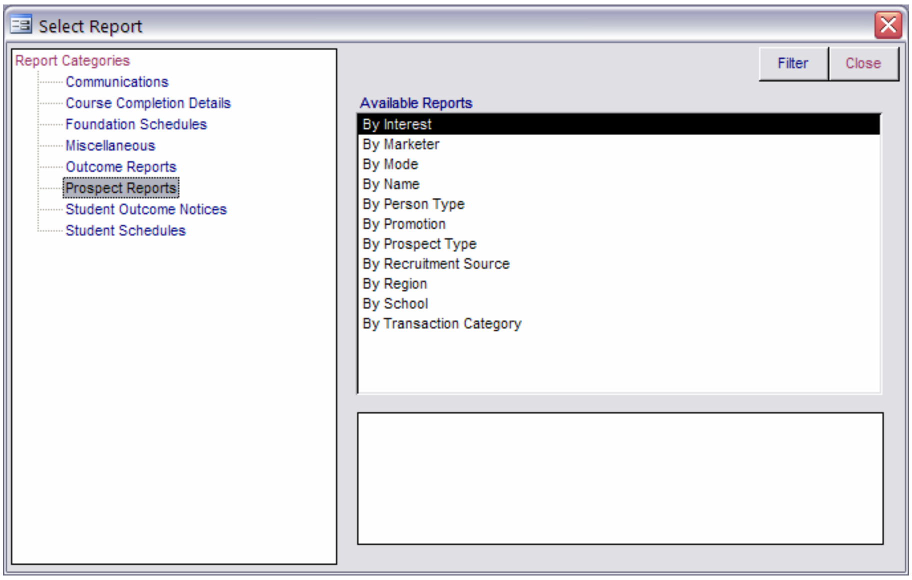
Reporting on Prospects

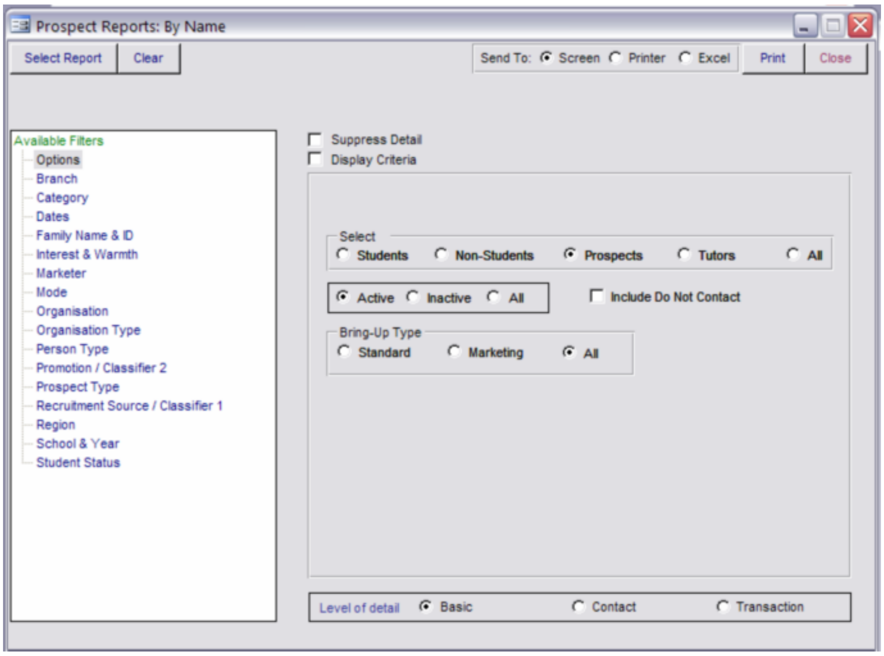
Take2 Tip Sheet

Take2 has a number of useful prospect reports. To generate these:

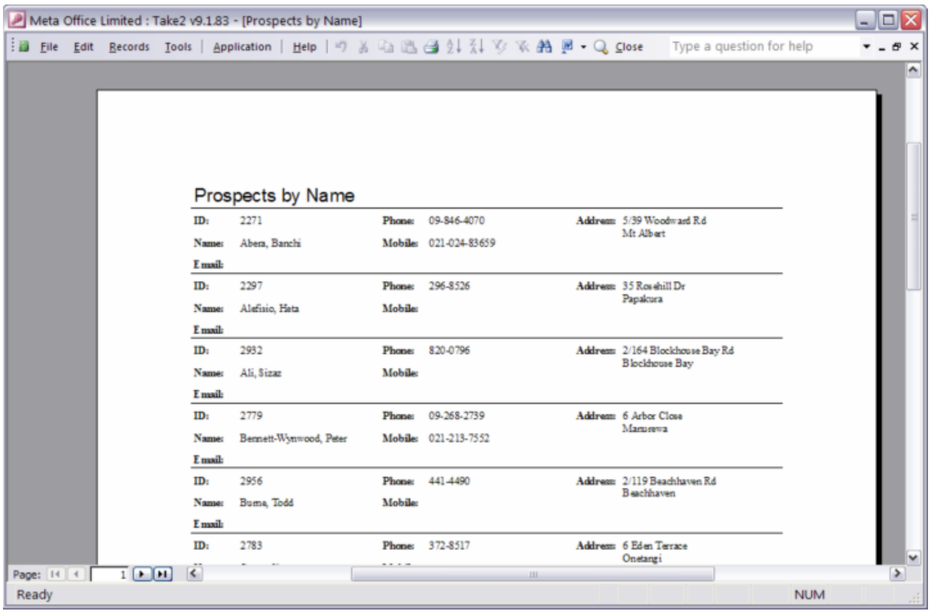
1. From the main menu click *Exports and Reports.*
2. Click *General Reports.*
3. Click *Prospect Reports.*
4. Select the report you wish to use. These are named by how the information is grouped in the report. If no grouping is required, select *By Name*.
5. Click *Filter.*



6. If you wish to filter your range of prospects, you can enter the criteria here. Otherwise click *Print*.



7. Your Report is shown. Click the printer icon on the toolbar, or click the blue *Word* icon to edit it further.



On the filter screen you can also specify the level of detail that the report will display. A "Basic" report will show just the prospect's name, ID, address, phone number, email, and mobile number. By selecting "Contact" as the level of detail the report will also list the contacts for prospects. Selecting "Transaction" adds in transaction records to the report, providing a very comprehensive overview of your interaction with prospects.

Note: that some reports, for example, "Prospects by Interest", may show the same prospect twice because the prospect has more than one interest.