The Raiser's Edge™

Proposal Gifts Guide

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What Is In This Guide?

In the *Proposal Gifts Guide*, you learn to add, edit, and delete proposal gift records (when you have the optional module, *Prospect Research Management*). You can also learn about the following.

- "Linking a gift to a proposal from a gift record" on page 5
- "Linking a gift to a proposal for another constituent from a gift record" on page 10
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How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

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With the optional module *Prospect Research Management*, you can manage all types of prospect information. You can track gifts made by prospective donors to other organizations; financial information such as sources of wealth, annual income, and real estate holdings of prospective donors; and much more. You can also track your organization's proposals, including amounts solicited, amounts funded, ratings from research firms, and you can enter extensive notes on your prospective donors.

Note: Modules such as *Event Management*, *Membership Management*, and *Prospect Research Management* enable you to customize ***The Raiser's Edge*** to meet the specific needs of your organization. When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the Program Basics chapter of the *Program Basics Guide*.

The optional module, *Prospect Research Management* adds the Prospect tab to all constituent records. From the Prospect tab, you can enter detailed information about prospective donors to your organization. To track donations requested from a prospect, you can create a proposal and enter information, such as the purpose of the proposal, the solicitors responsible for the proposal, and gifts donated in response to the proposal. When you receive a gift in response to a proposal, you need to create a gift record just like you would for any other type of gift. To show the gift was donated in response to a specific proposal, you can link a gift record to a proposal.

This book explains how to link gifts to a proposal from a gift record and a gift batch. For more information about the options available on the Prospect tab of a constituent record and about using the optional module *Prospect Research Management*, see the *Prospect Data Entry Guide*.

Frequently Used Terms

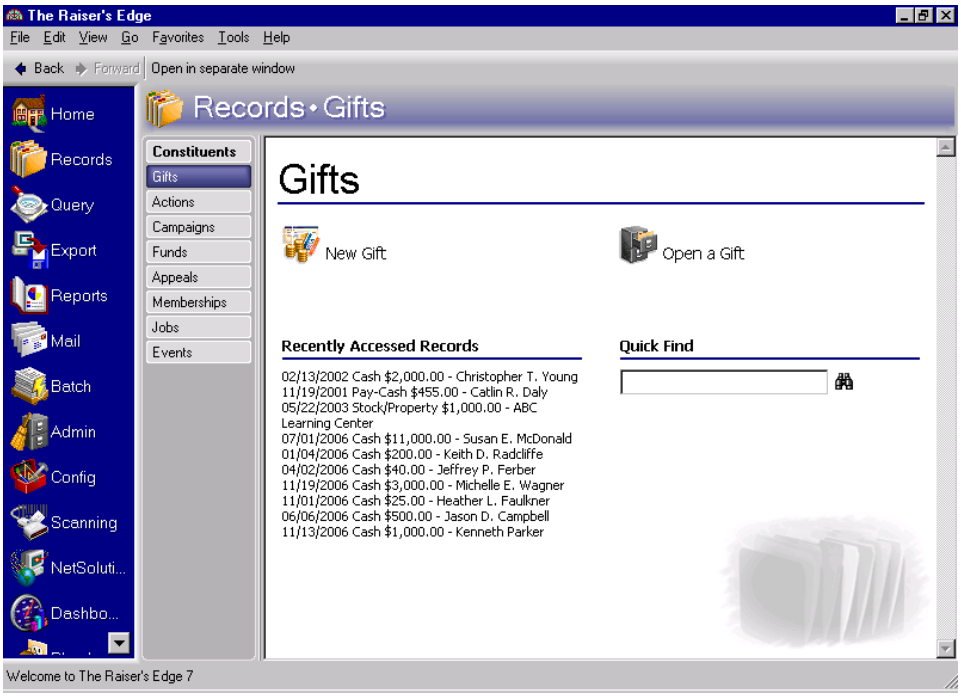
This section defines words and phrases you need to know as you work with the optional module *Prospect Research Management*. If you come across an unfamiliar term when reading this or any chapter in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Proposal. A proposal is a formal plan detailing how your organization intends to win funds from a prospective donor, how much financial support you expect, where the money is used, and much more. For example, your organization plans to build a new playground in your community. On the constituent record of a donor whom you plan to ask for a gift, you create a proposal detailing how much money your organization needs to build the playground. When the constituent donates a gift, you link the gift record to the proposal to show your goal was obtained.

Navigating in Gifts

Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

From the Gifts page, you can add and **l**ink new gifts to a proposal and access existing gift records. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



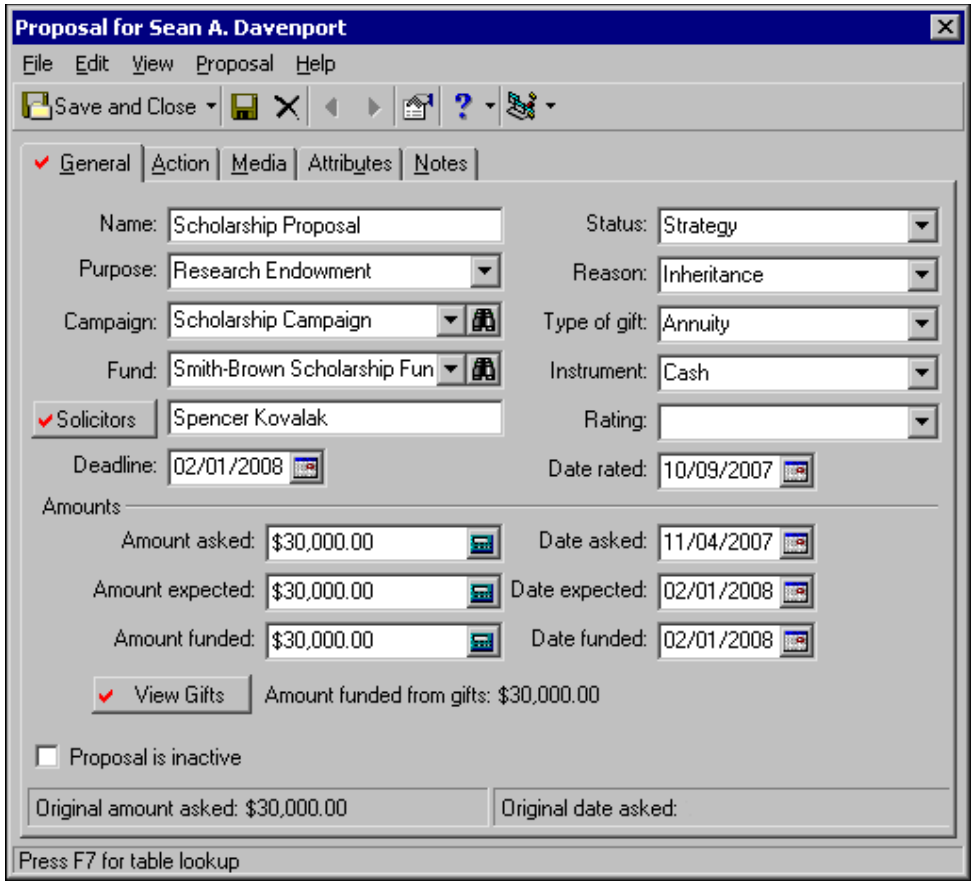
From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Planned Gift (if you have the optional module *PlannedGiftTracker*), and Other. The Gifts page also contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing a Gift Record

