Corporate & Foundation Fundraising Guide

03/21/2013 Blackbaud CRM 3.0 Corporate & Foundation Fundraising US

Corporate&FoundationFundraising-2013

Contents

Grants Configuration

Before you can manage information about grants and grant requests, we recommend you set up configuration options. From *Foundations*, you can access these options under **Configuration**.

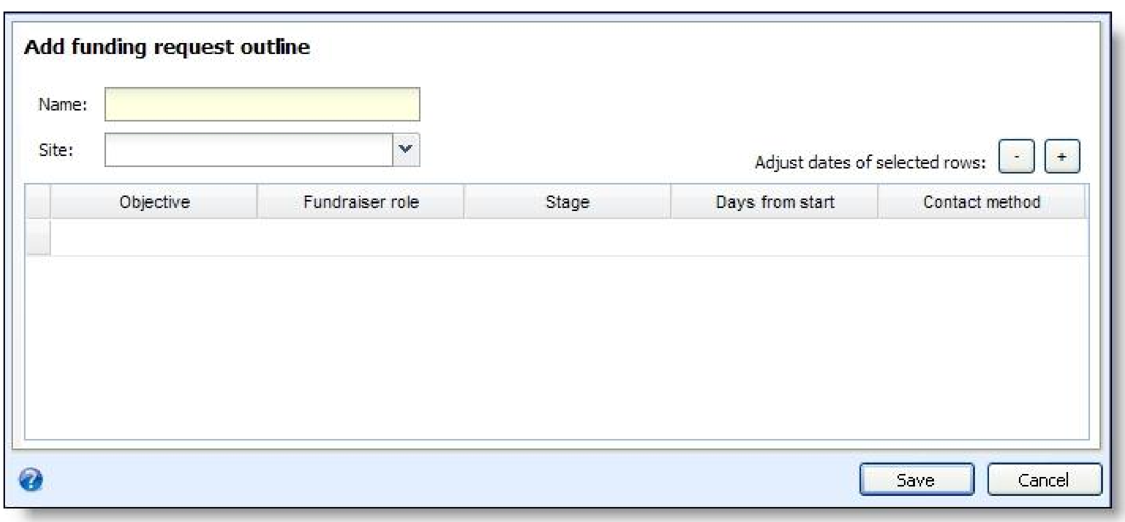
You use configuration options to set up *Foundations* for your users. For example, you can define plan outlines and the default credit rules you want available for your *Foundations* users.

Funding Request Outlines

Before you add a funding request to a funding plan, you can create request outlines. These outlines include basic steps such as meetings or phone calls that fundraisers or solicitors perform as part of the grant proposal process. With an outline, you can add multiple, related steps to a funding request at one time. After you add outline steps to a funding request, you can edit these steps, add new steps, or manually create steps as requirements change. For each outline, you can view the name, the number of stages included in the outline, and the number of steps.

Add a funding request outline

1. From *Foundations*, click **Funding request outlines** under **Configuration**. The Funding Request Outlines page appears.
2. Under **Funding request outlines**, click **Add** on the action bar. The Add funding request outline screen appears.



3. In the **Name** field, enter a unique name to help identify the request outline.

4. To restrict the use of the outline to a specific site at your organization, in the **Site** field, select the site to use the outline.
5. In the grid, enter the steps of the outline.
   a. In the **Objective** column, enter the purpose of each step.
   b. In the **Fundraiser role** column, select which fundraiser role performs each step.
   c. In the **Stage** column, enter the stage of the request process during which to perform each step.
   d. In the **Days from start** column, enter the number of days after the start date for each step to occur. The start date is the day you add the template step to a funding request.
   e. In the **Contact method** column, enter the type of contact required for each step.
6. Click **Save**. You return to the Funding Request Outlines page.

Add a Funding Request Outline Screen

The table below describes the items on the Add funding request outline screen. For information about how to access this screen, see Funding Request Outlines on page 1.

