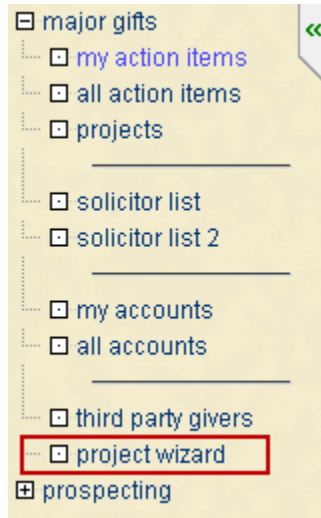


# Major Gifts Console: Using the Project Wizard

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Rather than having to go into each individual record one at a time, the Project Wizard allows you the ability to use already existing features of Revolution Online to search for records – and then take action in a systematic way.

Within the Major Gifts Console, you will find the project wizard command which will take you through the steps of creating a project and activity for multiple records.

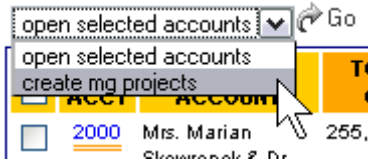


The first step is all about identifying the accounts to be added to the Project Wizard. The screen will accept a bulk input text box where you can type the account numbers you want, paste information from an excel spreadsheet or other source, or will display all of the accounts passed in from the MG Prospecting screens. Similarly, to “feed” the Project Wizard you can also use the Prospecting Sections within the MG Console to find records.

<input type="checkbox"/>	ACCT	ACCOUNT	TOTAL GIFT	HIGHEST	HIGHEST DATE	MOST RECENT
<input type="checkbox"/>	2000	Mrs. Marian Skowronek & Dr. Lola Nouryan	255,845.61	480.00	07/22/2008	1.87
<input checked="" type="checkbox"/>	1687	Dr & Mrs Ch Goldstein			2/2008	448.00
<input checked="" type="checkbox"/>	2465	Dr & Mrs M Roisman			4/2009	4,651.87
<input checked="" type="checkbox"/>	2433	Dr & Mrs Sid Hendler			4/2009	4,331.87
<input type="checkbox"/>	111111	Miles & Shir Fiterman, Fdtn.	222,222.00	111,111.00	06/23/2008	111,111.00
<input type="checkbox"/>	4474	Dr & Mrs S...	344,000.00	404.00	07/22/2008	404.00

You can select which accounts you want to be taken through the Project Wizard by checking the box.

You can then start the Major Gifts Project Wizard:



You can use the "process" button as many times as you like.

#### Major Gifts — Project Creation Wizard

**step 1 — identify donor accounts**

type or paste donor account numbers here then click the process button

ACCT ID	DONOR NAME & ADDRESS	CURRENT SOLICITOR ASSIGNMENTS	MOST RECENT PROJECT
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The list identifies the donors whose accounts you entered by account number plus full name and address. It also indicates whether the account already has any MG solicitors assigned or MG projects previously defined. (You might want to use that information to tailor the results, and possibly remove people who got into the list where you would rather not create new projects. To remove an account from the list, simply click the image in column 1 of the donor you wish to remove.)

ACCT ID	DONOR NAME & ADDRESS	CURRENT SOLICITOR ASSIGNMENTS	MOST RECENT PROJECT
<del>469</del>	deleted		
	472 Matthew A. Rosen 112 Union Park Street #2 Boston MA 02118-0001		03/01/2009
	617 MRS R Perkins 1208 Toledo St Bellingham WA 98226-1200		
	630 DR I Koziol 729 Woodson Pl Manakin Sabot VA 23103-0036		

When you are satisfied with your selection, click the next button to move on to the next step. You can also close the screen at any time to abandon your changes.

On this second screen of the Major Gifts Project Creation Wizard you can define the properties of the project and activities you want to create. Separate but identical projects and activities with the parameters you specify here will be created in all of the accounts you described in step 1.

## Major Gifts — Project Creation Wizard

step 2 — identify the project and activity details

Project Template	
Project type	<input checked="" type="checkbox"/> make a selection <input type="button" value="v"/>
Project purpose	<input checked="" type="checkbox"/> make a selection <input type="button" value="v"/>
Project priority	<input type="checkbox"/> High Priority <input type="button" value="v"/>
Project rating	<input type="checkbox"/> [none] <input type="button" value="v"/>
Start date	<input checked="" type="checkbox"/> mm/dd/yyyy <input type="button" value="calendar"/>
Target end date	<input type="checkbox"/> mm/dd/yyyy <input type="button" value="calendar"/>
Projected amount	<input type="checkbox"/> <input type="text"/>

For the project select the appropriate Project Type, Project Purpose, and Start Date. Additionally you can enter in a Project priority, Project rating, Target End Date and Projected Amount.