After you create a gift record that you link to a proposal, you can open the gift record from the Records page or the Gifts tab of the donor's constituent record. For more information about opening a gift record from the Records page, see the Gift Record chapter of the *Gift Records Guide*. For more information about opening a gift record from the Gifts tab of a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

Understanding Proposals

A proposal helps you track major donation projects. For example, your organization is raising money for a large research scholarship. From a friend, you learn that Sean Davenport acquired $200,000 as an inheritance. Because Sean has strong ties with your organization, you plan to ask him to contribute $30,000 toward the research scholarship. To record your proposal to Sean, click the **New Proposal** button on the Prospect tab of his constituent record. When you click **New Proposal**, the Proposal screen appears so you can enter information related to the scholarship money you want Sean to give.



When you add a proposal to a constituent record, you record such information as how you intend to solicit the individual, how much financial support you expect and in what time period, and who is responsible for the proposal. The fields and options on the Proposal screen are explained in the *Prospect Data Entry Guide*.

Once your proposal proves successful and you receive a donation, you should record the gift on the proposal record by linking a gift record to the proposal. There are two ways to link a gift record to a proposal. You can create a new gift record and link it to the proposal from the gift record, or you can link a gift and proposal by clicking the **Link to Gift** button on the proposal record. This chapter explains how to link gift records to a proposal from a gift record. For more information about the **Link to Gift** button on the proposal record, see the *Prospect Data Entry Guide*.

Linking a Gift to a Proposal

To record a successful proposal, you need to link a gift record to a proposal. For example, if Cynthia Thompson gives $2,000 in response to a proposal, you need to create a gift record for Cynthia's $2,000 gift. On this gift record, you specify the campaigns, funds, and appeals to which the gift is attributed; the solicitor responsible for the donation; the payment method; and any other information you want to record about the gift. Once you create a gift record, you can link it to a proposal.

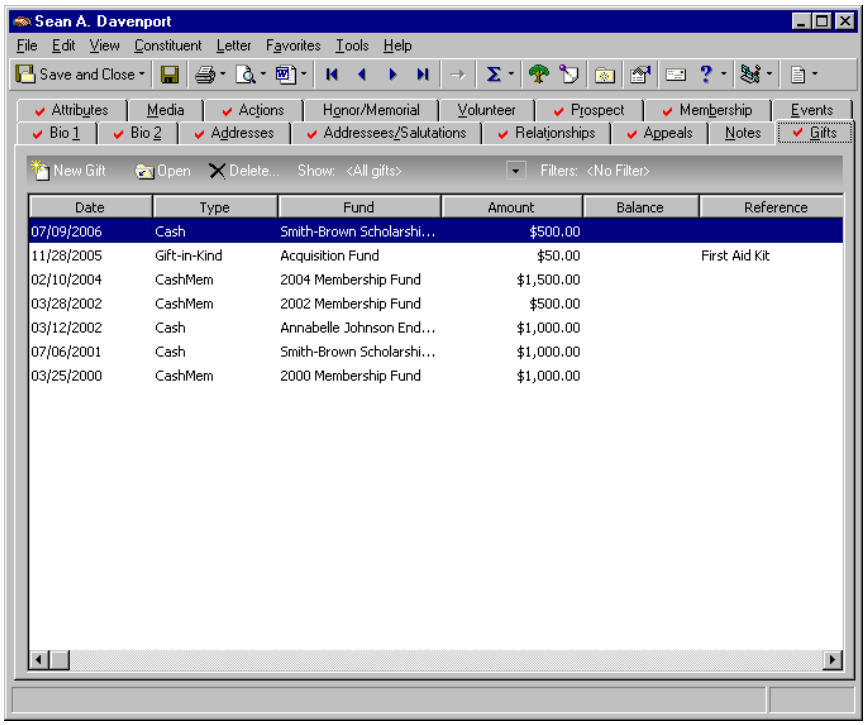
You can create a gift record from the Gifts page or from the Gifts tab of a constituent record. You can also create a gift record using a gift batch.This section explains how to link a gift to a proposal from a gift record and from a gift batch.

- **Linking a gift to a proposal from a gift record**

> ***Scenario:*** Your organization is raising money for a large research scholarship. Through a friend, you learn that Sean Davenport acquired $200,000 as an inheritance. Because Sean has strong ties with your organization, you create a proposal to ask him to contribute $30,000 toward your research scholarship. Sean agrees to donate $30,000 to the scholarship. Now, you need to create a gift record for Sean's gift and link the gift record to your existing proposal to ask for Sean's donation.

Warning: You cannot link a gift with a gift type of recurring gift to a proposal. However, when you generate cash gifts from a recurring gift template, you can link the individual cash gifts to a proposal.

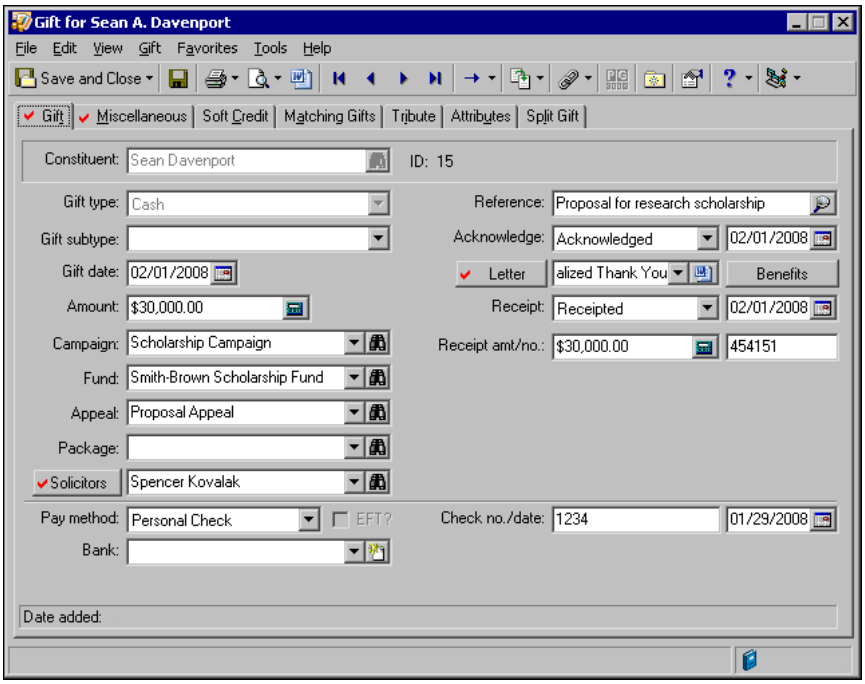
1. From Sean Davenport's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



