Printable Call Book Report for Outbound Fundraising or Prospecting Calls

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Overview

This article walks through the steps to create a **printable Call Book Report** (sometimes called an **Outbound Calling Report** or a **Trip Report**). This is used for your **fundraising** and **prospecting** needs when making phone calls (*sometimes this report is used for other purposes as well*).

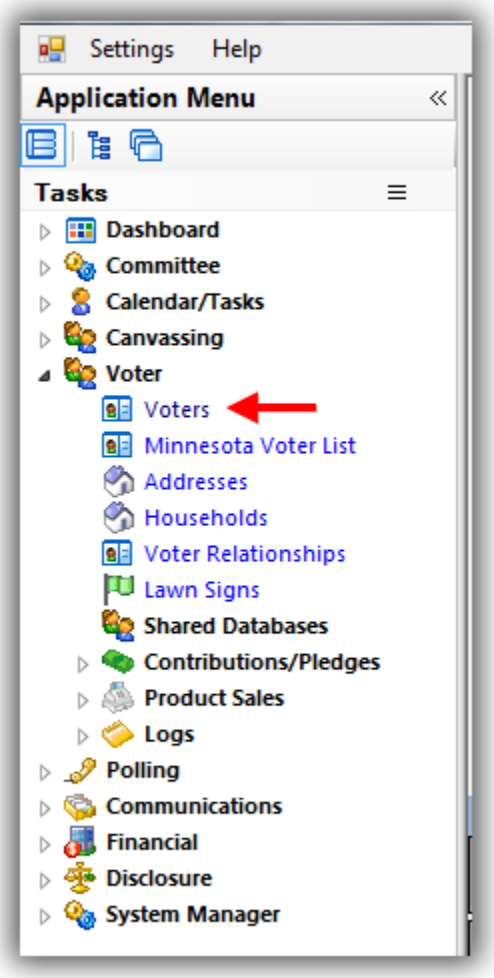
Call books provide an in-depth **summary** of **data** (e.g. **contribution history**, **log note** interactions, **attributes**, **user** fields, and **contact info**), for the list of **contacts** (voters/donors/prospects) that you **search for**. Call books are typically used for fundraising calls so the person making the call (usually the candidate or a board member) has a good understanding of who they're talking to and they can jot down notes on the call book during/after the call.

The article first shows how to **target a list** of contacts to call, how to **generate** the built-in **"report"**, **configure** the report options, and it provides an *example* of how a final **print preview** looks.

Tip: You can use our mobile app to look up contacts **on the go** and view things like **contact info**, **address**, **giving history**, **email/phone number**, and **record/view log notes**. This can be useful for someone who wants to make calls to donors but doesn't have their laptop with, but it does require appropriate security access.

Steps

Navigate to the **Voters/Donors** list under the **Application Menu**. *For the purpose of this article I used the **political version**.*



Build and **run** your search query for the list of contacts you want to generate a call book report for. *In my example I searched for all voters who contributed to my general 2016 election which produced 528 results.*

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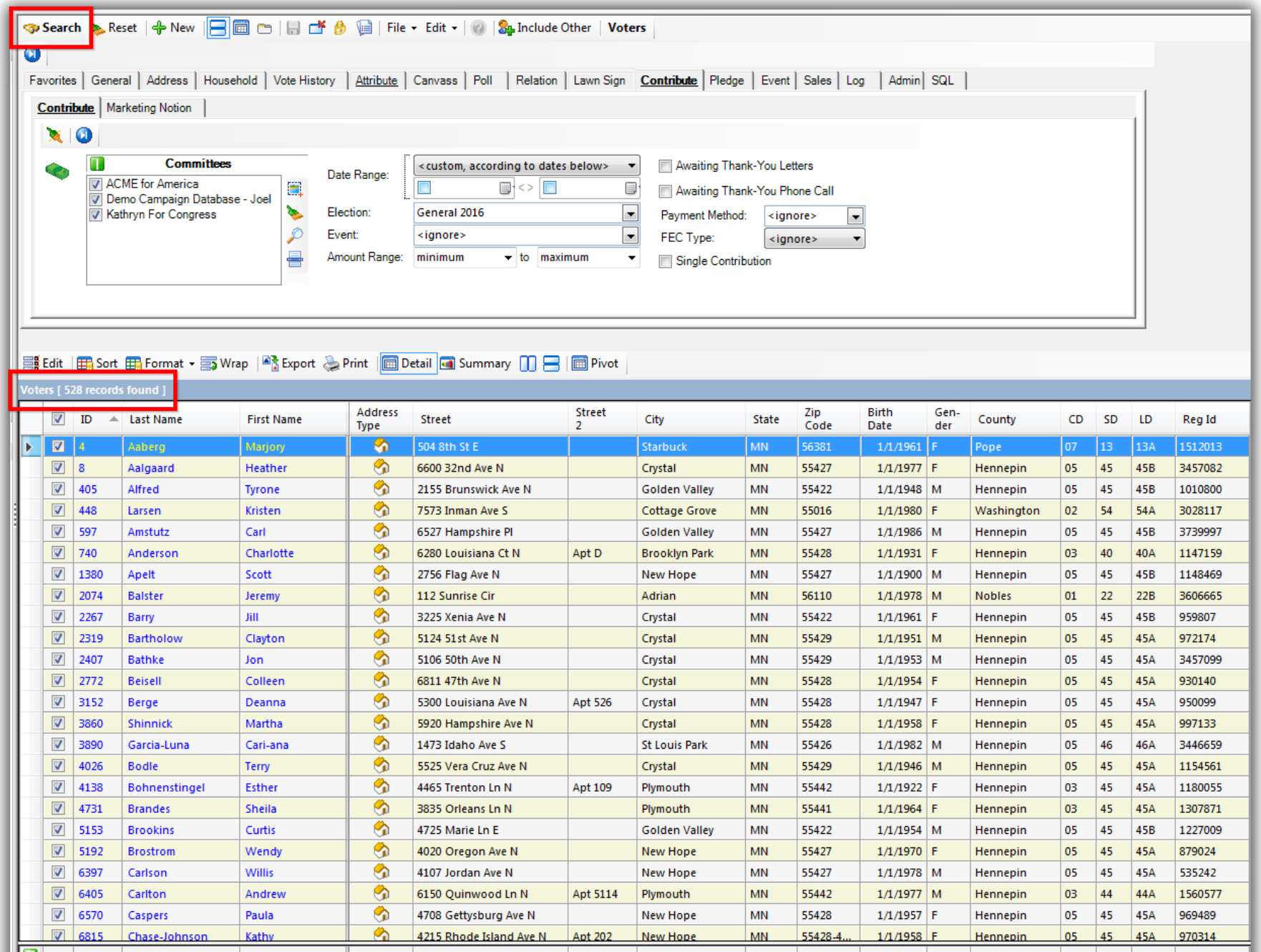
results