## Major Gifts — Project Creation Wizard

step 2 — identify the project and activity details

Project Template	
Project type	<input type="checkbox"/> 3 - Cultivation <input type="button" value="v"/>
Project purpose	<input type="checkbox"/> Annual Fund <input type="button" value="v"/>
Project priority	<input type="checkbox"/> High Priority <input type="button" value="v"/>
Project rating	<input type="checkbox"/> [none] <input type="button" value="v"/>
Start date	<input type="checkbox"/> 03/10/2009 <input type="button" value="calendar"/>
Target end date	<input type="checkbox"/> mm/dd/yyyy <input type="button" value="calendar"/>
Projected amount	<input type="checkbox"/> <input type="text"/>

Now you can add an activity by selecting the “add an activity” button.

## Major Gifts – Project Creation Wizard

step 2 – identify the project and activity details

Project Template	
Project type	3 - Cultivation
Project purpose	Annual Fund
Project priority	High Priority
Project rating	[none]
Start date	03/10/2009
Target end date	mm/dd/yyyy
Projected amount	

You will now be able to fill in the activity information.

Activity Details	
Action type	make a selection
Solicitor	make a selection
Target completion	mm/dd/yyyy
Asking amount	
Projected amount	
Notes	

Here you will identify the Action Type, Solicitor, and the Target completion date. Additionally, you can enter the Asking amount, Projected amount, and Notes specific to the activity.

Activity Details	
Action type	Donor Research
Solicitor	Primary MG Solicitor Garland Auton
Target completion	03/11/2009
Asking amount	
Projected amount	
Notes	Research donor's giving capability.
<input type="button" value="create"/> <input type="button" value="cancel"/>	

After the appropriate information has been filled in the select the create button.

Activity Details	
Action type	Donor Research
Solicitor	Primary MG Solicitor Garland Auton
Target completion	03/11/2009
Asking amount	
Projected amount	
Notes	Research donor's giving capability.
<input type="button" value="create"/> <input type="button" value="cancel"/>	

Both the project and activity will be displayed.



## Major Gifts – Project Creation Wizard

step 2 – identify the project and activity details

Project Template	
Project type	3 - Cultivation
Project purpose	Annual Fund
Project priority	High Priority
Project rating	[none]
Start date	03/10/2009
Target end date	mm/dd/yyyy
Projected amount	

<input type="button" value="edit"/> <input type="button" value="delete"/>	Activity	Donor Research
	Solicitor	Primary MG Solicitor Garland Auton
	Target completion	03/11/2009
	Notes	Research donor's giving capability.

Once you have filled in the project and activity details, click the **next »** button to continue.

You can add additional activities but clicking on the "add an activity" button. If you want to change the characteristics of an activity, click the  edit button on the activity header line. If you define an activity that you would like to remove, simply click the  delete button. If you would like to remove all of the activities you defined, click the "clear all activities" button.

To use this wizard to its potential, you should be familiar your with the "team" concept within our Major Gifts module. We anticipate that your MG staff will function as a coordinated team, and that the different staff members will fill the various roles that perform project activities. We populate the activity assignment pulldowns with the names and roles of people that you have previously assigned using the normal interactive process within the MG folders on the Donor Edit screen.

Once you have created your project and activity definitions, click the next button so that the wizard can review your choices. You can also go back to the previous screen; your project selections will remain intact when you come back.

On the third screen of the Major Gifts Project Creation Wizard the accounts, team assignments, and project details that you entered on the prior screens are summarized for your review. You should look over this information and confirm that it matches what you expect.

## Major Gifts — Project Creation Wizard

### step 3 — confirm your changes

#### Accounts Section

30 unique accounts have been identified. These include 472, 617, 630, 700, 764, 820, 842, 862, 893, 915, 1017, 1025, 1077, 1079, 1163, 1432, 1442, 2118, 2142, 6203, 12010, 15217, 19081, 23451, 24000, 29206, 34108, 44122, 44124, 77024.

#### Team Assignments

The following team members will be assigned to all selected accounts effective on the project or activity start date, replacing any other solicitors:


- Primary MG Solicitor Garland Auton

#### Project Details

A project will be created in the selected accounts with one activity record.

Once you have reviewed the information above, click the **finish** button to assign solicitors to the selected accounts and create the major gifts projects.

« prev finish



If you want to make changes, use the prev button to go back; if you are comfortable with your selections click the finish button to create the projects you specified.


After clicking the finish button, you will receive a confirmation that what you asked for has been done; additionally, if you click the "do some more" button you can go back and pick a different set of account, but your project definitions are still there...so you can simply modify them and keep going on creating additional projects.

## Major Gifts — Project Creation Wizard

### major gifts project creation has completed

Created 26 projects containing a total of 26 activities, and created or modified 26 solicitor assignments.  
Click the **close** button to close this window.

do some more close



###

