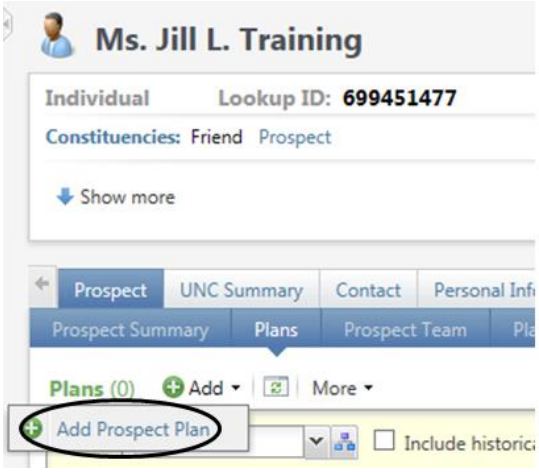
Add a Prospect Plan

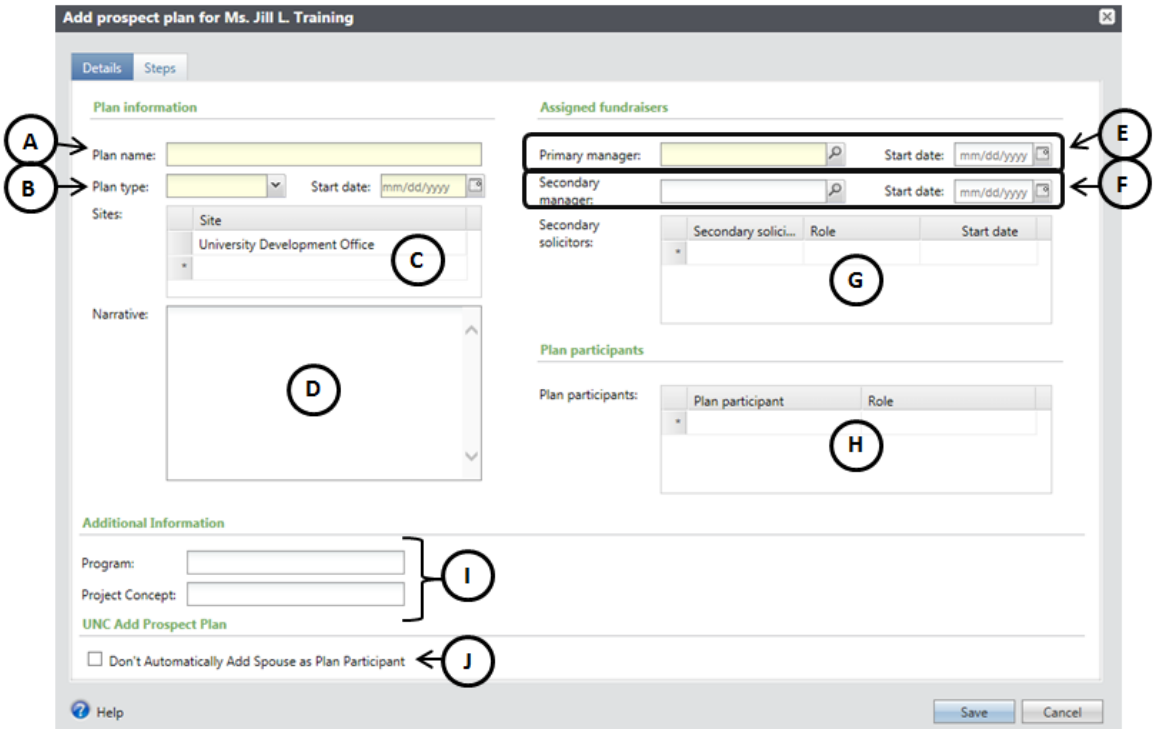
If there is no preexisting plan, you can add a prospect plan from the prospect view of the constituent.

1. On the **Prospect** tab and **Plans** subtab, click the **Add** button to add a prospect plan.



Details Tab

On the **Details** tab, you can enter plan information, assign fundraisers, and assign plan participants.



A. Name the plan assigned to this prospect using the standard naming convention. (*Site, Fiscal Year, Description, and Type* – example: UDO FY16 Major Giving Plan)

B. Select the type of prospect plan that best suits your strategy with your prospect. (Annual Giving, Commitment, Major Giving, Principal Giving, or Qualification)
Enter the **Start Date** for this plan.

