Prospect Management

To Search for Prospects:
Select 'Search for Prospects' from the menu on the left.

There are various ways to search:

- **Search by Date** – returns a list of prospect records created/submitted within the date range specified.
- **Search by Individual** – if you know some demographic information about a prospect (note the link to the right of first and last name for help on performing wildcard searches), including their unique Prospect ID.
- **Search by Created Date** – returns a list of prospect records created within the specified date range.
- **Search Using Query** – get a list of prospect records that meet criteria specified in a pre-defined query (you have the ability to create and save queries of your own).
- **Search by Group** – returns a list of prospect records that have been added to a particular group (you have the ability to create and save groups of your own).
- **Search by Action** – returns a list of prospect records on whom a particular action was performed (whether a system-generated action or one that you record specifically).

To view a Prospect:

Click on the Prospect's Name from the Search Results list. To the right is what a typical Prospect Details record would look like in the new window that pops up when you click on a prospect's name.

Everything in the Request for Information section (except for the internal fields section at the bottom) is actually a copy of the web form that prospects see when they visit our site.

By default, all search screens in all AY modules display 50 records at a time. You may change this for your particular search by clicking the drop-down and choosing 25, 75, or 100.

This information appears when a prospect record has been matched to an applicant record.
NOTE: A nightly batch job runs behind the scenes to match prospect records with submitted applications (on last name, first name, and date of birth). If a match is found, the three lines of information you see circled above will appear in the Prospect Details section.

Several options are available to you, as shown by the “action buttons” above the Prospect Details:

View History: displays a running “log” of all actions taken on this prospect record (print, email, etc.)

View Comments: displays a running “log” of any comments that you and/or the Graduate School has entered for the prospect

View Groups: displays groups to which you have added the prospect. Groups can mean anything you want them to; they can be used to quickly identify people in various categories. Some uses might include “Prospect Records for X semester” or “Contacted for Recruiting Fair,” etc. (Note the “Add to Group” drop down list; more on that later when we talk about adding new records and updating existing records.)

Below the “action buttons” described above is a Prospect Details box which shows additional data including whether the prospect record was created online (“by Prospect” will appear on the end of the “Created Date” line) or entered manually by an administrative user through the WebCenter (“by [x]” will appear on the end of the “Created Date” line, where [x] is the administrative user ID). The word “webcenter” will appear to the right of the “Web Source” line for any prospect records entered manually by an administrative user through the WebCenter.

Subscription Status: This feature was added to the on-line prospect form in response to the CAN-SPAM federal legislation, which in part prohibits agencies from loading names into on-line systems without the permission of the individuals. The feature gives a prospect the option of blocking any e-mailed response that we may send as a result of him (or someone else) entering his personal/educational information into our system. It is unlikely that a prospect would “unsubscribe” after he had entered a prospect record (which is really a request for information about specified programs) because unsubscribing would, in essence, block him from receiving a response from us. It might be used by a prospect whose information was entered by a Graduate Secretary as a result of a phoned inquiry, or by a recruiter, for example, after which the prospect decided he did not want to attend NC State and did not want to receive any further communication from us.

Let’s go back to the listing. Besides viewing details on an individual record (as we just did), you can also select one or more records on which to perform one of several actions as described below.
To add Existing Prospect Records to a Group:
After your search returns prospects, you can add them to a group by:
- Check the individuals you wish to add to the group, or choose ‘Apply to All’
- Next, ‘Select an Action’ to ‘Add/Remove Group’
- Choose ‘go’
Select the group from the available choices in the drop-down list and then choose ‘submit’ (NOTE: You may also click the “add new” button to create a new group which will then be added to the list of available choices.)

To Export Prospect Records:
After your search returns prospects, you can export this group by:
- Choose ‘Apply to All’
- Next, ‘Select an Action’ to ‘Export’
- Choose ‘go’
- Select the desired export template, click the appropriate boxes (to choose whether to include field names on first row, to record the export action on the prospect record, etc.), and click ‘run’

To Send Prospects an Email:
After your search returns prospects, you can send an Email to an entire group or to individuals by:
- Check the individuals you wish to send an Email, or choose ‘Apply to All’
- Next, ‘Select an Action’ to ‘Send Email’
- Choose ‘go’
- You will then need to fill in the email form and select ‘Send’

NOTE: Alternately, you may choose to send email from a drop-down list of available pre-defined email templates. We can show you how to create email templates of your own.

To Print Prospect Records
- Check the individuals you wish to print, or choose ‘Apply to All’
- Next, ‘Select an Action’ to ‘Print Prospect’
- Choose ‘go’
- On the page that comes up, choose whether or not to record the printing action, then click print.
- Alternately, if you are looking at a specific prospect’s record, you can scroll to the bottom and click the ‘Print Prospect Form’ button.

To Add a Prospect
Select ‘Add a Prospect’ from the menu on the left. Your screen should look like the picture to the right. Fill in the form as you would any other web-based form, remembering that fields with an asterisk are required.

Click the Check button to the right of the last name field to look for possible duplicate records (as shown in the picture above). If a match is found, a window pops up with a link you can click on to pull up the record. If it’s the
same person you’re trying to enter, you could simply edit that record, or you could choose to close that window and enter another record for that person.

If you choose to edit the existing record, keep in mind that you will not see that record again unless you include at least one of your degree programs in the “Graduate Program of Interest” field. Please remember to hold down the CTRL key to make multiple selections; otherwise, the previous choice(s) in that field will be gone.

Click the Submit button when you’re finished adding the prospect record, then click “yes” to the pop-up window that asks about business rules firing off.

NOTE: You can add prospects directly to an existing group while entering their records. You can do the same when updating existing records. Simply click the drop-down list next to the “Add to Group” heading at the top of the screen and select the desired group (as shown in the picture above).

Note that Prospect Records, unlike Applications, are accessible to all programs for which the student indicated an interest when he completed the Prospect form. In a sense, when the record is in “Prospects,” multiple graduate programs may be “competing” for the same student, i.e. they can all access the record, and send application information and/or correspond with the student. Once the student submits an application, however, then only authorized WebCenter users in the graduate program to which he applied can see/access the application.

Finding Prospects Who Have Also Applied for Admission

To search for prospects who have applied for admission, run the query “Find Matched Applicant Records” stored in the Generic Departmental Queries folder in the Prospect System.

NOTE: Whenever you receive emails from a prospective student requesting application materials, please do not forward these emails to the Graduate School. Instead, please enter a record for them in the prospect system. This will give you a record of their interest and ensure they receive the appropriate Graduate School mailing in the most efficient manner.

To increase applicant traffic, encourage your prospective students to apply online. We suggest you put a link to our Online Application from your prospective students and/or admissions web pages. Update your link to apply online to Graduate School with: http://www.ncsu.edu/applygrad.