2. On the action bar, click **New Gift**. The New Gift screen appears.

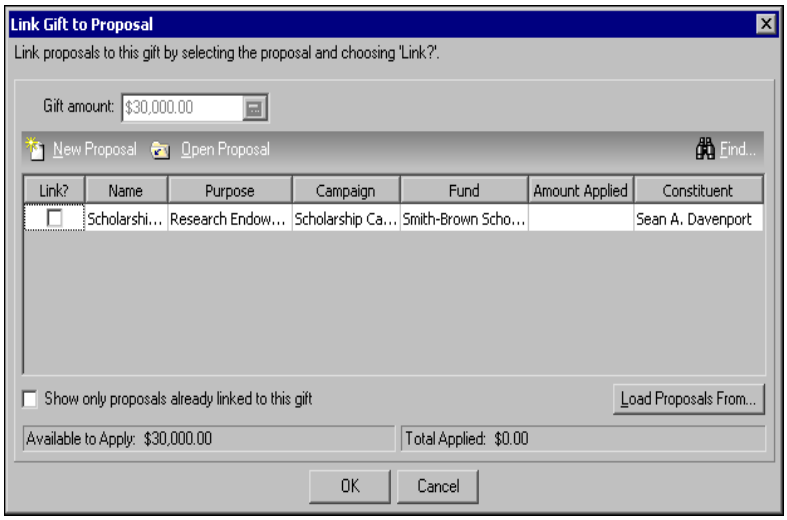
Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

3. Select the Gift tab and add the information about Sean's gift as shown on the screen below. For more information about adding a gift record, see the Gift Record chapter of the *Gift Records Guide*.



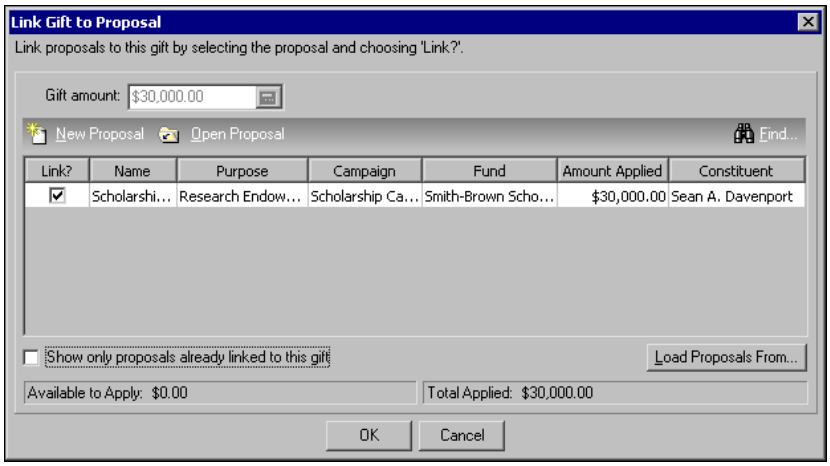
Note: Because you are creating a gift record for Sean Davenport, the program automatically displays all proposals associated with Sean on the Link Gift to Proposal screen.

4. To link the gift to your existing proposal for Sean, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears. The gift amount you entered in the **Amount** field on Sean's gift record automatically appears in the **Gift amount** field on the Link Gift to Proposal screen.



Note: You can also click the **Links** button on the toolbar and then select **Proposals** from the submenu to link the gift to an existing proposal in your database.

5. In the **Link?** column, mark the checkbox in the row containing Sean's proposal information.
6. In the **Amount Applied** column for Sean's proposal, enter the amount $30,000. When you tab out of the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $30,000.



7. Click **OK**. You return to Sean's gift record.
8. On the toolbar, click **Save and Close**. Sean's gift record is now linked to his proposal information. You return to the Gifts tab of Sean's constituent record.
9. Click **Save and Close**.

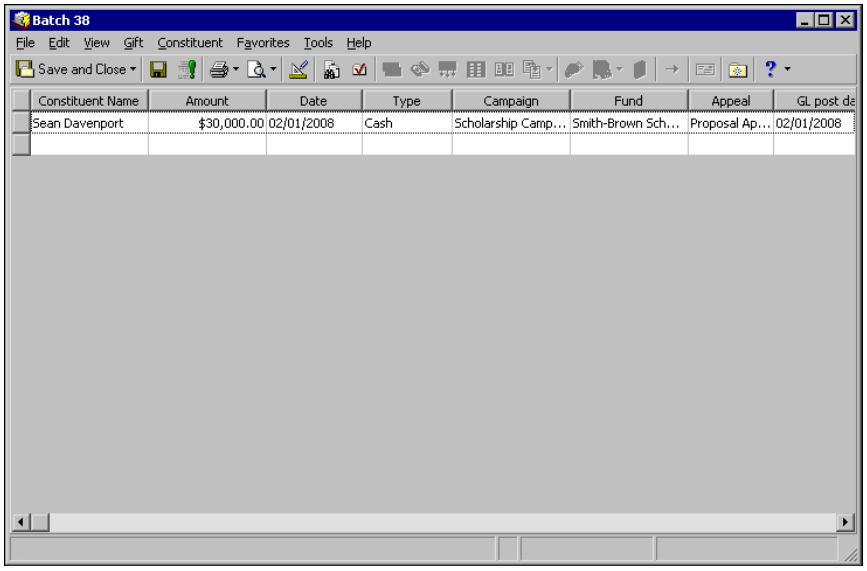
Linking a gift to a proposal from a gift batch

When using a gift batch to link a gift and proposal, you must commit the gift batch to add the new information and gift records to the database. Before you use this procedure, you need to understand how to use a gift batch. For more information, see the *Batch Guide*.

Scenario: Your organization is raising money for a large research scholarship. Through a friend, you learn Sean Davenport acquired $200,000 as an inheritance. Because Sean has strong ties with your organization, you create a proposal to ask him to contribute $30,000 toward your research scholarship. Sean agrees to donate $30,000 to the scholarship. Now, you need to enter Sean's gift information in a gift batch and link the gift to your existing proposal to ask for Sean's donation.