ID	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gender	County	CD	SD	LD	Reg Id
4	Aaberg	Marjory		504 8th St E		Starbuck	MN	56381	1/1/1961	F	Pope	07	13	13A	1512013
8	Aalgaard	Heather		6600 32nd Ave N		Crystal	MN	55427	1/1/1977	F	Hennepin	05	45	45B	3457082
405	Alfred	Tyrone		2155 Brunswick Ave N		Golden Valley	MN	55422	1/1/1948	M	Hennepin	05	45	45B	1010800
448	Larsen	Kristen		7573 Inman Ave S		Cottage Grove	MN	55016	1/1/1980	F	Washington	02	54	54A	3028117
597	Amstutz	Carl		6527 Hampshire Pl		Golden Valley	MN	55427	1/1/1986	M	Hennepin	05	45	45B	3739997
740	Anderson	Charlotte		6280 Louisiana Ct N	Apt D	Brooklyn Park	MN	55428	1/1/1931	F	Hennepin	03	40	40A	1147159
1380	Apelt	Scott		2756 Flag Ave N		New Hope	MN	55427	1/1/1900	M	Hennepin	05	45	45B	1148469
2074	Balster	Jeremy		112 Sunrise Cir		Adrian	MN	56110	1/1/1978	M	Nobles	01	22	22B	3606665
2267	Barry	Jill		3225 Xenia Ave N		Crystal	MN	55422	1/1/1961	F	Hennepin	05	45	45B	959807
2319	Bartholow	Clayton		5124 51st Ave N		Crystal	MN	55429	1/1/1951	M	Hennepin	05	45	45A	972174
2407	Bathke	Jon		5106 50th Ave N		Crystal	MN	55429	1/1/1953	M	Hennepin	05	45	45A	3457099
2772	Beisell	Colleen		6811 47th Ave N		Crystal	MN	55428	1/1/1954	F	Hennepin	05	45	45A	930140
3152	Berge	Deanna		5300 Louisiana Ave N	Apt 526	Crystal	MN	55428	1/1/1947	F	Hennepin	05	45	45A	950099
3860	Shinnick	Martha		5920 Hampshire Ave N		Crystal	MN	55428	1/1/1958	F	Hennepin	05	45	45A	997133
3890	Garcia-Luna	Cari-ana		1473 Idaho Ave S		St Louis Park	MN	55426	1/1/1982	M	Hennepin	05	46	46A	3446659
4026	Bodle	Terry		5525 Vera Cruz Ave N		Crystal	MN	55429	1/1/1946	M	Hennepin	05	45	45A	1154561
4138	Bohnenstingel	Esther		4465 Trenton Ln N	Apt 109	Plymouth	MN	55442	1/1/1922	F	Hennepin	03	45	45A	1180055
4731	Brandes	Sheila		3835 Orleans Ln N		Plymouth	MN	55441	1/1/1964	F	Hennepin	03	45	45A	1307871
5153	Brookins	Curtis		4725 Marie Ln E		Golden Valley	MN	55422	1/1/1954	M	Hennepin	05	45	45B	1227009
5192	Brostrom	Wendy		4020 Oregon Ave N		New Hope	MN	55427	1/1/1970	F	Hennepin	05	45	45A	879024
6397	Carlson	Willis		4107 Jordan Ave N		New Hope	MN	55427	1/1/1978	M	Hennepin	05	45	45A	535242
6405	Carlton	Andrew		6150 Quinwood Ln N	Apt 5114	Plymouth	MN	55442	1/1/1977	M	Hennepin	03	44	44A	1560577
6570	Caspers	Paula		4708 Gettysburg Ave N		New Hope	MN	55428	1/1/1957	F	Hennepin	05	45	45A	969489
6815	Chase-Johnson	Kathy		4215 Rhode Island Ave N	Apt 202	New Hope	MN	55428-4...	1/1/1958	F	Hennepin	05	45	45A	970314

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Click **File > Reporting > Call Book Report…**

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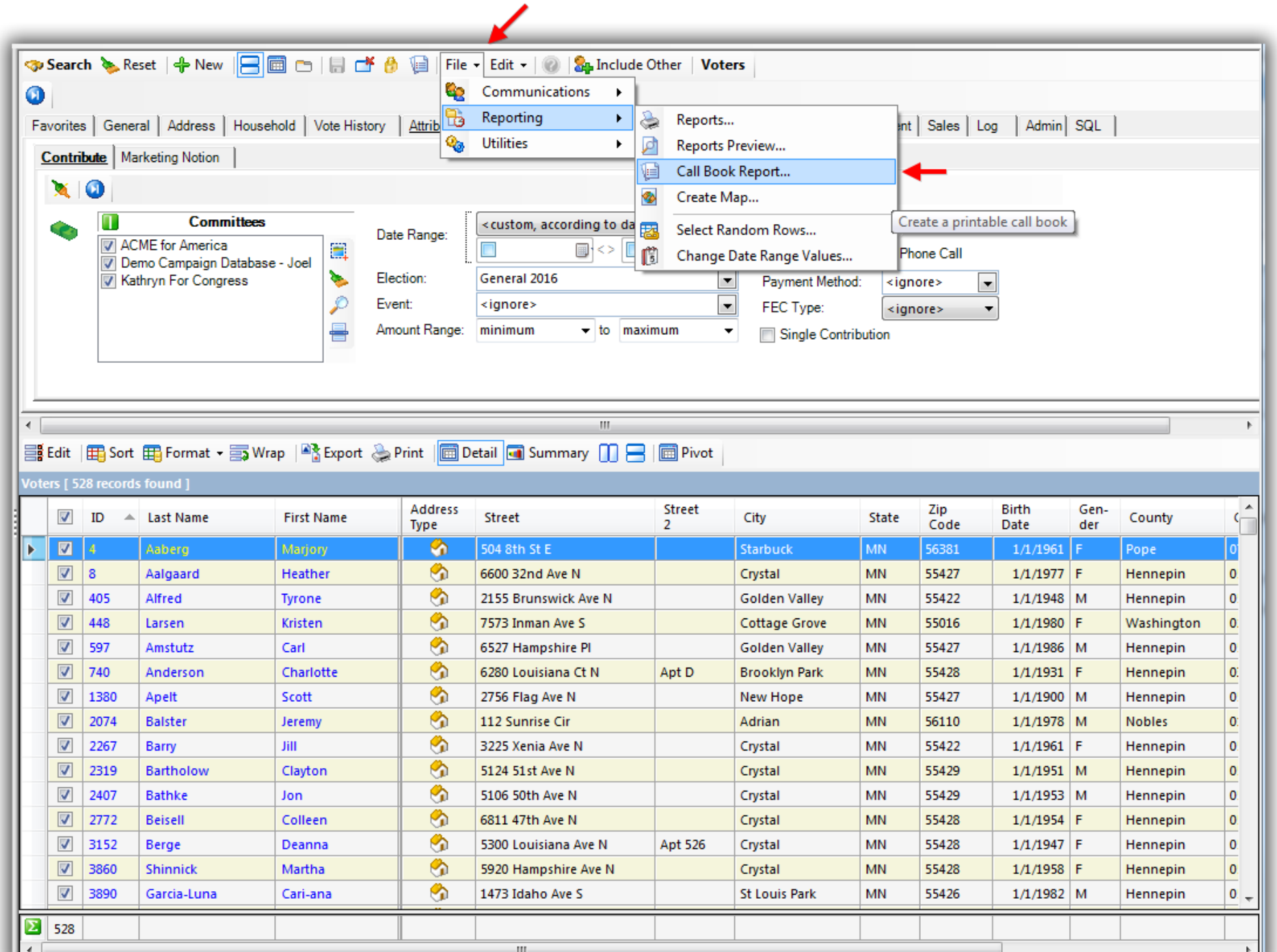

