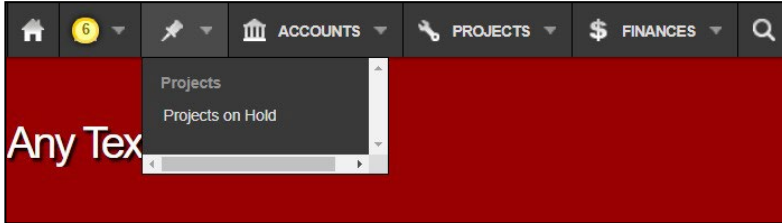


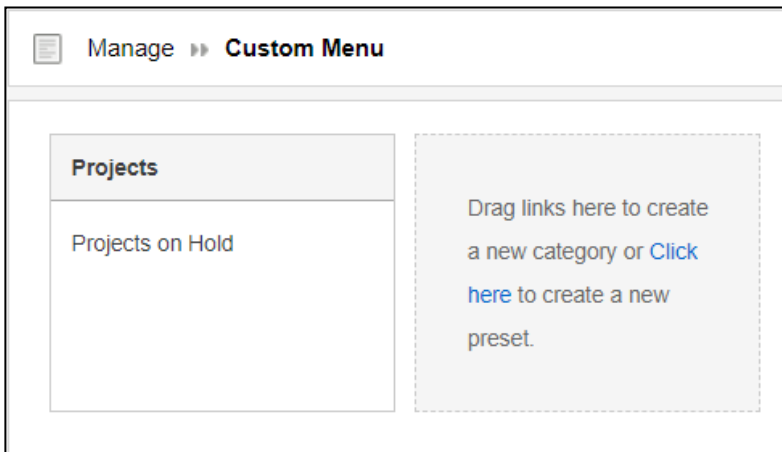
Create a Preset or Custom Menu

A **Preset** is a link to a listing with a saved set of filters.

View Saved Presets



Custom Menu View



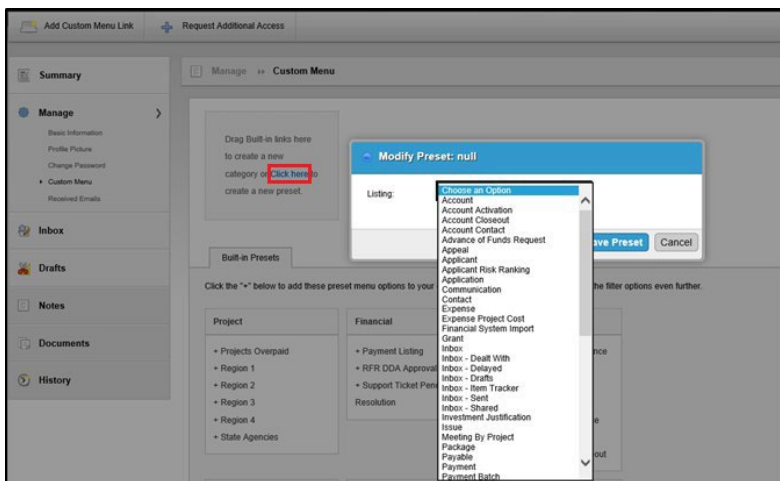
There are three ways to create new presets:

Method 1:

1. Navigate to the Custom Menu page found by clicking the **Saved Presets** (thumbtack) on the **Menu Bar**, and then **“Click here to create one”** link. Alternatively, if presets have already been created, click **“Customize this menu.”** This will display the same **Custom Menu** page. In order for the **“Customize this menu”** to appear, hover inside the menu content area (red square shown below).



2. At the Custom Menu page, click on the **“Click here”** link in the presets section. Select an item from the listing drop down menu.



3. A window will display with required fields. Enter the **“Preset Name”** (create a name for the preset). Select **“Category”** from the drop down menu. The only option is **“+ Add New Category”** (if this is the very first preset being created). Another red box will display to enter the **“New Category Name.”** The number of desired results per page can be selected from the drop down menu. Check the boxes for the desired filter options, and then click the **“Save Preset”** button.

Modify Preset: null

Basic Information

Preset Name:
This will be the name of the link in your menu.

Listing:

Other Information

Category:

New Category Name:

Results Per Page:

Filter Options:

Grant / Applicant

Program

Grant

Open

- 1999 (PA) Wildfires
- 4029 (PA) Wildfires
- 9999 (PA) Public Assistance Tech

County

Project

Type

Hazard Mitigation Grant Prog

Public Information (I) - Industry

Planning Other (P) - Planning

Public Assistance

A - Emergency Protective Mea

B - Emergency Protective Mea

C - Roads and Bridges

D - Water Control Facilities

Size

Other

Step

Submitted Date

Is in My Queue(s)

Custom

Amount

Type

4. A green check mark **Preset Saved** will appear briefly. This page has now been saved to the **Saved Presets/Custom Menu**.

