AT-A-GLANCE: PROSPECT TRAVEL TASKS & NEXT STEPS

DEFINED

Prospect Travel Tasks and Prospect Next Steps are entered by Development Officers on the Prospect Tasks screen. Prospect Travel Tasks are entered when a Development Officer has an upcoming visit scheduled outside the Northeast Ohio area (i.e. if the trip requires an overnight stay or flight, then enter a travel task). Prospect Next Step tasks are entered on a DO's most important prospects. These selected prospects are defined by the DO; not every prospect in the portfolio requires a Next Step. Next Steps should consist of information pertaining to the campaign strategy (i.e. something regarding a solicitation or proposal). Depending on the user's Advance profile, Prospect Travel Tasks and Next Steps are viewable by clicking on the My Tasks icon from the Home Screen.

HOW TO ENTER TRAVEL TASKS & NEXT STEPS

To enter a Prospect Task, navigate to the Entity, click the Prospect Summary link, click Tasks on the page tree, and click New under the Prospect Tasks bar. Enter the required information, the responsible party and click Save.

Prospect Next Steps are entered the same way as Travel Tasks, however instead of entering VST for Visit, the user should enter NXS for Next Step. NOTE - there should only be one Next Step on a prospect's record at any given time.

HOW TO EDIT TASKS

To edit a Task, navigate to the Task, make the appropriate changes (i.e. change the Status from Pending to Completed or Canceled) and Save. A completed date can be entered if you wish, but is not required.

REQUIRED FIELDS FOR TRAVEL TASKS

Field	Description
Task	VST for Visit or NXS for Next Step
Status	P for Pending
Scheduled	Date of visit or next step
Description	Brief description of visit
Responsible	DO name (multiple DO's can be listed here)

REPORTING

Travel Task data populates the Development Update Report, which can be found on the Home Screen under Favorites. The Development Update Report is viewed by the VP's office. Next Step data populates the Leadership Prospect Group reports which can be found under Canned Reports. This report is viewed by the VP's office. Tasks also appear on the Weekly Wizard Snapshot that is sent to Advance users.

FROM THE DEVELOPMENT OFFICER PROFILE
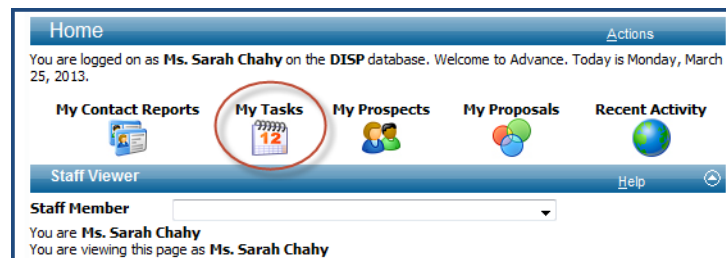
The My Tasks icon will only show Tasks associated with a Development Officer's assigned prospects. To see ALL tasks assigned to a user, regardless if they are the assigned Prospect Manager, go to Lookups, change the template to Prospect - Tasks and enter the user's name as Responsible.