

**University Development Office**

# **VI 100: Introduction to VIP**

**Presented by:**

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## Overview and History of VIP Direct

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1. VIP Direct is The University of Texas at Austin's homegrown database and central repository of alumni, donors, and its constituent's information. It went into production as VIP mainframe (aka 3270) in 1994 based on a 1993 presidential decree. Prior to 1994, most alumni and data records were kept at the departmental/CSU (college, school, unit) level with no direct correlation or contact. This proved to be inefficient and limiting to determine a constituent's global contributions and relationship across campus.
2. In 2003, VIP Direct started in production on the web with several enhanced subsystems. Since then, VIP Direct covers almost 100% of VIP mainframe's functionality. With VIP Direct, the database is now securely accessible with smartphones, tablets or pads, and laptops.
3. The over 800 VIP users across campus, as well as at UT System, UT Foundation, and Texas Exes, can access over 1.1 million records of individuals (alumni & friends), corporations, foundations, associations, government agencies, trusts, and testamentary gifts.
4. In VIP, we have over 477,000 living alumni and over 500,000 constituents we call friends, which also include those who attended UT, but did not graduate. Individuals become "friends" based on their continued relationship with the University, such as members of KUT, Lady Bird Johnson Wildflower Center, Harry Ransom Center, Blanton Museum, McDonald's Observatory, Texas Performing Arts, or the Longhorn Foundation. Current registered students and their parents, statewide elected officials, and all UT faculty and staff also have VIP records.
5. As VIP users, integrity and accuracy are the foundation of being stewards of VIP records. In order for VIP to be a trusted resource of information, accuracy is of utmost importance when making updates on VIP records.
6. In order to access most subsystems, specific training classes must be completed by the user.
7. Common reasons for losing access to VIP include compromising or mishandling data, changing positions to a new CSU, having over 100 days of inactivity, and failing to complete the appropriate training and confidentiality forms.

## VIP References

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<b>VIP</b>		<a href="https://utdirect.utexas.edu/vipdirect">https://utdirect.utexas.edu/vipdirect</a>
<b>Development Guide</b>		<a href="http://giving.utexas.edu/devguide/">http://giving.utexas.edu/devguide/</a>
<b>DevDirect</b> Melissa Ferrell		<a href="https://mydev.giving.utexas.edu/">https://mydev.giving.utexas.edu/</a> 475-9677 or <a href="mailto:mferrell@austin.utexas.edu">mferrell@austin.utexas.edu</a>
<b>VIP Help Desk</b>		232-7272 or <a href="mailto:viphelp@austin.utexas.edu">viphelp@austin.utexas.edu</a>

### **Biographical Updating (VI 100, VI 120, VI 140)**

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### **Report Writers (VI 200, VI 220)**

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Austin Bush (Cognos)	232-2313	<a href="mailto:abush@austin.utexas.edu">abush@austin.utexas.edu</a>

### **Activity Codes (VI 215)**

Dianne McManigle	475-9610	<a href="mailto:diannem@austin.utexas.edu">diannem@austin.utexas.edu</a>
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### **Gift Processing (VI 300)**

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Jessica Burford	232-2572	<a href="mailto:jessica.burford@austin.utexas.edu">jessica.burford@austin.utexas.edu</a>

### **Endowments (VI 500, VI 510)**

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### **Prospect Management (VI 600)**

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### **iModules classes (VI 150, VI 225, VI 230, VI 235)**

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Ryan Beavers	471-8534	<a href="mailto:rbeavers@austin.utexas.edu">rbeavers@austin.utexas.edu</a>
Remi Macias	475-9613	<a href="mailto:rmacias@austin.utexas.edu">rmacias@austin.utexas.edu</a>

### **Digital Asset Management (VI 245)**

Rachel Appel	232-2324	<a href="mailto:rappel@austin.utexas.edu">rappel@austin.utexas.edu</a>
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Dear User,

Please review the following security guidelines for Alumni and Donor Information. You must agree to these guidelines before accessing VIP.

Thank you.

