

Adding & Modifying a Single Opportunity

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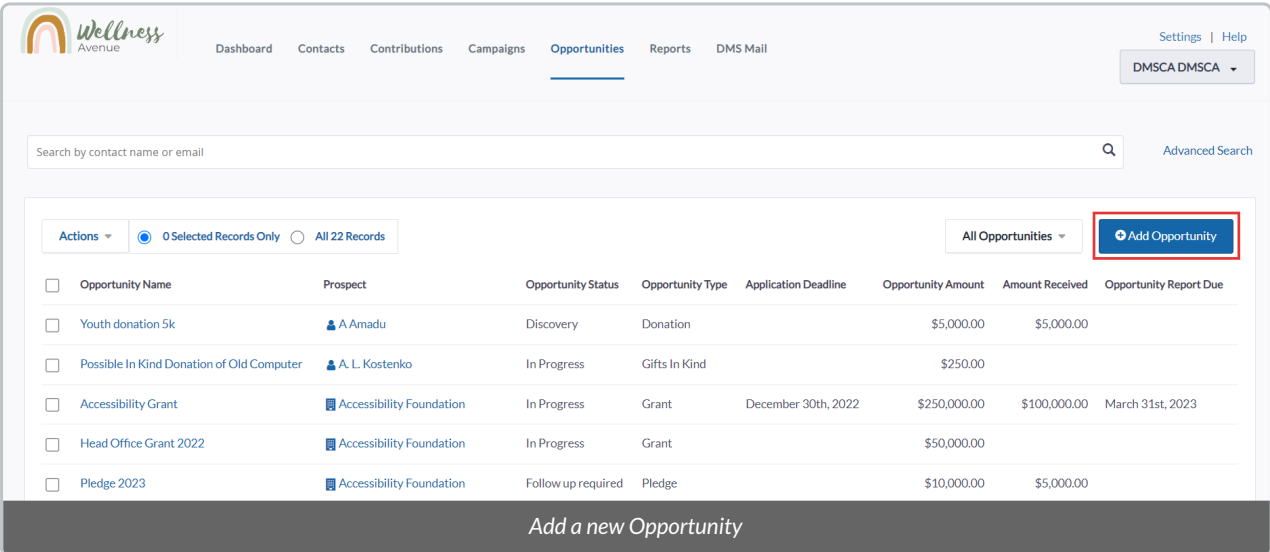
Donor Management System

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Adding a Single Opportunity

1. To add a single Opportunity to your DMS, visit the **Opportunities Tab**
2. Select **Add Opportunity** on the upper right side of the screen



The screenshot displays the 'Wellness Avenue' Donor Management System interface. The 'Opportunities' tab is selected in the top navigation bar. A search bar is located at the top left. Below the search bar, there are radio buttons for '0 Selected Records Only' (selected) and 'All 22 Records'. To the right, there is a dropdown menu for 'All Opportunities' and a blue button labeled 'Add Opportunity' with a plus icon, which is highlighted with a red box. Below this is a table with columns: Opportunity Name, Prospect, Opportunity Status, Opportunity Type, Application Deadline, Opportunity Amount, Amount Received, and Opportunity Report Due. The table contains five rows of data. At the bottom of the interface, there is a dark grey bar with the text 'Add a new Opportunity'.

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	

3. On the next page, you'll have to **provide the details** about your new Opportunity and click **Save**.

New Opportunity

Save

Cancel

OPPORTUNITY NAME *

50K Environment Ministry Grant

OPPORTUNITY OWNER

Jacob O'Connor :: jacob@canadahelps.org

PROSPECT *

Provincial Government Ministry

OPPORTUNITY TYPE *

Grant

OPPORTUNITY STATUS *

Submitted

PROBABILITY

Medium

OPPORTUNITY AMOUNT *

50,000.00

APPLICATION DEADLINE

12/30/2022

APPLICATION SUBMITTED

Yes No

DECISION DATE

01/31/2023

Date on which the opportunity decision was finalized.

