

# Affiliation Member Information Report

## Job Aid

### WHEN TO USE THE AFFILIATION MEMBER REPORT

This report produces a list constituents based upon various ABE CRM sources, including attributes/affinity lists and educational involvements. Use this report when you need to:

- Review group members and make (or submit to WFAA via the Help Center) any needed updates in ABE CRM.
- Select and refine a list of constituents.
- 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 to WFAA via the List & Report Request Form found on the Advancement Resources website. This will allow our Business Intelligence staff to tag the constituent record to show they received the communication. Please make sure to complete this step, as it helps us understand which communications a constituent received, and more generally, how frequently we communicate with our constituents. This helps us continue to refine our marketing and communications strategy.

### RELATED REPORTS AND LIMITATIONS:

- The Affiliation Member Information report allows you to run only ONE affiliated group at a time. For example, if your unit has multiple Academic Programs associated with it, you need to pull a report for each Academic Program.
- This report no longer includes Recognition Societies. To access this information, use or request (from your WFAA development contact) the Recognition Society Information Report.

### HOW TO GENERATE THE AFFILIATION MEMBER REPORT

This report allows you to select constituents from a specified affiliation tracked in ABE CRM. Once the list is exported, you can refine the list by region, county, city, state, etc.

1. Log in to [ABE CRM](#).
2. On the navigation bar, click **WFAA Reports**.
3. Under category of Constituent, click on CST- **Affiliation Member Information Report**.
4. Select parameters (see definition of available parameters below)
5. Click **View Report**.

The report will list constituents with US addresses separate from constituents with International addresses. When downloaded to Excel, separate tabs are generated for constituents based upon their Domestic (US) or International address.

**Available Parameters**

<p><b>Affiliation Category</b></p>	<p>Choose a single affiliation category. Options include:</p> <ul style="list-style-type: none"> <li>• Educational Involvement</li> <li>• Group</li> <li>• Involvement Attribute</li> </ul> <p>If you need assistance locating your campus unit/program information, please contact us through the WFAA <a href="#">Help Center</a>.</p>
<p><b>Affiliation Names</b></p>	<p>Choose the appropriate value from a list of affiliation names provided based on the category previously selected.</p>
<p><b>Member</b></p>	<p>Specify either “All,” which will includes past and current members, or “Current,” which limits the resulting set to members that are currently associated with the selected affiliation name.</p>
<p><b>Include deceased?</b></p>	<p>Defaults to “No.” If “Yes” is selected, the report output will include deceased members with an additional column of for “deceased flag” that indicates if a member is deceased.</p>
<p><b>Who is this communication from?</b></p>	<p>Applies appropriate solicit codes based on the source of the communication. Members with solicit codes in place will be returned, but contact information will be suppressed.</p>
<p><b>Intent of Communication</b></p>	<p>Applies additional solicit codes based on special types of communications. Members with solicit codes in place will be returned, but contact information will be suppressed.</p>
<p><b>Other Solicit Codes</b></p>	<p>Provides additional solicit codes to select if applicable. Members with solicit codes in place will be returned, but contact information will be suppressed.</p>

<b>Spouse Link</b>	Output will include spouses together in a single row.
<b>Include Spouse even if they do not qualify?</b>	When the selected “Spouse Link” parameter value is “Yes,” then the report user can choose to include a spouse in the output even though they may not be associated with the selected Affiliation. If the “Spouse Link” parameter value is “No,” then non-qualified spouses cannot be included in the report output.
<b>Excel-Ready Formatting</b>	Specify if the resulting output should be formatted for Excel. If “Yes” is specified, the report headings are removed so that sorting and filtering in Excel is made easier. If “no” is specified, the report headings are retained.

## REPORT GLOSSARY

### What is included in the report fields?

<b>Affiliation Type</b>	Outputs the type of ABE CRM affiliation used to track this population.
<b>Affiliation Level</b>	Some affiliations, such as Boards or Advisory Councils, have roles that may include Member, Treasurer, or President. If a value exists, the role is displayed. If no value exists, this field may be left blank or read “unknown.”
<b>Comments</b>	Any additional notes that were included with the affiliation record.
<b>Address, Phone and email</b>	Outputs the primary value for each type of contact information, and accounts for seasonal addresses if one exists.
<b>Full International Address</b>	When selecting the International option, the report returns the full international address block in this field. This only applies to constituents having an International address.
<b>Mail Indicator, Phone Indicator, Email Indicator</b>	Displays if this type of contact information is unavailable, due to solicit code restrictions, missing data, bounced email, etc.