ID	Last Name	First Name	Address Type	Street	Street 2	City	State	Zip Code	Birth Date	Gen-der	County
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405	Alfred	Tyrone		2155 Brunswick Ave N		Golden Valley	MN	55422	1/1/1948	M	Hennepin
448	Larsen	Kristen		7573 Inman Ave S		Cottage Grove	MN	55016	1/1/1980	F	Washington
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740	Anderson	Charlotte		6280 Louisiana Ct N	Apt D	Brooklyn Park	MN	55428	1/1/1931	F	Hennepin
1380	Apelt	Scott		2756 Flag Ave N		New Hope	MN	55427	1/1/1900	M	Hennepin
2074	Balster	Jeremy		112 Sunrise Cir		Adrian	MN	56110	1/1/1978	M	Nobles
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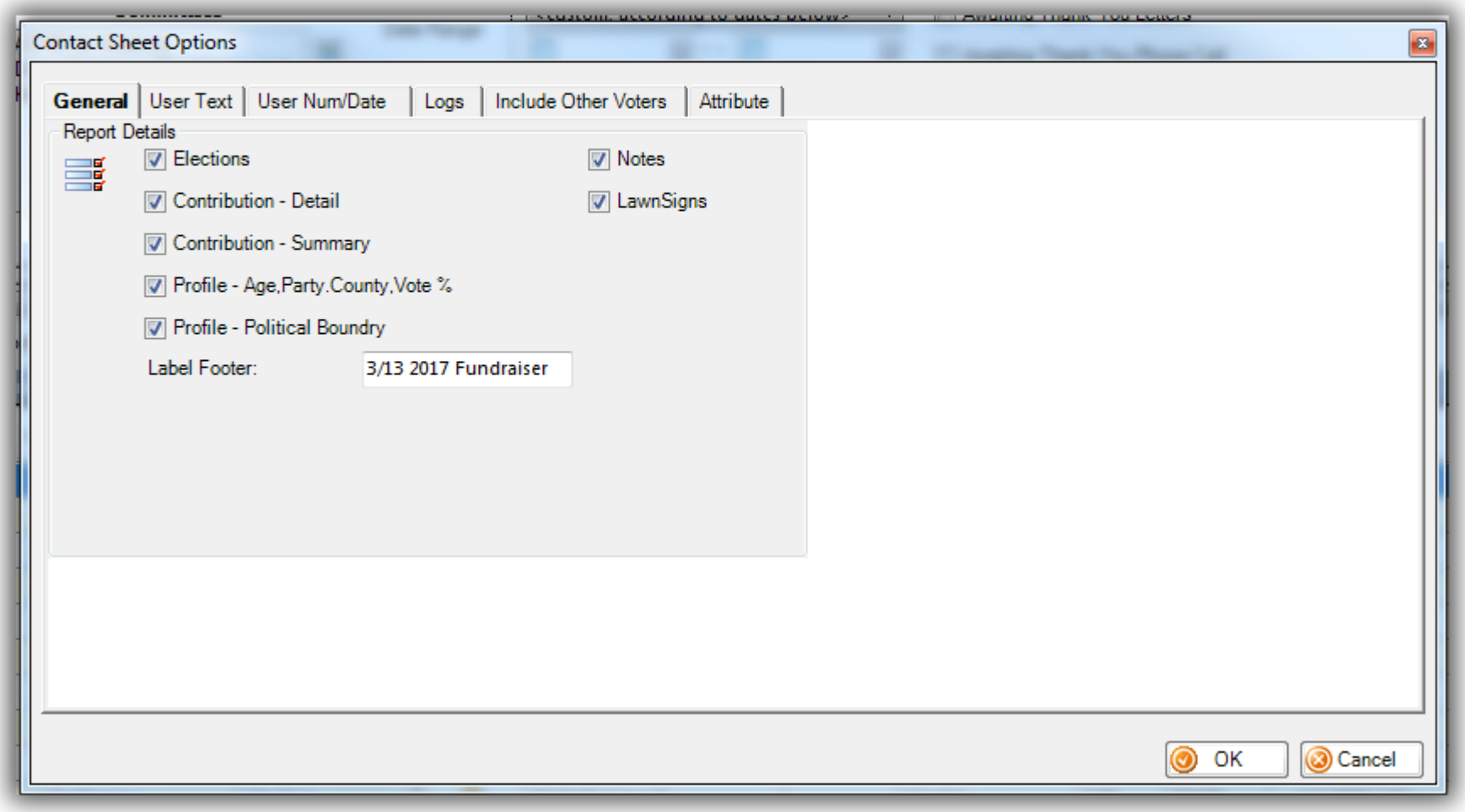
2772	Beisell	Colleen		6811 47th Ave N		Crystal	MN	55428	1/1/1954	F	Hennepin
3152	Berge	Deanna		5300 Louisiana Ave N	Apt 526	Crystal	MN	55428	1/1/1947	F	Hennepin
3860	Shinnick	Martha		5920 Hampshire Ave N		Crystal	MN	55428	1/1/1958	F	Hennepin
3890	Garcia-Luna	Cari-ana		1473 Idaho Ave S		St Louis Park	MN	55426	1/1/1982	M	Hennepin

528

Work your way through the different **tabs** to **configure** all the **options** you want to **print out** on your call book report. I've detailed my *example* below for each tab using 6 screenshots.