## CONFIDENTIALITY OF ALUMNI AND DONOR INFORMATION

By accessing this information, I agree to the following guidelines:

1. I acknowledge that as a data custodian of U. T. Austin, I have been assigned duties that will bring me in contact with information or information resources that are of value to the University and require confidentiality and protection.
2. I acknowledge that I am required to uphold university policies and standards to safeguard the information and associated resources that are entrusted to me or with which I have contact.
3. I acknowledge that all information contained within VIP is highly confidential and to be used only for University of Texas alumni relations and development activity.
4. I will not distribute, disclose or share alumni or donor information with persons external to The University of Texas or unauthorized University personnel in any form (written, electronic, oral, etc.) without prior approval of the data owner.
5. I will dispose of all information and data in an irretrievable manner, such as shredding hard copies of reports or deleting electronic files, emails and archives from computer and storage devices.
6. I agree to report violations of policies, standards, procedures, or guidelines that come to my attention to my supervisor and/or the Information Security Office.
7. I understand and agree that violations of University of Texas policies, standards, and procedures pertaining to data custodians of U. T. Austin information resources and confidential information shall be subject to disciplinary action up to and including termination.

I AGREE

By selecting this option, I acknowledge my awareness of and concurrence with this responsibility.

I DO NOT AGREE

I do not wish to have such responsibility.

*If you have any questions or concerns with the above guidelines, please feel free to direct your inquiries to Cesar De La Garza in the Office of Development.*

## Navigating VIP Direct

The URL for VIP Direct is <https://utdirect.utexas.edu/vipdirect>. Once you have logged into VIP, please bookmark or add to favorites in your browser. VIP Direct works best with Firefox and Google Chrome.

On the left-hand side is the Navigation menu showing the subsystems. Most of those subsystems are on top as tabs. The tabs will allow you to navigate from one subsystem to another without using the back button.

If you need help, you can go to the Help Desk tab, which contains help pages for each subsystem. When in a subsystem, click on the help link to access the help page for that specific system. You may also speak with someone at the help desk at 2-7272 or by email at [viphelp@austin.utexas.edu](mailto:viphelp@austin.utexas.edu). Clicking the confidential link will lead you to UT's policy on Category I data. As a reminder, all VIP records are confidential and to be used for UT business purposes only.

Home Activity Biographical Dashboard Download/Upload Endowment Gift Initiative Planned Gift Pledge Prospect Report Help Desk

Confidential

VIP Direct

Tip of the Day

Click on the new "Activity" tab to get to the new activity code system. For help or questions, send an email to [vip\\_activity\\_codes\\_training@utdsz.utexas.edu](mailto:vip_activity_codes_training@utdsz.utexas.edu).

Please note that UT is currently in peak processing through 11/08/2013

- The System reports the status "Spring semester Registration"
- The current peak processing period is expected to end on 11/08/2013 03:00 PM
- The event is scheduled to occur on Friday "Prime Time" (10:00 PM - 4:00 AM)
- This event is scheduled to occur only on weekdays.

Future scheduled peak processing events

Start Date	End Date	Prime Time Only	Weekdays Only	Description	Event Level
11/02/2013	12/21/2013			ComApp Scholarship & Admission deadline	U
01/06/2014	01/16/2014	X	Y	Spring semester start, reg., add'l fees	U
03/14/2014	03/17/2014	X		Summer-Fall Registration	G
03/22/2014	05/24/2014	X	X	Fall semester start, reg., add'l fees	M
03/26/2014	08/27/2014	X		Fall semester start final class day	H

My VIP Direct links

Biographical Documents for Review

RELATED LINKS

- Giving to UT
- Dev Direct
- Dev Guide
- Texas Exes
- Alumni/Friends
- WebSpace
- Cognos

A *Tip of the Day* will display on the home page every day.

The related links boxed in green in the image above contain links VIP Direct users may find helpful.

1. Giving to UT is the University Development Office web site.
2. Dev Direct is an intranet web site for development staff to access training, the calendar of events, mailings, emails, and common documents and forms such as organizational charts and role specific development groups.
3. Dev Guide gives a global view of fundraising at UT.
4. Texas Exes is the alumni association's web site.
5. Cognos is a reporting tool for VIP Direct users.

## Finding Records in VIP

There are several ways to find a record in VIP. If you know the EID of the person, you can enter it in the ID box at the top left hand corner and then click the Biographical tab to be taken to the individual's record.

