Version 7.70.874

User Guide for

Entering, Tracking & Updating Proposals in Raiser's Edge

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Topics

Figures and Screen Images

Entering proposals sent to constituents

Any proposal sent to a constituent should be noted in Raiser's Edge. The staff member who sends out the proposal is responsible for entering the information on the proposal tab correctly. For every proposal sent out, a separate proposal should be entered into the record. If one proposal is sent listing 5 amounts/giving opportunities, 5 separate proposals should be entered. This provides an accurate account of which proposal was accepted, and which ones were declined.

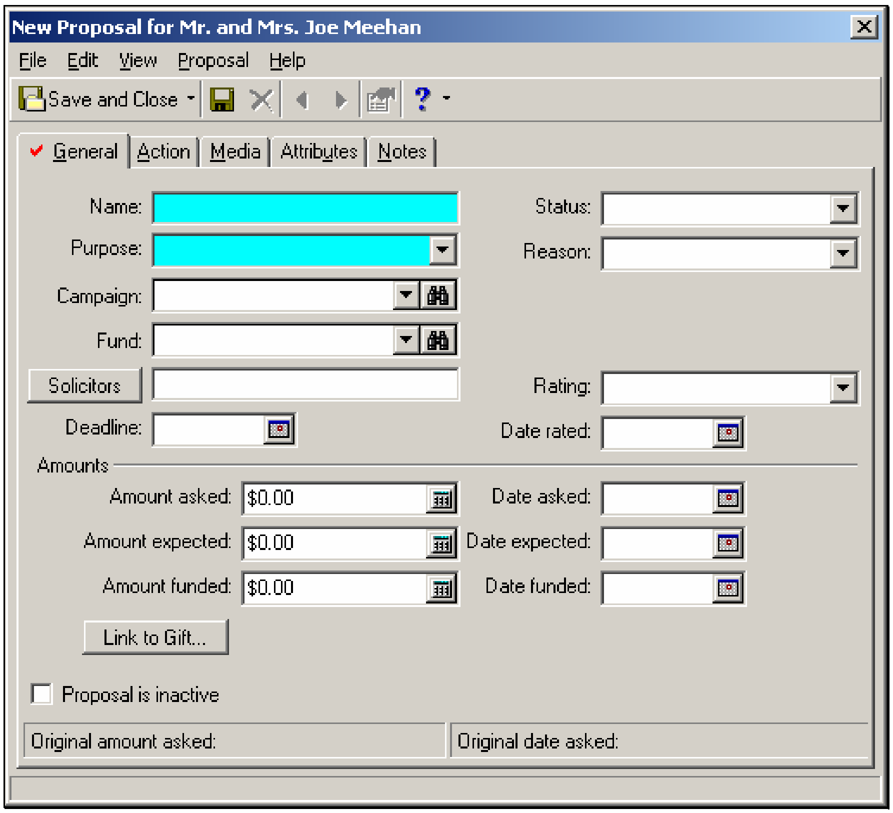

Figure 1 Proposal Screen - General Tab

General Tab

Field	Information
Name	This should be the name of the constituent as they might be listed for the proposal. For example; *The Bill Gates Patient Care Room* or *Harrison Ford Labor and Delivery Center*.
Purpose	Select from the drop down menu. This field can be included or excluded on reports.[1]
Campaign	Select the appropriate campaign.
Fund	Select the appropriate fund.
Solicitor	Choose the assigned solicitor (staff member, prospect manager). This field can be included or excluded on reports.
Deadline	Not necessary, but helpful for proposals that are time based (Foundation fiscal year endings).
Status	This field has 3 potentials entries from a drop down menu; **Accepted**, **Pending**, and **Decline**. Anytime a proposal is sent out it becomes Pending. A proposal that has been accepted should be indicated as well as those that have been declined. This field can be included or excluded on reports.
Reason	This field documents why the proposal was declined. Examples are: Giving to other charities, Accepted other proposal, **Unknown**, **Financial hardship**, **Not Interested**, or **Personal Reasons**. This field should be entered **only when a proposal has been declined**.
Rating	Entered by the research department

[1] Currently there are 5 variations of the New Century Circle (NCC) purposes entered.

Amounts

Field	Information
Amount asked	This is for the amount that the proposal is requesting.
Date asked	Date proposal was sent.
Amount expected	Enter the amount asked unless this is a different amount
Date expected	This field should always be entered to keep a current list of expected gifts.
Amount funded	This field will be entered when the gift is received.
Date Funded	This field will be entered when the gift is received.

