

Recent Prospect Stage Moves

The Recent Prospect Stage Moves viewport allows you to see all of the stage changes made to your prospects during the last 90 days. It is intended to help you keep track of what prospects have been moving recently.

Each row in the viewport represents one stage move for one prospect. (It also lists any newly created prospects during that time, as long as your institution counts creation as a "move"). If the same prospect is created in Identified, then moved to Qualified, and finally Solicitation in the past 90 days, that prospect will be listed three times in this viewport.

At the top of the page is a filter that allows you to limit the prospects displayed to only those currently assigned to specific officers. Or, you can choose "All Prospects" which will show you all prospect moves made in the last 90 days, even those for prospects not currently assigned.