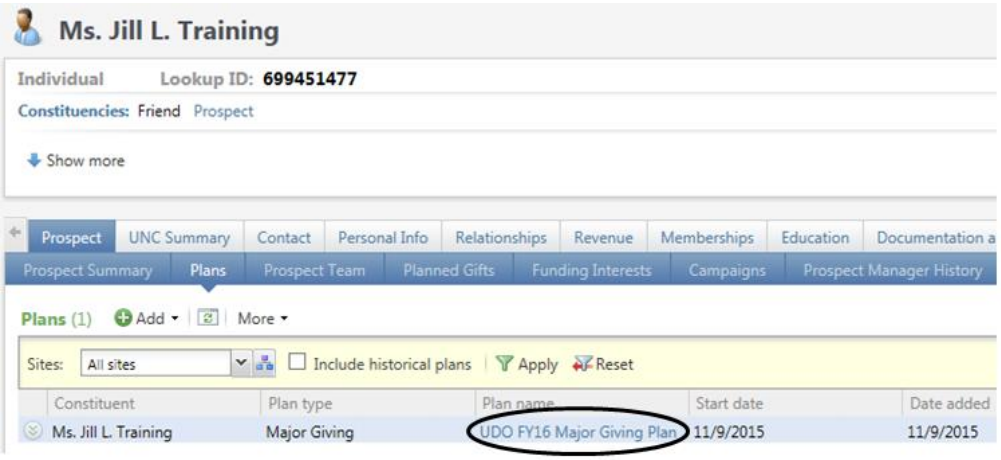
Edit an existing Prospect Plan

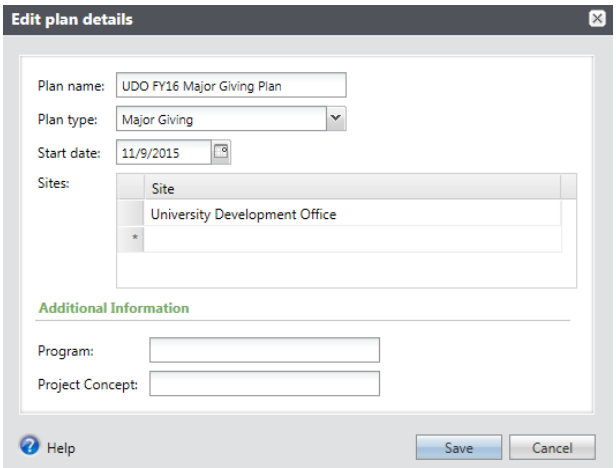
To edit an existing plan (either an intent to solicit from Advise that converted into a plan, or a new plan that was already created and saved in Davie):

1. Click on the plan name hyperlink located on the **Prospect** tab and **Plans** subtab on a prospect:



2. Click on **Edit plan details** under Tasks on the Explorer bar:

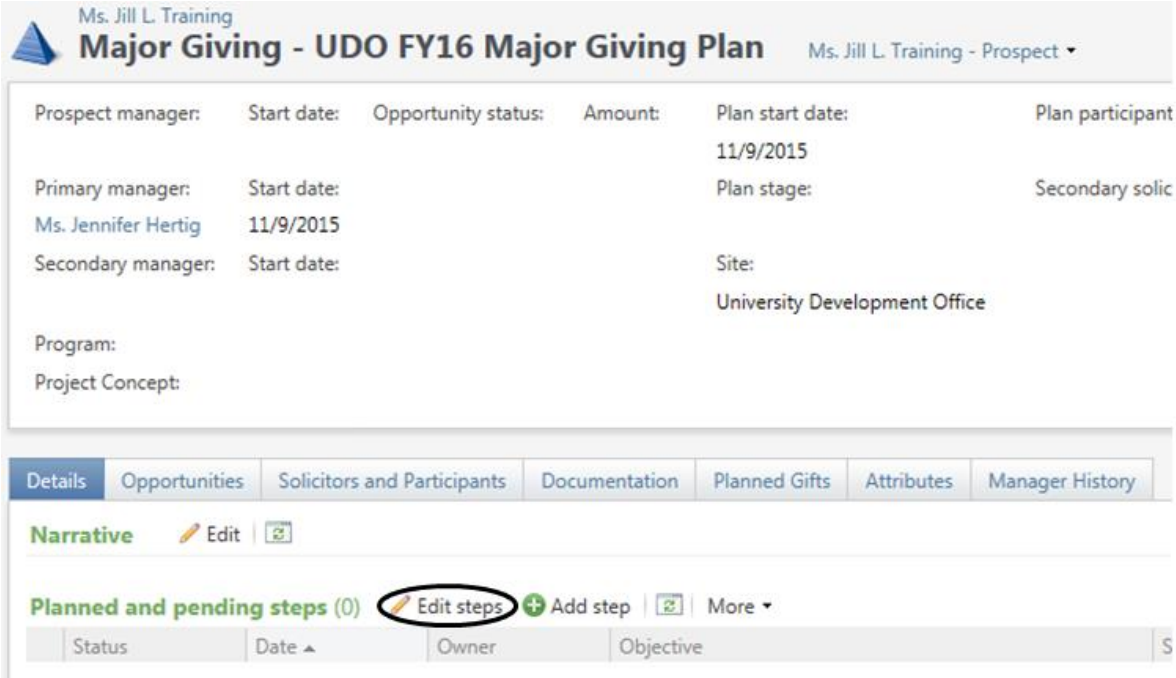
3. The Edit plan details screen will appear:



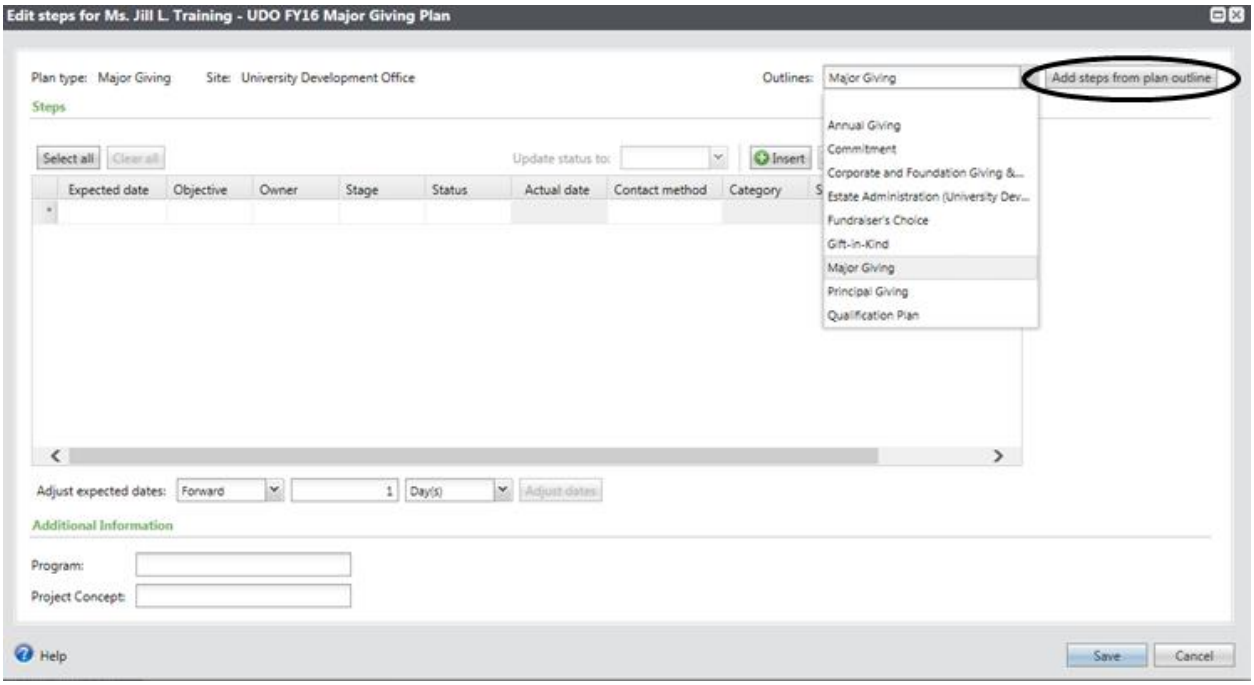
4. Complete the fields as needed. Click **Save** when complete.

Add Steps to an Existing Prospect Plan

1. Click on **Edit steps** in the **Planned and pending steps** section on the prospect plan. The Edit steps screen will appear:

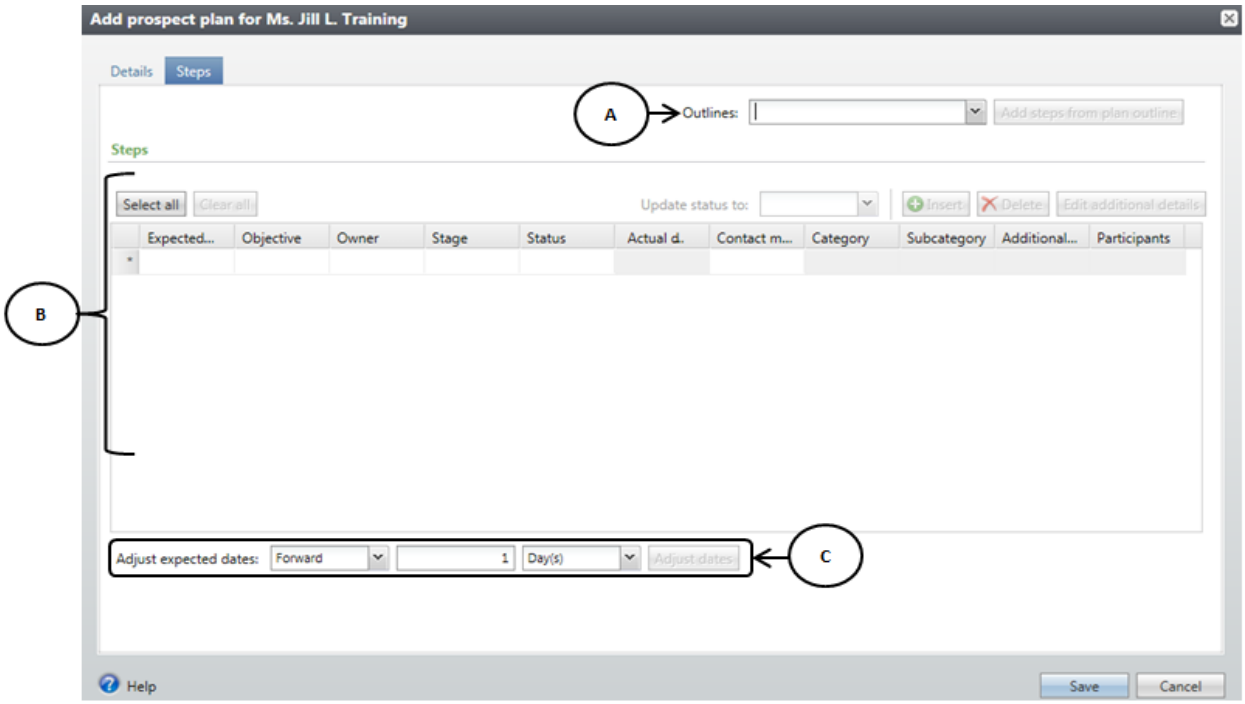


2. Select an outline and click **Add steps from plan outline**. Proceed to edit steps as desired. A more detailed description follows. (See **Steps Tab**)



Steps Tab

The **Steps** tab on the Add prospect plan form (when creating a new plan) and the **Edit steps** form (from within an existing plan) are where you outline your strategy for the plan. You may use the templates as you wish, adding or deleting steps as necessary.



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.

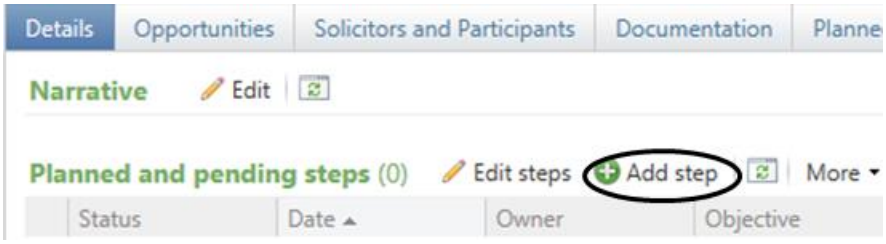
B. The steps from the plan outline default into the grid. At this point you can add, modify, or delete steps. You can also change the expected/actual dates, objective, owner, stage, status, or contact method.

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.