Proposal is inactive checkbox: This should be checked for any proposal that is Accepted, Declined. This checkbox can be included or excluded on reports. This allows only current proposals to be listed on the reports.

Attributes/Notes: Any specific notes regarding the proposal should be entered here, **but there are no reports that will print any specific notes**. A red check on the tab will indicate that there is information on that tab. Detailed information should be entered in ACTIONS.

Date Asked should be entered, but there also should be an **ACTION** entered on the **ACTION** tab from the proposal tab (which will appear on the regular ACTIONS tab), indicating the Proposal was sent out.

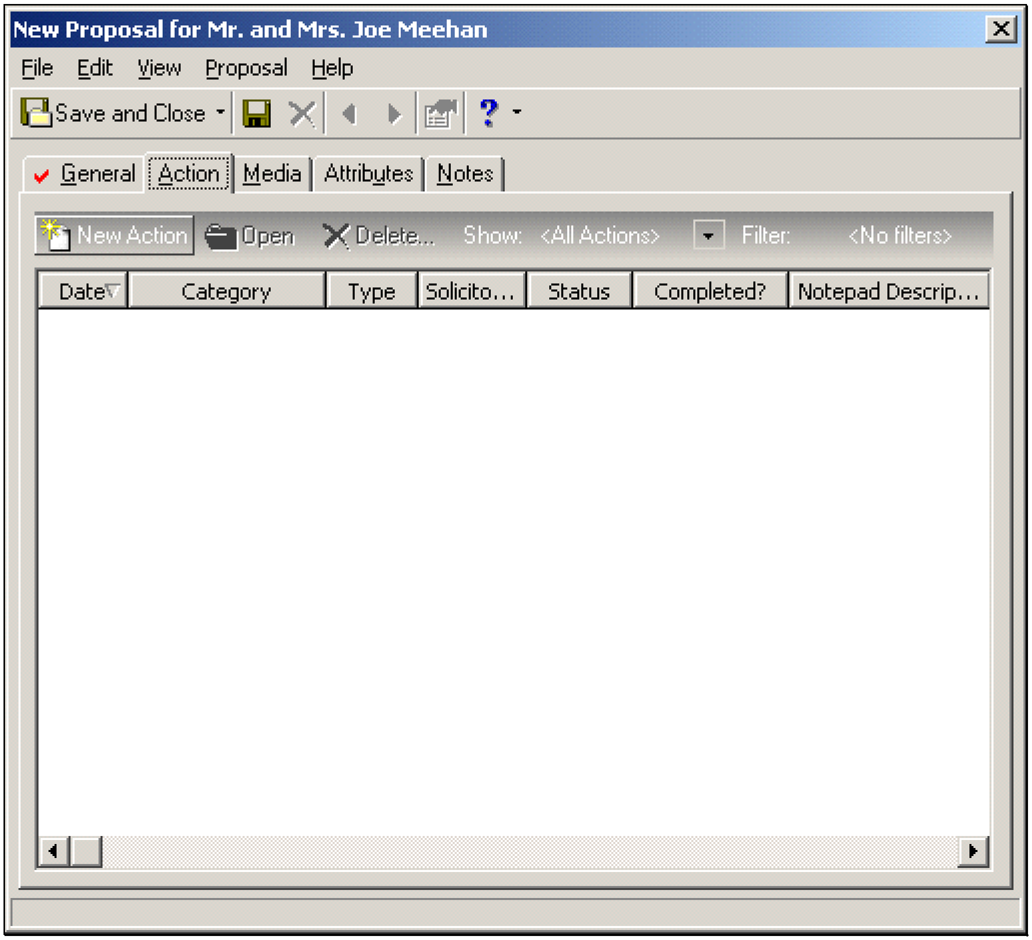

Figure 2 Entering a New Proposal Action Item

Entering Actions of Proposals

When a Proposal is sent out, **two actions** should be entered. The first action indicated the **proposal has been mailed**. The second action is the **follow up** to the mailing of the proposal.

Once the proposal information has been entered, (from the proposal screen)

1. Click on the Actions Tab.
2. Click on new action.

   This will bring the search constituent record screen with the name of the constituent already entered. By pressing [Enter] or clicking the [Find Now] button will list all previously entered actions. Do not search for previous actions. You want to be entering a new action.

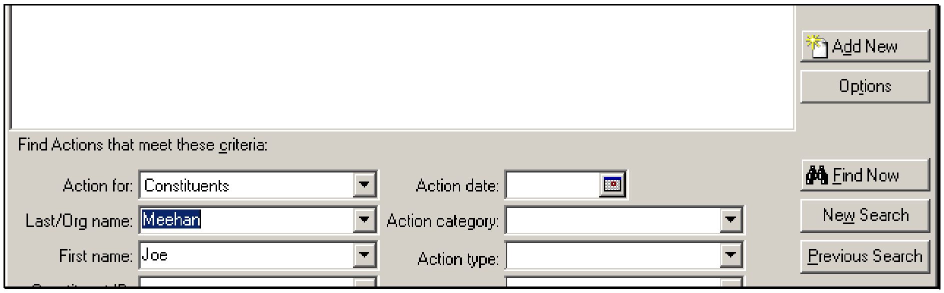

Figure 3 ADD NEW Action Item

3. Click on the [Add New] button.

Follow the guidelines to fill in the appropriate information for the first action – which is the documenting of the proposal mailing.

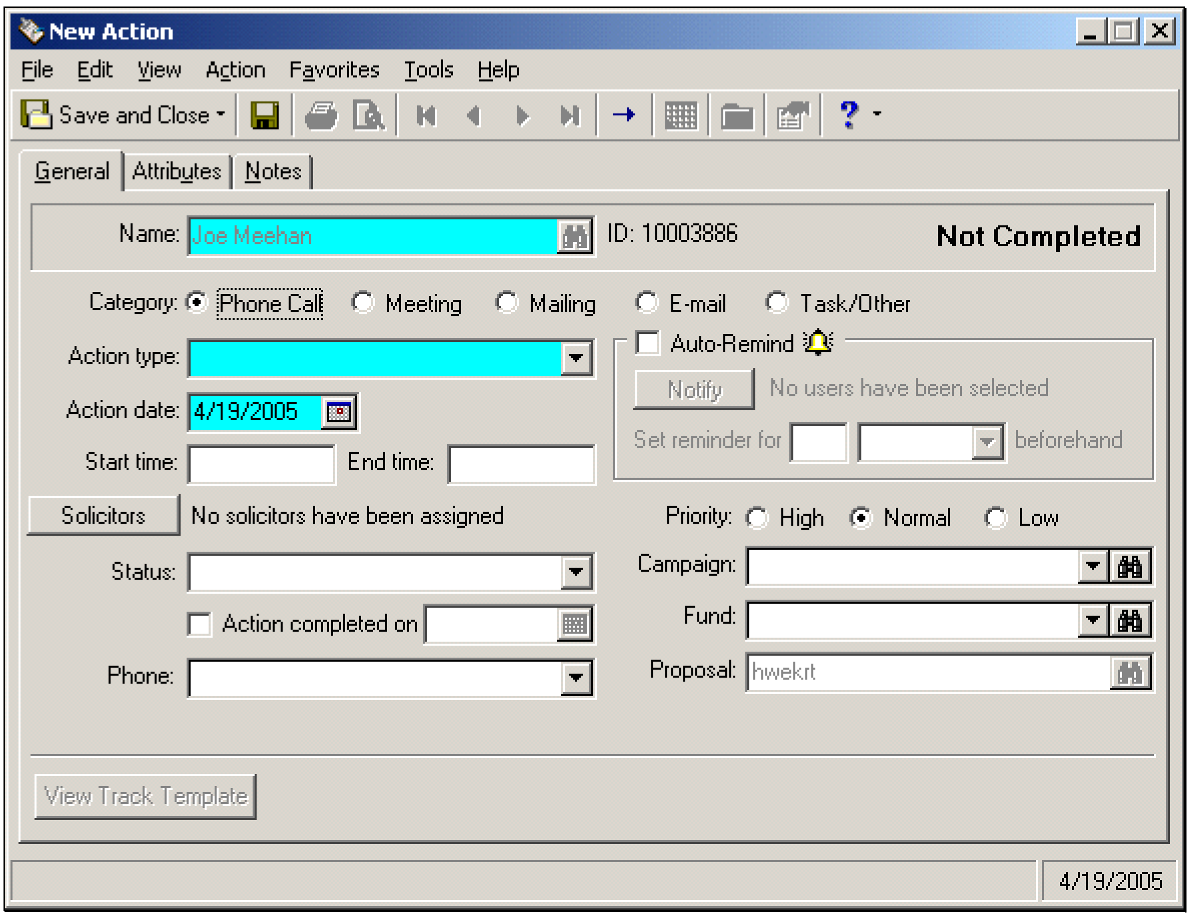

Figure 4 Entering the SENDING of the Proposal

Field	Information
Category	Select Mailing
Action Type	Correspondence
Action Date	Date of the mailing
Start Time/End Time	N/A – leave blank
Solicitor(s)	Click on the button to find the staff who sent the proposal out
Status	Mailed
Action Completed on:	Check the box – the current date will be entered. This should be the same as the action date.
Letter:	Proposals
Priority:	Normal (High or Low can be entered if desired)
(Next Tab) Attributes:	Not currently being used for anything.
(Tab 3) Notes:	Click on NEW note – enter any notes that pertain to THAT ACTION item (sent via FedEx / handed proposal to them at lunch).

When you are finished, click on Save and Close. Since the action you are entering is checked as completed, Raiser's Edge should prompt you for a follow-up action. [2]

Figure 5 Follow-up Prompt

[2] If you are not prompted for a follow-up action, see the Raiser's Edge Administrator to adjust your user settings.

Entering the follow-up Action

Field	Information
Category	Select the suitable category
Action Type	Select the suitable category. Follow-up or Next Step is suggested.
Action Date	Date to be follow-upped on. (Not the current date)
Start Time/End Time	N/A – leave blank
