Prospect Status Report

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Prospect Status Report

The AWA Prospect Status Report is a multipurpose report, which can be used to track any group of prospects. The report can be run against any AWA prospect clipboard or individual prospects. The report (See attached sample) returns the following data on each prospect:

- Entity & Prospect id.
- Rating
- Expected amount of solicitation
- Resulting amount, when solicitation is completed
- Staff assignments
- Proposals submitted and amount.
- Information on the last contact with development staff

In addition, the report returns comments and next step information entered in the Prospect Strategy window of AWA. The Comments fields are free form text and can be used to document any type of information you need for tracking. A few examples include status of proposal development, net worth/wealth information, past giving.

The report can be sorted by Prospect Name or Expected Amount.

RUNNING THE REPORT

1) In AWA, click Reports in the menu at the top of the page.
2) Scroll down in the Reports list to the Prospect Status Report.
3) Click on selection button for the Prospect Status Report.
4) You will see a blank report form.
5) First, click in the Report Title field and title your report. The field will already contain the “Prospect Status Report” title, but you enter any title you want (Martin Campaign Prospects, Campaign Leadership, Joe’s Prospects, etc.).
6) If you are running the report against a clipboard, click in the Clipboard field, and select a prospect clipboard from the drop down menu.

<table>
<thead>
<tr>
<th>Description</th>
<th>Prospect Status Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Reports</td>
</tr>
<tr>
<td>Comment</td>
<td>Andp0015 provides prospect information: contacts, contact notes, next step, last contact, and proposal status and amt.</td>
</tr>
</tbody>
</table>

**Report Title**

Enter a clipboard # or prospect id, not both

**Clipboard**

- Campaign List all 2/24
- Tier 1 - 2/24
- Martin Prospects
- Tier 1 3/3
- IPS Prospects/Lisa
- Martin Campaign List 3/14

**Report Header**

7) If you are running the report against a clipboard, click in the Sort Order field and select either Prospect Name or Expected Amt. The report will sort alphabetically by Prospect Name if you do not choose.

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**Report Title**

Enter a clipboard # or prospect id, not both

**Clipboard**

- Martin Campaign List

**Prospect ID**

**Sort Order**

- Prospect Name
- Expected Amt

8) If you are running the report against a single prospect, click in the Prospect ID field and enter the Prospect ID (Note: Prospect IDs are 8 digits and always start with a 1).
9) Click Run Report.

10) As with all AWA reports, if you want to print the report you first will need to convert to PDF format.

INPUTTING COMMENTS AND NEXT STEPS

IMPORTANT NOTE: As always, please use discretion in entering information. Do not enter any information that you would not want a donor/prospect to see.

1) Navigate to the Prospect Record.
   a. From the Entity Overview, scroll down to Prospect Summary and click on the prospect name hyperlink as usual.

2) In the page tree to the left, click “Strategy.”
3) Click “New” in the Strategy form header.

4) You will see a blank Strategy note form. Enter information in the following fields:
   a. **Type**: Double click the downward arrow beside the field and choose one of the following three values:
      - *Strategy – Comments*: Choose this note type if you would like to enter information that will appear in the Comments section of the Prospect Status Report.
      - *Strategy – Next Step*: Choose this note type if you would like to enter Next Step information to appear on the Prospect Status Report.

   b. **Description**: Double click the downward arrow beside the field and enter a brief description of the note.

c. **Author**: Double click the downward arrow beside the field and choose your name or enter your ANDI id in the field manually.

d. **Date**: The date you entering the note will automatically appear in the field, but you may change it if necessary.
5) Enter the information that you would like to appear on the Prospect Status Report in the “Brief Note” field. This is a free form text field and can hold up to 255 characters.

6) You may enter information in the “Text” field if you have more than 255 characters of information to record; however, information in the “Text” field will not appear in the Prospect Status Report.

7) Note that the report will print all Comments entered for any prospect. Only the most recent Next Step will appear on the report.

8) Click “Save” in the Strategy form header.

EDITING COMMENTS AND NEXT STEPS

1) Navigate to the Prospect Record.
   a. From the Entity Overview, scroll down to Prospect Summary and click on the prospect name hyperlink as usual.

2) In the page tree to the left, click “Strategy.”

3) You will see a list of all strategy notes for this prospect. Click on the note you would like to edit, keeping in mind that only the Brief Note fields “Strategy – Comments” and “Strategy – Next Step” notes appear on the Prospect Status Report.
4) When the Strategy data form opens, place your curser in the field you would like to edit and make the necessary changes.

5) Click “Save” in the Strategy form header.