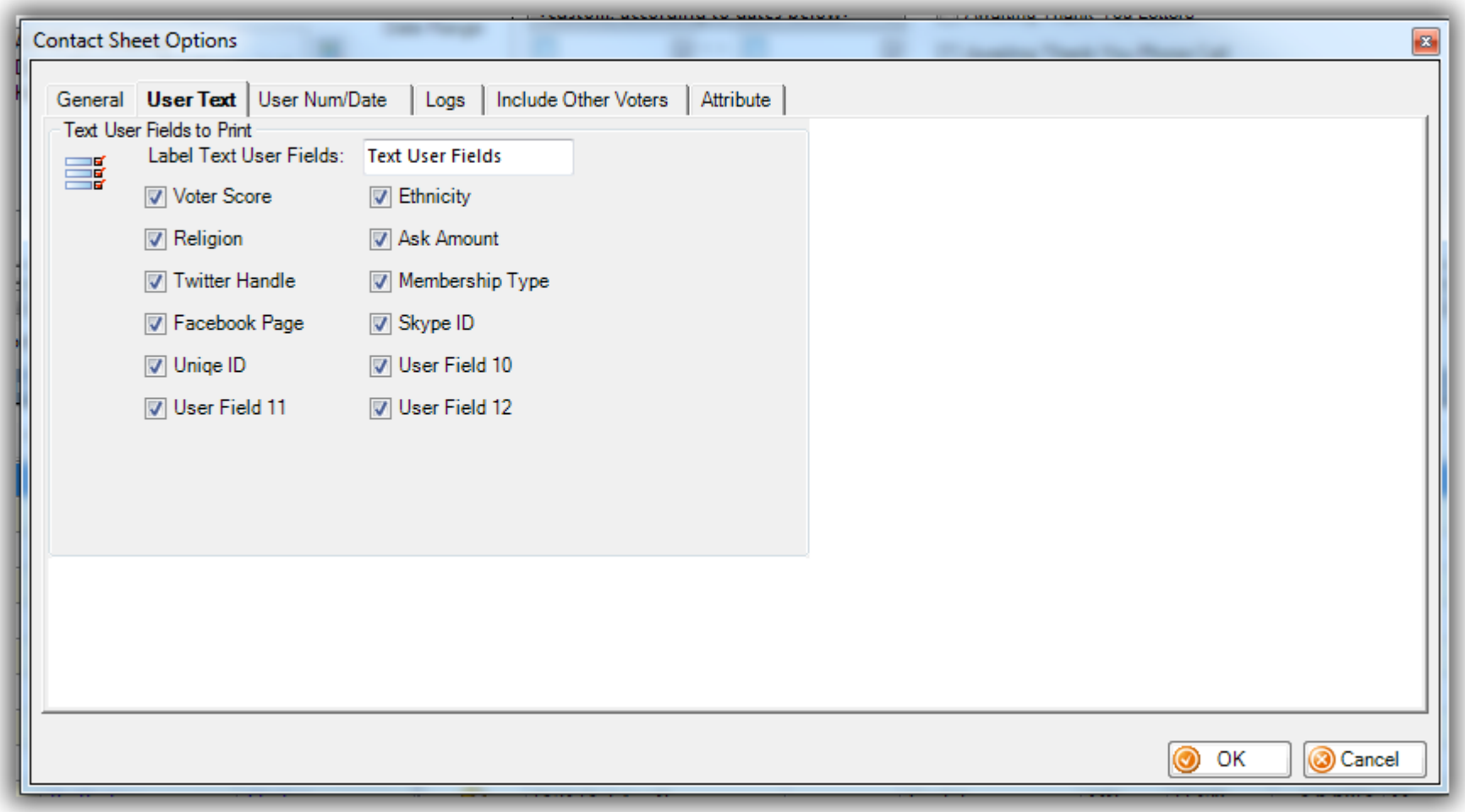
Img 1 of 6 – General

Under the General tab you configure some of the main details to print out like: contributions, elections, age, notes, etc. You can also create a custom 'footer' for the call book report.



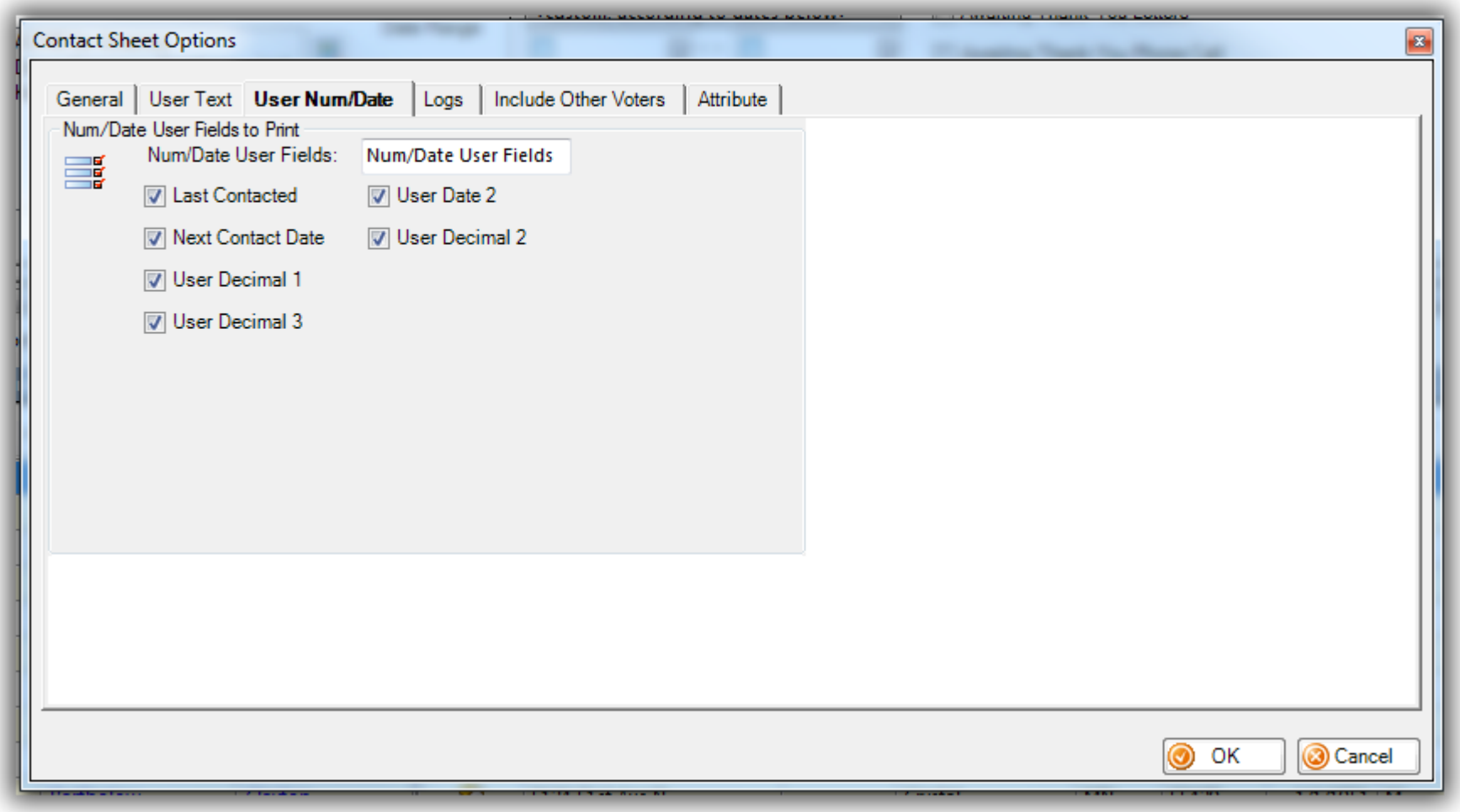
Img 2 of 6 – User Text

Under the User tab you can turn certain user fields on or off.



