

# My Prospect Alerts – Recently Marked Deceased

## WHEN TO USE THE MY PROSPECT ALERTS – RECENTLY MARKED DECEASED REPORT

The "My Prospect Alerts - Recently Marked Deceased" report outputs a list of all prospects for a defined date range that have been marked Deceased.

The output includes all prospects for which a development officer is a plan manager (primary, secondary, secondary solicitor) on an active plan, or an owner or additional solicitor of any interaction in the last 12 months or any step in pending/planned status. 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.

## WHAT IS INCLUDED IN THE MY PROSPECT ALERTS – RECENTLY MARKED DECEASED REPORT

The My Prospect Alerts – Recently Marked Deceased report outputs the following fields:

|                             |   |
|-----------------------------|---|
| <b>Lookup ID</b>            | 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.   |
| <b>Constituent Name</b>     | The individual constituent associated with the Lookup ID.   |
| <b>My Prospect Role</b>     | The current user's role with the prospect and the constituent's relationship to the prospect as appropriate<br><br>Examples include:<br><br>Prospect Manager or Prospect Manager/Participant - Spouse<br><br>Primary Manager or Primary Manager/Participant - Spouse or Primary Manager/Participant-Key Influencer<br><br>Secondary Manager or Secondary Manager/Participant – Decision Maker<br><br>Interaction Owner or Interaction Owner/Participant |
| <b>Death Date</b>           | The actual date the constituent died.   |
| <b>Marked Deceased Date</b> | The date the death was entered into the ABE CRM.  |

## HOW TO GENERATE THE MY PROSPECT ALERTS – RECENTLY MARKED DECEASED 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 **Recently Deceased** subtab on the red bar
6. The **Start Date** will default to a date two weeks prior to today's date and the **End Date** will default to the day before today's date. You may edit the date range. Then click the **View Report** button on the far right of the tan bar to see the Recently Marked Deceased in the date range specified

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