Checklist: Reviewing Exchange Submissions

Programs Checklist

- ❑ Start by selecting **View** (not Edit) in drop-down menu – this is an easy way to determine
  - ❑ if a map is displaying
  - ❑ if there is a logo and if it is too big
  - ❑ if any of the fields are missing information
  - ❑ most importantly, if it will need to be declined. (NOTE: That is done from admin program listing screen)
- ❑ Click the website and social media links – working and appropriate?
- ❑ Click the Send Email link – opens email with a valid address?
- ❑ Click any links in the description – working, open in new window, and appropriate?
- ❑ If logo is missing or needs to be edited, find/save.
- ❑ Scan description and compare it against program focus – any changes needed?
- ❑ Click **< Previous** to go back to Admin Screen and click **Set as Draft** in drop-down menu.
- ❑ Click **View** to double-check your changes. (If fixes needed, edit the record again.)
- ❑ Click **< Previous** to go back to Admin Screen and click **Active** in drop-down menu.
- ❑ **Edit** in drop-down menu.
  - ❑ Fix/add website social media links.
  - ❑ Open Contact Information, review address, and if needed, edit and select drop-down (Google API – pulls coordinates for geomapping)
  - ❑ Proof and edit description, removing any bold or other formatting by using Notepad (or other text editor) to copy-paste twice. Add hyperlinks to URLs, if needed.
- ❑ Click **< Previous** to go back to admin listings and click **Set as Draft** in drop-down menu.
- ❑ Click **View** to double-check your changes. (If fixes needed, edit the record again.)
- ❑ Click **< Previous** to go back to admin listings and click **Active** in drop-down menu.

Opportunities Checklist

- ❑ Start by selecting **View** (not Edit) in drop-down menu – this is an easy way to determine
  - ❑ if a map is displaying
  - ❑ if there is a logo and if it is too big (NOTE: Fixes made on program record)
  - ❑ if any of the fields are missing information
  - ❑ if there is a program attached to the opportunity
  - ❑ most importantly, if it will need to be declined. (NOTE: That is done from admin opportunity listing screen)
- ❑ Click the website and social media links – working and appropriate? (NOTE: Fixes made on program record)
- ❑ Click the Send Email link – opens email with a valid address? (NOTE: Fixes made on program record)
- ❑ Is logo is missing or needs to be edited? (NOTE: Fixes made on program record)
- ❑ Click any links in the description – working, open in new window, and appropriate?
- ❑ Scan description and compare it against Ages, Opportunity Focus, Cost, Type of Opportunity, and Special Attention fields – any changes needed?
- ❑ Click **< Previous** to go back to Admin Screen and click **Edit** in drop-down menu.
  - ❑ Open Location, review address, and if needed, edit and select drop-down (Google API – pulls coordinates for geomapping).
  - ❑ Open Time and Cost.
    - ❑ Add if known and user didn't.
    - ❑ If added by user, make sure End Date is entered (and End Time, if available).
    - ❑ Make Cost edit, if needed.
  - ❑ Open Opportunity Focus and make any needed edits.
  - ❑ Open Age and make any needed edits.
  - ❑ Open Attention and make any needed edits.
  - ❑ Proof and edit description, removing any bold or other formatting by using Notepad (or other text editor) to copy-paste twice. Add hyperlinks to URLs, if needed.
- ❑ Click **< Previous** to go back to admin listings and click **Set as Draft** in drop-down menu.
- ❑ Click **View** to double-check your changes. (If fixes needed, edit the record again.)
- ❑ Click **< Previous** to go back to admin listings and click **Active** in drop-down menu.
- ❑ When done approving opportunities, check listings on your site. NOTE: Clear out the location box and confirm that the entries you just approved are 1) showing up and 2) have the correct icon and other card information (if used by your site).