

Navigating the Opportunities Tab

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Donor Management System

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Overview

By selecting **Opportunities** in the Main Menu, you will be directed to the Opportunities Tab. The Opportunities Tab is a management resource for your organization that enables you to record and track the status of medium to long-term requests like grant applications, major gifts, and special projects.

Each Opportunity is associated with both a Contact in the DMS (the Contact you are approaching for the Opportunity) and a DMS User (the individual at your organization responsible for overseeing the Opportunity).

To access a single Opportunity, click on the Name of the Opportunity. You can also [add an Opportunity](#) from this tab by selecting *Add Opportunities* in the top right corner.

The screenshot shows the 'Opportunities' tab in the Donor Management System. The navigation menu includes Dashboard, Contacts, Contributions, Campaigns, **Opportunities** (highlighted with a red box), Reports, and DMS Mail. The user is logged in as 'DMSCA DMSCA'. The main content area features a search bar for contact names or emails, a filter for 'All Opportunities', and a table of opportunity records. The table columns are Opportunity Name, Prospect, Opportunity Status, Opportunity Type, Application Deadline, Opportunity Amount, Amount Received, and Opportunity Report Due. The table contains five rows of data.

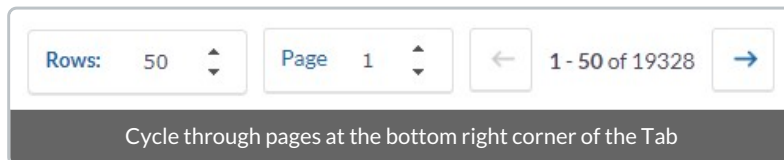
<input type="checkbox"/>	Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
<input type="checkbox"/>	Youth donation 5k	A. Amadu	Discovery	Donation		\$5,000.00	\$5,000.00	
<input type="checkbox"/>	Possible In Kind Donation of Old Computer	A. L. Kostenko	In Progress	Gifts In Kind		\$250.00		
<input type="checkbox"/>	Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
<input type="checkbox"/>	Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00		
<input type="checkbox"/>	Pledge 2023	Accessibility Foundation	Follow up required	Pledge		\$10,000.00	\$5,000.00	

Opportunities tab

Opportunities List Columns

- **Opportunity Name:** the name of the grant or project.
 - **Prospect:** the name of the Contact you are approaching for the Opportunity.
 - **Status:** the stage the Opportunity is in such as Submitted, Eligible, etc.
 - **Type:** if the Opportunity is a grant, donation cultivation or another project.
 - **Application Deadline:** the deadline for when an application for this Opportunity is due.
 - **Amount Requested:** the monetary amount requested for each Opportunity.
 - **Amount Received:** the monetary amount received for each Opportunity.
 - **Report due:** the deadline for when a report for this Opportunity is due.
-

Rows



- The default number of Rows displayed on the Opportunities Tab is set to 50.
 - To adjust the number of Rows of Opportunities displayed in the list view, scroll to the bottom of the page and press the “up” or “down” arrows on the box that is labeled Rows.
 - To the right of the box labeled Rows are the number of pages of rows, the total number of Opportunities in your DMS, as well as the ability to navigate to the next page list view.
 - To navigate to the next page of Opportunities, click the arrow pointing right on the far right side of the page. Click on the arrow pointing left to go back to the previous page.
-

Filtering Opportunities

- You can filter by Opportunity Type by clicking on **All Opportunities** and selecting a Type.

