

FUNDING OPPORTUNITIES

Module: Fundraising

➤ Search for funding

- ✓ Select module: **Fundraising > Funding opportunities**
- ✓ Define your search criteria by the dropdown menus and click **Search**
- ✓ Click **Reset** to clear the search
- ✓ Click the **Export** tab at the top to export funding opportunities to Excel or PDF
- ✓ Select funding opportunities by check boxes to the right and click **Excel (selected)** or **PDF (selected)**

➤ Schedule the application activities (up to 3 years)

- ✓ Select module: **Fundraising > Funding lists**
- ✓ Click **+New**
- ✓ Name the list and click **Save**
- ✓ Select module: **Fundraising > Funding opportunities**
- ✓ Define your search criteria and click **Search**
- ✓ Select funding opportunities by check boxes to the right
- ✓ Select the **Funding lists** tab at the top
- ✓ Click the **Funding lists** search field and add one or more Funding lists
- ✓ Click **Add selected opportunities to list(s)**
- ✓ Select module: **Fundraising > Funding lists**
- ✓ Select funding lists by check boxes to the right and the funding plan will be shown in a Gantt chart (in the **View options** tab at the top you can change number of months in the Gantt chart and click **Save**)
- ✓ Select the **Export** tab at the top and click **PDF (Gantt)** to export the chart to PDF

➤ Strategic fundraising

- ✓ Select module: **Fundraising > Funding strategies**
- ✓ Click **+New**
- ✓ Name the strategy and select funding lists to be added, then click **Save**
- ✓ Select funding strategies by check boxes to the right and the strategy will be shown as cards in a quarterly chart (in the **View options** tab at the top you can change number of quarters in the chart and click **Save**)
- ✓ Select the **Export** tab at the top and click **PDF (Cards)** to export the strategy to PDF