Screen Item	Description
Name	Enter a unique name to help identify the request outline.
Site	To restrict use of the outline to a specific site at your organization, select the site to use the outline.
Objective	Enter the purpose for each step of the outline.
Fundraiser role	Assign each step to a specific fundraiser role such as Funding plan manager, Primary manager, or Secondary manager. When you add the outline to a funding request, the name of the individual who acts within the role appears. If no fundraiser is assigned to the selected role, the column remains blank.
Stage	Enter the stage of the request process at which each step occurs.
Days from start	Enter the number of days after the start date for each step to occur. The start date is the date you add the outline to a funding request. For example, to have the funding plan manager submit a proposal two weeks after you add a step to a funding request, enter 14 for the step. The program calculates the calendar date for the step to occur based on the date you add the step to the request and the number of days entered here.
Contact method	Enter the type of contact required for each step.

Edit Funding Request Outlines

Before you add an outline to a funding request, you can edit the steps in the outline. Any changes you make do not affect the outline steps previously added to the request.

Edit a funding request outline

1. From *Foundations*, click **Funding request outlines** under **Configuration**. The Funding Request Outlines page appears.
2. Under **Funding request outlines**, select the outline to edit and click **Edit**. The Edit a funding request outline screen appears.

3. Edit the information as necessary. The items on this screen are the same as the Add funding request outline screen. For information about the items on this screen, see Add a Funding Request Outline Screen on page 2.
4. Click **Save**. You return to the Funding Request Outlines page.

Delete Funding Request Outlines

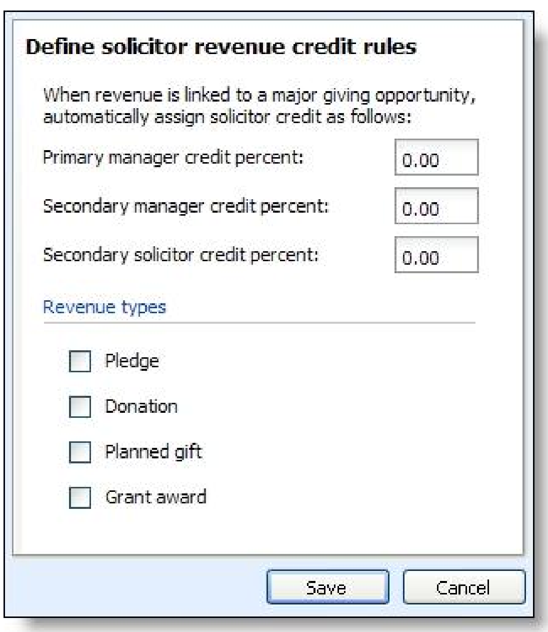
You can permanently remove a funding request outline you no longer need. When you delete an outline, any outline steps you previously added to a funding request remain on the request. From the Funding Request Outlines page, select the outline to remove and click **Delete** on the action bar. When a message appears to ask whether to delete the outline, click **Yes**.

Solicitor Revenue Credit

When you create a funding request on a funding plan, you can assign solicitors to the request to perform various steps you define for the request. After the grantor submits a grant award, you can credit the plan's solicitors for the revenue you receive. To simplify this process, you can define default credit rules for plan solicitors. When you apply revenue to the grant award, solicitors linked to the associated funding request automatically receive credit based on the credit rules you create. On the Credit Rules Setup page, you can view and manage the default credit rules for plan solicitors. To access this page from *Foundations*, click **Credit rules setup** under **Configuration**.

▸ **Edit solicitor revenue credit rules**

1. From *Foundations*, click **Credit rules setup** under **Configuration**. The Credit Rules Setup page appears.
2. Under **Solicitor revenue credit rules**, click **Edit** on the action bar. The Define solicitor revenue credit rules screen appears.



3. Enter the credit amount, up to 100 percent, to automatically assign to the primary manager, secondary manager, and secondary solicitors assigned to a funding request.

