Manage My Prospects

Click the **Manage My Prospects** menu link

Machine generated alternative text:
Advancement Offcers 
Manage My Prospects 
Add a Contact 
/olunteer 
Adv cement Officer 
Searches 
ement 
View/Edit Contacts 

There are two drop-down menus at the top of the Manage My Prospects screen:

* Prospect View
* Sort By

# Prospect View menu

There are 3 views available:

* Primary Only
* Other Assignments
* All

Choose a view and click Go to update which prospects are displayed.





Pay attention to which view is enabled when you log in to this screen while working. Banner will remember your last choice and show that setting as default when you return to this screen.

## All

Start with ALL first. This displays everybody you are assigned to, whether as the primary or secondary development officer.

Next, try Primary Only and Other Assignments to view the different display options.

## Primary Only

This view displays only prospects to which you are assigned as the Primary development officer.

## Other Assignments

This view displays only prospects to which you are assigned, but not as the Primary development officer.

# Sort by menu

We will only cover 3 options on this menu:

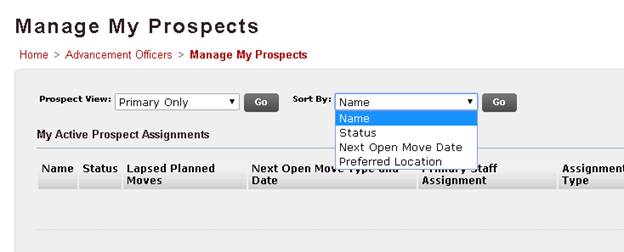
* Name
* Status
* Preferred Location

**Name** - Sorts Prospects alphabetically by last name

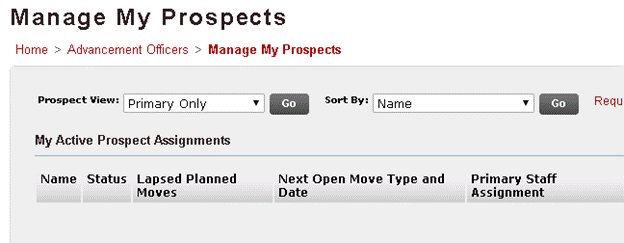
**Status** - Groups prospects by status. All the active prospects will be grouped together.

**Preferred** **Location** - Sorts prospects by the preferred address on the prospect profile.

Next Open Move Date will be covered in a different training as more functionality goes online.



## My Active Prospect Assignments



We will cover the following columns under My Active Prospect Assignments:

* Name
* Status
* Primary Staff Assignment
* Assignment Type
* Largest Recognized Gift
* Largest Recognized Pledge
* Lifetime Giving
* Spouse
* Preferred Location
* Add a Contact
* Add a Proposal

### Name

Displays the Prospect name. This is also a clickable link that will take you to the Prospect Profile page.

Machine generated alternative text:
Name 
Mr. 
Mr.. 
Michelle Hart 
Status 
Prospect 
Active 
Prospect 
Active 
Prospect 
Active 

### Status

Displays the Prospect Status. (Options include Prospect in Discovery, Prospect Active, Prospect Suspended, Prospect Inactive). This may include a clickable link that will take you to Update Prospect Status. Only the Primary has the ability to change the status.

### Primary Staff Assignment

This will appear blank if you are the Primary Staffer assigned to the Prospect.

If you are viewing a prospect that has someone else assigned as the primary, that person’s name will appear (no link in this value)

### Assignment Type

Describes whether the viewer is assigned as the Primary or Secondary Manager to a particular prospect.

Machine generated alternative text:
Primary Staff 
Assignment 
Nora a Frederick 
Assig nment 
Type 
Secondary 
Manager 
Primary 
Manager 
Secondary 
Manager 

### Largest Recognized Gift

### Largest Recognized Pledge

These columns may include clickable links that will take you to the Gift Detail screen

### Lifetime Giving

This column displays a static value without a link.

Machine generated alternative text:
Largest 
Recognized Gift 
$30.00 May 24, 2016 
Largest Recognized Lifetime 
Pledge 
Giving 
$80.00 

### Spouse

This column may have a name that is a clickable link that will take you to the Spouse's profile page.

### Preferred Location

This column displays the City, State and Zip associated with the preferred address on the prospect profile.

Machine generated alternative text:
Preferred Location 
Lafayette, Louisiana 
70508 
Breaux Bridge, 
Louisiana 70517 
Youngsville, Louisiana 
705g2 
Fairfax, Virginia 22033 
United States 
Add a 
Contact 
Add a 
Contact 
Add a 
Contact 
Add a 
Contact 
Add a 
Contact 
Add a 
Proposa I 
Add a 
Proposal 
Add a 
Proposal 
Add a 
Proposal 

### Add a Contact

This is one of several places where you can add contact reports in SSB.

### Add a Proposal

There will be a clickable link in this column on for prospects to which you are assigned as the Primary.