Prospect Activity Report

Job Aid

WHEN TO USE THE PROSPECT ACTIVITY REPORT

The Prospect Activity report is a tool for pulling interactions. The report output can be based on the unit/department of an interaction, an interaction owner, or all interactions for prospects associated with a particular Fundraiser/fundraiser role, as well as limited by date and a variety of other parameters.

This report has a variety of potential applications: Managers could pull all interactions for their team, or development officers could pull all past/future interactions with all managed prospects. Development staff can also use this report to gain insight on whether or not colleagues are contacting the same prospect.

The report can be exported into Excel for easy sorting and filtering, and can be viewed in ABE CRM or as a PDF.

WHAT IS INCLUDED IN THE PROSPECT ACTIVITY REPORT

Lookup ID	The unique ID used in the ABE CRM system. Report includes a hotlink that will redirect you to the constituent record in ABE CRM. Login to ABE CRM is required.
Athletic Patron ID	The Paciolan ID, for use by the Athletics Office.
Interaction Participant	The constituents listed as Participants on the Interaction or Contact Report, often a spouse or corporate contact
Constituent Degree(s)	Returns earned constituent degree(s)
Interaction Objective/Comments	Hyperlinked text from the Summary field of the Interaction or the Objective field of the Contact Report. You can access the full details of the interaction or contact report by clicking the link.
Interaction Owner	The WFAA or campus staff who is listed as the Owner of the Interaction or Contact Report
Additional Solicitor	The WFAA or campus staff who participated in the interaction. Currently, if there are multiple Interaction Participants or multiple Additional Solicitors, the report will return a separate row for each additional person listed. There is a future enhancement slated for this report that will return one row per interaction.

Interaction Expected Date	The intended date of the future interaction
Interaction Actual Date	The date the interaction actually occurred
Interaction Status	The status of the interaction or contact report – e.g. “Planned”, “Pending”, “Cancelled”, or “Completed”
Interaction Site	The ABE Site that is listed on the Interaction, or on the plan within which the Contact Report was recorded
Interaction Contact Method	The type of contact, such as email, phone call, personal visit, letter
Disqualified for Site	Outputs the site for which the Research and/or Development Disqualification note is applied and is active (not end-dated in the past). The site of WFA - Wisconsin Foundation and Alumni Association encompasses all UW sites and indicates a prospect has been disqualified for the entire organization. If several disqualifications have been made for a constituent, these sites will be listed in alphabetical order. See the Disqualification area on Connect for more details about how to apply a Disqualification to a constituent.
Step Stage	If the result is associated with a prospect plan, this is the development stage listed on the plan step/contact report. If the result is an interaction, this field will list “n/a”
Plan Name	If the result is associated with a prospect plan, this is the name of that prospect plan. If the result is an interaction, this field will list “n/a”
Plan Group	While uncommon, the plan group feature allows DoDs to view plans with specific attributes associated with a WFAA initiative – i.e.: “Legacy Project” or “LET A-Rated Project.” Selecting **All Plans** allows you to see all activity on plans with the attributes you select.
Interaction Category/Sub Category	Displays the category and subcategory associated with the interaction.

HOW TO GENERATE THE PROSPECT ACTIVITY REPORT

1. Log in to ABE CRM
2. On the navigation bar, click **WFAA Reports**
3. Click the **DEV – Prospect –Prospect Activity** report
4. If necessary, select the applicable **Plan Group –** To see all plans, select "**All Plans**" (most plans do not have a Plan Group associated with them)
5. Select **Interaction Owner**
6. Select **Interaction Status** (Select **completed** if you only want to see interactions that took place in the past; choose **pending** or **planned** for unfulfilled interactions.)
7. Select **Constituent Type**
8. Select **Interaction Category**
9. Select **Interaction Subcategory**
10. Select **Plan Type**
11. Select **Unit**
12. Select **Department** (this field only populates if a **Department** exists for the selected **Unit**)
13. Select **Fundraiser** (Limits results to interactions/contact reports for prospects for which the selected **Fundraiser** has a **Role** on a plan, even if the Fundraiser is not the Interaction owner.)
14. Select **Fundraiser Role** (select **Any** to see Interactions/Contact Reports for prospects where the selected **Fundraiser** plays *any* role on a plan.)
15. Select **Contact Reports** (select **Contact Reports Only** to limit results to plan activity; however, you may wish to select **All** to see activity documented both by WFAA development staff and campus partners, the latter who may be filing only Interactions.)
16. Select **Date Type** (use **Entered on Date** to ensure all interactions are captured, including those that have been backdated—i.e. the date the interaction was entered is later than the date of the interaction itself)
17. Select **Date From** (results are tied to the **Actual Date** when **Contacted Date** is selected for **Date Type,** but tie back to the date the interaction was actually entered when **Date Type** of **Entered on Date** is selected instead; for **Pending/Planned** interactions, results are based on the **Expected Date** when **Contacted Date** is selected as the **Date Type)**
18. Select **Date To** (see **"Date From"**)
19. Select **Region**
20. Select **Excel Ready Formatting**
21. Click **View Report**