Prospect Portfolio Report
User Guide

Search by Individual Development Officer

- To Locate the Prospect Portfolio in Advance Click on the beach ball icon at the top of the page on the Advance platform.

- Choose the CSUF_PMATS_PORFOLIO icon from the report list.
• Search for the individual you would like to pull by typing in the individuals Advance entity ID number.

• Choose the specific stage (Identification/Qualification, Cultivation Stage 1, Cultivation Stage 2, Cultivation Stage 3, Solicitation, Stewardship, All). **You must choose one of the options for the report to run.** If you would like to see the entire portfolio choose the “All” option. If you would like to see all prospects in a specific PMATS choose the appropriate stage from the dropdown menu.
Choose a range of days till drop (15, 30, 60, All). This is the indicator of how many days till the prospect will drop from the portfolio if no action is taken (PMATS stage move, and/or submitted contact report). **You must choose one of the options for the report to run.** If you would like to see the entire portfolio choose the “All” option. If you would like to see all prospects that have a certain time from being dropped select the days option from the dropdown menu.

Choose one of the three management types (Prospect Manager, Associate Prospect Manager, All). **You must choose one of the options for the report to run.** If you would like to see the entire portfolio, independent of Management type, choose the “All” option. If you would like to see all prospects that are managed at a specific level (Prospect Manager, Associate Prospect Manager) select the appropriate option from the dropdown menu.
Running the Report:

- Once all fields have been selected appropriately hit Run Report to get the Prospect Portfolio Report.
  - This will come up in a new tab in your internet browser.

*Please note that within the Prospect Portfolio Report you can choose the prospect number and the prospect record will open up within your open Advance window.