REPORT DUE

AMOUNT RECEIVED

NOTES

Save

Cancel

Fill out the fields here to add a new Opportunity

- **Opportunity Name:** the name of the grant, project, prospect etc.
- **Opportunity Owner:** the DMS User overseeing the Opportunity (usually a member of your charity).
- **Prospect:** the name of the contact (individual, organization) in the DMS who you are prospecting. You can also add a new Contact by selecting one of the 'new' icons.
- **Opportunity Type:** if the Opportunity is a grant, donation cultivation or another project. You can also

add new **Types** by selecting the “gear icon” under the field.

- **Opportunity Status:** the stage the Opportunity is (e.g., Discovery, In Progress, Submitted). You can also add new **Statuses** by selecting the “gear icon” under the field.
- **Probability:** the likelihood (low, medium, high) of closing the Opportunity.
- **Opportunity Amount:** the monetary amount requested for the Opportunity.
- **Amount Received:** the monetary amount received for the Opportunity (if approved)
- **Application Deadline:** (if applicable) the date on which the application for the Opportunity is due.
- **Application Submitted:** (if applicable) has an application for the Opportunity been submitted- yes/no.
- **Decision Date:** the date on which the Opportunity will be decided (approved, denied, yes/no etc.).
- **Report Due:** the date on which the Opportunity Report is due.
- **Notes:** optional notes for the Opportunity.

4. The Opportunity will then be added and you will be directed to the Applicant’s Opportunities section under their Contact Profile

The screenshot shows the Wellness Avenue interface. The top navigation bar includes Dashboard, Contacts, Contributions, Campaigns, Opportunities (highlighted), Reports, and DMS Mail. A user menu shows Settings and Help. Below the navigation, the contact name 'Amadu A' is displayed with 'Actions' and 'Edit' buttons. A breadcrumb trail shows Summary, Contributions 6, Activities 19, Relationships 0, Groups 4, Notes 0, Tags 1, and Opportunities 1 (highlighted with a red box). A message states: 'This page lists all opportunities for Amadu A since inception. Click Add Opportunity to record a Opportunity for this contact.' Below this is an 'Add Opportunity' button. A table lists the following opportunity:

Opportunity Name	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
Youth donation 5k	A Amadu	Discovery	Donation		\$5,000.00	\$5,000.00	

At the bottom, a breadcrumb trail reads 'Contact profile > Opportunities'.

5. You can also select the name of the Opportunity to access its details anytime

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Search by contact name or email

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 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	

Select the Opportunity Name to see its details

Modifying a Single Opportunity

1. Go to the **Opportunities** Tab
2. Search for the Opportunity you wish to modify and select its **Opportunity Name** to see more details

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

Search by contact name or email

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 Amount	Amount Received	Opportunity Report Due
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<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	

Select the Opportunity Name to see its details

3. On the Opportunity details page, select **Edit** on the top right corner of the screen

View Opportunity

[Edit](#)

[Cancel](#)

Application Submitted	Yes
Probability	High
Opportunity Name	Youth donation 5k
Opportunity Owner	
Prospect	Amadu A
Opportunity Type	Donation
Opportunity Status	Discovery
Opportunity Amount	\$5,000.00
Amount Received	\$5,000.00
Application Deadline	
Opportunity Decision Date	
Opportunity Report Due	
Notes	Youth Program

[Delete](#)



Select **Edit** in the top right corner

4. On the next page, you can make any edits to your **Opportunity** as needed, and **Save**.

Edit Opportunity

Save

Save and New

Cancel

PROSPECT

A Amadu

OPPORTUNITY NAME *

Youth donation 5k

OPPORTUNITY OWNER

Select contact

OPPORTUNITY TYPE *

Donation

OPPORTUNITY STATUS *

Approved

PROBABILITY

High

OPPORTUNITY AMOUNT *

5,000.00

APPLICATION DEADLINE

12/01/2022

APPLICATION SUBMITTED

Yes No

DECISION DATE

03/01/2023

Date on which the opportunity decision was finalized.

REPORT DUE

AMOUNT RECEIVED

5,000.00

NOTES

To put towards our after-school programming.

Save

Save and New

Cancel

Example edits of the Opportunity fields

Note: To change the Prospect, you would need to create a new Opportunity at this time.