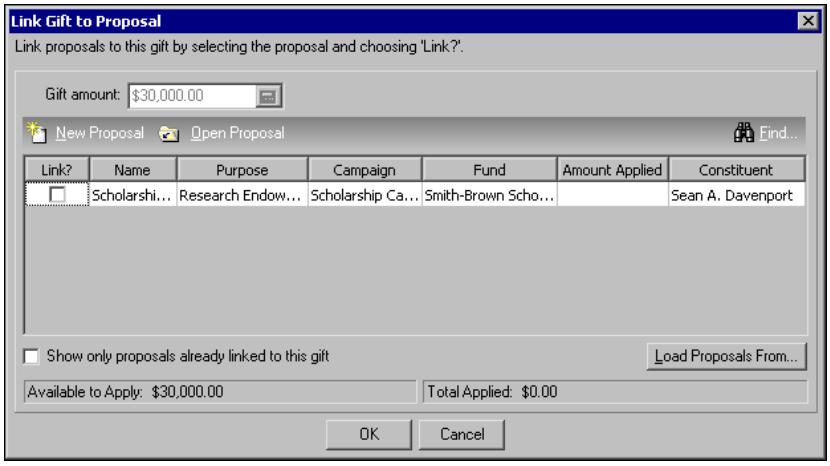
Warning: You cannot link a gift with a gift type of recurring gift to a proposal. However, when you generate cash gifts from a recurring gift template, you can link the individual cash gifts to a proposal.

1. From a gift batch, add a gift of $30,000 for Sean Davenport as shown on the screen below. For more information about setting up a gift batch and entering gifts into the batch, see the *Batch Guide*.



Note: Because you are creating a gift record for Sean Davenport, the program automatically displays all proposals associated with Sean on the Link Gift to Proposal screen.

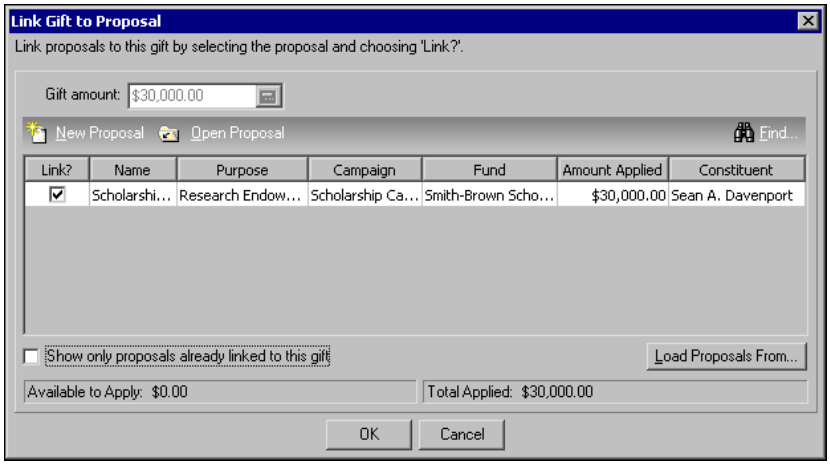
2. With your cursor in the row of the batch containing Sean's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears. The gift amount you entered in the **Amount** field on Sean's gift record automatically appears in the **Gift amount** field on the Link Gift to Proposal screen.



3. In the **Link?** column, mark the checkbox in the row containing Sean's proposal information.

Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

4. In the **Amount Applied** column for Sean's proposal, enter the amount $30,000. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $30,000.



5. Click **OK**. You return to the gift batch.
6. To create a gift record in the database for Sean, you need to commit this gift batch. For more information about committing a gift batch, see the *Batch Guide*.

Linking a Gift to a Proposal for Another Constituent

A constituent may contribute a donation toward a proposal written for another constituent. For example, you plan to ask Kristy Graham to donate $10,000 to your research scholarship, so you establish a proposal on Kristy Graham's constituent record. Kristy Graham tells you she cannot donate to the scholarship fund at this time, but her cousin, George Finley, will make a $10,000 donation. Although you entered the proposal on Kristy Graham's constituent record, you can link the gift record for George Finley's gift to the proposal to show how you obtained the gift.

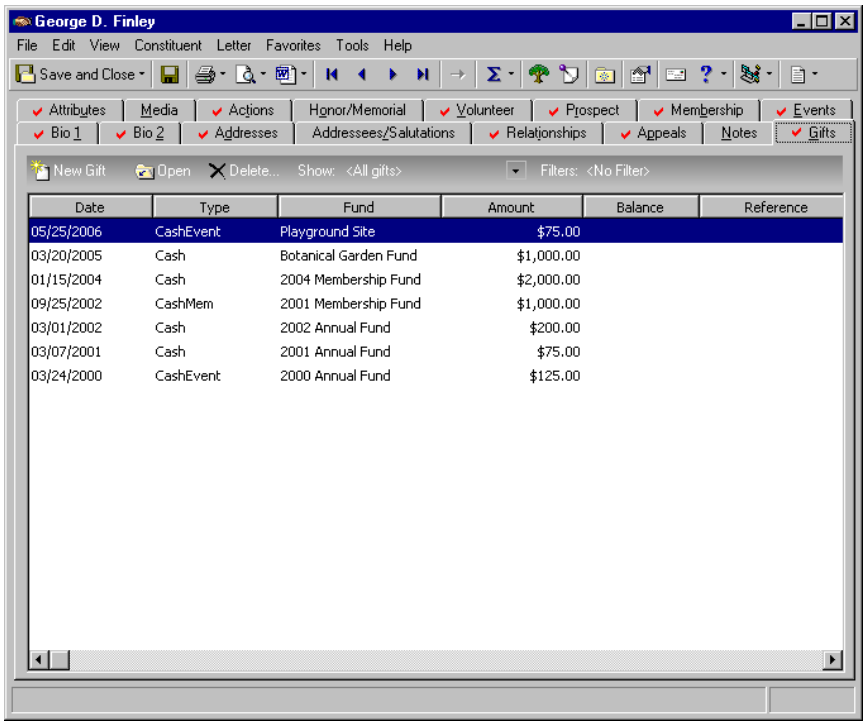
You can create a gift record from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift to a proposal for another constituent from a gift record and from a gift batch.