4. Under **Revenue types**, select the types of revenue for which to credit solicitors.

   To credit solicitors for grant award revenue, select **Grant award**. When you enter a payment for a grant award and select the appropriate funding request commitment to apply the payment to, the program automatically credits the solicitors on the funding request for the revenue received based on the default credit rules you defined.

5. Click **Save**. You return to the Solicitor Credit Rules page.

Consolidate Grants and Major Giving

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. From *Prospects*, click **Major giving setup** under **Configuration**. From the Major Giving Setup page, click **Include grants in major giving management** under **Configuration**. When you apply this setting, grant activity appears in *Prospects*.

- On a fundraiser’s My fundraiser page, the steps assigned to the fundraiser on a funding request appear. From the Grants tab, individuals can view information about their fundraising activity related to grants.
- On the Major Giving Management – Prospects page, current grant activity appears under **Grants in Pipeline** on the Pipeline tab.
- On the Major Giving Management – Opportunities and Asks page, grant funding request information appears under **Funding request summary** on the Summary tab.

If you previously included grant activity but no longer want to have a consolidated view, click **Exclude grants from major giving management**.

Grants Management

From *Foundations*, you can match your organization's funding needs with active grant programs, track grant program deadlines and award information, and report on grant program activity.

Funding from Foundations

In *Foundations*, you can create records for organizations that fund grant programs and enter the grant programs your organization identifies as potential funding sources. When you identify a need for funding, you can create a funding plan that identifies an overall funding goal and enter each funding request your organization will pursue to meet this goal. For example, a university identifies a need for one million dollars in funding to support an Online Community Learning program. While fundraising efforts will account for a portion of the funding required, you have been asked to locate grant programs to cover half of the total cost. You can create a funding plan for Online Community Learning, then identify specific programs that require funds so that you can refine your search for grant programs for which the plan qualifies.

The next step is to create a funding request for each grant program with funding interests that match your funding needs. For example, if you create a funding plan to support medical research, you can link each funding request in the plan to a grant program that specifically supports this type of research. The funding request defines the details of the request and the steps required to complete the process. When you receive notification of a grant award, you can enter this information then apply revenue from each grant award payment to the corresponding grant award.

Grantors

A grantor is the organization that funds a grant program. To make an organization a grantor, you assign a Grantor constituency to the organization from **Add a grantor** in *Foundations*. To access the Grantor view of an organization, click **Grantor** under **View as** on the organization's constituent record. Although you can view the Grantor constituency from the Constituencies tab of the organization's constituent record, you cannot delete the constituency from this tab. You also cannot add the Grantor constituency to an organization from the constituent record. To manage grantors, you must access the grantor record from *Foundations*.

Grantor Search

To locate grantor records you previously created, from *Foundations*, click **Grantor search**. You can search for grantors by information such as name, lookup ID, address, or industry.

Add Grantors

To add a grantor, you assign a Grantor constituency to an organization record. Once you create a grantor, you can add the grant programs that the grantor funds.

Add a grantor

1. From *Foundations*, click **Add a grantor**. The Add a grantor screen appears.
2. Search for and select the organization constituent to make a grantor.
3. In the **Type** field, enter the type of grantor such as Corporation or Government.
4. In the **Contact** field, select a contact for this organization. Only individuals marked as contacts on the Relationships tab of the organization's constituent record appear.
5. Click **Save**. The Grantor page appears.

Add a Grantor Screen

For information about how to access this screen, see Add Grantors on page 6.

Screen Item	Description
Constituent	Search for and select the organization constituent to make a grantor.
Type	Enter the type of grantor, such as a Foundation or Trust.
Contact	Select a contact for the grantor. Only individuals added as contacts on the Relationships tab of the organization's constituent record appear in the list.

Non-Grantor Search

From the Add a grantor screen, you can search for an organization in your database you want to make a grantor. Enter criteria to narrow the search results and click **Search**.

Edit Grantors

After you add a grantor, you can edit its type and contact information as necessary.