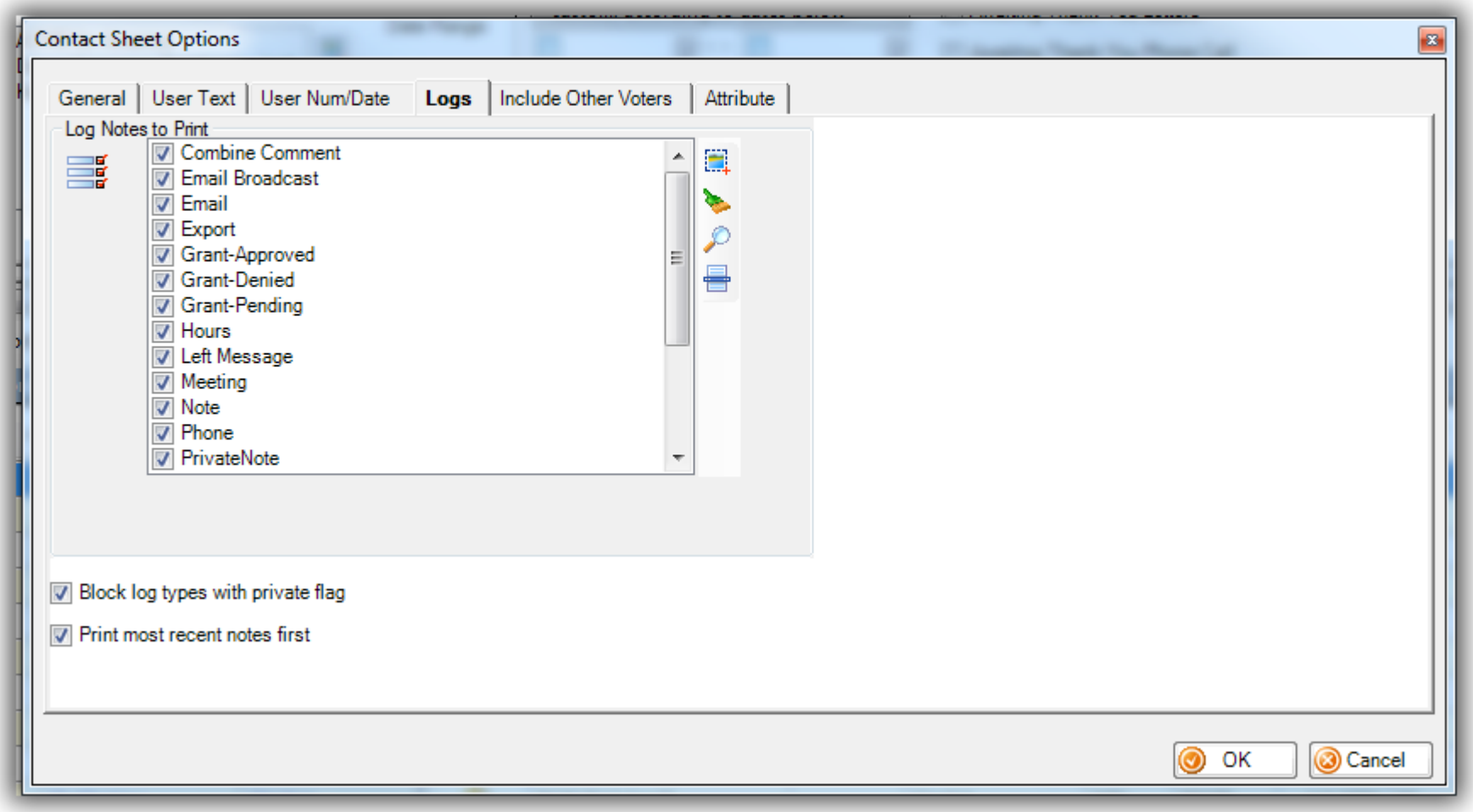
Img 3 of 6 – User Num/Date

Under the User Num/Date tab you can turn custom decimal and date user fields on or off.



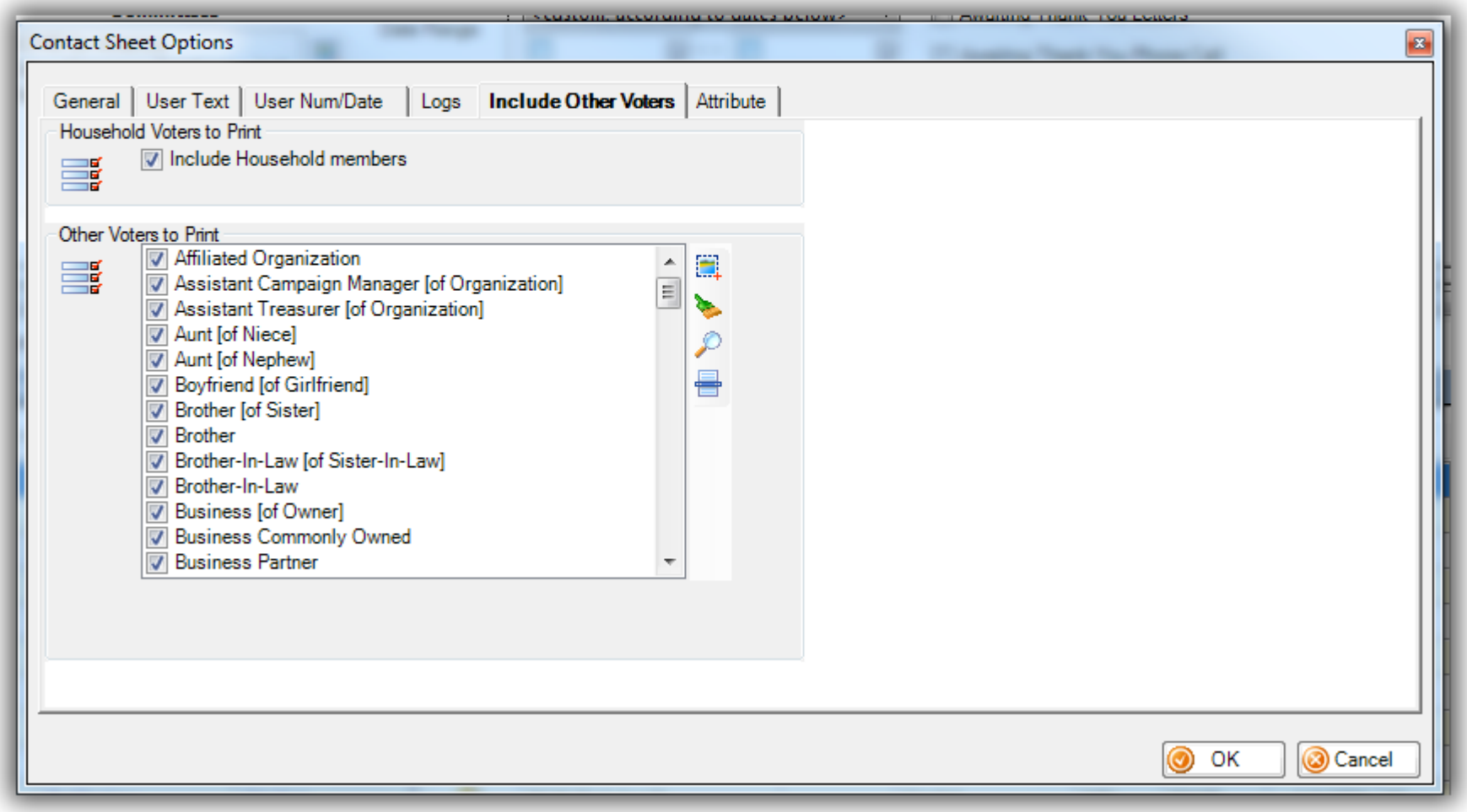
Img 4 of 6 – Logs

Under the Logs tab you can turn specific log types on or off as well as configure the sort order and choose if you want hide 'private' log notes.



