

# Prospects

The **Prospect** viewport displays all of the officer's current prospect assignments by Entity ID. You can filter by assignment type in this viewport using the drop-down menu at the top of the viewport. Assignment Types include Primary relationship assignments, Non-Primary (i.e. any other assignment type), or All assignment types. You can also sort by any of the columns by clicking on the title in the header row. Clicking on the **Entity ID** will open the prospect's **Relationship Profile**.

From this view, additional fields can be added to the list by using the **Add Columns** button at the upper right of the viewport. The available fields are grouped in to categories on the left hand column. You can click each category to expand the selection, then put a check mark next to each of the fields you would like to add to the view. To search for a specific column, just use the search bar at the top of the category list. If you have a question about a specific field, hovering over it with your mouse will produce a pop-up box with a definition. Your selected fields will display on the list to the right. Here, you can drag items up or down to change the display order, or click the X to remove them from this list. Once complete, click **Submit**, and your fields will be add to your Prospect Assignments view. Any changes you make to the columns will be automatically saved for your account.

The screenshot shows the 'Prospects' viewport interface. At the top, there is a search bar and a settings icon. Below that, a dropdown menu is set to 'Show Primary' and an 'Add Columns' button is visible. The main area displays a table with the following data:

Entity ID	First Name	Last Name	Days Since
6	HSBC Holdings		Not Cont
47	BP		Not Cont
135	ING Group		91
297	Citigroup		631
301	Royal Dutch Shell		Not Cont

## Households

The **Households** view in the Prospects viewport gives you a quick snapshot of how many households you have in your prospect list and allows you to visualize where spouse pairs exist that have been combined as households. You can toggle between viewing your results with all Entities or grouped together by Households via the buttons at the top left of the results list.

By default, Households are defined by looking at spouses. Fundraiser Performance Management will then determine who has the lower of the two Entity IDs of those two spouses and display the lowest as the primary in the household view. If you want to get more specific about who displays as the primary spouse, you can provide the Primary Entity ID to Fundraiser Performance Management during the nightly data transfer.

## Default View Definitions:

- **Entity ID:** The unique ID of the relationship.
- **Prospect ID:** The unique ID of the prospect record that is associated with the entity record and the selected officer.
- **Full Name:** The full name of the entity record.
- **Home Phone:** The home phone number of the entity record.
- **Home State:** The home state of the entity record.
- **MG EVI:** Major Giving Estimated Value Index (MG EVI) is a rank score for all entity records based on a custom predictive model for your institution. These scores range from 1 to 99, with 99 being the best and 1 being the worst.
- **Assignment Type:** The type of assignment relationship the officer has to the prospect record.
- **Prospect Stage:** The stage the prospect record is currently in.
- **Prospect Rating:** This is your internal prospect rating level.
- **Days Since Last Contact:** This is the number of days since the officer last contacted the entity record by any kind of contact type.
- **Proposal Status:** This field displays the proposal status of a related active proposal.