Prospect Management Tab

The Prospect Management Tab includes four Viewports relevant to managing the movement of prospects. You can choose to view the information on any gift officers you have access to by choosing the appropriate name from the Officer drop-down menu.

Viewports on this dashboard use data related to when prospects moved between stages to demonstrate how effectively your institution is identifying and qualifying prospects. If your institution is not sending prospect stage history data to FPM, and is not using Activity Center to manage prospects, then the viewports in this tab will not show any results.

