



Assigning Proposal Team Members (Sharing Proposal Credit)

Before you can add someone to a prospect record as an assignment for sharing credit on a proposal, you must contact Processing (processing@cufund.org) to have the staff member added to the Prospect Management team. You must also be the Proposal Manager to make changes to a proposal in Advance.

Note: Your next level manager should be aware of the assignment you are making to share credit.

To assign prospect credit to another prospect management team member:

1. From the Advance home page, under the Shortcut Buttons, click **My Proposals**.
2. Click the ellipsis button  next to the proposal you want to update.
3. From the Proposal page tree, click **Assignments**.
4. From the Proposal Assignments form header, click **New**.
5. From the **Staff** drop down list, select the staff member you want to assign as a Proposal Team Member.
6. From the **Type** list box, select either Proposal Manager or Proposal Team Member.
7. In the **Start Date** field, enter or select the date on which this staff member began supporting this proposal.
8. Click the **Save** command from the form header.

If this staff member is not on the Prospect Management team for this prospect, you will see the following error message:

**▲ Staff Assigned - The staff member being assigned to this proposal is not currently on the Prospect Management team.
YOUR DATA HAS NOT BEEN SAVED**

If the staff member is on the Prospect Management team, the assignment is saved.