Wellness Avenue

Dashboard Contacts Contributions Campaigns **Opportunities** Reports DMS Mail

Settings | Help

DMSCA DMSCA

Search by contact name or email Q [Advanced Search](#)

Actions 0 Selected Records Only All 22 Records All Opportunities + Add Opportunity

<input type="checkbox"/>	Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity	Opportunity Report Due
<input type="checkbox"/>	Youth donation 5k	A Amadu	Discovery	Donation		\$5,000.00	
<input type="checkbox"/>	Possible In Kind Donation of Old Computer	A. L. Kostenko	In Progress	Gifts In Kind			
<input type="checkbox"/>	Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	March 31st, 2023
<input type="checkbox"/>	Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00	
<input type="checkbox"/>	Pledge 2023	Accessibility Foundation	Follow up required	Pledge		\$10,000.00	\$5,000.00
<input type="checkbox"/>	AAD proposal 2023	Alex Fergie	In Progress	Gifts In Kind		\$25,000.00	
<input type="checkbox"/>	Foreign Policy Event	Alex Fergie	Submitted	Grant	September 1st, 2022	\$15,000.00	November 1st, 2022
<input type="checkbox"/>	Renewal	Anderson Ada	Follow up required	Grant	September 12th, 2022	\$5,000.00	September 6th, 2023
<input type="checkbox"/>	bernadette grant	Bernadette Love	In Progress	Grant	January 28th, 2022	\$5,000.00	

Filter by Opportunity Type

Actions

- There are many Actions you can perform from the Opportunities Tab to one or more Opportunities.
- The available Actions include deleting, exporting or printing Opportunities.

Performing an Action

1. To perform an Action, search for a specific Opportunity or select either:

- (1) **The specific Opportunities** you wish to perform an Action to,
- (2) Every listed Opportunity **on the page**, or
- (3) **All Opportunities** in your search criteria

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | **Opportunities** | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Q] Advanced Search

Actions ▾ 3 Selected Records Only All 22 Records All Opportunities ▾ [Add Opportunity](#)

<input type="checkbox"/>	Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
<input type="checkbox"/>	Youth donation 5k	A Amadu	Discovery	Donation		\$5,000.00	\$5,000.00	
<input checked="" type="checkbox"/>	Possible In Kind Donation of Old Computer	A. L. Kostenko	In Progress	Gifts In Kind		\$250.00		
<input type="checkbox"/>	Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
<input type="checkbox"/>	Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00		
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<input type="checkbox"/>	AAD proposal 2023	Alex Fergie	In Progress	Gifts In Kind		\$25,000.00		
<input type="checkbox"/>	Foreign Policy Event	Alex Fergie	Submitted	Grant	September 1st, 2022	\$15,000.00		November 1st, 2022
<input checked="" type="checkbox"/>	Renewal	Anderson Ada	Follow up required	Grant	September 12th, 2022	\$5,000.00		September 6th, 2023
<input type="checkbox"/>	Berardette Grant	Berardette Love	In Progress	Grant	January 28th, 2022	\$5,000.00		

Select your desired Opportunities

2. Select the **Actions** menu at the upper-left side of the Opportunities list and then select your desired **Action**.

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | **Opportunities** | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Search by contact name or email [Q] Advanced Search

Actions ▾ 3 Selected Records Only All 22 Records All Opportunities ▾ [Add Opportunity](#)

- Delete opportunities
- Export opportunities
- Print selected rows

<input type="checkbox"/>	Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
<input type="checkbox"/>	Youth donation 5k	A Amadu	Discovery	Donation		\$5,000.00	\$5,000.00	
<input checked="" type="checkbox"/>	Possible In Kind Donation of Old Computer	A. L. Kostenko	In Progress	Gifts In Kind		\$250.00		
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<input type="checkbox"/>	Foreign Policy Event	Alex Fergie	Submitted	Grant	September 1st, 2022	\$15,000.00		November 1st, 2022
<input checked="" type="checkbox"/>	Renewal	Anderson Ada	Follow up required	Grant	September 12th, 2022	\$5,000.00		September 6th, 2023

Perform Actions on selected Opportunities

All Actions

- **Delete Opportunities:** completely removes an Opportunity and its information from the DMS.
- **Export Opportunities:** exports selected Opportunities to a .csv format (opens with any version of Excel or Google Sheets).
- **Print Selected Rows:** prints the selected Opportunities' information via your web browser.