

Gift Opportunities Catalog

Purpose of the application:

The online Gift Opportunities Catalog is a tool for Gift Officers to find opportunities they can use to create proposals in Advance for their prospects. Donor Relations Officers and Gift Officers to access the approved descriptions for each opportunity to use in conversations with donors.

In future releases, the catalog will connect to Advance, providing:

- a list of current commitments for each opportunity to know what portion of the opportunity has been funded
- provide a list of proposals already tagged for the opportunity to know what proposals exist for the opportunity

The Gift Opportunities will also be used in providing some donor facing opportunities to participate in funding through group funding.

Using the Application

There are several ways to search the Gift Opportunities Catalog to find opportunities that might be a good match for a prospect.

- Theme, Initiative and Purpose
 - o Theme: the broadest campaign category available to identify initiatives and purposes
 - o Initiative (*Program* in Advance): a broad campaign category used to narrow down the amount of purposes
 - o Purpose: campaign purpose available for a prospect to give
- Amounts: identifies which purposes are in the select range
- Search: used to search themes, initiative, purpose and descriptions to identify giving opportunities
- Keywords: tags used to quickly identify purposes with the keywords selected

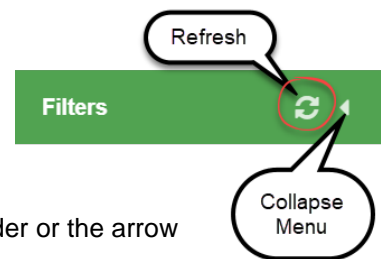
Filters

The filters can be used together or on their own.

To remove a single selection, click the **X** in any box.

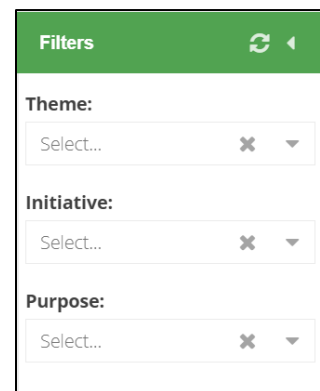
To remove all selections, click Refresh

To collapse the filter menu, click the left pointing arrow on the Filters header or the arrow to the right of the Filter menu.




Theme, Initiative and Purpose Opportunities

Using the Filter menu, narrow down available opportunities by clicking in the box under Theme, Initiative or Purpose. Start broad by selecting a Theme, then narrow it down further by selecting an Initiative and/or a Purpose. The Initiative and Purpose will be filtered to only show the ones under the previous selected filter for Theme or Initiative.



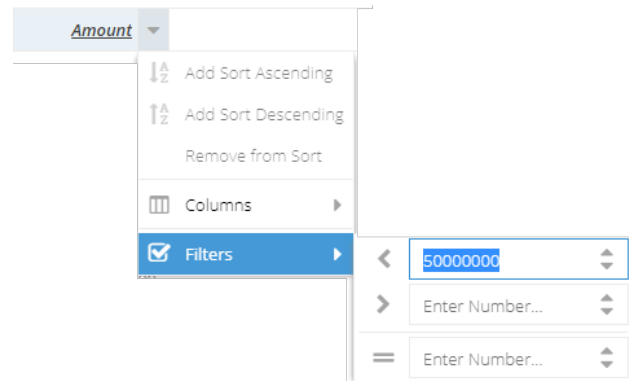
Search Box

To search by using the search box type a keyword in the box, then click the magnifying glass  icon.



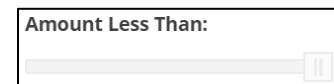
Find Purpose Based on Amount

1. Scroll over the Amount, then click the arrow.
2. Scroll over Filters then enter the values in the boxes to the right.
3. To filter on a range, enter amounts in both the greater than and the less than fields.



Find Purpose Based on Amount Less Than Slider

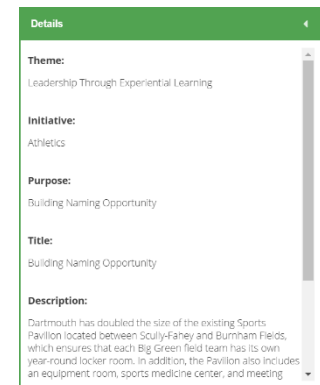
The Amount Less Than slider will show all purposes listed under the select amount. To use the slider, click the slider and move to the amount wanted.



Details

The Details section displays all the information about a selected purpose, including:

- Theme
- Initiative
- Purpose
- Title
- Description
- Amount
- Goal Note
- Keywords



Expand/Collapse All

To see a full list of all the Themes, Initiatives and Purposes, click . To minimize them all, click .

Export

Purposes filtered can be exported using a CSV file. Click CSV Export at the bottom of the screen.



Feedback

To help improve the Online Gift Catalog or report a problem, click the feedback



button.