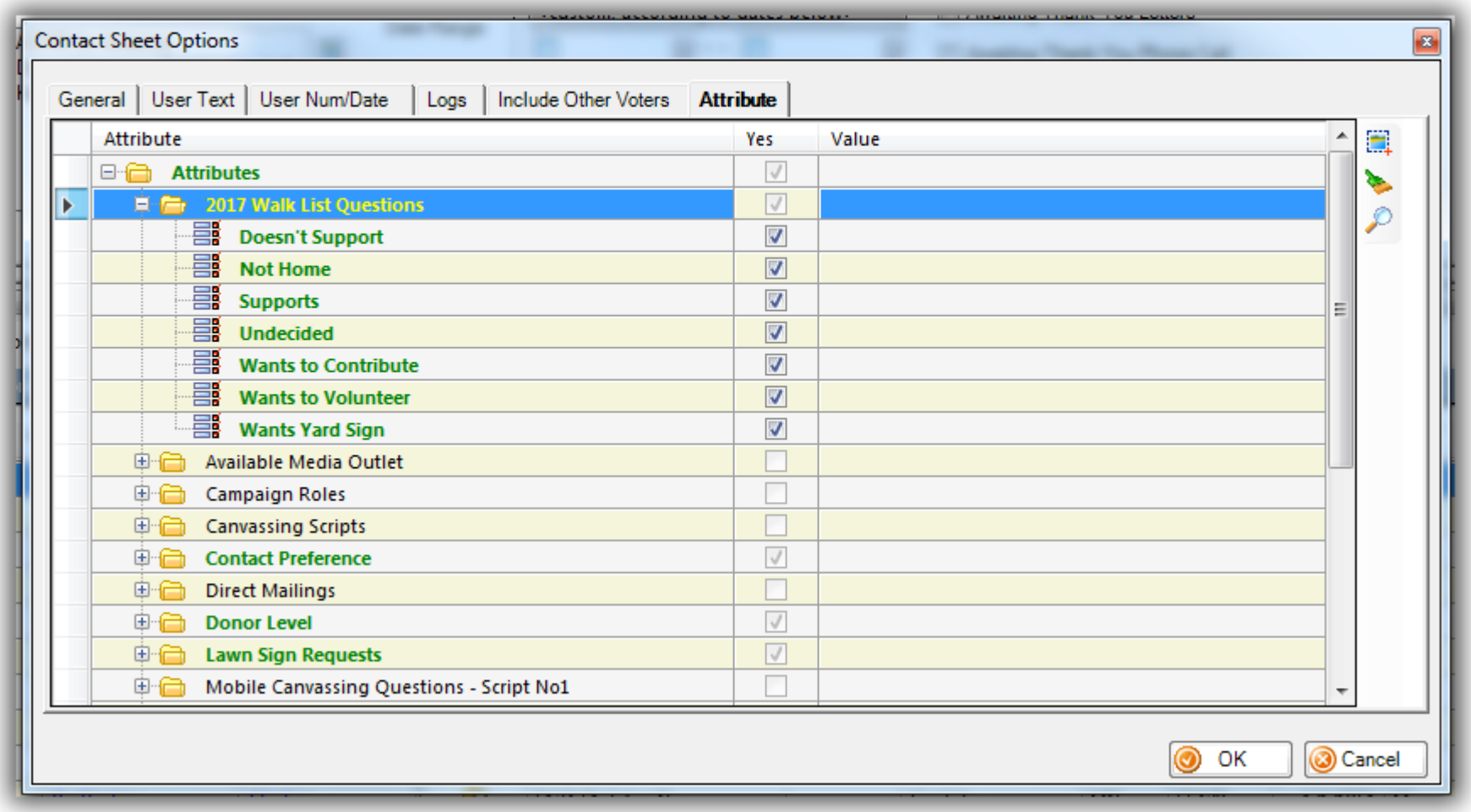
Img 5 of 6 – Include Other Voters

Under the Include Other Voters tab you can display which relationships you want to display that are linked to the contacts you queried for, you can also display who is in their household (if anyone).



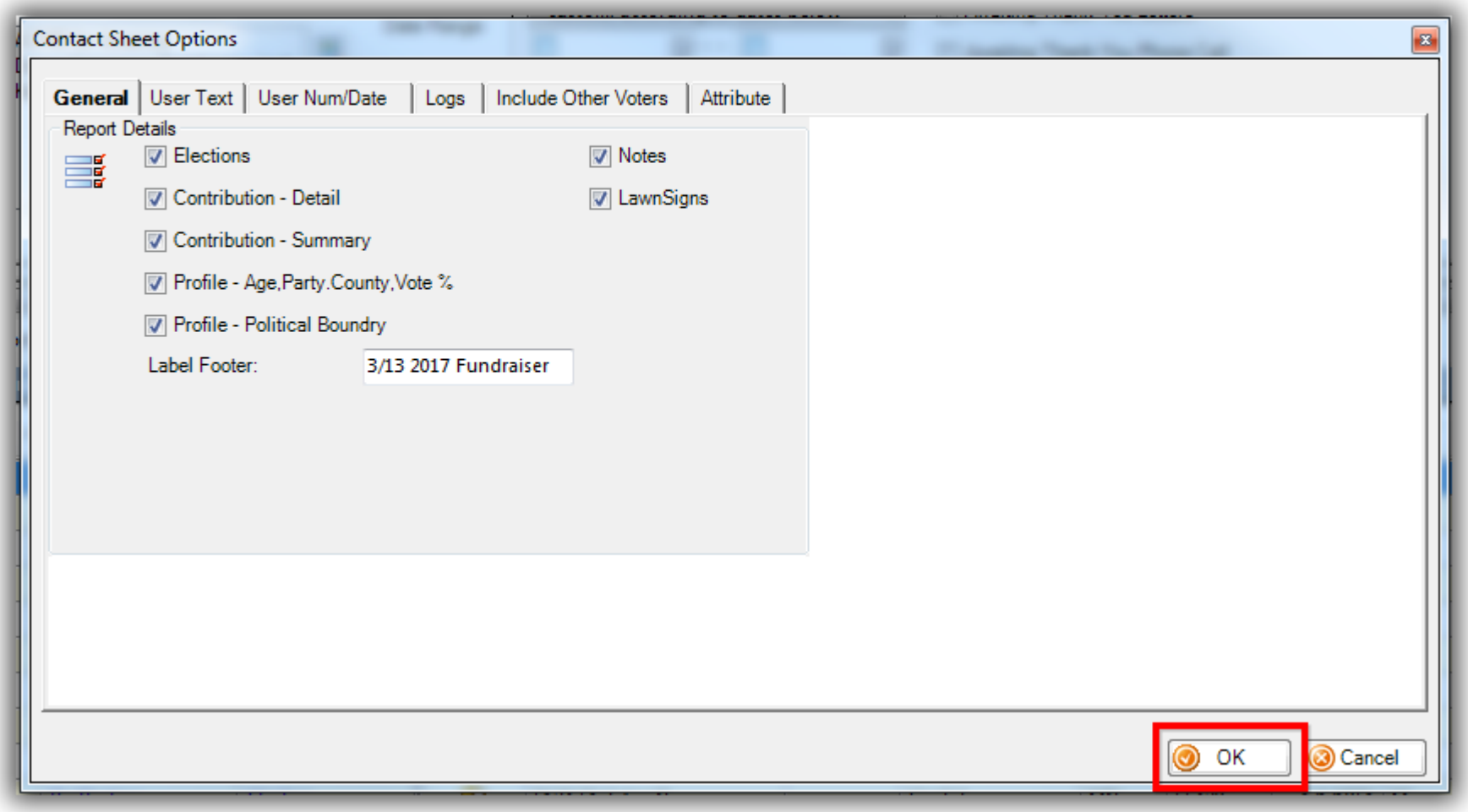
Img 6 of 6 – Attribute

Under the Attribute tab you can display which attributes you want to print out (whether they have the attribute assigned to them or not).



Once you're finished configuring everything, click **[OK]** to run the **print preview**. *If you're doing this for a large list it may take a few minutes for the report to finish generating.*

After everything is configured, click [OK]. If you're running a large list it may take awhile to load.