Home Activity Biographical Dashboard Download/Upload Endowment Gift Initiative Planned Gift Pledge Prospect Report Help Desk

**VIP Direct**

**Tip of the Day**

Don't forget! You can cross-reference individual and company records to build an employment history.

Please note that UT is currently in peak processing through 11/01/2013

- ITS Systems reports this event as: "Spring semester Registration"
- The current peak processing period is expected to end on 11/01/2013 04:00 PM.
- This event is scheduled to occur only during "prime time" (12 AM to 4 PM)
  - This event is scheduled to occur only on weekdays.

**Future scheduled peak processing events**

Start Date	End Date	Prime Time Only	Weekdays Only	Description
10/28/2013	11/08/2013	X	X	Spring semester Registration
11/01/2013	12/01/2013			Corr App Scholarship & Admission deadlines
01/06/2014	01/15/2014	X	X	Spring semester start, reg., add/drops
04/14/2014	04/25/2014	X	X	Summer/Fall Registration
09/22/2014	09/25/2014	X	X	Fall semester start, reg., add/drops

**RELATED LINKS**  
Giving to UT

If you do not know the EID, you can click on "Find a Record" right below the ID box. There are four different ways for searching in VIP. You do not have to worry about correct capitalization.

1. Last name, First name
2. Email address
3. Phone number
4. Zip code and Last name

Home Activity Biographical Dashboard Download/Upload Endowment Gift Initiative Planned Gift Pledge Prospect Report Help Desk

**Find a Record in VIP**

**Find Options**

Searching People (Everybody) by  for \*

Additional Options

- Last Name/Entity Name
- E-Mail Address
- Phone Number
- Zip Code

● Please enter a search value and hit the Find Now button

# Deciphering Your Search Results

Find a Record in VIP

help Confidential

Find Options

Searching People (Everybody) by Last Name/Entity Name for chips, michael

Find Item

Additional Options

Your search returned 11 records

Show/Hide Columns

First Previous 1 Next Last

Show 25 entries

Search

Title	Name	EID	Type	Link to UT	CSU	Major	Grad Yr	Address
Mr.	Chips, Michael R. (P)	DCHP83	Ind. Adult	Graduate	GR P	201 P	2003	2602 Rio Grande Street Austin, TX 78705-0017-02
Mr.	Chips, Michael Roe (P)	DCHP83	Individual	Graduate	GR P	201 P	2003	2602 Rio Grande Street Austin, TX 78705-0017-02
Ms	Chips Dea	D133736	Individual	Graduate	GR P	203 P	2004	2442 Rio Grande Street Austin, TX 78705-0019-12
Mr	Chips LC. (P)	DCHP82	Ind. Adult	Friend			1992	2511 San Gabriel Street Austin, TX 78705-4321-11
Mr	Chips, Mack R. (P)	DCHP82	Individual	Friend			1982	2511 San Gabriel Street Austin, TX 78705-4321-11
Mr	Chips, Mack Roe (P)	DCHP82	Individual	Friend			1982	2511 San Gabriel Street Austin, TX 78705-4321-11
Mr	Chips, Mega S. (P)	DWJUMF	Individual	Friend				9402 Mountain Quail Road Austin, TX 78738-0216-02
Mr	Chips, Mega Saurus (P)	DWJUMF	Individual	Friend				9402 Mountain Quail Road Austin, T. 78738-0216-02
Mr	Chips, Megie (P)	DWJUMF	Individual	Friend				9402 Mountain Quail Road Austin, TX 78738-0216-02
Mr.	Chips M.C. (P)	DCHP83	Individual	Graduate	GR P	201 P	2003	2602 Rio Grande Street Austin, TX 78705-0017-02

The columns going from left to right are Title, Name, EID, Type, Link to UT, CSU, Major, Grad Yr, and Address.

