



Opportunity Details Menu Updates

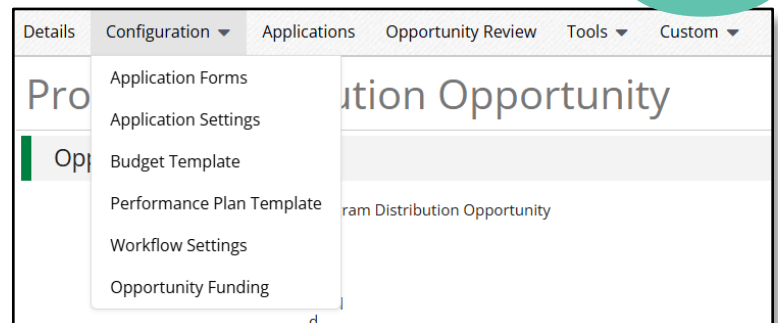
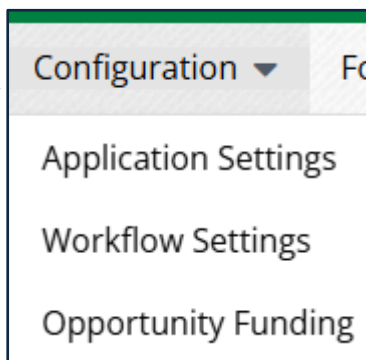
With this enhancement, you'll experience easier navigation and configuration of Opportunity Details. The new layout allows Funders to access the various components of an opportunity in simplified sub-tabs, making for a more streamlined and improved user experience.

Key Changes

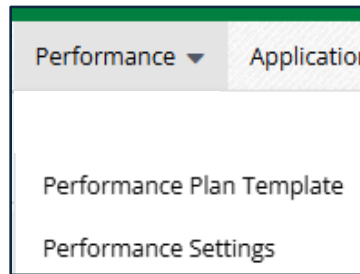
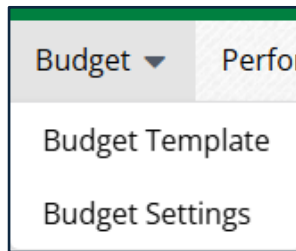
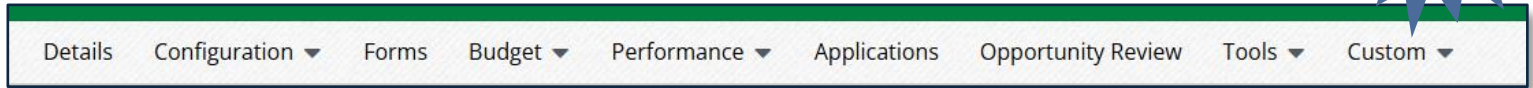
- Application Forms, Budget Template, and Performance Template originally housed under Configuration Tab are now accessible under the Opportunity Details Menu.
- Budget and Performance Template sub-tabs show on the main menu, providing quicker access to their templates and settings.
- Application Forms sub-tab is now its own main tab called Forms.



Simplified Configuration Tab



New Budget and Performance Tabs



Budget and **Performance** are created into new tabs on the menu, providing quicker access to their templates and settings.

The **Details**, **Applications**, **Opportunity Review**, **Tools**, and **Custom** tabs and their drop-down options will remain the same. Application Forms is now **Forms**.

Application Configuration Changes



Old

Application Configuration

Applicant Budget Template Required

Budget Categories Created By Applicant Allowed

Applicant Performance Plan Template Required

Make Budget Narrative Required on Line Items

test opp 1 – Budget Settings

Application Configuration

Show Budget ☒

Applicants Can Propose Categories ☒

Budget Required ☒

Budget Narratives Required ☒

test opp 1 – Performance Settings

Application Configuration

Show Performance Plan ☒

Applicants Can Propose Strategies ☒

Performance Plan Required ☒

The **Application Configuration** section under Configuration > Applications Settings has been moved under the respective **Budget** and **Performance** tabs for easier accessibility. Additional configuration options can be configured using clickable check boxes.

For further assistance, reach out to your Customer Success Rep.