Linking a gift to a proposal for another constituent from a gift record

Scenario: You ask Kristy Graham to donate $10,000 to your research scholarship. You establish a proposal on Kristy Graham's constituent record. Kristy responds stating she cannot donate to the scholarship fund at this time, but her cousin George Finley can make a $10,000 donation. You receive George's check for $10,000. Now, you need to create a gift record for George's gift and link the gift record to the existing proposal on Kristy Graham's constituent record.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

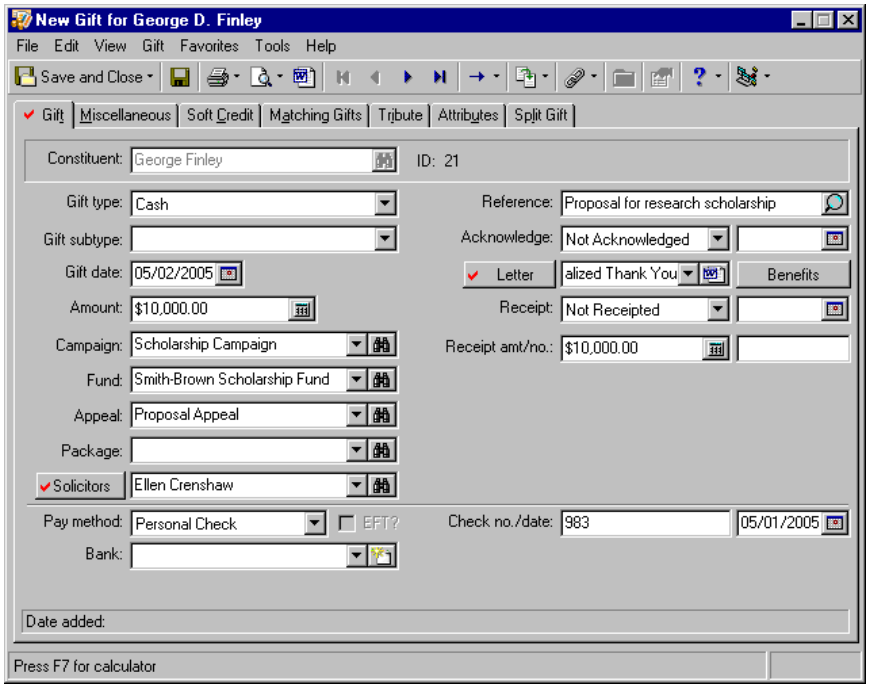
1. From George Finley's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



2. On the action bar, click **New Gift**. The New Gift screen appears.

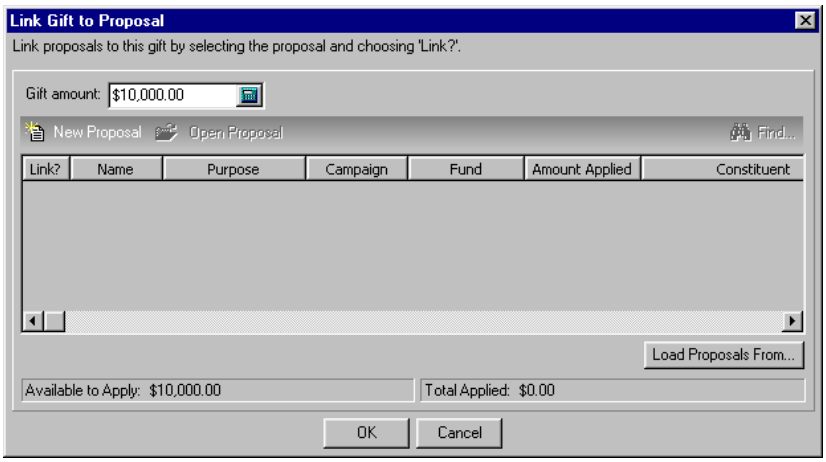
Note: If George has an outstanding pledge, you will receive a message asking if you want to pay this pledge. Click **No**.

3. From the New Gift screen, select the Gift tab and add the information about George's gift as shown on the screen below. For more information about adding a gift record, see the Gift Record chapter of the *Gift Records Guide*.

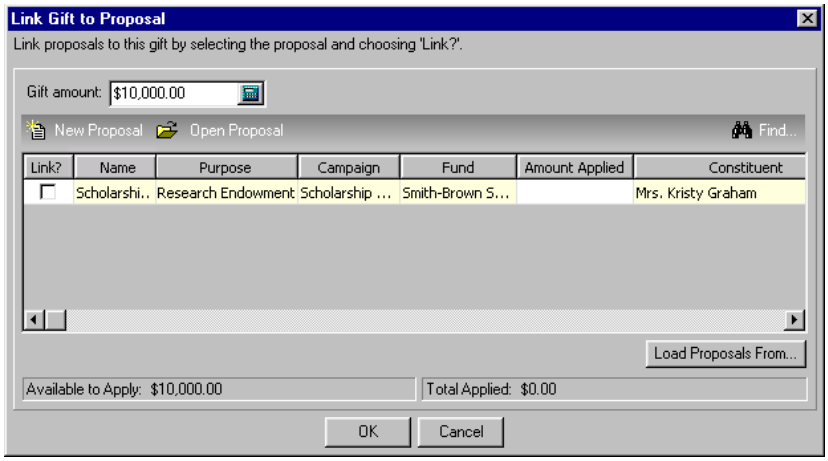


Note: The grid on the Link Gift to Proposal screen does not contain any information because you have not entered any proposals on George Finley's constituent record.

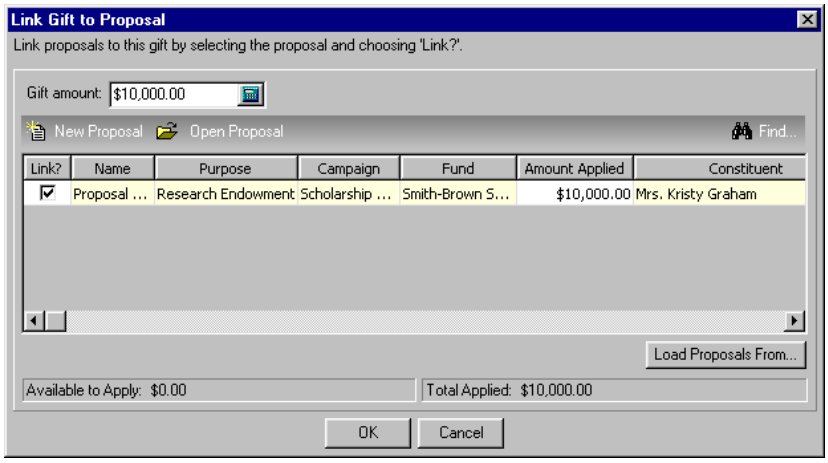
4. To link George's gift to Kristy's proposal information, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears.



5. Click **Load Proposals From**. The Open screen appears so you can search for Kristy Graham's proposal information in your database. When you find and select Kristy in your database, her proposal information appears in the grid on the Link Gift to Proposal screen.



