PROSPECT MANAGEMENT REPORTS

FUNDRAISER ACTIVITY REPORTS

Core Campaign Prospect Report
Shows your Core (a subset of your portfolio – prospects you plan to solicit during the next 5 to 10 years). Compares your Core to the recommendations for size and minimum rating, depending on your metrics type. Shows your activity with your Core this fiscal year.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section. Also sent to you and your supervisor at the close of each quarter.

Contact Activity Report
Shows your Contact Report activity for the current fiscal year, broken down by Core prospect/other prospect/non prospect, and by capacity rating.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section. Also sent to you and your supervisor at the close of each quarter.

Top 25 Activity Report
Shows your progress toward delivering and closing your Top 25 proposals for the current fiscal year.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section. Also sent to you and your supervisor at the close of each quarter.

Proposals Submitted Report
Shows all the proposals you’ve submitted this fiscal year (including Top 25 proposals and non-Top 25 proposals) and their results. Also shows proposals that were solicited in a past year, but closed this year.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section. Also sent to you and your supervisor at the close of each quarter.
PORTFOLIO AND PROPOSAL LISTS

My Prospect Portfolio
A list of every prospect you’re assigned to as Unit Staff, Relationship Manager, or Stewardship Staff.
Where to find it: View on your Advance Home Page. You can Export Form to Excel or Print by pointing your mouse to Actions on the purple header bar.

My Active Proposals
A list of all the active proposals you’re assigned to.
Where to find it: View on your Advance Home Page. You can Export Form to Excel or Print by pointing your mouse to Actions on the purple header bar.

Top 25 Dashboard
Shows all unit Top 25 proposals. This report is interactive and can be customized to view proposals by unit or by fundraiser.
Where to find it: In Reportal, search for the report by name.

REPORTS ON A SINGLE PROSPECT

Prospect Profile
Shows summary prospect information for one person or organization, including recent gifts, open proposals, and a biography, if one exists in Advance.
Where to find it: In Advance, open the person’s record. Expand the “Prospect Tracking” menu on the left. Click Prospect Profile. Or, in Reportal, search for the report by name. You can also find this in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section.
Volunteer Profile
Created to share with volunteers and non-Advancement staff who have donor interactions. Shows prospect information for one person or organization in a more condensed format than the Prospect Profile. It includes a biography, if one exists in Advance, but excludes some personal information included in the Prospect Profile.
**Where to find it:** In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section.

Organization Giving Profile
Shows gifts and grants for one organization. Can include giving detail for a single college, division, or allocation.
**Where to find it:** In Advance, open the organization’s record. Expand the “Giving” menu on the left. Click UW Org Giving Profile. Or, in Reportal, search for the report by name. You can also find this in ReportWriter.NET under Web Reports, in the Corporate and Foundation Relations section.

Person Giving Profile
Shows gifts plus matching gifts for a single donor. Includes 5-year summary and giving detail by department.
**Where to find it:** In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Gift Status Reports section.

Contact Report Reader
Allows users to easily read contact report histories, either by fundraiser or by donor. Exportable in both PDF and spreadsheet form.
**Where to find it:** In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section.
UNIT PROSPECT REPORTS

UPL – Prospect Pyramid
Shows all the prospects for a unit, broken down by campaign rating. Fields are interactive and exportable.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section.

UPL – Purple People
Shows the same information as the pyramid, but laid out in a grid with the highest-capacity, most closely affiliated prospects (purple people) in the upper right. Fields are interactive and exportable.
Where to find it: In Reportal, search for the report by name. Or, in ReportWriter.NET under Web Reports, in the Advancement Research and Relationship Management section.

Great Wall Dashboard
Shows all unit campaign asks. This report is interactive and can be customized to view proposals by unit, likelihood, region, or projected quarter.
Where to find it: In Reportal, search for the report by name.

AND MORE

Newsfeed
This feature delivers real-time information about the prospects that you care about. Customize your view by prospect assignments, UPL, or giving, or view specific entities.
Where to find it: In Reportal, select Newsfeed in the top bar. Set filters to indicate who/what you would like to follow, and select the categories of news you would like to see.
Custom Advance Lookups
Shows almost any prospect information you'd like.
Where to find it: In Advance, click on the binoculars
and do a lookup to find your recent contact reports,
Top 25 proposals for your unit, and much more.
Follow one of our handouts to try it!

Population Chooser
Population Chooser is a reporting tool currently
available in test mode. It allows users to choose
populations of people based on requested fields,
providing custom reporting in real time. For more
information on this tool, contact the Advancement
HelpDesk at advhelp@uw.edu.
Where to find it: In ReportWriter.NET, under Web
Reports, in the Test section. Or in Reportal under its
alternate name: Michelangelo.

Capture
Users enter a list of ID numbers and Capture generates an Excel
spreadsheet with names, addresses, giving, and other
information as selected by users. For more information on this
tool, contact the Advancement HelpDesk at advhelp@uw.edu.
Where to find it: In Reportal, search for it by name. Or, in
ReportWriter.NET, under Web Reports, in the Test section.

Questions? Concerns?
Contact Prospect Management at tracking@uw.edu