Using Categories to Group Prospects

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The Categories window in AWA can be used to specify groups of prospects for easy tracking. For example, there currently are categories designated for the campaign lists for each campus. Prospects can be easily added or removed from any category and they can be included in more that one category.

**ADDING A PROSPECT TO A CATEGORY**

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) Click “Categories” in the page tree to the left.

3) Click “New” in the Categories form header.
4) Double click on the downward arrow beside the Category field.

5) Select a category from the Categories drop down menu.

6) Click “Save” in the Categories form header.

REMOVING A PROSPECT FROM A CATEGORY

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) Click “Categories” in the page tree to the left.

3) You will see a listing of the categories that the prospect is in.

4) Click on the category from which you would like to remove the prospect.

5) Click on “Delete” in the Categories form header.

6) Click “Yes” when you see the following message:
LOOKING UP ALL PROSPECTS IN A CATEGORY

1) In AWA, click Lookups in the menu at the top of the page.
2) Under number 1 on the Lookup form (choosing a template), choose Prospect – Prospect from the drop down menu.

3) AWA will automatically fill in numbers 2 and 3 for you (It may take a couple of seconds).
4) Scroll down the Prospect Lookup form to the Active field.
5) Click on the Active field and select “Active” from the drop down menu.

6) In the page tree to the left, click on the Prospect Tracking arrow to expand the menu.
7) In the expanded Prospect Tracking page tree, click “Categories.”

8) Click in the Category field and choose the category of prospects you are looking for from the drop down menu.

9) Click “Search.”

10) AWA will return a list of all prospects in the category you requested. You can then print the list, save to a clipboard for running reports, or export to excel.