |  |  |  |
| --- | --- | --- | --- |
| **Interaction** **Form** | **Plan Step form** | **Interaction** **Data List Column** | **Rule** |
| Contact \* | Contact \* | Yes | Contact (Level of Contact) and Method (Contact Method) fields. Select them in the interaction launcher as described below as per tables below and that will auto populate on the add interaction/ add plan step forms. The Level of Contact and Contact Method are editable when adjusting an interaction with a status of Pending and read-only for other statuses. An older interaction record may not have these values set, but you must set them to save your changes. |
| Method \* | Method \* |  |  |
| ----- | Plan\* | Plan | Enter plan name. |
| Summary\* | Objective\* | Summary | Succinct description of the Interaction. Enter a summary to help identify the purpose or objective of the interaction. |
| Status\* | Status\* | Status | Select whether the interaction is pending, complete, declined, or canceled. The status of an interaction can be changed as needed. For example, if a Gift Officer would like to add a “Pending” status to a future Interaction. |
| Expected Date | Expected Date | ----- | Must be used in conjunction with the “Pending” status. |
| Actual Date\* | Actual Date | Date | The date of the Interaction If the interaction status is “Completed,” enter the date the owner performed the interaction. |
| Owner\* | Owner | Owner | Auto defaults to the person entering the interaction into BBEC. Click the search icon and use the search screen to locate and select the owner to perform the interaction. For information about the search screen. |
| Category\* | Category | Category | The purpose of the Interaction. Select a category for the interaction as per table below. |
| Subcategory\* | Subcategory | ----- | Select a subcategory for the interaction as per table below. Only used with specific categories including Foundation Relations and Internal Strategy. The interaction form for adding or editing automatically choose a subcategory of "None" when a category is chosen that does not have any other subcategory choices. |
| Event | Event | ----- | If an Interaction took place during an event, click the search icon to search and choose the correct event to add to the Interaction criteria. The Event Search screen appears so you can select the event to associate with the interaction. |
| Location\* | Location | ----- | Location of the interaction. For zoom calls it defaults to Zoom. Location is important to capture for all Visits. |
| Other Location | Other Location | ----- | Other location of the interaction. Required when Location is “Other” |
| Outcome | Outcome | ----- | Select outcome as per table below |
| Sites | ----- | ----- | To restrict access to the interaction to only selected BU sites, select the sites to use the interaction. This section can be used to differentiate what school the interaction was designated towards. It can be helpful to use if a Gift Officer fundraises for multiple schools. |
| ----- | Gift Officer | ----- | DAR frontline fundraisers only. Anyone else is a participant, including other BU staff. |
| Participants | Participants | Participants | Any non-fundraiser involved with the cultivation of a gift opportunity. This may include University leadership, trustees, deans, faculty, family members, or individuals serving as connectors or advisors to the prospect. You can add other involved constituents by clicking  the plus icon and searching by name or Lookup ID.  Using Lookup ID is recommended, particularly if  the constituent has a common name |
| Comments\* | Comments | ----- | Enter details of the interaction using prompts what you can frilly change, edit or remove:  Prospect Name:  Contact Officer:  Date of Meeting:  Location of Meeting:  Other Participants:  Summary of Meeting:  Goals:  Outcomes:  Key Points:  Career information:  Family information:  Inclination, BU affinities, and potential gift opportunities:  Other Items of Note:  Next Steps: |
| Affinity Tags | Affinity Tags |  | Add any relevant Affinity Tags, if necessary, as per [SOP for Constituent Interests and Affinity](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Constituent%20Interests%20and%20Affinity.docx?web=1) |

* Business rules for Level of Contact

|  |  |
| --- | --- |
| **Level of Contact** | **Rule for selecting contact type** |
| Visit | Must reflect a substantive direct interaction with the constituent. Visits can be conducted by the following contact methods: In person, Video call or Phone call. |
| Two-way communication | Must reflect all two-way Interactions initiated by DAR staff or a constituent that are not a visit |
| Inbound | Must reflect all interactions initiated by the constituent via web form, email phone call, or chat. |
| One-way outreach | Must reflect all one-way Interactions initiated by DAR Staff. When the constituent responds, a new two-way correspondence interaction would be added. |
| Internal | Must reflect all communications between DAR Staff regarding a constituent |