- The title column can be populated with personal titles like Mr. or Mrs., professional titles like Dr., military titles like Lt. Colonel or religious titles like The Rev.
- The name column is listed as last name, given name. Clicking on a name will take you to the individual's Biographical Snapshot.
- Some names will have a red letter in parenthesis next to them.
  - (P) shows that the record has a prospect record in the prospect subsystem.
  - (D) means the person is deceased. If it is next to a corporation, foundation, or association, that institution has been dissolved and is no longer in business.
  - (H) next to a corporation means that it is the home office/headquarters for that entity.
  - (S) denotes a spouse name when that spouse does not have their own VIP record.
- EID is a link that will open a new tab for the record. You can click on the Name or EID and get the same VIP record.
- Type shows if the record is for an Individual, Corporation, Foundation, Association, Government Agency, Trust, or a Testamentary Gift.
- Link to UT shows the relationship of the VIP record to the University, such as Graduate, No degree/Attended, Registered Student, Parent, Student Applicant, and Friend.
- CSU stands for College, School, or Unit. To know the meaning of the two-letter code, please click on the icon next to it. This will open a CSU Help window.
- Major is the major code. To know the major for a graduate, click on the icon next to the number for the Major Code Help table.



9. Grad Yr shows the year they obtained their degree.
10. Address will list the preferred or default address. If the address is in red font with a white exclamation point within a red triangle, the address is bad and this was the last known address for that record.

These results can be printed, saved to Excel/ CSV file, or copied to the clipboard.

## Narrowing Down Your Search

If you click the People (Everybody) link, additional record entity types will appear.

1. For people, the drop-down menu allows you to search for only living individuals, only deceased individuals, or all individuals (Everybody).
2. Search for corporations or corporate foundations, like the Dell Foundation, by checking the Corporations box.
3. For Foundations, you may choose to start by last name if you cannot find the record by the full foundation name. For example, if the foundation name is The Michael and Susan Dell Family Foundation, you may choose to search by Dell Family Foundation, The Michael and Susan.

Find a Record in VIP Help Confidential

**Find Options**

Searching > People (Everybody) by Last Name/Entity Name for

Choose one or more record types (All Find Now's see updates)  Check All  Uncheck All

People  Associations  Corporations  Foundations  Governments  Testamentary Gifts  Trusts (Other)  Unknown

Additional Living  Deceased

---

Please enter a search value and hit the Find Now button

If you click on Additional Options, you can narrow your search by adding some additional parameters.

1. When searching for a graduate, you can select the college using the CSU drop-down menu and fill in the grad year fields.
2. A person may have multiple results due to variations of their name (formal, informal, full name). You can reduce the number of name variation results by clicking "Return one entry per EID".
3. To use the other parameters, click on the icon next to the box to find the selection you want.

## Find a Record in VIP

**Find Options**

Searching > People (Everybody) by Last Name/Entity Name for

**Additional Options**

Optional search restrictions:

**CSU**  
 Select CSU/Dept

**Grad Year**  
 YYYY thru YYYY (opt)

**Table format:**  
 Normal (Compact)  First & Last UT Degrees  Last GR Detail

Return one entry per EID

Affiliation    
 Major    
 Employer EID    
 MSA    
 Unit Key

## Basic biographical updating

### Steward and Non-steward Departments:

A steward department is a CSU that has an existing relationship with a VIP record. For example, a UT graduate received an undergrad degree in the College of Liberal Arts, obtained a JD degree from the Law School, and donated her art collection to the Blanton Museum. In this case, the steward departments include Liberal Arts, Law, and the Blanton Museum. Texas Exes are stewards of every UT graduate, so they would be included in this list. And, because of her gift to the University (thru the Blanton Museum), the University Development Office is also a steward.

A non-steward department in the example above would be any other CSU that does not have a relationship with this person. For example, if a VIP user employed at the Lady Bird Johnson Wildflower Center knows this UT alumna, he can make an update on her record based on his personal knowledge. However, the update will not take effect immediately since it will be routed to a steward department for review.

Please allow one to 24 hours for routed updates to be reviewed. If a day has passed and the update has not been applied, please email the VIP Help Desk.

