

Individual Event Tracking in Development

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

Individual Events in the Veracross Development module are used to track all contact made with constituents. Tracking contact allows schools to better manage the relationship building process between constituents and the school. Individual Events can include anything from dinners, phone calls, meetings, internal notes, tasks for the development office, etc. This process is more commonly known as "moves management" by development offices.

All Individual Event types will be listed on the Events tab of a person record. They can also be found on the Household record under the Giving History tab and the Member Events tab (this will include all household member individual events). To add a new event, you can enter it on the blank line in the events tab of the person, or click "Add an Individual Event" on the Development homepage.

Configuration

Individual Events can be categorized by 3 things: Category, Event Type, and Classification.

Category

Individual Event Categories are a way to break apart events across departments and set security, as well as to provide an additional layer of sorting within one department. Each category has permissions setup to identify who can view, add, update or delete these events. Examples of categories a Development office might use are "Development Notes" and "Development Tasks."

Event Type

Individual Event Types belong to individual event categories and are a way to better define what a particular event is or relates to. Examples of event types are Phone Call, Email Sent, Letter Sent, Meeting, Proposal, etc.

Classification

Individual Event Classifications belong to individual event categories and provide an even further level of clarification on what an event relates to. Examples of classifications are Alumni Mailing, Auction, Solicitation, Research, etc.

Details

General

On the Individual Event record, you can specify the Person, Date, Event Type and Classification. It is also important to make note of the Subject and then enter your notes. The Notes field is what typically will hold the body of an email sent, notes from a phone call, etc.

A follow-up person, date and notes can be included on the individual event to flag someone to take action on an individual event in the future. The event will show up in the “My Events for Review” query on the Development homepage for everyone to check.

Files

Attach files to an event that are related to the event (eg. Letters, documents, etc.)

Automatically Add an Email as an Event Via CC/BCC

When emailing a constituent from your regular email program, just cc or bcc the school’s tracking alias with either:

- <*yourschool_shortname*>.tracking@mail.veracross.com
- <*yourschool_shortname*>.tracking@email.veracross.com

The email will be recorded as an individual event on the person’s record in Veracross. Note that the person must already exist in Veracross, and their **Email1** must match the email you send to.