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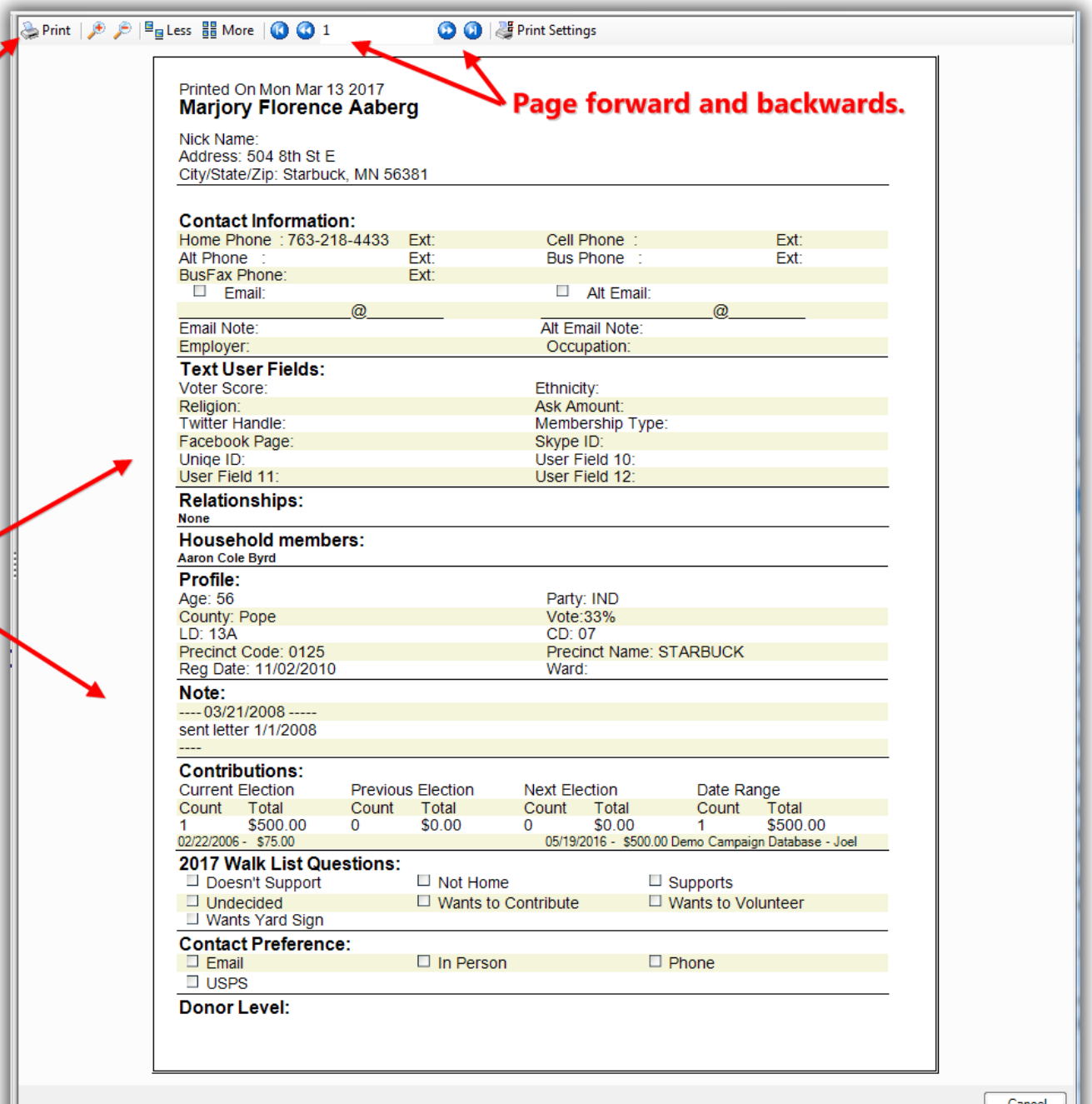
The two images below display **print previews** of my *example* call book report. You can click the **[Page Settings]** button to adjust the margins, type of paper, etc. You can view the different pages of the call book using the **blue** **page forward** and page **backward buttons** on the top tool strip.

Img 1 of 2 – Page 1 Example Call Book Report

Printable Call Book Report for Outbound Fundraising or Prospecting Calls

Example print preview of a call book report.



Print to paper or as a PDF.

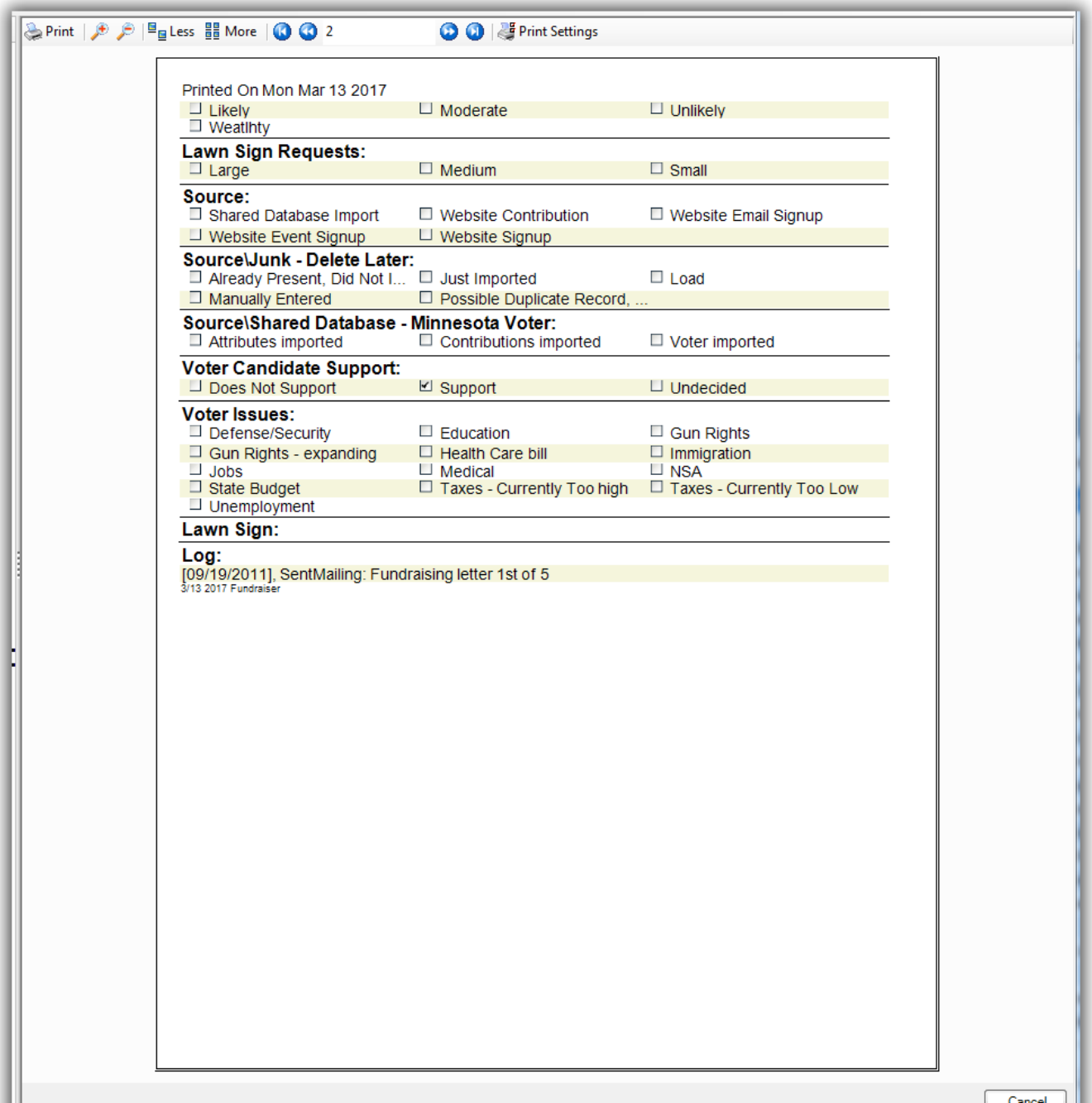
Page forward and backwards.