Edit a grantor

1. Access the record of the grantor to edit.
2. Under **Tasks**, click **Edit grantor**. The Edit grantor screen appears.
3. Edit the grantor type or organization contact as necessary.
4. Click **Save**. You return to the grantor record.

Delete Grantors

From the record of a grantor, you can delete the grantor only if the grantor record has no grant programs with associated funding requests. When you delete a grantor, you remove the Grantor constituency from the organization's constituent record. To delete a grantor from its record, click **Delete grantor** under **Tasks**.

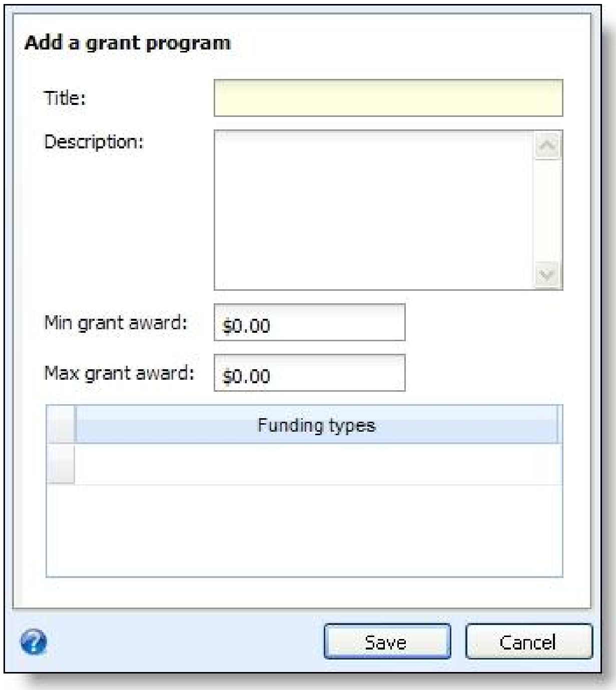
Add Grant Programs

From the record of a grantor, you can add the grant programs the grantor issues. When you add a grant program, you can enter its eligibility requirements, minimum and maximum award amounts, and the type of programs or projects it funds.

For information about how to manage grant programs, see Grant Program Record on page 9.

Add a grant program

1. Access the record of the grantor for which to add a grant program.
2. Under **Grant programs**, click **Add** on the action bar. The Add a grant program screen appears.



3. In the **Title** field, enter the name of the program.
4. In the **Description** field, enter a description to help identify the program.
5. In the **Min grant award** and **Max grant award** fields, enter the minimum and maximum award amounts you may receive from the program.
6. Under **Funding types**, select the funding interests associated with the program. For example, if the program funds projects related to education, select Education.
7. Click **Save**. You return to the grantor record.

Add a Grant Program Screen

The table below describes the items on the Add a grant program screen. For information about how to access this screen, see Add Grant Programs on page 7.

Screen Item	Description
Title	Enter the name of the program.
Description	Enter a description to help identify the grant program.
Min grant award	Enter the minimum award amount your organization may receive from the program.
Max grant award	Enter the maximum award amount your organization may receive from the program.
Funding types	Select the funding types associated with the program. Funding types indicate the program or project categories the grantor intends to fund with the grant award. For example, if a grantor awards the program to only projects that conduct medical research, select Medical and Research.

Edit Grant Programs

After you add a grant program, you can edit its information as necessary.

▸ **Edit a grant program**

1. Access the record of the grantor for which to edit a grant program.
2. Under **Grant programs**, select the program to edit.
3. On the action bar, click **Edit**. The Edit grant program screen appears. The items on this screen are the same as the Add a grant program screen. For information about the items on this screen, see Add a Grant Program Screen on page 8.
4. Edit the information as necessary.
5. Click **Save**. You return to the Grant program page.

Delete Grant Programs

After you add a grant program, you can delete it only when it is not linked to a funding request. From the record of the grantor, select the program under **Grant programs** and click **Delete** on the action bar. When a message appears to ask whether to delete the program, click **Yes**.