Solicitor(s)	Click on the button to find the staff that should be assigned to follow up.
Status	Pending
Action Completed on:	Leave blank
Letter/Phone/Email:	Depending on the Category chosen, this field will correspond to the category. Use it to choose a letter, email address, or phone number to use to follow-up.
Priority:	Normal (High or Low can be entered if desired)
Auto-Reminder Fields:	
Auto-Remind:	Check this box to Auto-Remind a staff member of the action follow-up.
Notify:	Click on this button and search for Raiser's Edge users, and choose whether to notify the staff member of the reminder by Action Reminder, Microsoft Outlook or both.
Set Reminder For:	[__] Enter a number; [__] Enter days, weeks, month beforehand. This works with the action date. If the action date is 10/15/2005, and the reminder is set for 5 days beforehand, the reminder will appear on 10/10/2005.
Campaign:	Fill in the Campaign based on the proposal information
Fund:	Fill in the Fund based on the proposal information
Proposal:	Press F7 to search for the proposal. Search by the proposal name. This ensures that the reminder action is linked to the correct proposal.
(Next Tab) Attributes:	Not currently being used for anything.
(Tab 3) Notes:	Click on NEW note – enter any notes that pertain to THAT ACTION item (call the donor to follow up on proposal status).

You'll now see all the ACTIONS that are part of that Proposal on the ACTIONS tab.

Optional: Adding a copy of the proposal letter/document to the proposal via the Media tab.

