



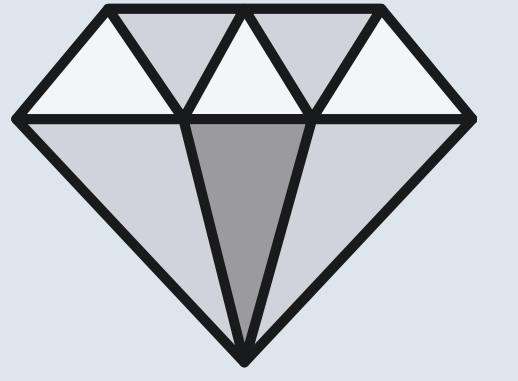
Pipeline to Success: How UC Davis Automated Contact Report Updates

Award Winner: University of California, Davis

Year: 2024

Award Level: Diamond

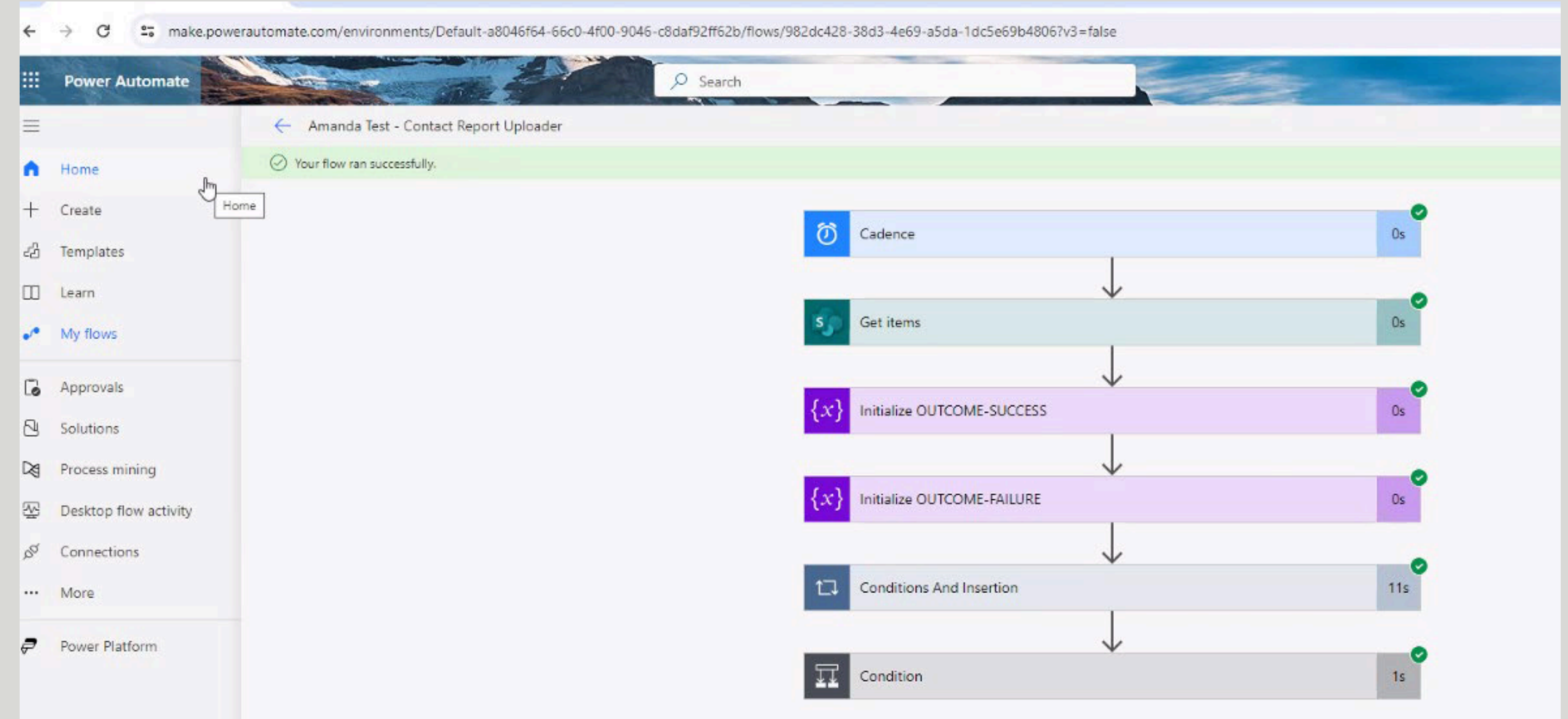
Category: Prospect Development



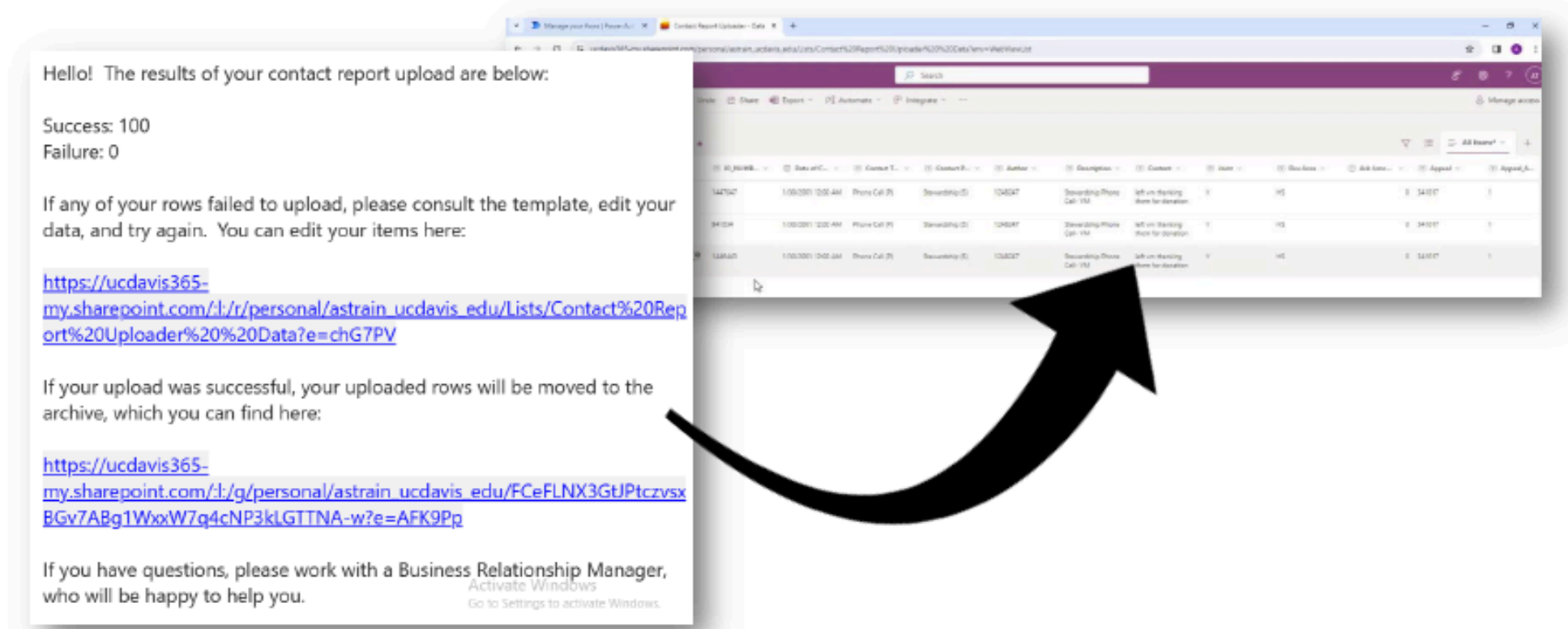
Project Summary

The solution that we developed consists of three elements:

- A Sharepoint-based contact report input form that consists primarily of dropdown elements and variable-controlled text fields (which contain data integrity checks);
- A set of automated administrative checks and procedures developed in MS Power Automate that runs and either asks for edits to form data that fail integrity checks or grabs the ready data (passes integrity checks);
- An SQL server accepts the validated data and then runs a script that moves them into our data warehouse/Advance.



Automated Emails and Links to the Contact Report Form



Aspire Awards Feedback

“Love the relative ease and adaptability of this solution that so many of us battle [with] and that they did so with virtually no impact to the front-line fundraisers.”

Contact Information

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