

## Entering and Viewing Strategy Notes in EverTrue

A prospect **Strategy** is an overarching statement of a long-term approach to be taken with a prospect and is required for any prospect beyond the qualification stage in major, planned, leadership annual, and principal gift portfolios.

### Entering a Strategy Note in EverTrue

Strategy notes are a specific type of **Interaction** in EverTrue and can be entered through the **Constituent Profile**. ***\*Note:** While you can view strategy notes in both EverTrue and Advance, they are entered through EverTrue only. No strategy notes can be entered into Advance.*

Begin on the **Constituent Profile** for the individual you plan to solicit. Select the purple **Actions** button in the upper right corner to open the drop-down menu. Select **Add Interaction** to open the EverTrue interactions form.

The screenshot displays the EverTrue interface for a constituent profile. The constituent is Mr. Thomas Alexander "Alex" Davis, a Friend with Remote ID: 0002738431. The profile is divided into several sections: LIFETIME GIVING (\$2,405 in total gifts), LAST GIFT (\$10 a month ago), and FACEBOOK (0 matches). A red box highlights the 'Add Interaction' option in the 'Actions...' dropdown menu. The 'Recent Interactions' section shows no logged interactions, and the 'Pinned Comments' section is empty.

### Strategy Note Required Information

The following information must be included in all strategy notes:

- **Interaction Type:** Select **Team Leader Strategy Note** from the drop-down menu
- **Date**
- **Solicitors** (maximum of 5 solicitors)
- **Description**
- **Purpose:** Select **Strategy** from the drop-down menu
- **Program**

Once all required information has been entered, select **Save**. See the image below.

Add Interaction
Cancel Save

Interaction type REQUIRED
Substantive 

Team Leader Strategy Note

v

Date REQUIRED
Solicitors REQUIRED

📅 Sep 12, 2023

v

Select Option...

v

Summary

Add a summary (optional)...

120 characters remaining

Description REQUIRED

Add details...

Purpose REQUIRED

Select Option... ^

🔍 Search...

Qualification  
 Solicitation: Planned Gift  

Strategy

 Solicitation: Follow-up  
 Scheduling  
 Cultivation

### Viewing Strategy Notes in EverTrue and Advance

To view strategy notes for a constituent in EverTrue, navigate to the **Interactions** tab from the **Constituent Summary** page. Select the **Filters** icon to open the Filters list.

From the Filters list, select any that apply:

- **Date:** Lifetime Interactions or Pick Specific Dates
- **Interaction Type:** Select **Team Leader Strategy Note**
- **Authored By:** Select the appropriate solicitor(s)

- **Content Keyword Search:** Enter any desired keywords
- Select **Apply Filters**

The screenshot shows the profile page for Mr. Bowen Harding "Bo" Billups, an Alum, Alumni Association Member - Class of 1989, with Remote Id: 8056. The page has several tabs: SUMMARY, CONSTITUENT INFO, ENRICHMENT, ENGAGEMENT, GIVING, INTERACTIONS (highlighted), and PROPOSALS. Below the tabs, there is a 'Filters' dropdown menu (highlighted) showing 'All Interactions' and '20 Interactions'. Below the filters, there are four filter selection boxes (all highlighted with red boxes):

- Date:** Lifetime Interactions
- Interaction Type:** Team Leader Strategy Note
- Authored By:** Select Options...
- Content Keyword Search:** Enter keywords...

Once the strategy notes have populated, sort by **Date Engaged** or select a specific strategy note to view.

The screenshot shows the profile page for Mr. Bowen Harding "Bo" Billups, an Alum, Alumni Association Member - Class of 1989, with Remote Id: 8056. The page has several tabs: SUMMARY, CONSTITUENT INFO, ENRICHMENT, ENGAGEMENT, GIVING, INTERACTIONS (highlighted), and PROPOSALS. Below the tabs, there is a 'Filters' dropdown menu (highlighted) showing 'Team Leader Strategy Note' and '2 Interactions'. Below the filters, there is an 'Add Interaction' button and a 'Date Engaged' sorting dropdown menu (highlighted with a red box). Below the sorting options, there are two strategy notes:

Interaction Type	Description	Date	Author
Team Leader Strategy Note	The team discussed scheduling lunch with Mr. Billups.	09/12/2023	Shelby Bowen
Test Strategy Note	Test Strategy Note	07/11/2023	Anna Hodges

### To view strategy notes in Advance:

- Select the binoculars **Look Ups** icon in the upper tool bar ribbon.
- Enter the **Entity Remote ID** from EverTrue in the **ID Lookup** section and select **Enter** on your keyboard. The Entity Overview page will populate. See the image below.

Lookups

1. Choose a template (optional) Bio - Entity

2. Select results format\* Entity Lookup List

3. Select output type\* Display results/Open on exact match

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

View Criteria Clear Search

**ID Lookup** Help

ID = 8056 Mr. Bowen H. Billups

Alt ID =

**Entity Lookup** Help

'Sounds Like'

Last/Org Name Begins with

First Begins with

To view strategy notes for that entity, navigate to left navigation menu and select **Prospect Tracking**. Once the Prospect Tracking menu has opened, select **Entity Notes** to view any strategy notes for that entity. If there are no strategy notes, the field will remain empty.

Entity Notes

Mr. Bowen H. Billups #8056

Rec Type Alum (1989 Arts & Sciences)

Degree BA 1989 Arts & Sciences (Major: Foreign Affairs)

Notes (0) New Actions Help

Date	Area/Level	Description	Author

Attachments (0) Actions Help

View	Doc Type	Description	Modified