

WINDSHIELD 2020

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Windshield 2020 Annotated Core Strategy (ACS) Guide

The purpose of this guide is to offer a brief description of use for the ACS module. This module is intended for capital campaign users, though it could be used for any type of campaign. The ACS is produced from the uncompleted next steps that are in the system. This is a simple “report” that can be adjusted as needed, since it is an excel export, in order to use in a development team, CSC or other leadership meeting. It also can be helpful for any development user to quickly see a task list of planned next steps.

Note: The *Advanced* next steps method must be used to produce an ACS report.

New Behavior

The design of this module is that the “Priority” field for each prospect would contain the phase number that the prospect is planned to be asked.

Steps to use

1. Code each prospect with the proper phase number in the priority field.
2. Enter the next steps for each prospect being sure to mark any completed when it is true.
3. Click the green “ACS Export” button which is located on the upper right area of the Campaign Ledger screen. (Click the Home icon to find)
4. Once the Excel file is exported, format to desired appearance. The following steps may be considered.
 - a. Add filters to the top row, bold the text, and freeze the top row
 - b. Sort by Priority
 - c. Adjust the “Notes” column width and add word wrap to all the rows.
 - d. Hide the “Completed” column