

Proposals are used to track gift solicitations in ANDI. To enter a proposal and proposal assignments, follow the steps below:

1. Go to the entity record where you would like to enter a proposal. In order to enter a proposal, there must be a prospect record. If there is not currently a prospect record, you can request one by selecting “Add/remove assignment request” on the entity record.
2. Access the prospect record from the entity record by clicking on the prospect name.
3. From the left-hand menu, select “Proposal Entry”.

The screenshot displays the 'Prospect Overview' page in the ANDI system. On the left, a navigation menu lists various options: Overview, Detail, Assignments 1, Categories, Contact Rpts, Entities 2, Evaluations, Strategy, **Proposal Entry** (highlighted with a red box), Proposal List 1, Stages 2, Transactions, and Next Steps. The main content area shows the prospect name 'John & Jane Doe (Prospect)', the type 'Multiple', and a section titled 'Prospect Entities (2)' listing 'Ms. Jane Doe #2843558' and 'Mr. John Doe #94926'. Below this, another 'Prospect Overview' section shows details: Name (John & Jane), Stage (Cultivation), and Start Date (Jun 25, 2018).

4. Enter the required proposal details. Under “Assignment”, select the name of the staff receiving primary assignment.
  - a. For “In Preparation” proposals, remove the “Start Date” and enter an “Expected Date” instead.
  - b. If the gift is split between multiple units, make sure to provide details in the “Description” box. This should include specifics about which units are a part of the proposal and how the overall ask amount will be split between the units.
5. Under “Assignment”, select the name of the staff receiving primary assignment.

Proposal		Save	Actions	Help
<b>Title</b>	Test Proposal			
<b>School:</b>	UM	UWA-Multiple Campus	<b>Proposal ID</b>	
<b>Status:</b>	S	Submitted to Donor	<b>Start</b>	12/17/2018
<b>Type:</b>	EN	Endowment	<b>Stop</b>	
<b>Ask</b>	50000			
<b>Granted</b>				
<b>Expected Date</b>				
<b>Funding Type</b>	CA	Cash/Check		
<b>Description</b>	<input type="checkbox"/> <b>Planned Gift</b> \$25K to <u>UTK</u> Nursing and \$25K to <u>HSC</u> Nursing			

  

Assignment		Help
<b>Staff:</b>	2813014	Ms. Katie M. McMahon
<b>Type*</b>	ZP	Proposal - Primary

6. Select "Save".
7. If there are multiple staff assigned to the proposal, additional assignments can be added by selecting "Assignments" from the left menu.
  - a. From the Assignments screen, select "New" from the Proposal Assignments bar. Enter the staff's name and assignment type. Select "Save". Repeat for all assigned staff members.
8. Proposal details can be reviewed by selected "Overview" from the left menu.