Biographical Snapshot

[help](#) Confidential

PROSPECT **Mr. Michael Roe Chips (2,1)** Individual  
Degree Year: 2003

VIP ID: 986009197  
EID: 0CHIPS3

Review Department: EX  
Stewardship Status: STW

[Personal](#) | [Contact](#) | [Online Contact](#) | [Education](#) | [Gifting](#) | [Other](#)

[Add GIF](#) [Add CC GIF](#)

**Personal Information**

<b>Formal Name:</b> Mr. MR Chips	<b>Informal Name:</b> Mr. MR Chips
<b>Birthdate:</b> 04-01-1932	<b>Marital Status:</b> Single
<b>Gender:</b> Male	<b>Spouse Name:</b> None
<b>Deceased Date:</b> None	
<b>Job Title:</b> Senior Executive Vice President	<b>Employer Name:</b> Exxon Mobil

There are four levels of VIP access:

1. **Viewer Level-** Viewers have completed the VI 101 VIP Security compliance training, but have not attended any VIP classes. They may only view the information in VIP and cannot make any updates.
2. **Novice Level-** Novice users have taken VI 100. The changes Novices make to VIP records do not take effect immediately and are routed for review to either a reviewer in their department or a reviewer in the steward CSU.
3. **Updater Level-** After taking VI 120, users become Updaters and can make immediate changes to records, unless the user works for a non-steward department.
4. **Reviewer Level-** Reviewers have the same access as Updaters with one bonus: they can review updates made by Novices and non-steward departments. To gain this level's access, a user will have to take VI 140.

## Updating an Address

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At UT we use the presidential standard for U.S. domestic mailing addresses in VIP.

### First address line:

1. Spell out directional information that comes before the street name.  
Ex. 1200 North Lamar Boulevard  
300 East 51<sup>st</sup> Street
2. Spell out street suffices.  
Ex. 1800 Park Avenue instead of 1800 Park Ave
3. Abbreviate directional information that comes after the street suffix. Do not use a comma after street suffix and do not add "." after each directional letter. This is very common in cities like Washington, DC; Atlanta, GA; Minneapolis/ St. Paul, MN; Oklahoma City, OK, etc.  
Ex. 520 I Street NW
4. For numerical street names, always spell out streets named from 1<sup>st</sup> to 10<sup>th</sup>. From 11<sup>th</sup> to infinity, use the appropriate digits and ending.  
Ex. 300 East Sixth Street  
1000 Fifth Avenue  
314 West 11<sup>th</sup> Street
5. Do not spell out single digit address numbers unless it is the name of a building.  
Ex. One American Center  
600 Congress Avenue
6. Exceptions to spelling everything out.  
Ex. 1800 East Doctor Martin Luther King, Junior Boulevard  
45000 West Lyndon Baines Johnson Freeway
7. Post Office Box Standard  
Ex. P. O. Box 7458, not PO Box 7458
8. Highways and rural roads
  - a. Interstate highways are formatted as IH 35
  - b. US Highways are formatted as US Highway 183
  - c. State highways are formatted as Texas Highway 71 or State Highway 71  
Exceptions are for states with long names (CA for California)
  - d. County roads are formatted as County Road 147
  - e. Ranch roads are formatted as Ranch Road 2222  
This was done to differentiate from the former Rural Route 2 Box 74 rural addresses.
  - f. Farm to Market roads are formatted as FM 620

### Second address line:

1. It is used to enter Apartment, Condo, or Suite numbers.
2. Always spell out Apartment or Suite. Do not abbreviate to Apt. or Ste.  
Ex. Apartment 321 or Suite 150B
3. Do not use "#", "No.", "Number".
4. For condos, use the word "Unit" instead of "Apartment".
5. If you do not know if it's an apartment or suite, use the word "Unit".

### City name:

1. Always spell out the city names.  
Ex. Fort Worth, Saint Louis, Dripping Springs, Long Beach

**State name:**

1. Always use the two letter state code. Click on the icon next to the state field for assistance in finding the two letter code for a state.  
Ex. TX instead of Texas or Tex. and MO instead of Missouri
2. The two letter codes also apply for US territories like Guam and Puerto Rico. These are considered domestic mail and their names should not populate the country name field.
3. Armed forces addresses should have the three letter code for city (APO) and two letter code for state (AA, AE, or AP).

**International addresses:**

1. Do not follow the domestic addressing standards. Please address according to your source document. If they abbreviate or use "#", please use them.
2. Do remember to type every bit of information in the appropriate field.
3. Use postal code in postal code field and use province/ state in the state field. They do not have to be abbreviated.
4. Make sure you populate the country name field. Click on the icon next to the field to locate the appropriate VIP country name.

Every update requires a source code at the bottom of the page. Select the appropriate one (1, 2, 3, or 4 are the most popular choices) and click "Audit Data/ Update Record" after you've made the address changes. The address will go through our Finalist software, which compares the address you put in with USPS to determine if the address is valid/ deliverable.

**Home Address**

Home Mailing Address | Home Phone | Home Fax

---

Home Mailing Address:

Mark address Good **\*\*Bad Address\*\***

Address	2410 Rio Grande Street Apartment 310	Finalist Address Returned: 2410 RIO GRANDE ST APT 310 AUSTIN, TX 78705-4819-10
City	Austin	Success Code: 1
State	TX	Finalist Messages: ZIP code, ZIP+4 & carrier route assigned Street found using phonetics match
Zip/Postal Code	78705-4819-10	
Country		
MSA		
Reference Date	11-13-2013	
Include prior version in address history?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <small>Prior Address is already in history</small>	
Comments		

---

Update Date:	Update Source:	Updated by:	NCOA Date:
11-13-2013	From Indiv or Contact	Ricardo A Vela (DB)	

You will get a success code of 1, 2, or 3.

1. If you get a success code 1, it means the address is deliverable. Still check what the Finalist message says.
2. If you get a success code 2, it means the address is still deliverable but there may be something missing or wrong in the address such as the street suffix. Check what the Finalist message says.
3. If you get a success code 3, it means the address is not deliverable and you will have to do some research.

The Finalist software has a phonetics match, so if you update the address to 2410 Reo Grand Street, you will get a Success Code of 1. Yet if you look at the Finalist message, it shows that the street was found using a phonetics match. Please note that Finalist will not correct the misspelling for you. It is only a guide, and you will still need to correct the spelling yourself. The Finalist software will also use abbreviations for directional and street suffices. Do not change the address to match the Finalist results. VIP archives the last eight address changes.

**Home Address**

Home Mailing Address | Home Phone | Home Fax

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Home Mailing Address:

Mark address Good     "Bad Address"

<b>Address</b>	24000 Rio Grande Street Apartment 310	<p><b>Finalist Address Returned:</b> 24000 RIO GRANDE STREET AUSTIN, TX 78705-4819-10</p> <p><b>Failure Code:</b> 3</p> <p><b>Finalist Messages:</b> ZIP+4 not determined Number of address out of range</p>
<b>City</b>	Austin	
<b>State</b>	TX	
<b>Zip/Postal Code</b>	78705-4819-10	
<b>Country</b>		
<b>MSA</b>		
<b>Reference Date</b>	11-19-2013    MM/DD/YYYY	
<b>Include prior version in address history?</b>	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes ** Prior address/Zip is already in history	
<b>Comments</b>		

---

<b>Update Date:</b>	<b>Update Source:</b>	<b>Updated by:</b>	<b>HCOA Date:</b>
11-13-2013	From Indv or Contact	Ricardo A Vais (DB)	

If you receive returned mail without a forwarding address, please mark the address bad by checking the box "Mark Address Bad" to the left of the address field. Use source code 3 for returned mail, and click on "Audit Date/ Update Record."

## Updating a Phone Number

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If you are only updating a telephone number and not an address, please use the Phone/ Email/ Web page to make the change. This page's updates are not routed for review even if you are a Novice.

1. When adding a new telephone number, please check that an existing type and address link does not currently exist with a different number. If there is the same existing type and address link, please update that field by replacing the existing number with the new telephone number. If there is not the same existing phone number type and address link, please select the type from the drop down menu that best matches the type of phone number you are updating (Telephone, Cellular, etc.) and also select the address link that best matches the phone number (Home, Business, Alternate).

### Phone Update

The screenshot shows a form with three sections: 'Mark as Bad', 'Number', and 'Comments'. The 'Number' field contains '512-441-3011'. To the right, there are two dropdown menus: 'Telephone' and 'Link to Business'. The 'Telephone' dropdown is open, showing options: 'Select Type', 'Cellular', 'Fax', 'Pager', and 'Telephone'. Below the form, the text reads: 'Update Date: 10-11-2012' and 'Updated by: Robert A. G. S. 25'.