All the details you configured on the previous screens for the call book report.

Img 2 of 2 – Page 2 Example Call Book Report

Printable Call Book Report for Outbound Fundraising or Prospecting Calls

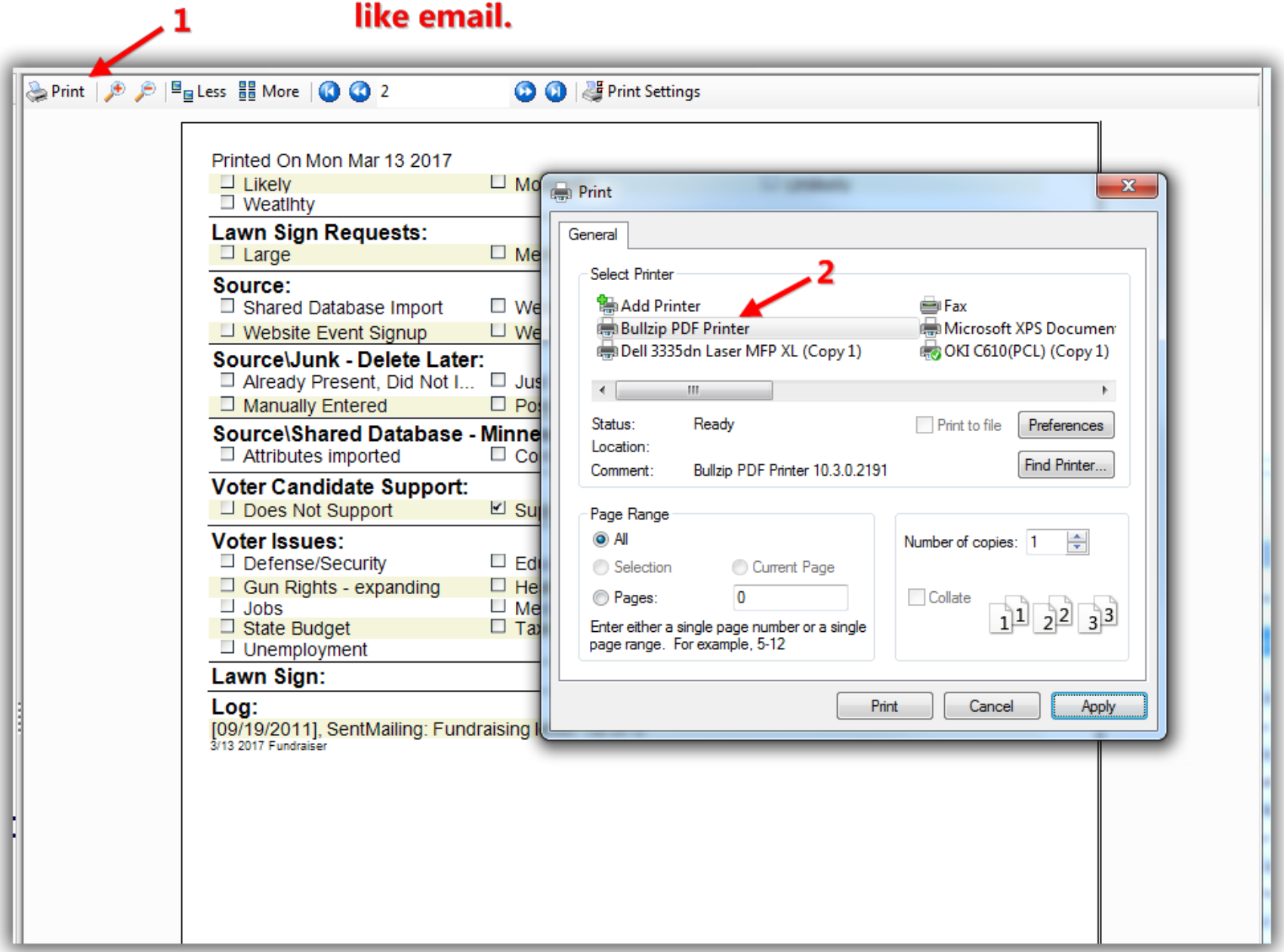
Example page two of a call book report.



Once you're ready you can click the **[Print]** button to print to either **paper** or as a **PDF** (*requires you have a PDF printer installed*).

Printable Call Book Report for Outbound Fundraising or Prospecting Calls

If you want to print the report as a PDF you can select that option (if you have a PDF printer installed). Then you can send it via things like email.



Tip: Instead of printing directly to paper you could save your call book report as a **pdf**. I would suggest using the free Bullzip PDF if you're working on a PC. *Typically a computer will come with a PDF printer installed.*

Take a look at the **related resources** below for links to a variety of similar articles and videos.

Related Resources

Article: Customizing Field Names
Article: Walk List Selectable Format
Article: Adding Log Types
Article: Adding Log Notes, Mass Log Notes & Reminders
Article: How to Rename User Fields, Query by them, Add them to the Grid as Columns, and Utilizing them as Merge Fields in a Letter & E-Mail Template
Article: How to Create Attribute Folders and Attribute Items (Custom Categories)
Article: Creating and Saving Default Formats for Reporting with the Grid
Article: Add Attributes, Attribute Dates, and Attribute Notes to the Grid by Formatting them in as Columns
Article: Mobile Base Camp – Contact Search
Article: Mobile Base Camp – How to Create and Run a Mobile Canvassing (Walk) List
Article: Mobile Base Camp – How to Setup and Use the Mobile Poll Watching App
Article: Tips and Tricks for using Mobile Base Camp – Add Shortcuts to your Home Screen, Adjust Device Settings to Keep the Screen on, and More
Article: Log Notes vs User Fields vs Attributes
Article: SQL Wildcards
Article: Save and Load a Search Query as a (Dynamic) Search Favorite
Video: Reporting 102 – Quick Reports and Export
Video: Attributes – Adding New
Video: Reporting 101 – Political – Contribution reports & Walk Lists
Video: Reporting 104 – Joined tables
Video: Search Tool Strip Enhancements

Video: Getting Started 105 – Queries with an AND condition
Video: Canvass Your Neighborhood With Our Mobile Canvassing App
Video: Getting Started 104 Queries with wildcards
Video: Getting Started 102 Beginning Queries - Political
Video: Getting Started 102 Beginning Queries - Nonprofit
Video: Mobile Canvassing
3rd Party Tool: Bullzip PDF Printer

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- **Email:** support@trailblz.com
- **Facebook:** https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **Twitter:** https://twitter.com/trailblazersoft

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Click here to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the GoToMeeting session where we host our live interactive trainings.*

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** This service is included in your contract.*