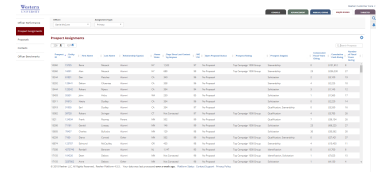


Prospect Assignments Tab

The **Prospect Assignments** tab displays all of the selected officer's current prospect assignments by Entity ID, regardless of the entities' relationship status (even if their status is set to hide in Targeter). You can filter this report using the menu at the top of the page to include Primary 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 column title in the header row. In addition, you can click on the **Entity ID** link to view the [Relationship Profile](#).



Entity ID	Name	Address	Phone	State	MG EVI	Assignment Type	Prospect Stage	Prospect Rating	Days Since Last Contact	Proposal Status
12345	John Doe	123 Main St	555-123-4567	CA	85	Primary	Active	4	15	Active
67890	Jane Smith	456 Oak Ave	555-987-6543	TX	72	Non-Primary	Inactive	2	30	Completed
11111	Bob Johnson	789 Pine Rd	555-234-5678	FL	91	Primary	Active	5	10	Pending
22222	Alice Brown	101 Elm St	555-345-6789	NY	68	Non-Primary	Inactive	3	25	Completed

From this view, additional fields can be added to the list by using the **Add Columns** button in the gear icon at the top right of the page. The available fields are grouped into 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, 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.

Finally, you can export the list by clicking on the **Excel (Table Only)** option in the gear icon at the top right of the page. This will create a Comma Separated Values (CSV) file that you can view in Microsoft Excel.

Households

The **Households** view in Prospect Assignments 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, then we will 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 in 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 to 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 Expected 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.