* Business rules for Methods of Contact

|  |  |  |
| --- | --- | --- |
| **Method** | **Use for level of contact** | **Use when** |
| Alumni Portal | Inbound | Interactions from DAR alumni community platforms, such as BU Connects or Salesforce |
| Alumni Website | Inbound | Interactions deriving from completed forms obtained through the alumni and friends’ website (contact update, new account requests, parking requests) |
| Email | Two-way communication, Outreach, Inbound | Communications sent or received by DAR Staff via email |
| Event | Two-way communication, Outreach, Inbound | Engaged with a constituent at an event |
| Handwritten Note | Outreach, Inbound | Handwritten correspondence with the constituent that is not in a form of a mail merge or mass communication |
| In Person Meeting | Visit | Gift Officer or Engagement Officer met with constituent to qualify, cultivate, solicit, or steward |
| Internal Meeting | Internal | Any communications between DAR Staff regarding constituent strategy |
| LinkedIn | Two-way communication, Outreach, Inbound | Communications sent via a LinkedIn message |
| Mail | Two-way communication, Outreach, Inbound | Any communication or item sent via postal or shipping services |
| On Campus Visit | Inbound | Constituent visit to the Dahod Family Alumni Center, DAR Offices, or DAR Staff led tours initiated by the constituent |
| Phone Call | Visit, Two-way communication, Outreach, Inbound | Any voice communication via phone |
| Planned Giving Website | Inbound | Interactions deriving from a form completed through the Planned Giving website |
| Social Media | Two-way communication, Outreach, Inbound | Communications sent or received by DAR Staff via a social media platform; such Facebook, Instagram, or X (formerly Twitter) |
| Text Message | Two-way communication, Outreach, Inbound | Any communication via SMS, MMS, or WhatsApp |
| Video Call | Visit, Two-way communication | Any communications via a video platform, such as Facetime, Zoom, Teams, or WhatsApp |

* Interaction category must represent the purpose of and be one of the following:

|  |  |
| --- | --- |
| **Category** | **Used for** |
| Cultivation | Engagement that further develops the prospect towards a gift solicitation |
| Event Invitation | Any event invitation sent to a constituent |
| Foundation Relations | Any communications from the Foundation Relations team |
| Inquiry | Any constituent-initiated request for help or more information |
| Internal Strategy | Any DAR Staff communications about constituent strategy. |
| LYBUNT Follow-up | Outreach regarding lapsed annual donors |
| Meeting Request | DAR Staff initiated request for a meeting with a constituent |
| Pledge Reminder | Communications sent regarding pledge follow up |
| Pledge Status Report | Communications sent regarding the status of a pledge |
| Qualification | Any direct communication with a constituent that determines a constituent's capacity or affinity towards the University |
| Solicitation | Any communication regarding a gift solicitation |
| Stewardship | Any communication regarding stewarding a donor for a previous donation |
| Token | Any gift given or sent to a constituent from DAR Staff |
| Volunteer Engagement | Any communications or engagement with a volunteer |

* The interaction subcategory must provide additional details on the interaction's purpose. The subcategory available depends on the category as per the following:

|  |  |  |
| --- | --- | --- |
| **Category** | **Subcategory** | **Used for** |
| Foundation Relations | Email Inquiry | Email to a foundation |
| Foundation Relations | Funder Meeting | Meeting with funder |
| Foundation Relations | Internal Coordination | Work with BIJ stakeholders, such as faculty |
| Foundation Relations | LOI Submission | Submit LOI to foundation |
| Foundation Relations | LSO Submission | Submit LSO to Research |
| Foundation Relations | Proposal Submission | Submit proposal to foundation |
| Foundation Relations | Research | Generate profiles or more targeted research on a particular foundation |
| Foundation Relations | RFP Distribution | Send RFPs out to faculty and leadership |
| Foundation Relations | Stewardship | Stewardship and reporting on a grant received |
| Internal Strategy | Planned Giving | Any communications between the Planned Giving Team and Gift Officers to capture planned giving consultations. |
| Internal Strategy | Prospect Management | Any communications between Prospect Management and Gift Officers regarding prospect development. |

* Outcomes provides a framework for Gift Officers to hand-off prospects that may better align with a different GO or department. For example, if a Major Gift Officer meets with a prospect and qualifies them as Leadership Annual Giving, then they can use this attribute to flag the prospect for the LAG team. The Prospect Management team processes all referrals.

|  |  |
| --- | --- |
| **Outcome** | **Used for** |
| AF Referral | Annual Fund Referral |
| MG Referral | Major Giving Referral |
| Not a Prospect |  |
| PG Referral | Planned Giving Referral |
| Qualified MG |  |
| Unconfirmed |  |

