Add a Proposal

You can only add a proposal if you are assigned to the prospect as the Primary.

Anyone who is assigned to a proposal can access it to view and make changes, but only the primary can add.

Machine generated alternative text:
Add 
Add 
Add 
Add 
Add 
Add 

 Click the **Add a Proposal** link to access the **Prospect Proposal Create** screen.

Note: Red asterisks indicate required values. You will not be able to save your work if a field marked with a red asterisk is left blank.

The only required field on this screen is proposal type.

Machine generated alternative text:
Prospect Proposal Create 
Horne Prospect Proposal 
Advancement Individual Information 
ID 
coo 
New Proposal 
proposal: * 
Status: 
status Date: MH/DD,'YYYY 
Create Date: MM/DD/YYYY 
Due Date: MH,'DD/YYYY 
Sta ff: 
Select 
04/17/2017 
Sasha A Rodriguez 

Machine generated alternative text:
Proj 
to the 
Return to Manage My Prospects 
Ask 
Ask 
StanE 
Givirw 

# Proposal

This drop-down menu allows you to choose from 3 types of Proposals

Machine generated alternative text:
Prospect Proposal Create 
Home Prospect Proposal 
Advancement Individual Information 
ID 
New Proposal 
proposal: * 
Select 
Select 
Annual Gift Proposal 
Major Gift Proposal 
Planned Gift Proposal 
Status: 
Status Date 
Create Date 
: MH/DD/YYYY 
: MH,'DD/YYYY 

# Status

This drop-down menu allows you to choose from 7 status types to indicate where you are in the solicitation process.

Machine generated alternative text:
Prospect Proposal Create 
Home Prospect Proposal 
Advancement Individual Information 
ID 
New Proposal 
proposal: * 
Status: 
status Date: MH,'DD/YYYY 
Create Date: MH/ DD/YYYY 
Due Date: MH,'DD/YYYY 
Sta ff: 
Select 
Select 
Sel ect 
Proposal Declined 
Proposal Funded 
Proposal in Cultivation 
proposal in Discovery 
proposal in Solicitation 
proposal in Steverdship 
Pro I in Suspen 

# Status Date

This will automatically fill in with today's date when the status is changed. You can edit this value.

# Create Date

This will automatically fill in with today's date. You can edit this value.

# Due Date

The actual ask date when the proposal is/was solicited.

# Amount

Add the target ask amount here.

# Comment

You can add an optional comment to the proposal.

# Project

Choose an area of interest for a project. An asterisk indicates an area of interest that is already assigned to the prospect.

Machine generated alternative text:
Proj 
S el ect 
s Igned to the 
Adopt prof 
Annual Giving 
A 
n nuity Trust 
Ath let i. 
Ad m i n istra t i o 
CharltESle Trust 
Charitable unltrust 
Dupre Library 
Facilities 
lty 
pm 
Gift Annuity 
Sch• 
Hilliard 
Ask 

# Target Ask Amount

All target ask amounts for projects on a proposal should add up to the total proposal amount.

You cannot add an ask amount that will exceed the total proposal amount.

# Target ask date

This is the same as the solicitation date and should match the target askdate on the proposal due date.

# Status

Choose a status for the project: interest suspended, never interested, no longer interested, project active

Machine generated alternative text:
Ask 
Ask 
S el ect 
InterEt Suspended 
No Longer 
p Act 

# Giving Vehicle

Choose a giving vehicle for the project:

bequest, cash/monetary gift, charitable remainder trust, gift annuity, gift in kind, insurance policy, stock holding, unitrust

Machine generated alternative text:
StanE 
Givirw 
S el ect 
Cash/ Monetary Gift 
Charitable 
Gift Annuity 
Date 
G ift 
in Kind 
Holding 
u n itrust 

# Effective From Date

This has no default value. You can choose a date for this field.

# Effective To Date

Leave this date open until the project is either funded or killed.

# Comment

You can add an optional comment to the project.

# Additional Staff

You have the option to add additional staff to a project.

# Primary indicator

Checking the box next to Primary will make the selected Additional Staffer the primary solicitor for the project. **This will not change the primary assigned to the prospect.**

Note: It's possible to have a different primary on a project than on the prospect or proposal, if the person doing the soliciting is different from the person managing, performing moves etc.

Machine generated alternative text:
Proj 
Return to Manage My Prospects 
ass.gned to the 
Ask 
S el ect 
Sasha A. Rod g 
Ask 

Click the **Create Proposal** button at the bottom of the screen to save.