Login as this User | Back to Contact Admin | Add Custom Menu Link

Preset Saved

Summary

Manage

- Basic Information
- Profile Picture
- Permissions
- Assignments
- Custom Menu
- Received Emails

Manage **Custom Menu**

Funding

9999 PA - AFR Type A

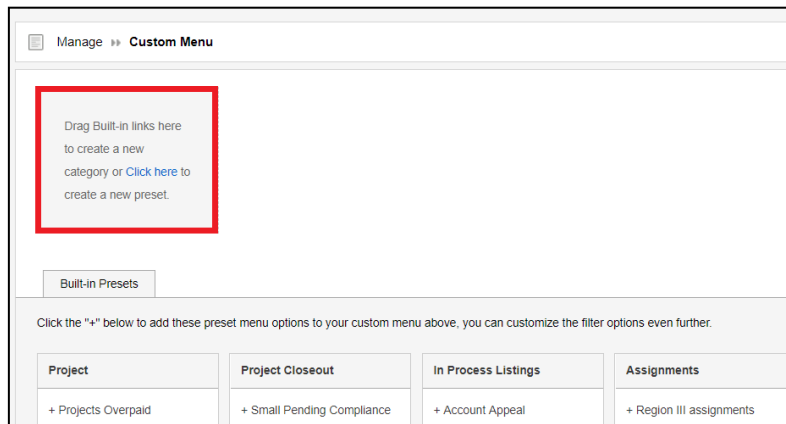
Drag links here to create a new category or [Click here](#) to create a new preset.

Method 2:

1. Navigate to the Custom Menu page found by clicking the **Saved Presets** (thumbtack) on the **Menu Bar**, and then **“Click here to create one”** link. Alternatively, if presets have already been created, click **“Customize this menu.”** This will display the same **Custom Menu** page. In order for the **“Customize this menu”** to appear, hover inside the menu content area (red square shown below).

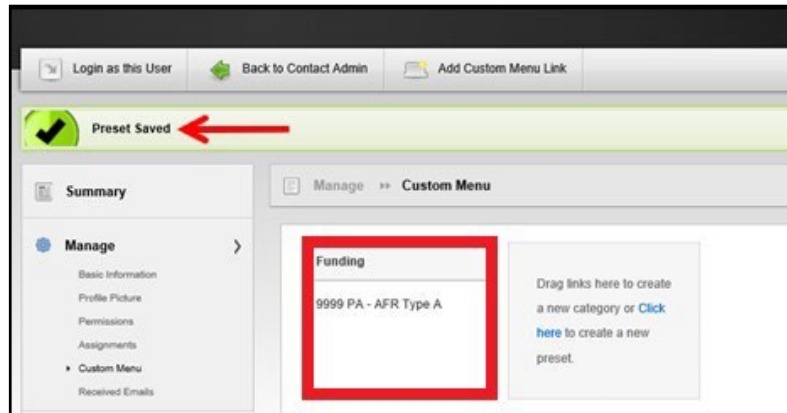


2. Built-In Presets can be added by selecting an option from the **“Built-in Presets”** section below the preset area (red square shown below). If you click on the plus signs next to the built-in presets, it will display a window to further customize the **Built-in Preset**.



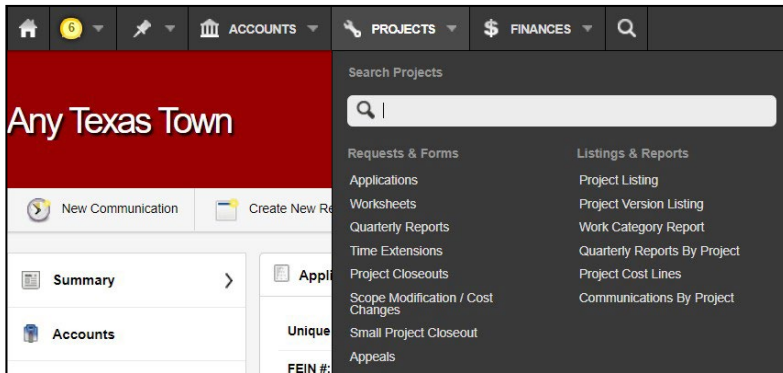
3. A window will display with the required fields. The **“Preset Name”** will carry over from the Built-In Preset, but can be revised to better fit the user’s need. Select **“Category”** from the drop down menu. The number of desired results per page can be selected from the drop down menu. Check the boxes for the desired filter options, and then click the **“Save Preset”** button.

