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<u>Overview</u>

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 <u>mobile app</u> 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 <u>security access</u>.



<u>Steps</u>

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 <u>search query</u> 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.*



Build and run a search query for the list of contacts you want to generate a call book report for.

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Click File > Reporting > Call Book Report...



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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.

Contact Sh	neet Options	: Excusion, according to dates below?	
Contact Sh General Report I	neet Options	ate Logs Include Other Voters Attribute Voters University attribute Voters Voters Attribute Voters V	
		OK OK	



Img 2 of 6 – User Text

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

Contact Sh	eet Options		
General Text Use	User Text User Num/Der Fields to Print Label Text User Fields: Voter Score Religion Twitter Handle Facebook Page Uniqe ID User Field 11	Date Logs Include Other Voters Attribute Text User Fields © Ethnicity © Ask Amount © Membership Type © Skype ID © User Field 10 © User Field 12	



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.

Contact Sh	eet Options		
Contact Sh General Num/Da	User Text User Num/ ate User Fields to Print Num/Date User Fields: User Contacted User Decimal 1 User Decimal 3	Date Logs Include Other Voters Attribute Num/Date User Fields Image: Comparison of the second of the	
		OK OK	



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.

Contact Sheet Options	×
General User Text User Num/Date Logs Log Notes to Print Combine Comment Email Broadcast Email Export Grant-Approved Grant-Pending Hours Left Message Meeting Note Phone PrivateNote 	clude Other Voters Attribute
 Block log types with private flag Print most recent notes first 	
	OK OK Cancel

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).

Contact Sheet Options			
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Not Home	V		
Supports	V	=	
Undecided	V		
Wants to Contribute	V		
Wants to Volunteer	V		
Wants Yard Sign	V		
🕀 🔂 Available Media Outlet			
🕀 🧰 Campaign Roles			
Canvassing Scripts			
Contact Preference	1		
Direct Mailings			
Donor Level	1		
🕀 🛅 Lawn Sign Requests	V		
🕀 🛅 Mobile Canvassing Questions - Script No1			
		🞯 OK 😡 🙆 Cancel	



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.





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





Example print preview of a call book report.

Connel



Img 2 of 2 – Page 2 Example Call Book Report



Example page two of a call book report.

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





- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources



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: <u>Reporting 104 – Joined tables</u> Video: Search Tool Strip Enhancements



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- Video: <u>Canvass Your Neighborhood With Our Mobile Canvassing App</u>
- Video: Getting Started 104 Queries with wildcards
- Video: Getting Started 102 Beginning Queries Political
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- 3rd Party Tool: <u>Bullzip PDF Printer</u>

Trail Blazer Live Support

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- Email: <u>support@trailblz.com</u>
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* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.



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