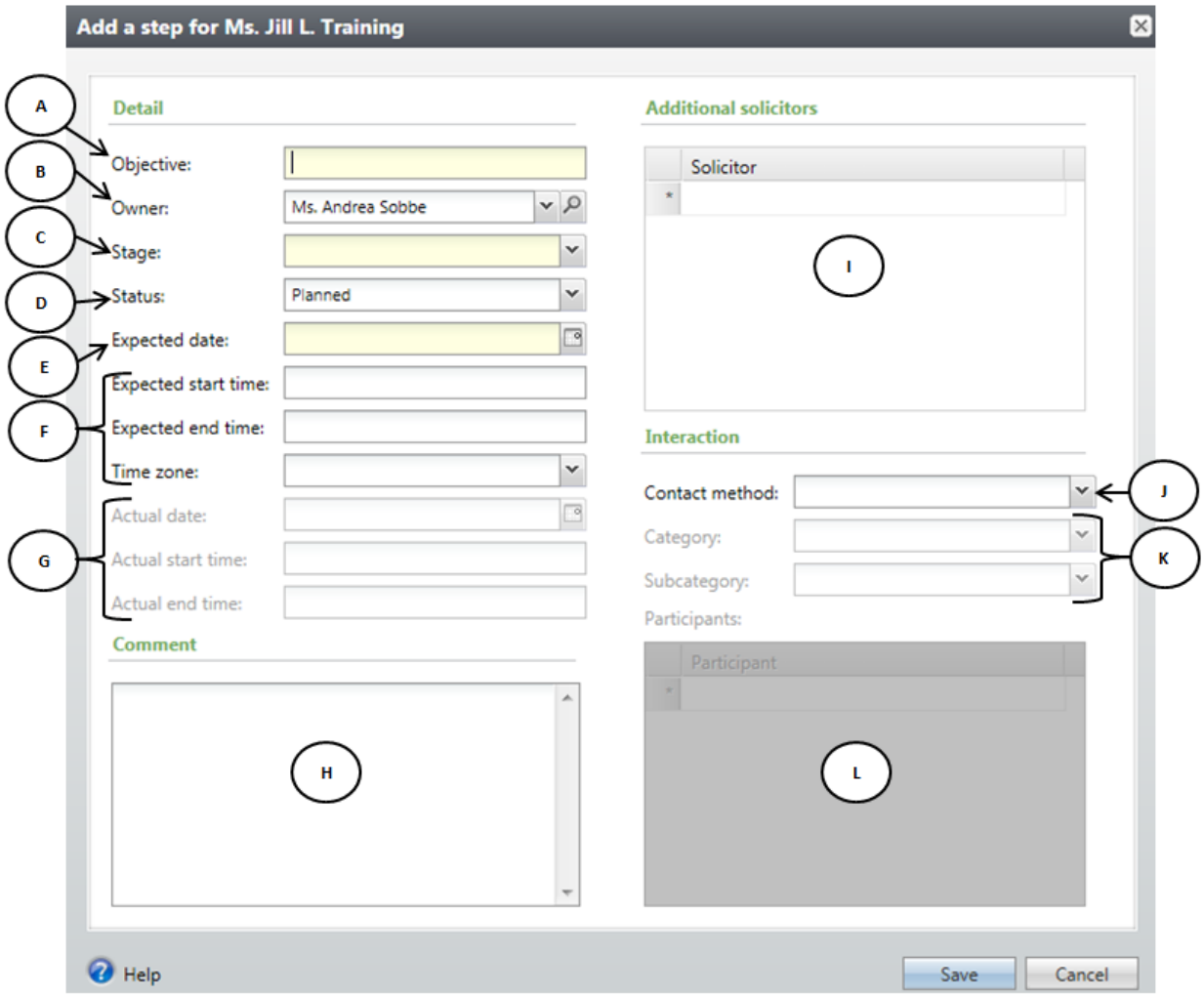
Add Steps Individually

In addition to using the template, you can also add steps to a prospect's plan individually:

1. Click on **Add step** in the **Planned and pending steps** section on the prospect plan:



2. Fill in the Add a step form (description of each field below) and Save:



A. Enter the purpose for the step. This is the summary of the step's activity. (In Advise this was the 2-line computer input text)

B. Select a fundraiser to assign to this step. If the fundraiser is not listed in the menu, click the **Search** icon to search for the fundraiser to assign to this step. (The default owner is the primary manager of the plan)

C. Select the stage of the step**.** (Qualification, Cultivation, Proposal Development, Proposal Delivered, Closure, Stewardship)

D. Select the status of the step**.** (Planned, Pending, Completed, Cancelled, Declined) **The default status is Planned. Planned steps will not appear on the Pending Activity tab on your My Fundraiser Page, so it is best practice to change the step status of the first step in a plan to Pending. The Cancelled status is no longer being used and will generate an error message.**

E. Enter the date you expect the step to take place.

F. Enter the start time, end time, and time zone that you expect the step to take place. (Not widely used)

G. If the step has taken place, enter the date and time the step occurred. (Start and End time fields are not widely used)

H. Enter comments to further describe this step. (In Advise, this was the narrative text)

I. List all additional solicitors to assign to this plan step.

J. Select how you intend to contact the prospect for this step.

K. This is not necessary as we are not using the **Category** and **Subcategory** fields.

L. List all constituents that will participate in this step. This is especially helpful if you are working with a constituent group prospect.