C. Select the associated site for the prospect plan.

D. Add a general description of your plan strategy.

E. Search for and select the primary manager to assign to this plan. (The primary manager must be a fundraiser)

F. Search for and select the secondary manager to assign to this plan. (The secondary manager must be a fundraiser)

G. In the **Secondary solicitor** column, search for and select the secondary solicitor to assign to this plan. In the **Role** column, select the solicitor's role. (A secondary solicitor must be a fundraiser)

H. In the **Plan participant** column, search for and select the plan participants. In the **Role** column, select each participant's role. A plan participant does not have to be a fundraiser, but must be a constituent.

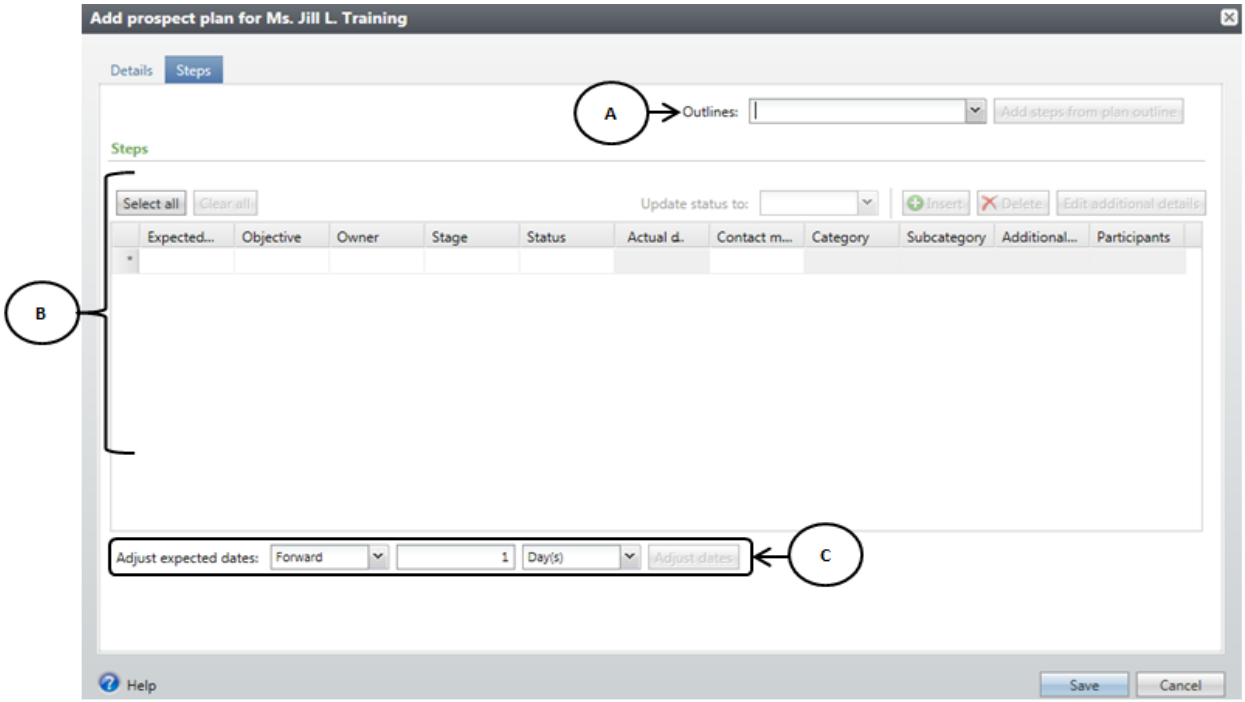
I. If this plan is associated with a larger initiative (for example water quality, Delta Delta Delta Professorship, or development facility campaign), fill in these free text fields.

J. Check this box if the prospect has a spouse that you do not wish to automatically add to the plan as a plan participant.

Steps Tab

Before you save your plan, click on the **Steps** tab. Here, you will complete the steps that outline your strategy from the preconfigured templates. You may use the templates as you wish, adding or deleting steps as necessary.

How To Create a New Prospect Plan



A. Select the appropriate outline. (Outline templates are Annual Giving, Commitment, Corporate and Foundation Giving & Grants, Estate Administration, Fundraiser's Choice, Gift-in-Kind, Major Giving, Principal Giving, and Qualification Plan). Once an outline is chosen, click **Add steps from plan outline** to populate the plan steps in the grid.

B. The steps from the plan outline default into the grid. At this point you can add, modify, or delete steps. You can also change the expected/actual dates, objective, owner, stage, status, or contact method.

C. You can adjust all the dates in the **Expected date** column forward or backward by a certain number of days, weeks, months, or years by highlighting the date rows and clicking Adjust dates. You can also change dates individually by clicking on the date and using the calendar.