6. In the **Link?** column, mark the checkbox in the row containing Kristy's proposal information.
7. In the **Amount Applied** column for Kristy's proposal, enter the amount $10,000. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $10,000.



8. Click **OK**. You return to George's gift record.
9. On the toolbar, click **Save and Close**. George Finley's gift record is now linked to the proposal on Kristy Graham's constituent record.
10. Click **Save and Close**.

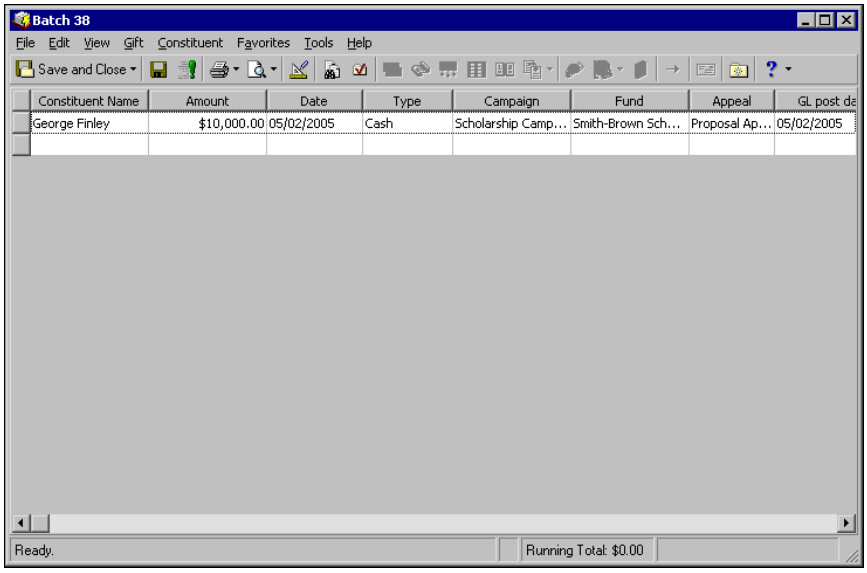
Linking a gift to a proposal for another constituent from a gift batch

When using a gift batch to link a gift and proposal, you must commit the gift batch to add the new information and records to the database. Before you use this procedure, you need to understand how to use a gift batch. For more information, see the *Batch Guide*.

Scenario: You ask Kristy Graham to donate $10,000 to your research scholarship. You establish a proposal on Kristy Graham's constituent record. Kristy responds that she cannot donate to the scholarship fund at this time, but her cousin, George Finley, can make a $10,000 donation. You receive George's check for $10,000. Now, you need to enter George's gift information into a gift batch and link this gift record to the existing proposal on Kristy Graham's constituent record.

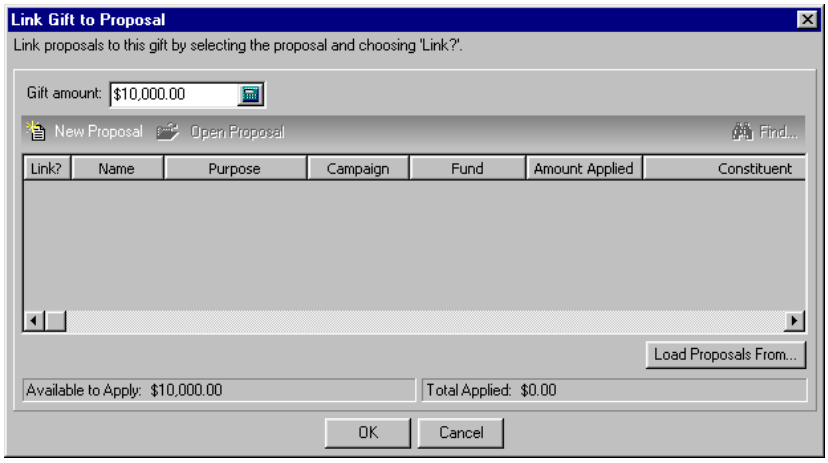
Warning: You cannot link a gift with a gift type of recurring gift to a proposal. However, when you generate cash gifts from a recurring gift template, you can link the individual cash gifts to a proposal.

1. From a gift batch, add a gift of $10,000 for George Finley as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.

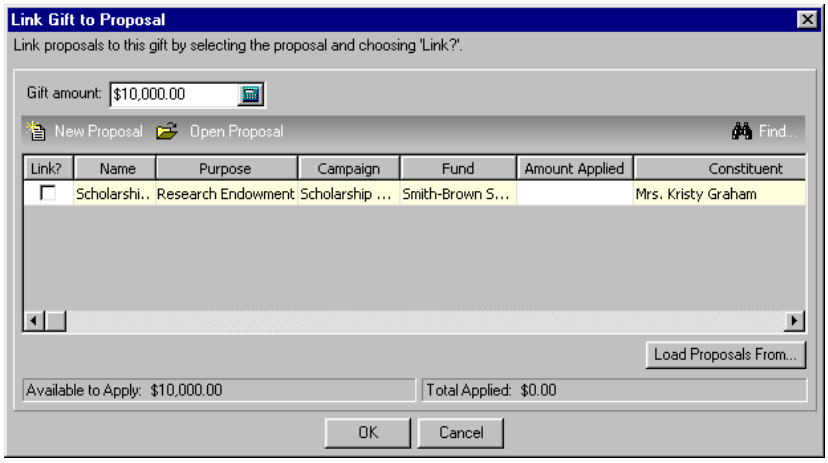


Note: The grid on the Link Gift to Proposal screen does not contain any information because you have not entered any proposals on George Finley's constituent record.

2. With your cursor in the row of the batch containing George's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears.

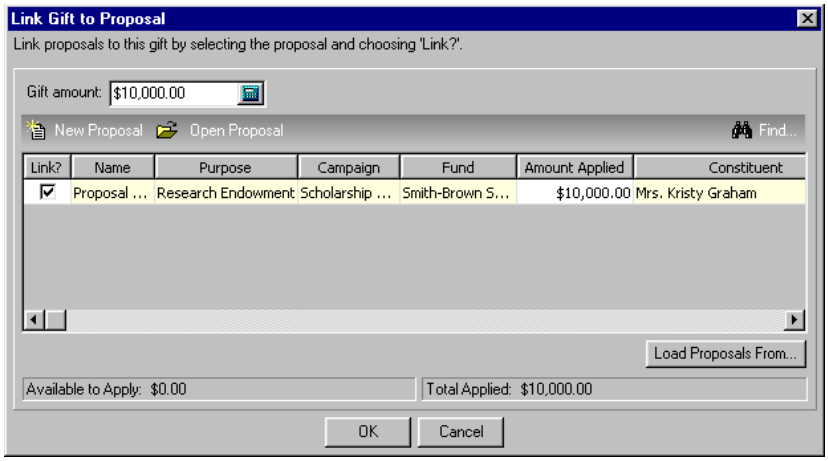


3. Click **Load Proposals From**. The Open screen appears so you can search for Kristy Graham's proposal information in your database. When you find and select Kristy, her proposal information appears in the grid on the Link Gift to Proposal screen.