# Business Steps

## Business Steps to Add Interaction from Prospect Constituent Record Documentation and Interactions Tab

1. Search for constituent record as described in [SOP for Searching for Constituent Records in BBEC](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Searching%20for%20Constituent%20Records%20in%20BBEC.docx?web=1).
2. From the open constituent record, select *Documentation and Interactions tab*. The *Documentation and Interactions* displays. Add a new interaction by selecting Add on the action bar on the *Interactions* sub tab.
3. The **Interaction Launcher** screendisplays:

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1. Define your level of contact for this interaction:
   1. Visit
   2. Two-way communication
   3. Inbound
   4. One-way outreach

Alternatively select “Was this an internal meeting regarding a prospect?”

1. Select an option under “Which contact method was used?”:
   1. If you selected “Visit” select one of:
      1. In Person Meeting
      2. Phone
      3. Video Call

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* 1. If you selected “Two-way communication” select one of:
     1. Alumni Portal
     2. Alumni Website
     3. Email
     4. Event
     5. Handwritten Note
     6. Internal Meeting
     7. Interview
     8. LinkedIn
     9. Mail
     10. On Campus Visit
     11. Phone call
     12. Text Message
     13. Token
     14. Video Call

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* 1. If you selected “Inbound” select one of:
     1. Email
     2. On Campus Visit
     3. Phone call
  2. If you selected “One-way outreach” select “Phone call”

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* 1. If you selected ‘Internal’ select Internal Meeting

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1. For “Visit,” “Two-way communication,” “One-way outreach” and “Internal” also select “Is this associated with a Plan?”
2. If you selected Yes, select the plan by browsing preexisting plans using arrows and clicking “Select Plan.”

**NOTE**: If constituent is not a prospect and does not have a plan you cannot add it to a plan. Instead, an error message will be shown.

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1. Select the Go button.
2. If you selected a Plan, then **Add step** form appears and if you did not then **Add interaction** form appears:

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Description automatically generatedA screenshot of a computer

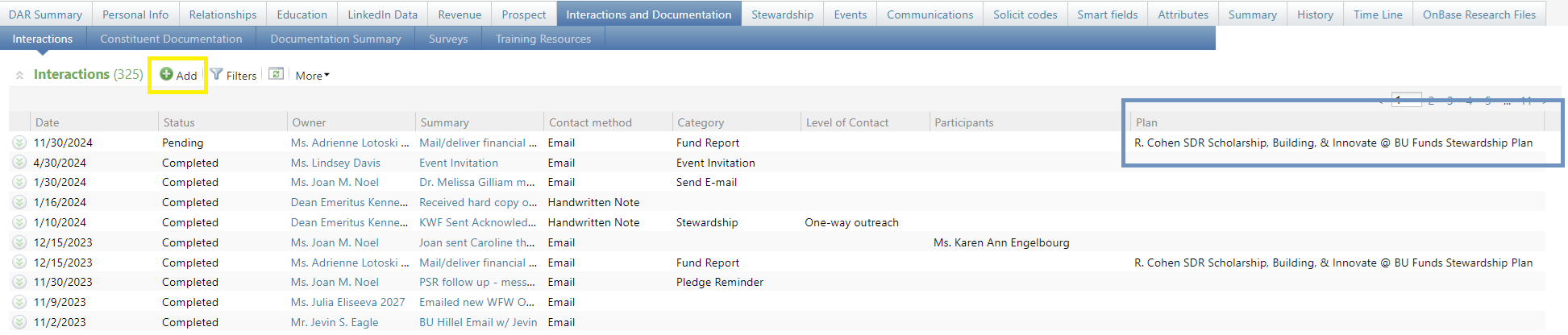
Description automatically generated

1. Make the appropriate edits to the necessary fieldsandselect ‘*Save.’*

## Business Steps to Review Interaction

When you add a constituent interaction, BBEC automatically creates a record of the interaction. From the interaction record, you can view and manage detailed information about the interaction. You can also view and manage the responses and documentation associated with the interaction.

1. To access an interaction record, from the constituent record, select the Documentation and Interactions tab or
2. Then click Interactions.
3. The Interactions tab appears.
4. Review the following information in the iterations data list
   1. Date
   2. Status
   3. Owner
   4. Summary
   5. Contact Method
   6. Category
   7. Level of Contact
   8. Participants
   9. Plan



NOTE: Alternatively select Prospect Tab > Contact Reports and interactions:

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AI-generated content may be incorrect.

