iProspect Detail Report

The Detail Report provides details for all the recruiting activities completed by an office within a specified period. This report is available to individuals with the Recruiter, Delegate and Executive roles in iProspect.
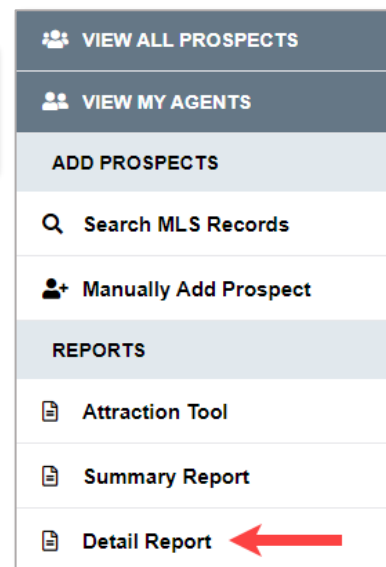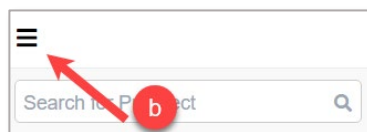
There are two ways to get to the Detail Report:

a. From within the Summary Report, right-click on an office name, and choose **View Detail Report**.

b. Click **Menu** in the upper left corner and then choose **Detail Report**.

If you have access to multiple offices, your first step will be to select the office you wish to view.

- Click in the **Select an Office** field to choose your office.
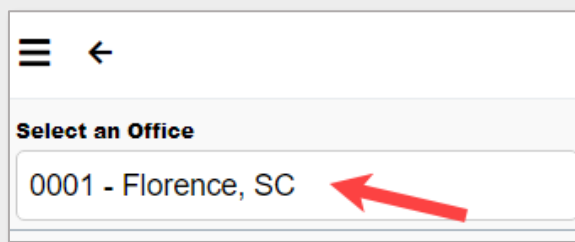
**Note:** The following steps in this section are not necessary if you accessed the Detail Report via the Summary Report. You can, however, still use these fields to modify your new report, if desired.

- Enter the parameters for your report:
  a. **Start Date**

  b. **End Date**

  c. **Date Range Type:**
     - **Activity** – this is the **ACTUAL** date the activity took place.
     - **Entry** – this is the date the activity was **ENTERED** into iProspect.

  a. **Show Notes As:**
     - Abbreviated Notes
     - Full Notes

  b. Click **Go**.
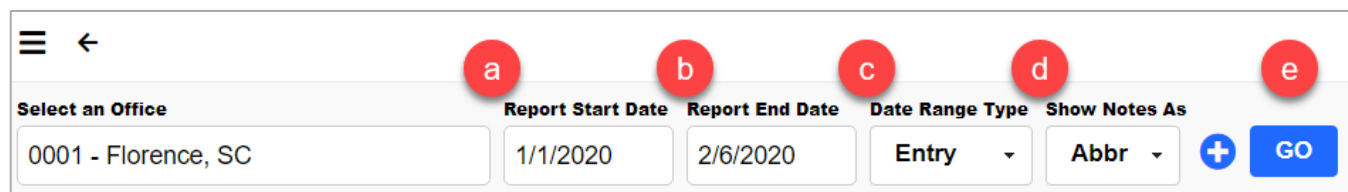
The detail report displays the specific details for every contact made with a prospect.

a. This table can be sorted by any of the column headings by clicking on the **column heading** name you'd like to sort by.

b. To share the information contained in the Detail Report with someone without access to iProspect, click:
   - **Download Excel** – to open an editable Excel sheet.
   - **Download PDF** – to open a PDF document.

Prospect Detail Report

For: 0001 - Florence, SC from 1/1/2020 to 2/6/2020 (Entry Date Range Type)

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| | | Prospecting Activity | | | | | | | | | | |
| | | Prospects | | | | Activities | | | | | Next Activity | |
Recruiter	Office	Name	Broker	Added	Date	Sys Date	Type	Outcome	Notes	Status	Type	Date
Humphrey, Angela	0001 - Florence, SC	Butz, Annabelle (Abby) (843) 555-6666	RE/MAX Southern	1/8/2020								
Humphrey, Angela	0001 - Florence, SC	Brown, Moesha (843) 555-1616	Andrews Realty	1/8/2020	1/8/2020	1/8/2020	Phone	SA	Notes for Connie	N	Meeting	1/9/2020
Humphrey, Angela	0001 - Florence, SC	Chanel, Julie (843) 555-4444	Keller Williams Mb SC Realty	1/8/2020	1/8/2020	1/8/2020	Phone	SA	Good call. Lunch on Thursday	N	Meeting	1/9/2020