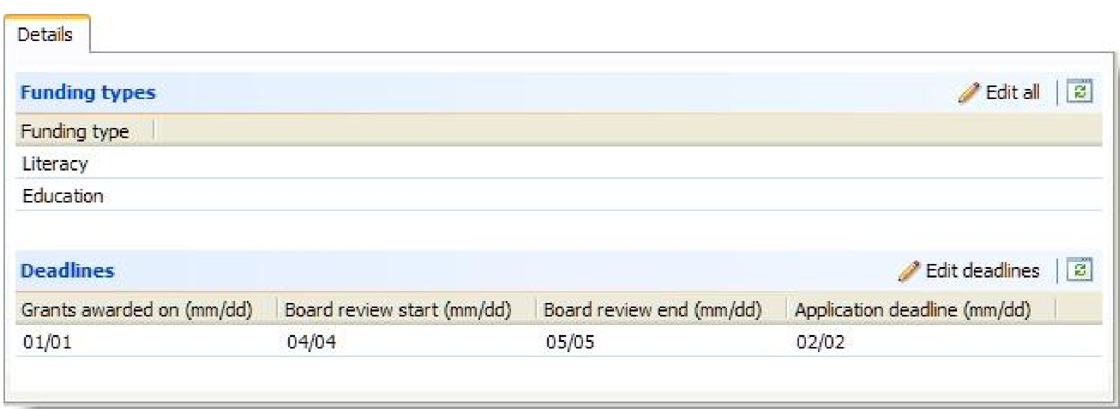
Grant Program Record

From the record of a grant program, you can view information about the program and any deadlines associated with the grant proposal and award. You can also view information about any grant requests and awards, if your organization received an award.

You access the record of a grant program from the record of the grantor that funds the program. Select the program under **Grant programs** and click **Go to grant program** on the action bar. To help you navigate through the information, the grant program record contains multiple tabs.

Grant Program Details

From the Details tab of the grant program record, you can manage information about the funding types and deadlines associated with the grant program.



Under **Funding types**, you can view the types of projects the grantor wants to fund with the program. For information about how to edit this information, see Funding Types on page 10.

Under **Deadlines**, the annual deadlines required to receive a grant award through the program appear. For information about how to manage this information, see Deadlines on page 10.

Funding Types

From the Details tab of a grant program record, you can select the types of projects that qualify for the program. For example, you can select a funding type of Research to a grant program that supports medical research. When you add a request to a funding plan, you can search for grant programs by funding type to help determine which programs may meet a specific need.

Edit a funding type

1. On the record of the grant program, select the Details tab.
2. Under **Funding types**, click **Edit all** on the action bar The Edit grant funding types screen appears.
3. Select the interests a funding plan must address to qualify for the grant program.
4. Click **Save**. You return to the Details tab.