1. Select the interaction from the list. The row expands to display additional information.
2. From the grid on the Interactions tab, click the interaction summary under the Summary column.
3. Interaction Record appears.
4. To view specific detailed information entered about an interaction, from the interaction record, select the Details tab. Under Details, information entered about the interaction such as owner, dates, status, and categories appear. You can also view any comments or additional information entered about the interaction.
5. To edit the information that appears on this tab, click Edit on the action bar. The Edit interaction screen appears. For more information about how to edit an interaction, see “Business steps to edit interaction.”
6. To view the responses received from the constituent interaction, select the Responses tab. Under Responses, you can view its category and answer associated with each response. To make sure the latest information appears, click Refresh List on the action bar. To add or edit responses to the interaction, click Edit Responses on the action bar. The Edit responses screen appears.
7. To view the documentation for the constituent interaction, select the Constituent Documentation sub tab. On the sub tab, you can attach interaction documentation as per guidelines specified in [SOP for managing constituent documentation](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Managing%20Constituent%20Related%20Documentation.docx?web=1).

NOTE: You can also navigate to interactions documentation in constituent record by selecting Documentation Summary sub tab from the *Interactions and Documentation tab* and scrolling down to the second section called Interaction documentation. This allows you to see the list of attached documentation for all interactions with this constituent. From that page, you can click on Interaction Objective to navigate to interaction record.

1. Attributes tab. BBEC allows using attributes to store specialized information. DAR uses only one interaction attribute called “DAR Contact Report” Yes/No.
2. You can also view Event Engagement list-based Event attendance for the constituent.

## Business Steps to Edit Interaction

Edit a constituent interaction to correct or update information previously entered. When editing an interaction use **extreme caution** not to overwrite information that does not need editing.

1. To edit a Constituent Interaction, locate and open the constituent record like the one on picture below then select *Interactions* subtab from the *Documentation and Interactions* tab as described in [SOP for Searching for Constituent Records in BBEC](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Searching%20for%20Constituent%20Records%20in%20BBEC.docx??web=1).
2. In the Interactions subtab that displays, click on the arrow next to the interaction you would like to edit.
3. Select ***Edit* *Interaction*** the interactions action bar:The *Edit Information* screen displays with pre-filled information fields in the form like in Add Interaction form
4. An older interaction record may not have Level of Contact and Contact Method fields values set, but you must set them to save your changes.
5. Make the appropriate edits to the necessary fieldsandselect ‘*Save.’*

**NOTE:** If you choose to make no edits, you need to click cancel or the x button on the top of the form. Clicking save with no changes still affects reporting.

## Business Steps to Delete Interaction

You may need to delete a constituent interaction from the constituent to correct an entry error (not typical task). Use **extreme caution** to delete the correct interaction. When you delete constituent interaction, BBEC deletes the complete interaction record from the Interactions list.

1. To Delete a Constituent Interaction, locate and open the constituent record then select *Interactions* subtab from the *Documentation and Interactions* tab (see [SOP for Searching Constituent Record](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Searching%20for%20Constituent%20Records%20in%20BBEC.docx??web=1)).
2. Select the chevron arrow to display the interaction to delete, the *Interaction* action bar displays.
3. Selects *Delete*on the action barto delete the interaction record. Exercises **extreme caution** to ensure that they delete the correct interaction. Once you delete the interaction, it is unrecoverable.
4. BBEC displays a confirmation message: “*Are you sure you want to delete interaction?”* Select ‘*Yes’* to confirm deletion of the selected interaction. Select *No* to **cancel** the deletion of the selected interaction.
5. BBEC will return to the Interactions Page.

**NOTE*:*** Deleting Interaction BBEC will delete DAR Contact Report and all the details of the meeting from the record.

## Business Steps for Spousal Interactions

You can review interactions, which credit a spouse as a participant or primary recipient by selecting *Spousal* *Interactions* sub tab from the *Documentation and Interactions* tab. This is the same information as information shown on *Interactions* sub tab of the constituent record for the spouse.

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## Business Steps to Maintain Interaction Categories and Subcategories

**NOTE:** You need to have admin permission to maintain interaction categories and subcategories in BBEC, so it is often better to contact DAR Applications as described in [SOP for Service Tracking in DAR](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Service%20Tracking%20in%20DAR.docx?web=1) instead of attempting the following steps.

1. Navigate to Marketing and Communications > Configuration section > Interaction Categories and Subcategories
2. Click on a category (i.e., "Foundation Relations")
3. Click on chevron and “Edit” to edit the category.
4. Click Add to add a category.
5. Click on the link to view subcategories.
6. Click on chevron and “Edit” to edit a subcategory.
7. Click Add to add a subcategory.