4. In the **Link?** column, mark the checkbox in the row containing Kristy's proposal information.

5. In the **Amount Applied** column for Kristy's proposal, enter the amount $10,000. When you tab through the **Amount Applied** column, the program updates the status bar at the bottom of the screen to show the total amount applied is $10,000.



6. Click **OK** to return to the gift batch.
7. Click **Save and Close**.

   For more information about gift batches, see the *Batch Guide*.

Breaking the Link between a Gift and a Proposal

On occasion, you may need to break the link between a gift and a proposal. A gift and proposal may have been linked in error or the donor may decide to donate the gift to another project in your organization. When you break the link, neither the gift or the proposal is deleted from the database. For example, you link a gift record for a $2,000 gift to a proposal. On the proposal record, the **View/Link Gifts** display shows a $2,000 gift has been associated with this proposal. If you break the link between the gift and proposal records, the **View/Link Gifts** display shows $0.00 has been associated with this proposal. However, the $2,000 gift remains in the database.

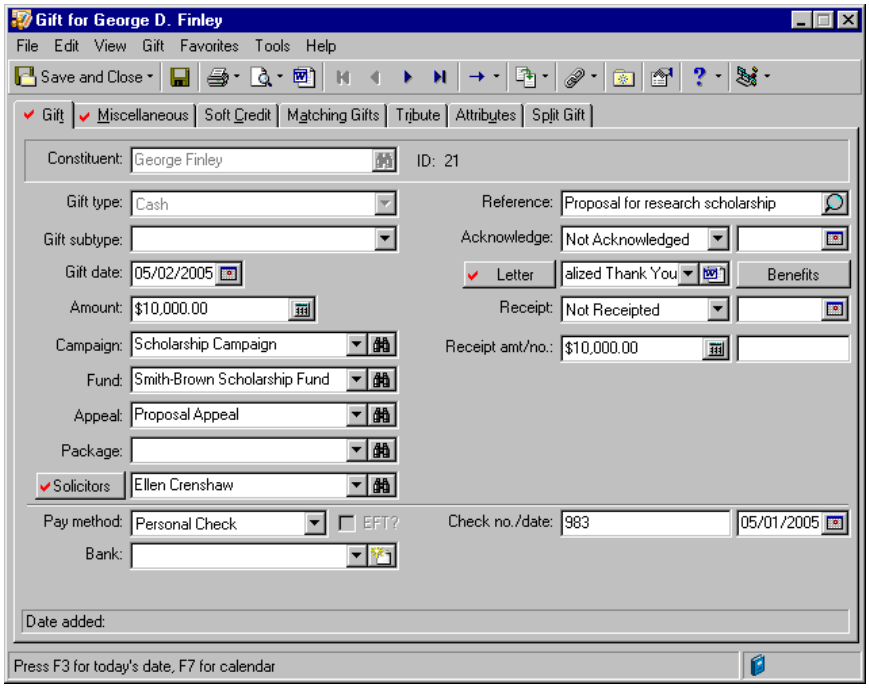
If you add a gift record to the database using a gift batch, you can break the link between a gift and proposal from the gift batch if you have not yet committed the gift batch to the database. If you have committed the gift batch to the database, you can break the link between a gift and proposal from the gift record.

Breaking the link between a gift and a proposal from a gift record

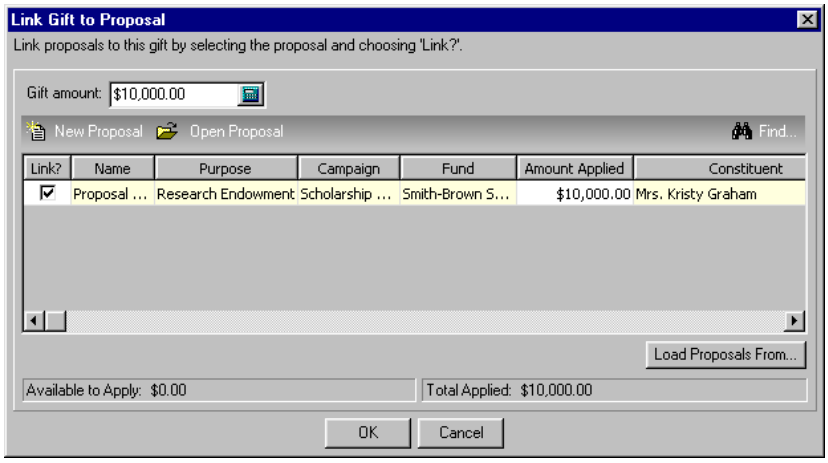
When you break the link between a gift record and a proposal, neither the gift nor proposal record is deleted from the database. For more information about deleting a proposal, see the *Prospect Data Entry Guide*. For more information about deleting a gift record, see the Gift Record chapter of the *Gift Records Guide*.

Scenario: You linked George Finley's $10,000 gift to your proposal for Kristy Graham to donate to your research scholarship. You decide you do not want to associate George's gift with Kristy's proposal, but you want to keep the gift record and the proposal in the database. Break the link between George's gift record and Kristy's proposal information. To break a link between a gift record and a proposal, you must first link a gift record to a proposal. This scenario uses the gift and proposal linked in "Linking a gift to a proposal for another constituent from a gift record" on page 10.

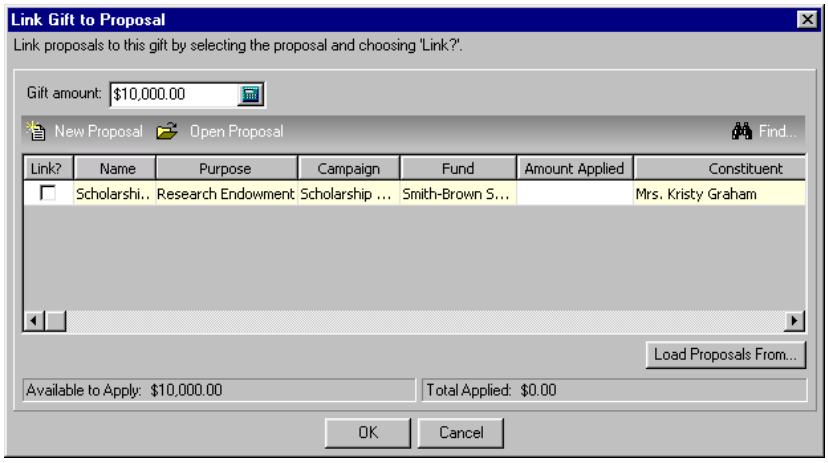
1. Open the gift record for George Finley's $10,000 gift. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.