Deadlines

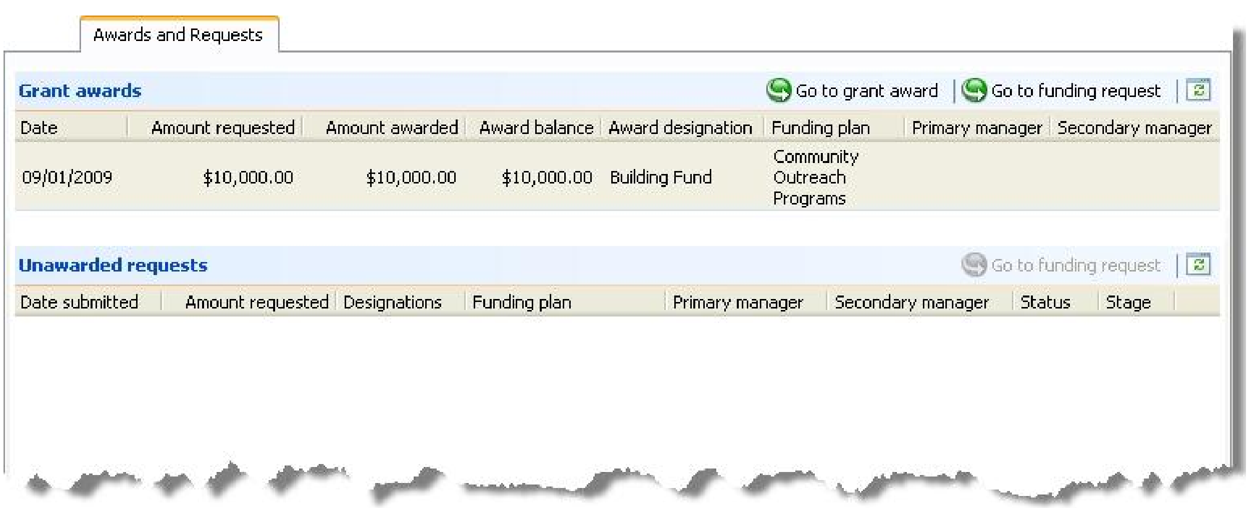
From the Details tab of a grant program record, you can enter the different deadlines required to request a grant award, such as the application due date, board review dates, and grant award date.

Edit a deadline

1. On the record of the grant program, select the Details tab.
2. Under **Deadlines**, click **Edit deadlines** on the action bar. The Edit grant program deadlines screen appears.
3. In the grid, enter each applicable deadline in mm/dd format.
4. Click **Save**. You return to the Details tab.

Awards and Requests

From the Awards and Requests tab, you can view details about any grant awards received and the funding requests your organization has submitted that have not yet received an award.



For information about grant awards, see Grant Awards on page 32.

For information about funding requests, see Funding Requests Overview on page 18.

Attributes Tab

From the Attributes tab, you can enter additional details. Depending on how the system administrator configured the attribute category you select, you may enter your own attribute or select from a predefined list.

For each attribute, you can view details such as the attribute's value and the date range for which the attribute is valid. You can add new attributes, edit specific details for existing attributes, or delete selected entries from the grid.

Note: A system administrator adds attribute categories in *Administration*. For information about how to create and manage attributes in *Administration*, see the *Administration Guide*.

Note: A system administrator adds attribute categories in *Administration*. For information about how to create and manage attributes in *Administration*, see the Configuration Tasks section of the help file.

Add Attributes

From the Attributes tab, you can use attributes to store specific details about a record. Attributes provide more flexibility than notes or comments because you can include attributes in queries and reports to narrow the results.

Add an attribute

1. From the Attributes tab, click **Add**. The Add attribute screen appears.
2. In the **Category** field, select the type of attribute to assign.

Note: A system administrator defines attribute categories in *Administration*.

3. In the **Value** field, enter or select a value for the attribute.
4. If the attribute applies to a specific period of time, select the start and end dates.
5. In the **Comments** field, enter any additional information about the attribute.
6. Click **Save**. You return to the Attributes tab.

Add an Attribute Screen

For information about how to access this screen, see Add Attributes on page 11.

Screen Item	Description
Category	Select the type of attribute to assign. When you edit an attribute, you cannot change the category you previously assigned. A system administrator defines attribute categories in *Administration*. For information about how to manage attribute categories, see the *Administration Guide*. A system administrator defines attribute categories in *Administration*. For information about how to manage attribute categories, see the Configuration Tasks section of the help file.
Value	Enter or select a value for the attribute category. For example, if you have a grant program attribute category of "Award Frequency," you many enter "Annually," "Bi-annually," or "Quarterly." A system administrator defines attribute categories in *Administration*. Each category's configuration determines whether you select or enter a value, and the type of entries allowed,

Screen Item	Description
	such as free-form text, dates, or currency. For information about how to manage attribute categories and data types, see the *Administration Guide*. A system administrator defines attribute categories in *Administration*. Each category's configuration determines whether you select or enter a value, and the type of entries allowed, such as free-form text, dates, or currency. For information about how to manage attribute categories and data types, see the Configuration Tasks section of the help file.
Start date and **End date**	If the attribute or attribute value applies to a specific period of time, enter start and end dates.
Comment	Enter any additional information about the attribute.