**NOTE:** You can only delete an unused category or subcategory. To prevent category or subcategory from showing as a choice on the list mark it as inactive.

## Business Steps for Contact Report Daily Log

1. To see the log, navigate to DAR Custom Reports > Fundraisers section

A screenshot of a computer

AI-generated content may be incorrect.

1. Under Fundraisers select DAR Contact Report Daily Log

**NOTE:** The report format is the same as for Prospect Audit Report described in [SOP for Prospect Auditing](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Prospect%20Auditing.docx?web=1) but only shows prospects with [DAR Contact Reports](#_DAR_Contact_Report_1)

## Business Steps for Contact Report Log by Actual Date

1. To see the log, navigate to DAR Custom Reports
2. Under Fundraisers select “DAR Contact Report Log by Actual Date”

Fundraisers 
“DAR Contact Report Log by Actual Date” 

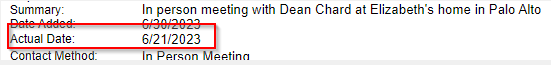
**NOTE:** The report has the same format / data as the existing DAR Contact Report Daily Log, except for the following:

1. Parameters:

Parameters
Interaction Actual Date Start
Interaction Actual Date End
Region(s)


* 1. The report filters on the Interaction Actual Date. The default dates are set to yesterday as start and today as the end.
  2. You can filter the report also by region.

1. Report Output:
   1. You can view interaction Actual Date on report:



* 1. The sizes page so you can save it as a pdf. (The daily log version seems optimized for mobile use.)

## Business Steps for Requesting to Add Same Interaction Content for Multiple Constituents

Performed by DAR staff when they need to upload the same interaction content for multiple constituents into BBEC.

1. Contact Gifts and Records staff as described in [SOP for Requesting Gifts & Records Related Updates](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20for%20Requesting%20Gifts%20&%20Records%20Related%20Updates.docx?web=1) or by sending email to [alumbio@bu.edu](mailto:alumbio@bu.edu)

Provide the following information to be added in bulk:

**NOTE**: Level of Contact will always be “One-way outreach”

* 1. Contact Method
  2. Category
  3. Subcategory
  4. Status
  5. Owner LookupID
  6. Summary
  7. Date
  8. Comment

1. Attach a CSV/excel document listing the constituent BBEC Lookup IDs or for the constituents to upload the interaction.

**NOTE**: DAR Applications staff is working to ability to provide constituent BBEC system ID (GUID) instead of the Lookup ID

1. Gifts and Records staff will notify you when the interactions are uploaded or if there is an issue with what you are provided.

## Business Steps for Adding Interaction Content in Batches

Performed by Gifts and Records staff upon receiving the bulk interactions information via [alumbio@bu.edu](mailto:alumbio@bu.edu) email. See [SOP Overview of Batches in BBEC](https://bushare.sharepoint.com/sites/DAR/darapps/Shared%20Documents/SOP%20Overview%20of%20Batches%20in%20BBEC.docx?web=1) describes import processes and batches in BBEC.

1. Open [Interaction Bulk Upload](https://crm30656p.sky.blackbaud.com/30656p/webui/webshellpage.aspx?databasename=30656p" \l "pageType=p&pageId=7cec37b8-968d-4b5e-b171-be2a43d2cb8a&recordId=77d55936-ace2-4957-87eb-1c87f0caf3f4) import process.
2. Provide correct file name
3. Run the process
4. The process creates an uncommitted batch.
5. Commit the batch to update BBEC constituent records.

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Description automatically generated

