Manage My Prospects: links detail

# Name

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

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

Under the Prospect's ID number and name are several clickable links that jump to information further down this page.

Machine generated alternative text:
Prospect Long Profile 
Home Prospect Long Profile 
Ret""' to 
"turn Manage My 
Advancement Individual Information 
Mrhelle Hart 
t A&resses I Internet Addresses I General I Ratings Star Assignments propcts,qnterest Areas I External Ratings Strategy Plans I Prospect Contacts I Prospect proposals prospect Moves I Prospect Researchers I Prospect Resource or Source Information I Research Data I 
Comments Names and Salutations I Addlticnal Phone Nurnbers I Totals I I Planned Gi•ang I prospect Status History I VanaNe and Special purgnse Information I Event Attendance I Comments 
Addresses 
Go to top of page 

There are links to return to the top of this screen located in multiple places further down this page.

Machine generated alternative text:
Prospect Resource or Source Information 
Go to top of page 
Resource or Source 
Ancestry.com 
Relative 
Research Data 
Go to top of page 
Research Data 
Data Type 
Children Data 
Effective Date Activity Date 
Apr 06, 2017 Apr 06, 2017 
TEST RESEARCH 4/6/2017 
Data Type 
Effective Date Activity Date 
Spouse Information Apr 06, 2017 Apr 06, 2017 
TEST 4/6/2017 
Comments 
Go to top of page 
No Comments. 

At the top of the Prospect Profile page is a **Return to Manage My Prospects** link.

Machine generated alternative text:
Prospect Long Profile 
Home Prospect Long Profile 
Return to O List 
Return to Manage My Prospects 
Advancement Individual Information 
Name 

# Status

Displays the **Prospect Status**.

If you are the Primary, status will be a clickable link that will take you to **Update Prospect Status**.

Machine generated alternative text:
Update Prospect Status 
Home Update Prospect Status 
Advancement Individual Information 
ID 
coc 
Status: 
Name 
Stephannie 
- indicates a required field. 
Select 
04/17/2017 
Sasha A. Rodriguez 
From Date: MM/ DD/YYYY * 
Days 
1 
5 
Authorized By: 
Update Status 
Status Changes 
Reset 
Status 
Prospect Inactive 
Prospect Inactive 
* Prospect Active 
Authorized By 
* Nora B Frederick 
From Date To Date 
Apr 12, 2017 
Apr 13, 2017 
Return to Manage My Prospects 

The **Update Prospect Status** screen displays the status change history, which shows **From** and **To** dates for the different statuses.

Only the Primary has the ability to change the status.

Machine generated alternative text:
Select 
Select 
Prospect In Discovery 
Prospect Active 
Prospect Suspended 
Pros ect Inactive 

## Status Options

Discovery is the initial phase.

Active - the prospect will remain active for the life of their relationship with UL.

Suspended or Inactive will only be used when the prospect is deceased or otherwise terminates their relationship with UL.

# Giving information

* Largest Recognized Gift
* Largest Recognized Pledge
* Lifetime Giving

## Largest Recognized Gift and Largest Recognized Pledge

These columns show a dollar amount and a date for the largest value of all gifts or pledges associated with the prospect.

Click a dollar value link to see the specifics of that particular gift or pledge.

Machine generated alternative text:
Gift Detail 
Home Gift Detail 
Choose the ink in the Pledge Number column to view detail about the pledge to which a gift has been applied. use the browser beck option to return to this page. 
Advancement Organization Information 
Organization Parent Company 
Organizational Status: 
Donor Categwies: 
Prospect Status: 
Primary Prospect Manager: 
coc 
Active 
CORP 
coo 
CORP 
Gift Detail 
Date 
knount Gift Type Gift Number Gift Class 1 Gift Class 2 Gift Class 3 
Amount Pledge Number 
2015 S7E,ooo.OO Check 
RCAF Capital Campaign Fund 
Associated ID 
No Associated D Information. 
Allocation 
Allocations 
Designation 
Ragin' Cajuns Strong Campaign RCAF Capital Campaign Fund $75,000.00 

## Lifetime Giving

This displays the total accumulated giving. This value will not contain a clickable link.

## Spouse

This column may have a name that is a clickable link that will take you to the Spouse's profile page. The spouse will have a separate ID number and profile pages.

## Request a Prospect Assignment

There is a Request a Prospect Assignment link at the top of the Manage My Prospects screen, to the right of the Sort By menu. This will create an e-mail to the Advancement Research Officer with the subject line: Prospect Assignment Request.

### A note about e-mail links in SSB:

Clicking a link to send an e-mail only works in SSB if your computer has an e-mail program set up, such as Outlook or Mail (for Mac). If you do not have an e-mail program set up, clicking an e-mail link in SSB will try to open your computer's default mail program and ask you to set up the program. If this happens, you can still use mail links in SSB to copy and paste the e-mail address into Zimbra webmail or another web-based e-mail program.

Right-click the e-mail link and choose "Copy e-mail address"

Machine generated alternative text:
Nut 
Open Link in New Tab 
Open Link in New Window 
Open Link in New Private Window 
Staff 
Copy Email Address 
Search Google for "Request a Prosp... 

Right-click in the To field of your e-mail and choose Paste

Machine generated alternative text:
New Message 
undo 
Cut 
Subject 
Qelete 
Select All 
Check Spelling 