Adding Media to the Proposal

1. Open the proposal.
2. Click on the MEDIA tab.
3. Click on NEW MEDIA.

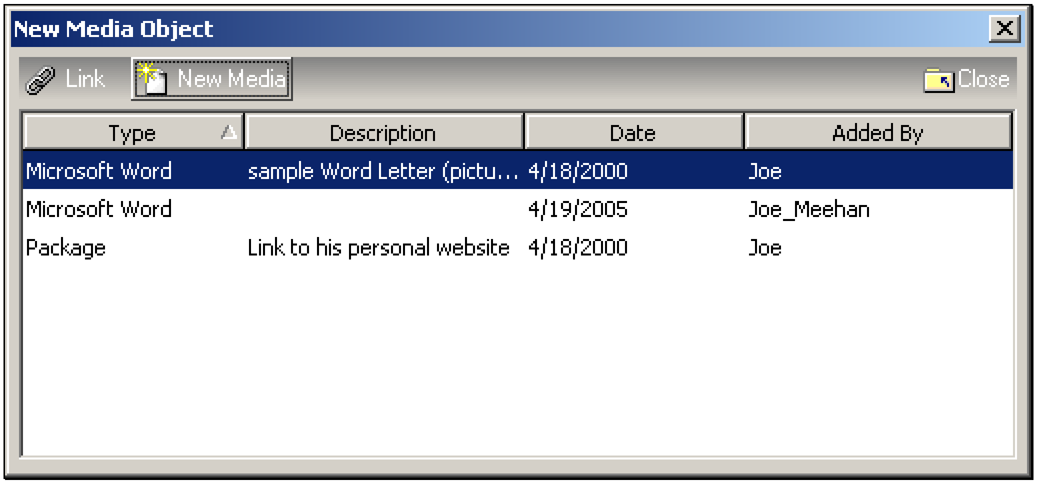

Figure 6 Current Media items in the constituent record

4. Click on NEW MEDIA again. (A new, smaller screen listing specific media will appear.)

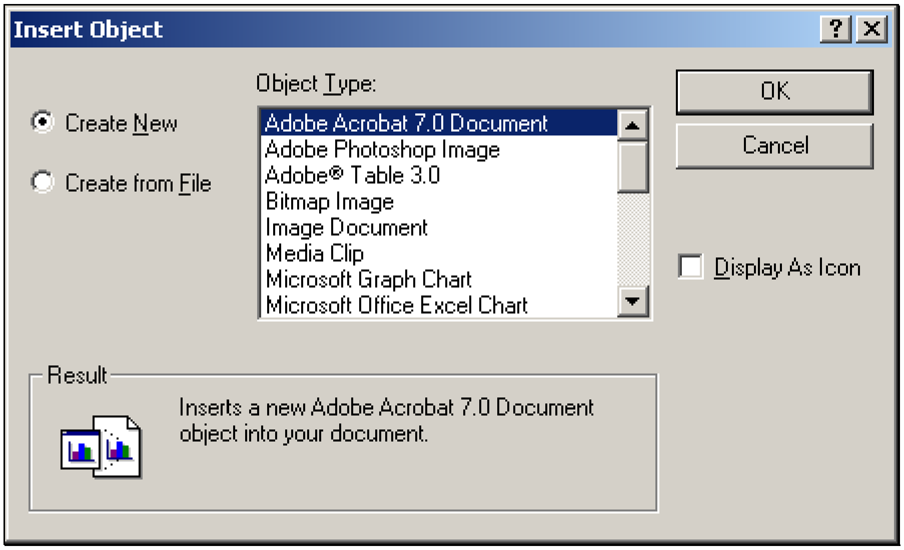

Figure 7 Adding a NEW media Item

5. The INSERT OBJECT prompt will appear.

6. Click on the CREATE FROM FILE button.

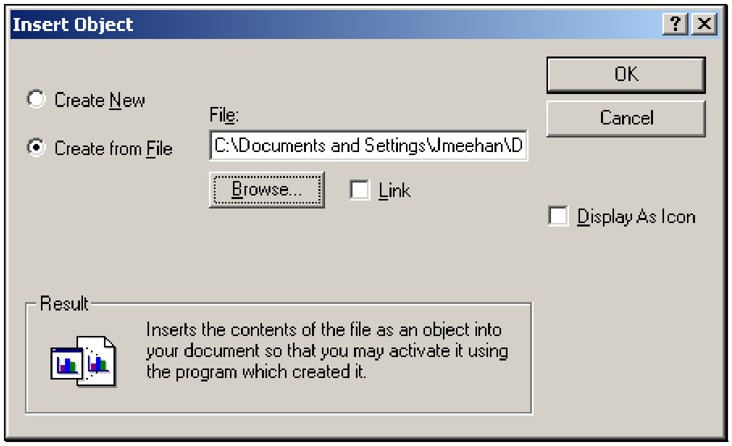

Figure 8 Creating a NEW media item

7. This opens a new screen where you can click on the BROWSE button and search for the document you want to link.
8. Select the document and click OK.
9. You should be back at the screen but the document path should be listed.
10. Check the box that reads: **DISPLAY AS ICON**. This attaches the document, but only displays an icon in the media area.
11. Check the box that reads: LINK only if you want to link the document. Not linking the document will not reflect any changes to the document made after adding it to the MEDIA tab.
12. The New Media window will open up.
13. Fill in the following fields:

Field	Information
Date:	Date proposal sent out
Type:	Select type of attachment from menu
Proposal:	This field should automatically enter the proposal.
Description:	Enter a brief description (if desired) of the attachment.
Title:	Enter a title of the proposal
Author	Select the staff member from the drop-down menu

Click on [Save and Close], of the Media Tab. Click on [Save and Close], of the Prospect Tab.

Outstanding Proposal Report

The first Monday of every month, as part of the monthly reports, an ***Outstanding Proposal Report*** is run and distributed to all the solicitors and prospect managers. It should be reviewed for any activity that needs to be updated in the Raiser's Edge system.