My Prospect Alerts – Steps and Interactions

The "My Prospect Alerts - Steps and Interactions" report outputs a list of all pending or completed steps and basic interactions entered, by any staff, for prospects (or a prospect's spouse)in a specific development officer's portfolio, as well as prospects/spouses with whom they have an interaction in the prior 12 months. The output by default includes steps or interactions completed in the previous two weeks or scheduled in the coming next two weeks. Dates can be edited to provide any desired timeframe and reflect the entered on date for completed steps/interactions or the contact date for pending steps/interactions.

This is a self-service report available to WFAA development staff and campus users who have the Prospect & Plan Management role.

The report data is only available to be viewed online and cannot be exported to any other format.

The My Prospect Alerts – Steps and Interactions report outputs the following fields:

Lookup ID	This is the unique ID used in the ABE CRM system. The report includes a hotlink that will redirect you to the constituent record in ABE CRM. ABE CRM login is required.
Constituent Name	The individual constituent associated with the Lookup ID.
My Prospect Role	The current user's role with the prospect and the constituent's relationship to the prospect as appropriate Examples include: Prospect Manager or Prospect Manager/Participant - Spouse Primary Manager or Primary Manager/Participant - Spouse or Primary Manager/Participant-Key Influencer Secondary Manager or Secondary Manager/Participant – Decision Maker Interaction Owner or Interaction Owner/Participant
Interaction Status	The current status of the interaction (Completed, Pending, Planned).
Interaction Objective	Text from the Summary field of the Interaction or the Objective field of the Contact Report.
Interaction Owner	The WFAA or campus staff who is listed as the Owner of the Interaction or Contact Report.

Interaction Date	The contacted date entered on a step or interaction.

HOW TO GENERATE THE MY PROSPECT ALERTS – STEPS AND INTERACTIONS REPORT

1. Log in to ABE CRM
2. On the navigation bar, click **Prospects**
3. Under Prospect Management, click **My fundraiser page**
4. Find the **My Prospect Alerts** tab among the choices of tabs (it may be on the far right) and click
5. Click the **Steps and Interactions** subtab on the red bar
6. The **Start Date** will default to the previous two weeks and the **End Date** will default to the coming two weeks. You may edit the date range, and click the **View Report** button on the far right of the tan bar to see the steps and interactions in the date range specified. *For Interactions with a status of "Completed" this report pulls from the Actual Date, when the status is "Pending" or "Planned" the report pulls from the Expected Date.*

Note: The **Fundraiser** field defaults to the current user and may not be edited.