1. Notify requesting DAR staff when the interactions are uploaded or if there is an issue with what is provided.

# Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Sections** | **Description** |
| 1 | 01/13/2015 | Carol Mitchner | All | Created procedure |
| 2 | 01/20/2015 | Carol Mitchner | All | Update with revisions per M. Rivera |
| 3 | 02/03/2015 | Carol Mitchner | All | Updated per review from M. Rivera |
| 4 | 02/11/2015 | Carol Mitchner | All | Updated per comments & review by S. Witkowski |
| 5 | 01/12/2017 | Marina Rozenberg | All | Formatted text |
| 6 | 06/15/2017 | Marina Rozenberg | All | Updated navigation to Interaction pages based on BBEC 4.0 |
| 7 | 08/30/2017 | Marina Rozenberg | All | Removed redundant steps and added links to other interactions SOPs. Updated per comments from Kate Deforest. |
| 8 | 09/19/2017 | Marina Rozenberg | Process Description | Added information about reviewing spousal interactions. |
| 9 | 03/28/2018 | Marina Rozenberg | All | Consolidated all the information about interactions in one SOP. |
| 10 | 03/29/2018 | Marina Rozenberg | All | Incorporated review comments from Melody |
| 11 | 03/30/2018 | Marina Rozenberg | Business Steps | Added “Business steps to review interaction” section |
| 12 | 04/04/2018 | Marina Rozenberg | Business Steps | Added “Business steps for using Microsoft Outlook to add interaction” section |
| 13 | 02/18/2020 | Marina Rozenberg | Business Rules | Added placeholder text for Business Rules |
| 14 | 02/18/2020 | Marina Rozenberg | Business Steps | Added “Business Steps to Maintain Interaction Categories and Subcategories” |
| 15 | 08/25/2020 | Marina Rozenberg | Business Rules | Consolidated Business Rules for Documenting Contacts and Interactions section of SOP for Managing Prospects. |
| 16 | 03/04/2022 | Marina Rozenberg | Business Steps | ENHC0026796 - data list to surface Event attendance for a constituent in the interaction screen of BBEC. |
| 17 | 10/20/2022 | Marina Rozenberg | Business Steps,  Process Description | New report based on the Prospect Audit report that will show just interactions with the DAR Contact checkbox checked. This will show all DAR Contact reports; constituent does not need to be a prospect and any capacity will show. |
| 18 | 12/02/2022 | Marina Rozenberg | Business Steps | Affinity tags section |
| 19 | 05/09/2023 | Marina Rozenberg | Business Steps | Updated Business Steps for Using Microsoft Outlook for BBEC Interactions |
| 20 | 08/24/2023 | Marina Rozenberg | Business Steps | Business Steps for DAR Contact Report Log by Actual Date |
| 21 | 08/29/2023 | Marina Rozenberg | Business Steps | No longer using outlook plugin |
| 22 | 11/01/2023 | Marina Rozenberg | Process Description | Added section |
| 23 | 11/15/2023 | Marina Rozenberg | Business Steps | Business Steps to Add Interaction. Change the interaction contact method from "Evertrue" to "Alumni Portal" to be more generic and platform agonistic. |
| 24 | 11/15/2023 | Marina Rozenberg | Business Steps | Added Business Steps to Add Interaction in Outlook Email Client |
| 25 | 01/08/2024 | Marina Rozenberg | Business Users  Business Steps | Melody: the owner for his SOP should is Scott R. in the prospect management team  Mike: a slight adjustment to the wording "Adjust to make the Actual Date equal the Expected date" |
| 26 | 03/13/2024 | Marina Rozenberg | Business Steps | Business Steps for Adding Same Interaction to a List of Constituents |
| 27 | 05/29/2024 | Marina Rozenberg | All | Formatting |
| 28 | 07/12/2024 | Marina Rozenberg | All | Interactions functionality rework |
| 29 | 08/14/2024 | Marina Rozenberg | Business Steps | Business Steps for Requesting to Add Same Interaction Content for Multiple Constituents Business Steps for Adding Interaction Content in Batches updated based on input from Katie |
| 30 | 10/28/2024 | Marina Rozenberg | Business Rules  Business Steps | ENHC2003752 - The new interaction edit form has the top fields for Level of contact and Contact method not editable by default. Adjusted so that they will be editable when adjusting an interaction with a status of Pending.  ENHC2003754 - The list showing an interaction on the Interactions subtab of the Interactions and Documentation tab on the constituent page has a new column which will show the plan name if that interaction is linked to one.  ENHC2003609 - The new interaction adds or edit form will now automatically choose a subcategory of "None" when a category is chosen that does not have any other subcategory choices. |
| 31 | 12/20/2024 | Marina Rozenberg | Process Description | Interaction Smart Query information |
| 32 | 03/31/2025 | Marina Rozenberg | Header  Business Rules  Business Steps | Link to How to Use BBEC Outlook Add-In.pdf training instead of the Mike Cicerone original doc.  Business Rules for Interaction and Plan Step Form Fields to include Outlook Add-In info  Business Steps to Add Interaction Through Outlook Email Client to closely resemble steps in the training material provided by Tess Walsh |
| 33 | 05/05/2025 | Marina Rozenberg | All | Moved Zuri Outlook Add-in information to the separate SOP for Managing Constituent Interactions via Outlook |