Proposal Quick Reference Guide

Fill in when creating a new proposal:

Type (for combination, also use description)
Start Date (date proposal delivered to donor)
School (for multi-campus, campus-wide or UWA, use description also)
Status
Submit Type
Ask
Campaign
Title
Active
Planned Gift
Description if needed

Proposal Assignments – Enter an assignment for each DO who worked on proposal, and complete the following fields: Assigned, Office and Type (Proposal-Primary or Proposal-Secondary)

NOTE: There should be only one Proposal-Primary assignment (the fundraiser with the primary responsibility for developing and writing the proposal). However, there can be multiple Proposal-Secondary assignments.

Fill in when gift agreement is signed or proposal declined:

Status – Funded/Pledged or Declined
Granted
Funding Type
Stop (date gift agreement signed or date proposal declined)
Uncheck Active Box

Completely Optional Fields:

Expected Date
Initial Contribution
Original Ask
Initial Date
Anticipated