

ALUMNI REPORT

Job Aid

WHAT IS AN ALUMNI REPORT

The Alumni Report is a tool for WFAA staff to build lists for the purposes of planning events or estimating counts for a specific communication. The report includes contact information, so it may be used to produce lists for mailings, emails or phone calls.

If you choose to use this list to communicate to a group of constituents, you must also submit the final list used via the [List & Report Request](#) Form. This will allow BI to tag the constituent records to show they received the communication. Please complete this step, as it helps us understand which communications a constituent received and how frequently we communicate with our constituents. This helps WFAA and UW continue to refine our marketing and communications strategies.

If you use this to create a solicitation mailing, please work with BI in advance in order to create an appeal. This will streamline gift processing and allow you to track the results of your appeal.

HOW TO ACCESS THE ALUMNI REPORT

This report allows you to select alumni from a specified unit or department(s). You can refine the list by region and state using the parameter selection or by other criteria after exporting the list. This report will apply ABE Solicit Codes based on the source of the communication. This feature ensures that no contact information is surfaced if the constituent does not wish to receive a certain type of communication from specific areas on campus or WFAA. This feature will not exclude any constituent who meets the criteria selected in the parameters, but it will suppress the relevant contact information.

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Click the **Alumni Report**.
4. Select **Alumni from Unit** and **Alumni from Department** (You can only select one unit but may select one or more departments.)
5. Select **Majors in** to limit results to specific majors within a department.
6. Select **Region** and **State** (You may select "International" to include international mailing addresses in the output file. If you want to see all alumni for the specified unit/department, use the "Select All" box for Region and State.)
7. Select **Who is Communication from?** (Applies appropriate solicit codes based on the "brand" on the communication. Solicit codes track a constituent's preference or opt-outs for specific types of communications. For cross-branded communications, you may select multiple options.)

8. Select **Intent of Communication** (Applies additional solicit codes based on special types of communications (invitations, solicitations, magazine/newsletter)
9. Select **Other Solicitcodes** (Provides additional solicit codes to select if applicable. For example, some schools and colleges have multiple magazines/newsletters)
10. Select **Include Double Majors** (If “yes” is selected, the output will include alumni with majors to the department even if they did not graduate from the unit selected.)
11. Select **Include Minors** (If “yes” is selected, the output will include alumni with minors from the department selected)
12. Select **Include Certificates** (If “yes” is selected, the output will include alumni with certificates from the unit/department selected)
13. Select **Spouse Link** (If “yes”, spouses will be merged and will output together on one row. If “no”, the spouses will be listed individually on the list.)
14. Select **Include Spouse even if they do not qualify?** (If “yes”, the spouse of the main constituent will be included even if s/he is not an alumnus from the unit/department selected. Select “yes” if you’d like to invite all spouses to an event regardless of their qualification.)

Helpful hint: If you are creating an email list for alumni of a department, select “no” to Spouse Link. Names with their email addresses will be listed individually. You will have to remove anyone without an email address – this can be done by sorting or filtering on the Email Indicator or Email Address columns.

15. Click **View Report**.

HOW TO INTERPRET AN ALUMNI REPORT

What is included in the report fields?

Lookup ID	The unique ID used in the ABE CRM system. Report includes a hotlink that will redirect you to the constituent record in ABE CRM. Login to ABE CRM is required
Address, Phone and Email	Outputs the primary for each type of contact information. The address is the in-season address (if a seasonal address is on file).
Full International Address	When selecting the International option, the report returns the full international address block in this field.
Mail Indicator, Phone Indicator, Email Indicator	Displays if this type of contact information is unavailable, due to solicit code restrictions (opt-outs), missing data, bounced email, etc.
Region	Displays the geographic region as defined by their address and the ABE regional definition. ABE regions do not cover all constituent addresses, so County may be used for further refinement.

Household GCR (Gift Capacity Rating)	Estimates a constituent's ability to make a gift of a certain size, payable over a 5 year time frame. See Capacity overview for more detail.
MG (Major Giving) Likelihood Score	The predictive model score that indicates a prospect's likelihood to make a major gift. See Likelihood overview for more detail.