### Phone Update

The screenshot shows a form with three sections: 'Mark as Bad', 'Number', and 'Comments'. The 'Number' field contains '512-441-3011'. To the right, there are two dropdown menus: 'Telephone' and 'Link to Business'. The 'Link to Business' dropdown is open, showing options: 'Select an Address Link', 'Link to Residential', 'Link to Business', and 'Link to Alternate'. Below the form, the text reads: 'Update Date: 10-11-2012' and 'Updated by: Robert A. G. S. 25'.

2. Domestic telephone numbers include the area code at all times. Do not include parenthesis surrounding the area code or a hyphen between the prefix and the remainder of the phone number.
3. International telephone numbers always start with "011" followed by the country code and then the telephone number.

## Updating an Email Address

---

You may update the Preferred and Alternate email fields. If an email address is bad, please check the box to the left to mark it bad.

1. The preferred email address is the primary email.
2. The alternate email address is a secondary email, which a constituent may provide and which will be used if the preferred email address is marked bad.

## Preferences

Under the Preferences tab, a record's address and do not contact preferences can be saved. Users may only add preferences for their own CSU.

### Address Preferences

A constituent may have different mail delivered at different addresses depending on their preferences. Preferences are CSU, address, and publication specific. If you do not know the code of the publication, you can click on the icon next to the field to look it up.

#### Address Types:

1. Resident/ Home address is "R"
2. Business address is "B"
3. Alternate address is "A"

#### Preferences

hel Confidential

PROSPECT

Mr. Michael Roe Chips (3,3)

Individual

VIP ID: 98608187  
EID: DC-IPRS3

Degree Year: 2003

Review Department: EX  
Stewardship Status: CTM

Authorized For: DB VP/D MS/DI

Address Preferences    Do Not Contact Preferences

Update Record

CSU	Type	Description	Publication	Updater	Date
1 GE	R	Residence/Home	ALL		
2 DP	R	Residence/Home	ALL		
3 DB - Development Office	R	Residence/Home	ALL		
4 EX	B	Business	ALL		
5 VI - VP - Alumni and Donor systems	R	Residence/Home	ALL		
6 DB - Development Office	B	Business	EX	Ricardo A Vela	02/08/12
7 EL	B	Business	ALL	Ricardo A Vela	02/24/12
8 GR	R	Residence/Home	ALL	Ricardo A Vela	08/12/12
9 EN	R	Residence/Home	FOA	Huong Thuong	06/13/2013
10 Please Select					
11 Please Select					

Add 3 more rows    Refresh Table

Update Record

## Do Not Contact Preferences

This is the type of communication(s) a constituent prefers not to receive. No contact preferences are CSU, communication type, and publication or call specific. A constituent may prefer not to receive calls from one CSU while still wishing to receive mail from a different CSU.

Different types of communication:

1. Mail is "M"
2. Telephone is "T"
3. Email is "E"

There are specific codes that affect University-wide contacts.

1. DNS (do not solicit) is a University-wide code where the constituent prefers not to receive any type of solicitation communication from across campus.
2. \* UT \* is a University-wide code where a constituent does not want to receive any type of communication from across campus. When adding these codes, you will be prompted to add an explanation/reason why the constituent prefers not to receive any contact.

### Preferences

[Help](#) [Confidential](#)

PROSPECT **Mr. Michael Roe Chips (3,3)** Individual  
Degree Year: 2003

VIP ID: 966009187  
SID: 6CHRPG3

Review Department: EX  
Stewardship Status: STW

Authorized For: DB VP PO VS DM

Address Preferences **Do Not Contact Preferences**

							Update Record
CSU	Type	Description	Code	Updater	Date		
1 EX	N	No contact at all	*UT*				
2 EX	T	No contact at all	*UT*				
3 DB - Development Office	<input type="checkbox"/>	No mail or contact					
4 DB - Development Office	<input type="checkbox"/>	No phone/FAX/No con	RODE				
5 GR	N	No solict. at all	NSAA				
6 GR	T	No Sol. by Phone	NSBP				
7 LG	T	No Phone Calls	NP				
8 LG	N	*CREATE CODE IN ACTU	*UT*				
9 DB - Development Office	<input type="checkbox"/>	Do not solicit	*DNS				
10 DB - Development Office	<input type="checkbox"/>	Only -Afternoon Cont	*NCC				
11 Please Select	<input type="checkbox"/>						
12 Please Select	<input type="checkbox"/>						

Update Record