Proposals

The **Proposals** viewport is a list of all the selected officer's (or officers') historical proposals or any proposal that has been closed in the selected fiscal year. The data displayed in the Proposals Table is provided from your institution in the nightly file that is received by Fundraiser Performance Management. By clicking on the Subject in the table you can view the full contact report detail. By clicking on the Entity Name, you can view the constituent's Relationship Profile.

Use the **arrows** at the top to page through the listed proposals. The **Search** bar will allow you to find a proposal by searching on the Proposal ID, Proposal Name, Entity Name, or associated gift officer. Use the **Gear** or 'options' icon to export, resize, or view iHelp for the viewport. The **Grabber Icon** allows you drag and drop the viewport to another area on the page.

You can **sort** the content of the Proposals Table by the different available columns. Just click on the column header once for A to Z, twice for Z to A sorting.

The columns of information in the Proposals Table include the following:

- **Proposal ID**: The unique identifier on the proposal record. Click this to open the Proposal Detail page
- **Proposal Name**: The name given to the proposal
- **Entity Name(s)**: These are the constituent records associated with the proposal
- **Officers**: All officers related to the proposal record
- **Type**: The type of proposal (e.g. Program Support, Scholarships, Unrestricted, Endowment)
- **Status**: The current status of the proposal (e.g. In Development, Pending, Approved, Declined)
- **School/Unit:** The division within your institution associated with this proposal
- **Stage**: Current stage that the proposal is in within the proposal development cycle
- **Funding Type**: How the constituents intend to fund the gift (e.g. one time gift, multi-year gift, bequest)
- **Target Amount**: The expected dollar amount the officer(s) will ask for.
- **Target Date**: The expected date the officer(s) plans to make the ask.
- **Ask Amount**: The actual amount the officer(s) asked for.
- **Ask Date**: The date the ask occurred.
- **Expected Amount**: The amount of the proposal that is expected to be granted/committed.
- **Expected Date**: The date that the proposal is expected to close.
- **Granted Amount**: The dollar amount the donor granted against the proposal.
- **Granted Date**: The date the proposal was granted by the donor.