

# Prospect Add and Drop Before and After Aggie Assign

## Previous process: Add

Verify there is no existing RM →

Select **Add Prospect to PMATS (No RM Exists)**

Complete the required fields

- Relationship Manager
- Overall Stage

Save

## Drop

### Step 1: Close proposals

- Select **Update an Existing Ask** button
- Highlight proposal record that needs to be closed
- Update **Proposal Stage**
  - If *Ask Planned*, change to *Cancelled Solicitation*
  - If *Ask Made*, change to *Declined*
  - If *Gift Closed*, STOP -> contact [PMATS@ucdavis.edu](mailto:PMATS@ucdavis.edu)
- Update **Proposal Status** to "Closed/Not Booked MG"
- Update **Comment** to describe why action is taken
- Save

### Step 2: Deactivate assignment

- Select **Add/Update RM or TM** button
- Highlight assignment record from list
- Uncheck **Active** box to deactivate assignment
- Enter **Comment** to describe why assignment is dropped
- Save

### Step 3: Drop Prospect

- Select **Update Prospect Record** button
- Update **Overall Stage** to Dropped
- Save

**IMPORTANT**

If drop is due to disqualification as a major gift (MG) prospect, add contact report documenting why prospect was disqualified. See [Complete Guide to Contact Reports](#).

**Aggie Assign interface:**

Prospect Management and Research

# Aggie Assign

DEVAR's assignment change request form

Get started

Prospect Management and Research

For user information and tips click here

Confidentiality Notice:

All information contained in this form and the resulting emails is confidential and meant for the intended audience and recipients only. If you believe you have reached this form in error, please inform pmats@ucdavis.edu

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Question 1/5

This request is to...

- Add RM
- Drop RM
- Add TM
- Drop TM
- Add or Drop Info Only
- Switch RM/TM
- None of the above

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Question 2/5

Confirm requesting DO's supervisor

Confirm email of supervisor

Confirm unit of supervisor

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Question 3/5

Entity name or ID search

Press Enter to search (Case Sensitive)

Confirm entity

Prospect stage

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Question 4/5

Please explain briefly why you are requesting this assignment change

Recommend by my Portfolio Strategist. Great prospect - high interest in supporting the Food Bank

255 characters or less!

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You may use the navigation buttons to return to previous questions without losing your responses.

Please use the submit button to complete the form and send your request.

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Submit

