My Prospect Alerts – Recent Gifts and Pledges

WHEN TO USE THE MY PROSPECT ALERTS – RECENT GIFTS AND PLEDGES REPORT

The "My Prospect Alerts - Recent gifts and Pledges" report outputs a list of all pledges, outright gifts, planned gifts, and pledge payments made, within a selected date range, by prospects in a specific development officier's portfolio. The output by default includes gifts and pledges in the previous two weeks. Dates can be edited to provide any desired timeframe and reflect the entered on date for gifts and pledges.

This is a self-service report available to WFAA development staff and campus users who have the Prospect & Plan Management role. This report does not replace the Donor Stewardship Report as the tool for generating acknowledgements by unit and department.

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 – RECENT GIFTS AND PLEDGES REPORT

The My Prospect Alerts – Recent Gifts and Pledges 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 the 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
Spouse Lookup ID	This is the unique ID used in the ABE CRM system for the Constituent's spouse, if one exists and is linked. The report includes a hotlink that will redirect you to the spouse's record in the ABE CRM. ABE CRM login is required.
Spouse Name	The individual constituent associated with the Spouse Lookup ID.
Donor Directed Organization	If the gift or pledge is directed from the donor via an organization, the organization is indicated. The report includes a hotlink that will redirect

	you to the Organization's record in the ABE CRM. ABE CRM login is required.
Date Entered	The date the gift or pledge was entered into the ABE CRM.
Transaction Date	The date the gift or pledge was made by the donor.
Recognition Amount	The amount of the gift or pledge.
Transaction Type	Indicates whether the gift or pledge was a Payment, Pledge, or Pledge Payment.
Revenue ID	This is the unique ID used in the ABE CRM system for the gift or pledge. The report includes a hotlink that will redirect you to the specific gift or pledge record in the ABE CRM. ABE CRM login is required.
Fund Number	This is the unique number used in the ABE CRM for the specific fund that the gift or pledge was directed into.
Fund Name	This is the unique name used in the ABE CRM associate with the Fund Number.

HOW TO GENERATE THE MY PROSPECT ALERTS – RECENT GIFTS AND PLEDGES 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 **Recent Gifts and Pledges** subtab on the red bar
6. The **Entered Start Date** and **Entered End Date** will default to the last two weeks. You may edit the date range, and click the **View Report** button on the far right of the tan bar to see gifts entered in the date range specified. *This report pulls transactions based on the date entered by Gift Processing.*

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