4. A green check mark **Preset Saved** will appear briefly. This page has now been saved to the **Saved Presets/Custom Menu**.



Method 3:

1. Select one of the navigation tabs (**Accounts, Projects, or Finances**), and generate the desired listing or report.



2. Once the desired list is created, click on the **“Save as Menu Preset”** button on the Action Bar.

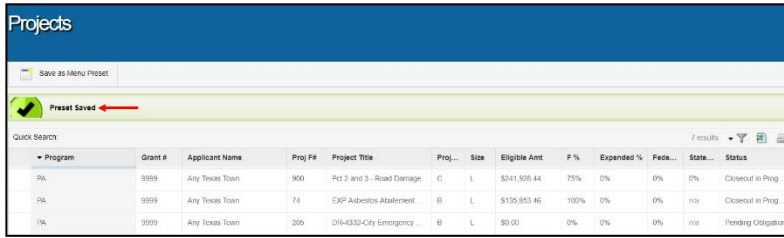
The screenshot shows a table titled 'Projects' with a search bar and a 'Save as Menu Preset' button highlighted in a red box. The table has columns for Program, Grant #, Applicant Name, Proj #, Project Title, Proj... (Project), Size, Eligible Amt, F %, Expended %, Fece... (Fiscal Year), State..., and Status. The table contains several rows of project data.

Program	Grant #	Applicant Name	Proj #	Project Title	Proj...	Size	Eligible Amt	F %	Expended %	Fece...	State...	Status
PA	9999	Any Texas Town	900	Rd 2 and 3 - Road Damage	C	L	\$241,526.44	75%	0%	0%	0%	Closed in Prog.
PA	9999	Any Texas Town	74	EXP Asbestos Abatement ...	B	L	\$125,853.46	100%	0%	0%	n/a	Closed in Prog.
PA	9999	Any Texas Town	205	DR-4332-City Emergency ...	B	L	\$0.00	0%	0%	0%	n/a	Pending Obligation
PA	9999	Any Texas Town	126	Emergency Protective Mea...	B	L	\$0.00	0%	0%	0%	n/a	Pending Obligation
PA	9999	Any Texas Town	75	EXP Asbestos Abatement ...	B	L	\$0.00	0%	0%	0%	n/a	Pending Obligation
PA	9999	Any Texas Town	490	Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Pending Obligation
PA	9999	Any Texas Town	11	Test	E	L	\$0.00	0%	0%	0%	n/a	Pending Obligation
							\$377,781.90					

3. The **Create Preset from Listing** window will appear. To build the preset, enter the **“Preset Name,”** select **“+ Add New Category,”** or select an existing category from the drop down menu. If selecting **“+ Add New Category,”** enter the **“New Category Name,”** select the number of results to be displayed per page, and apply the desired filters. Click the **“Save Preset”** button to save the Preset.

The screenshot shows the 'Create Preset from Listing' dialog box. It has two main sections: 'Basic Information' and 'Other Information'. In 'Basic Information', 'Preset Name' is 'Projects on Hold', 'Listing' is 'Project', and 'Results Per Page' is '25'. In 'Other Information', 'Category' is '+ Add New Category' and 'New Category Name' is 'Projects'. Below these are 'Filter Options' for 'Grant / Applicant', 'Project', 'General', and 'Custom'. The 'Project' filter is expanded, showing options like 'Type', 'Size', and 'Obligated'. The 'General' filter has 'On Hold' checked. At the bottom right, there are 'Save Preset' and 'Cancel' buttons.

4. A green check mark “**Preset Saved**” will appear briefly. This page has now been saved to the **Saved Presets/Custom Menu**.



The screenshot shows a web interface titled "Projects". At the top, there is a "Save as Menu Preset" button. Below it, a green checkmark icon and the text "Preset Saved" with a red arrow pointing left are displayed. Underneath, there is a "Quick Search" section with a dropdown menu showing "7 results". The main content is a table with the following columns: Program, Grant #, Applicant Name, Proj #, Project Title, Proj... (likely Proj. Code), Size, Eligible Amt, P %, Expended %, Fede... (likely Federal), State..., and Status.

Program	Grant #	Applicant Name	Proj #	Project Title	Proj...	Size	Eligible Amt	P %	Expended %	Fede...	State...	Status
PA	9999	Any Texas Town	900	Pct 2 and 3 - Road Damage	C	L	\$241,938.44	70%	0%	0%	0%	Closed in Prog.
PA	9999	Any Texas Town	74	EXP Asbestos Abatement ...	B	L	\$135,853.46	100%	0%	0%	n/a	Closed in Prog.
PA	9999	Any Texas Town	205	Dit-4332-City Emergency ...	B	L	\$0.00	0%	0%	0%	n/a	Pending Obligation