

## Add an Opportunity

On the Opportunities tab of a plan record, you can add information about opportunities to help you track gift requests. An opportunity is the place within the plan where a fundraiser records the proposal for the prospect - the amount and designation of the solicitation. If you are working with another fundraiser on a joint proposal, you should have one plan with one opportunity which could contain various designations.

There are certain situations where it may be more appropriate to add multiple opportunities to a plan:

- If a plan is documenting an overarching strategy for a major or principal gift prospect, where there will be more than one solicitation on the plan, it would be best to add multiple opportunities.
- If a plan is targeted at a major gift in the future, but you are soliciting one or more annual gifts as cultivation for the upcoming major gift, each individual solicitation should have its own opportunity with its own expected close date, designation(s) and amount(s).
- If a prospect has agreed to your solicitation but wants to make payments over time without making a pledge, each individual payment should have its own opportunity with the appropriate expected close date.
- If the prospect makes a pledge, only one opportunity is needed, because once the pledge is associated to the opportunity, subsequent payments will follow.

The screenshot shows a dialog box titled "Add opportunity for Mr. Anonymous". It contains the following fields and callouts:

- A:** Plan name: UDO FY15 Major Giving Plan
- B:** Status: Unqualified
- C:** Expected ask amount: \$0.00
- D:** Ask amount: \$0.00
- E:** Likelihood: (dropdown menu)
- F:** Plan type: Major Giving
- G:** Opportunity type: (dropdown menu)
- H:** Expected ask date: (calendar icon)
- I:** Ask date: (calendar icon)
- J:** Table with columns: Designation, Amount, Funding M..., Category, Type, Use code
- K:** Comments: (text area)
- L:** Accepted amount: \$0.00
- L:** Response date: (calendar icon)
- L:** Expected Close Date: (calendar icon)

Buttons at the bottom: Help, Save, Cancel.

## How To Add an Opportunity

- A. Select a status for the opportunity. If the opportunity has been accepted, it is best practice to mark the status appropriately so that Gift Services staff can link incoming revenue to the opportunity.
- B. Enter the amount you plan to request from the prospect.
- C. Enter the actual amount you asked for. This field is not activated if the opportunity's Status is "Unqualified."
- D. Rate the likelihood of receiving the entered amount from this prospect. This information can be used to project fundraising revenue.
- E. Enter the amount the prospect agreed to give. This field is activated when the opportunity status is "Accepted." **It is very important to mark your opportunities "Accepted" when the prospect agrees to fund the proposal – this allows gift processing staff to link your opportunity to the pledge or gift when it comes in.**
- F. Select the opportunity type.
- G. Enter the date you plan to ask for a gift.
- H. Enter the date you asked for the amount entered in the **Ask amount** field.
- I. Enter the date the prospect agreed to the amount entered in the **Accepted amount** field.
- J. In the **Designation** column, specify the designation where you want the money distributed. In the **Amount** column, enter the amount of the gift you want allocated to the corresponding designation. If you do not know the designation yet, a special designation number has been created for you that indicates a general gift to your site – [site#]0000. For example, 100000, 170000, 240000 and so on.
- K. Enter any comments or notes related to the opportunity.
- L. Enter the date you expect to receive the revenue.

### **Edit Opportunities**

As you move through the plan and circumstances require, you can edit information in existing ask opportunities.

The screenshot shows a software interface with a navigation bar at the top containing tabs: 'Details', 'Opportunities', 'Solicitors and Participants', 'Documentation', and 'Plan'. The 'Opportunities' tab is selected. Below the navigation bar, there is a header for 'Opportunities (1)' with a green plus icon and an 'Add' button. Below this, there are three action buttons: 'Go to opportunity' (with a green arrow icon), 'Edit' (with a pencil icon and circled in red), and 'Delete' (with a red X icon). The main content area displays details for an opportunity:

Status:	Unqualified	Opportunity type:
Expected ask amount:	\$1,000.00	Expected ask date: 7/6/2015
Actual ask amount:	\$0.00	Actual ask date:
Likelihood:	High (75%)	
Accepted amount:	\$0.00	Response date:
Revenue committed:	\$0.00	Total paid amount: \$0.00
Comments:		
Expected Close Date:	7/6/2015	