

Closing a Proposal in EverTrue

Once the gift has been finalized and all necessary documentation has been received, you may mark the proposal **Accepted**. You must also close any proposal that has been Declined or Withdrawn. ***Note:** Gift payment does not need to have been received but all necessary documentation must be in hand.

Close a Proposal

You will need to update the following:

Proposal Stage (Accepted, Declined, or Withdrawn)

Active Indicator to “Inactive” (Unless it is a planned gift, in which case it remains Active.)

Expected Date, Amount, and Confidence: Regardless of whether the proposal was Accepted, Declined, or Withdrawn, a date must always be entered into this field.

Original Ask and Amount: Regardless of whether the proposal was Accepted, Declined, or Withdrawn, an amount must always be entered into this field.

Funded: If the proposal Stage is Withdrawn or Declined update this area to reflect that change.

Designation area(s) and amount(s): Adjust these as needed to reflect what the donor specifically funded (or initially agreed to fund in the case of a Withdrawn or Declined proposal.)

Program Stage: If Accepted, update to Stewardship. If Declined or Withdrawn, move to Stewardship or Cultivation as appropriate.

The screenshot shows the 'Edit Proposal' form with the following fields highlighted in red boxes:

- Status:** Stage (REQUIRED) dropdown menu set to 'Withdrawn' and an Active indicator toggle switch.
- Expected:** Date (REQUIRED) dropdown set to 'Nov 30, 2023', Amount (REQUIRED) input field set to '\$ 50,000', and Confidence (REQUIRED) input field set to '100 %'.
- Original Ask:** Date (REQUIRED) dropdown set to 'Aug 01, 2023', and Amount (REQUIRED) input field set to '\$ 100,000'.
- Current Ask:** Date dropdown set to 'Aug 31, 2023' and Amount input field set to '\$ 50,000'.
- Funded:** Date dropdown and Amount input field set to '\$ 0'.
- Designations (max 5) (REQUIRED):** A list containing 'UNV: Science and Tech. Capital Campaign' with an amount of '\$ 50,000'.
- Custom Fields:** Program Stage (REQUIRED) dropdown menu set to 'Stewardship'.
- Planned Gift (REQUIRED):** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Submit Type:** Dropdown menu set to 'General'.
- Funding Type:** Dropdown menu set to 'PG-Bequest'.