



Maintaining the Campaign Remainder Amount (CRA)

As gifts and pledges are received from your prospects, you should review the Campaign Remainder Amount, or CRA, for those prospects. If the CRA for a prospect needs updating, the Prospect Manager should notify Processing. The CRA is reflected in many forecasting reports, campaign reports, and the Prospect Stage Detail report. The CRA is reviewed and discussed frequently by Senior Leadership and the University, so it is important to be accurate at all times.

To view the CRA for a prospect:

1. From the Home page tree, under CUF Lookups, click **Entity**.
2. In the **ID Number** box, type the Entity ID and click **Run Report**.
3. Click the link to the Entity record. The Entity Overview page appears.
4. From the Prospect Summary form, click the link to the prospect. The Prospect Overview page appears, and the Campaign Remainder Amount (CRA) is displayed in the Prospect Overview form:

Take a Shortcut:



1. Click **My Prospects** shortcut.
2. Click the Prospect Name link.

The screenshot shows a web application interface with several tabs: Home, Report Viewer, Entity Overview, and Prospect Overview. The Prospect Overview tab is active. On the left, there is a navigation menu for 'Prospect' with options like Overview, Detail, Assignments, Entities, New Proposal, Proposals, Stages, and Transactions. The main content area shows a table for 'Prospect Entities (50136) (1)' with columns for 'Entity' and 'Primary'. Below this is a 'Prospect Overview (70071)' section with a list of fields: Name (Active), Stage (Stewardship), Start (06/13/1998), Stop, Type (Priority 1), Priority, Campus (UCB-Boulder), Campaign Rating, Rating Status, Campaign Remainder Amount (CRA) (\$500,000.00), Gift Likelihood % (0.00), and Comment (Changed next ask amount from \$1M to \$500K 6/8/10). An arrow points to the CRA field.

5. If the CRA needs updating, notify Processing by sending an email to processing@cufund.org.

Be sure to include the following information in your email:

- **Entity ID**
- **Prospect Name**
- **Amount** (This is the updated amount expected from the prospect by the end of the campaign. If you are not sure when the campaign ends, speak with your manager.)

Note: It is important to review the CRA when a gift is received or when a proposal is withdrawn or denied. You should have a CRA specified for each managed prospect and keep it updated over time.