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.



 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.





# Proposal

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



# Status

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



# 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.



# 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



# 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



# 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.



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