

My Prospect Alerts – Event Registration

WHEN TO USE THE MY PROSPECT ALERTS – EVENT REGISTRATION REPORT

The "My Prospect Alerts – Event Registration" report outputs a list of all prospects for a defined date range that have either:

- registered for an event (regardless of when that event occurs) in the date range
- attended an event in the date range
- will attend an event in the date range

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 events which occurred in the previous two weeks or the Registered Date in the coming two weeks. Dates can be edited to provide any desired timeframe and reflect the Event Date or Registered Date.

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 – EVENT REGISTRATION REPORT

The My Prospect Alerts – Event Registration 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

Event Lookup ID	This is the unique ID used in the ABE CRM system. The report includes a hotlink that will redirect you to the Event record in ABE CRM. ABE CRM login is required.
Event Name	This is the unique name of the Event.
Event Date	This is the date the Event was held or will be held.
Registration Date	The date the constituent registered for the event.
Registration Status	Indicates the current registration status of the constituent (Registered/Canceled).
Attended Status	Indicates whether the constituent attended the Event (Yes/No/No-show)
Alert Type	Indicates that this is a Registration & Event alert.

HOW TO GENERATE THE MY PROSPECT ALERTS – EVENT REGISTRATION 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 **Events Registration** subtab on the red bar
6. The **Start Date** and **End 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 then click the **View Report** button on the far right of the tan bar to see the Event Registrations in the date range specified.

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