2. Select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears.



3. In the **Link?** column, unmark the checkbox in the row containing Kristy's proposal information. The gift amount entered in the **Amount Applied** column disappears and the status bar updates to show George's gift has been unapplied from this proposal.



4. Click **OK**. You return to George's gift record.
5. Click **Save and Close** on the toolbar. George's gift record is no longer linked to Kristy's proposal information.

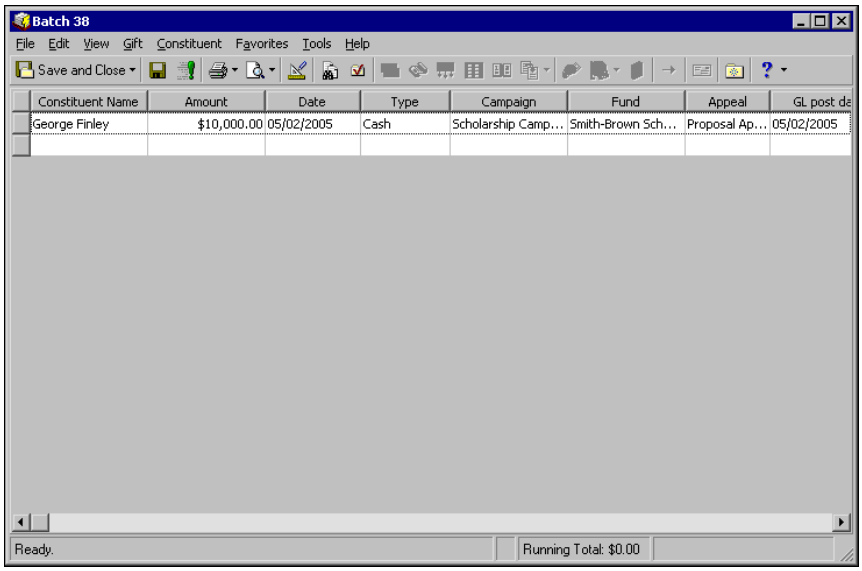
Breaking the link between a gift and a proposal from a gift batch

You can break the link between a gift and a proposal from a gift batch only if you have not yet committed the gift batch to the database. If you have committed the batch to the database, you need to break the link from the gift record.

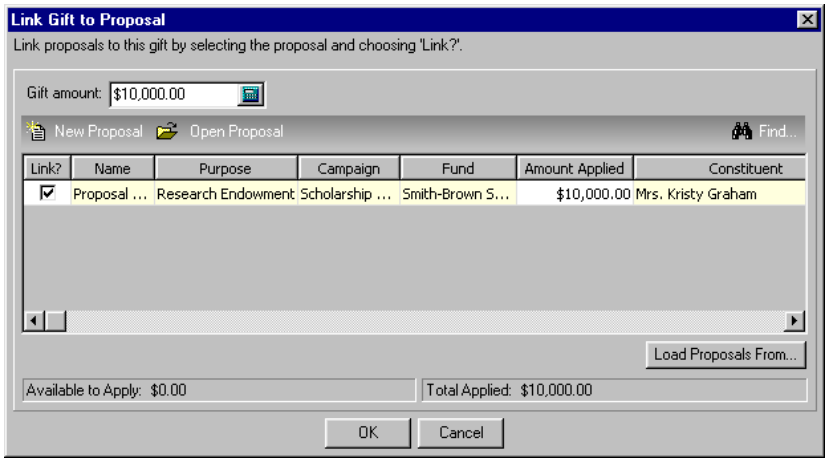
Scenario: Using a gift batch, you added a gift record for George Finley's $10,000 gift and linked this gift to your proposal for Kristy Graham to donate to your research scholarship. You decide you do not want to associate George's gift with Kristy's proposal, but you want to add George's gift to the database when you commit the gift batch. To remove the association between George's gift and Kristy's proposal, break the link between George's gift record and Kristy's proposal in the gift batch. To break a link between a gift record and a proposal, you must first link a gift record to a proposal. This scenario uses the gift and proposal linked in "Linking a gift to a proposal for another constituent from a gift batch" on page 13.

Warning: If you already committed this gift batch to the database, you need to break the link between George's gift and Kristy's proposal from George's gift record. For more information, see "Breaking the link between a gift and a proposal from a gift record" on page 16.

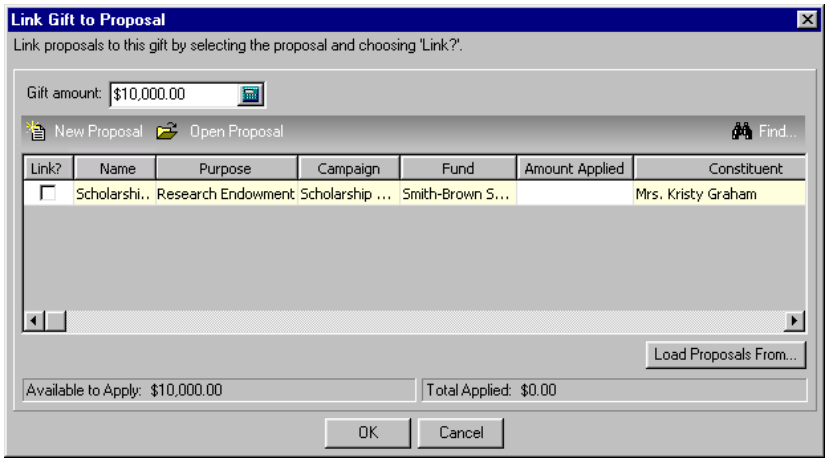
1. Open the gift batch containing George Finley's $10,000 gift. For more information about opening a gift batch, see the *Batch Guide*.



2. With your cursor in the row of the batch containing George's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Proposal**. The Link Gift to Proposal screen appears.



3. In the **Link?** column, unmark the checkbox in the row containing Kristy's proposal information. The gift amount entered in the **Amount Applied** column disappears and the status bar updates to show George's gift has been unapplied from this proposal.



4. Click **OK**. You return to George's gift record.
5. Click **Save and Close** on the toolbar. George's gift record is no longer linked to Kristy's proposal information.

   For more information about gift batches, see the *Batch Guide*.

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