Add a Prospect

There are two ways to add a prospect record.

1. From the **Search** tab, select **Prospects/All**.

   Alternatively, select **All** from the Prospects section on the site map.

2. Select the plus sign icon to add a record.

3. Enter the information you have in the Prospect Add/Edit window and then **Save**.
   - The fields in the window will fill portions of the Academic Summary, Address, and Biographical sections.
• If you have not customized your workspace, click on the section names you want to display. These sections will display in the window on the right. For more information on this process, see the how-to document called Customize a Prospect Record.

• In the blue bar above the navigation tabs, you will see the name of the prospect you are adding.
Delete a Prospect

1. From the **Search** tab, select **Prospects/All**.
   
   Alternatively, select **All** from the Prospects section on the site map.

2. Enter your search criteria and select **Search** or press **Enter** on your keyboard. Your results will be displayed in the bottom half of the screen.
There are two ways to delete the prospect.

1. On the search results grid, at the far right-hand side of the prospect record you want to delete, select the trash can icon.

   - You will be asked to confirm the deletion.
   - You will also have an option to prevent the confirmation box from displaying again.

2. While in a prospect record, click the trash can icon on the navigation bar.

   - You will get a confirmation message to confirm the deletion.
   - You will not get the option to prevent that message from displaying again when you delete a prospect from within the record.