

NEW: Proposal Stages in Reeher

The "Proposal Status" in Reeher has been repurposed to be Proposal **STAGE**.

Below are the Proposal Stages we currently use in Advance with the PMATS entry form that are now in Reeher

PMATS Entry Form

Add Prospect to PMATS (No RM Exists) | Update Prospect Record | Add/Update RM or TM | Add New Ask/Proposal | Update an Existing Ask | Add/Update Solicitation Team

Active Ask/Proposals (3/3) Actions Help

Solicitation Lead	Unit	Title/Purpose	Ask Amount	Ask Date	Stage

Add New Ask/Proposal Save Actions Help

Solicitation Lead* (none)
 Title/Purpose* Ask Planned (RB)
 Comment Ask Made (AM)
 Proposal Stage* Gift Closed (GC)
 Proposal Status* Gift/Pledge Stewardship (ST)
 Ask Date* Declined (DN)
 Ask Amount* Cancelled Solicitation (DP)
 PG Stewardship (PL)

Assignment Type* SL

Benefitting Unit*

Initiative

Close Date

Received Amount

All of these stages will now show in Reeher on the proposal tab in the proposal table and view ports on the Major giving layer (red layer).

UCDAVIS UNIVERSITY OF CALIFORNIA

ADVANCEMENT ANNUAL FUND MAJOR GIVING TARGETER

LOGOUT | HELP & TRAINING User: Dawn Roarty CONTROL PANEL

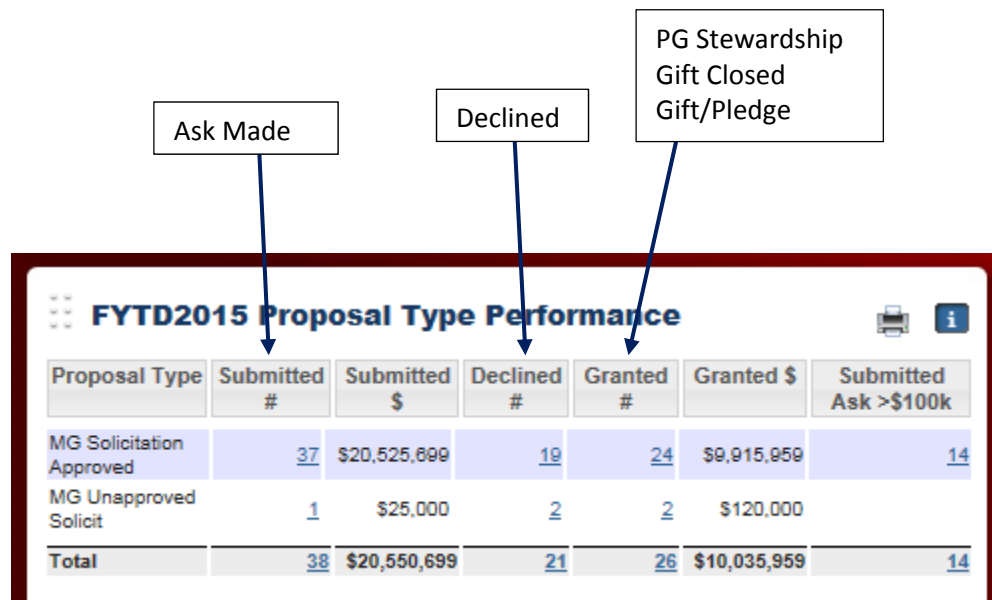
Select Officer: 4 of 84 selected Fiscal Year: FY2014 + VIEWPORTS

Proposals Table HIDE DETAIL

Proposal ID	Proposal Name	Entity Name(s)	Officers	Proposal Type	Proposal Status	Target Amount	Target Date	Ask Amount	Ask Date	Granted Amount	Granted Date
3184	Football Legacy Club	Mary Taborn Joseph	Michael Angius	MG Solicitation Approved	Gift Closed	25,000	02/28/2014	\$25,000	02/28/2014	\$25,000	06/30/2014
4133	Football Legacy Club	Lynn Feltz	Michael Angius	MG Solicitation Approved	Ask Made	25,000	04/17/2014	\$25,000	04/17/2014	\$0	06/30/2014
3110	Altruism support	George Mingo	Martina Ozonoff	MG Solicitation Approved	Cancelled Solicitation	25,000	11/12/2013	\$25,000	11/12/2013	\$0	12/31/2014
4100	No Family Foundation	John Doe	Michael Angius	MG Unapproved Solicit	Gift Closed	25,000	11/01/2013	\$25,000	11/01/2013	\$25,000	06/30/2014
2100				MG Solicitation Approved	Ask Made	25,000	11/30/2011	\$25,000	11/30/2011	\$0	06/30/2014
3100				MG Unapproved Solicit	Ask Made	25,000	12/17/2013	\$25,000	12/17/2013	\$0	06/30/2014

Reeher uses mapping to display information in tables and view ports. Below is the matrix that shows how these proposal stages are mapped in Reeher and how to find this information in the platform easily.

Advance Proposal Stage Codes	Advance Proposal Stage Definition	Reeher Mapping
RB	Ask Planned	In development
AM	Ask Made	Submitted/Pending
DN	Declined	Declined
PL	PG Stewardship	Granted
GC	Gift Closed	Granted
ST	Gift/Pledge Stewardship	Granted
DP	Cancelled Solicitation	[Not Mapped]



Asked Planned proposals can be seen in the pipeline viewport:

