

Exporting, Printing & Deleting Opportunities

Last Modified on 03/01/2023 3:33 pm EST

Donor Management System

After adding an Opportunity, you can easily export, print and delete it.

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Exporting Opportunities

1. Go to the **Opportunities Tab**
2. Search for a specific Opportunity or select either:
 1. **The specific Opportunities** you wish to export,
 2. Every listed Opportunity **on the page**, or
 3. **All Opportunities** in your search criteria

The screenshot shows the 'Opportunities' tab in the Donor Management System. The interface includes a search bar, a table of opportunities, and an 'Actions' menu. A red circle highlights the 'Actions' menu, and a red circle highlights the 'Add Opportunity' button. A red circle highlights the '3 Selected Records Only' radio button. A red circle highlights the 'Possible In Kind Donation of Old Computer' row. A red circle highlights the 'Renewal' row. A red circle highlights the 'Add Opportunity' button.

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		
<input checked="" 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 checked="" 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		

3. Select the **Actions** menu at the upper-left side and then **Export opportunities**

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▼ Edit Search Criteria

Actions ▾ 22 Selected Records Only All 22 Records ➕ Add Opportunity

	Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
<input type="checkbox"/>	A Amadu	Approved	Donation	December 1st, 2022	\$5,000.00	\$5,000.00	
<input checked="" type="checkbox"/>	A. L. Kostenko	In Progress	Gifts In Kind		\$250.00		
<input checked="" type="checkbox"/>	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
<input checked="" type="checkbox"/>	Accessibility Foundation	In Progress	Grant		\$50,000.00		
<input checked="" type="checkbox"/>	Accessibility Foundation	Follow up required	Pledge		\$10,000.00	\$5,000.00	

Select Actions > Export opportunities

4. On the next page, you can choose to **export primary fields** (i.e., those on the main Opportunities page), or pick and choose your fields for export.

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Export PRIMARY fields provides the most commonly used data values. This includes primary address information, preferred phone and email. Click **Select fields for export** and then **Continue** to choose a subset of fields for export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

✓ 1. Find Opportunities > **2. Export Options** > 3. Select Fields to Export

3 records selected for export.

Export PRIMARY fields
 Select fields for export

Continue Cancel

Confirm by selecting Export

5. Your selected Opportunities will then be **exported as a .csv file** (open with Excel or Google Sheets).

Printing Opportunities

1. Go to the **Opportunities Tab**

2. Search for a specific Opportunity, or select either:

1. **The specific Opportunities** you wish to print,
2. Every listed Opportunity **on the page**, or
3. **All Opportunities** in your search criteria

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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		
<input checked="" 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 checked="" 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, 2023	\$5,000.00		

Select your desired Opportunities

3. Select the **Actions** menu at the upper-left side and then **Print selected rows**

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▼ Edit Search Criteria

Actions ▾ 22 Selected Records Only All 22 Records [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"/>		A Amadu	Approved	Donation	December 1st, 2022	\$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 checked="" type="checkbox"/>	Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
<input checked="" type="checkbox"/>	Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00		
<input checked="" type="checkbox"/>	Pledge 2023	Accessibility Foundation	Follow up required	Pledge		\$10,000.00	\$5,000.00	

Select Actions > Print selected rows

4. On the next page, you will be able to print the information of the selected Opportunities using your web browser.

3/1/23, 3:18 PM Printer-Friendly View | CanadaHelps DMS

Name	Status	Type	Amount Requested	Amount Requested(orig. currency)	Amount to be given	Application Received	Money Transferred
A Amadu	Approved	Donation	\$5,000.00		\$5,000.00	December 1st, 2022	
A. L. Kostenko	In Progress	Gifts In Kind	\$250.00				
Accessibility Foundation	In Progress	Grant	\$250,000.00		\$100,000.00	December 30th, 2022	
Accessibility Foundation	In Progress	Grant	\$50,000.00				
Accessibility Foundation	Follow up required	Pledge	\$10,000.00		\$5,000.00		
Alex Fergie	In Progress	Gifts In Kind	\$25,000.00				
Alex Fergie	Submitted	Grant	\$15,000.00			September 1st, 2022	
Anderson Ada	Follow up required	Grant	\$5,000.00			September 12th, 2022	
Bernadette Love	In Progress	Grant	\$5,000.00			January 28th, 2022	
Digital Angela	In Progress	Other	\$2,500.00				
Edmonton Fund Grant	Discovery	Grant	\$15,000.00			May 27th, 2022	
Fred Jones	Submitted	Donation	\$50,000.00				
Government of British Columbia	In Progress	Grant	\$25,000.00			December 16th, 2022	
Government of British Columbia	In Progress	Grant	\$50,000.00			March 15th, 2023	
Lucas Froese	In Progress	Donation	\$10,000.00				
Lucas Froese	Follow up required	Pledge	\$10,000.00			January 31st, 2025	

Discovery Gifts In Kind \$1,200.00

Print 2 sheets of paper

Destination SHARP MX-3070N PCI

Pages All

Copies 1

Layout Portrait

Color Black and white

More settings

Print Cancel

Print preview

Deleting Opportunities

1. Visit the **Opportunities** Tab

2. To delete a single Opportunity, find the Opportunity you wish to delete and select its name

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Search by contact name or email

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 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

3. When viewing the Opportunity, scroll down the page and select **Delete**

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View Opportunity

Edit Cancel

Application Submitted	Yes
Probability	High
Opportunity Name	Youth donation 5k
Opportunity Owner	
Prospect	Amadu A
Opportunity Type	Donation
Opportunity Status	Approved
Opportunity Amount	\$5,000.00
Amount Received	\$5,000.00
Application Deadline	December 1st, 2022
Opportunity Decision Date	March 1st, 2023
Opportunity Report Due	
Notes	To put towards our after-school programming.

Delete

Scroll down and select *Delete*

4. On the next page, you will have to **confirm you want to delete** this Opportunity by selecting **Delete**

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Are you sure you want to delete this Opportunity? This action cannot be undone.

Delete Opportunity

Delete Cancel

Confirm by selecting *Delete*

5. To delete multiple Opportunities simultaneously, select either:

1. **The specific Opportunities** you wish to print,
2. Every listed Opportunity **on the page**, or
3. **All Opportunities** in your search criteria

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

Actions ▾ 3 Selected Records Only All 22 Records All Opportunities ▾

<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		
<input checked="" 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 checked="" 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, 2023	\$5,000.00		

Select your desired Opportunities

6. From the **Actions** menu, select **Delete Opportunities**

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

Actions ▾ 3 Selected Records Only All 22 Records All Opportunities ▾

- 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	Approved	Donation	December 1st, 2022	\$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 checked="" type="checkbox"/>	Accessibility Grant	Accessibility Foundation	In Progress	Grant	December 30th, 2022	\$250,000.00	\$100,000.00	March 31st, 2023
<input checked="" type="checkbox"/>	Head Office Grant 2022	Accessibility Foundation	In Progress	Grant		\$50,000.00		
<input checked="" 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		

Delete multiple Opportunities

7. On the next page, confirm that you wish to delete these Opportunities by selecting **Delete Opportunities**

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Are you sure you want to delete the selected Opportunities? This delete operation cannot be undone and will delete all transactions associated with these opportunities.
Number of selected opportunities: 3

Confirm multiple Opportunity deletion

8. The **Opportunities** selected will then be deleted permanently, and you'll be directed back to the main Opportunities Tab.