Edit Attributes

When you edit an attribute, you cannot change the attribute category.

Edit an attribute

1. From the Attributes tab, click **Edit**. The Edit attribute screen appears.
2. In the **Value** field, enter or select the attribute value to assign.
3. If the attribute applies to a specific period of time, select the start and end dates.
4. In the **Comments** field, enter any additional information about the attribute.
5. Click **Save**. You return to the Attributes tab.

Delete Attributes

To delete an attribute from the Attributes tab, click Delete. The program removes the entry from the **Attributes** grid.

Funding Plan Search

To locate funding plans you previously created, from the Foundations page, click **Funding plan search**. Enter criteria, such as name or department, to narrow the search results.

Funding Plans

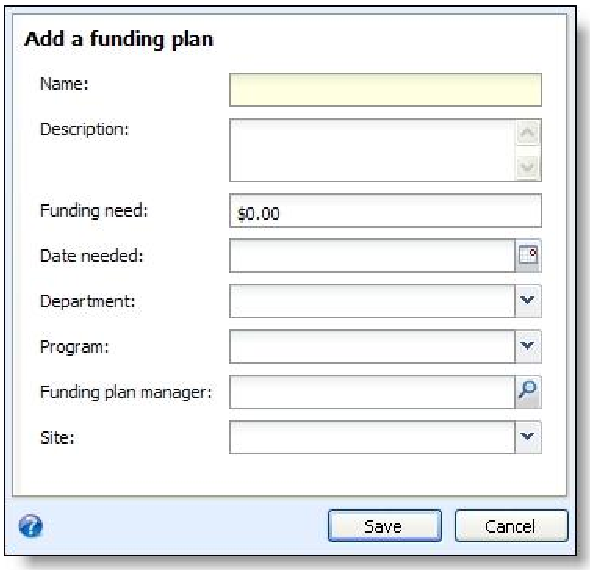
The funding plan record contains information about a specific, overall need within your organization. For example, you may create a funding plan for your organization's community outreach programs. In this plan, you enter the overall funding need for all programs that fall under the community outreach umbrella. You can assign fundraisers to the plan and add funding requests for each grant program you want to pursue to meet the total funding amount needed.

Add a Funding Plan

You can create a funding plan for programs or projects within your organization that may be eligible for funding from corporations or foundations.

▶ Add a funding plan

1. From the Foundations page, click **Add a funding plan**. The Add a funding plan screen appears.



2. In the **Name** field, enter a name for the funding plan.
3. In the **Description** field, enter any details about this plan.
4. In the **Funding need** field, enter the total funding amount you want to obtain with this plan.
5. In the **Date needed** field, enter the date by which fundraisers should meet the funding goal.
6. In the **Department** field, enter the department within your organization to which this funding plan applies.
7. In the **Program** field, enter the program that will receive the funding requested.
8. In the **Funding plan manager** field, enter the name of the fundraiser who creates the grant proposal and makes sure your organization meets the terms of the grant program after you receive an award.

Note: You can select only constituents with a "Fundraiser" constituency as the funding plan manager.

9. In the **Site** field, enter the site that applies to this funding plan.
10. Click **Save**. The Funding Plan page appears. For information about the Funding Plan page, see Funding Plans on page 12.

Add a Funding Plan Screen

For information about how to access this screen, see Add a Funding Plan on page 13.

Screen Item	Description
Name and Description	Enter a name and description for the funding plan.
Funding details	In the **Funding need** field, enter the total amount required to fund the programs or projects in this plan. After you create the plan, you can add a funding request for each grant program you will pursue to meet this need. In the **Date needed** field, enter the end date for locating funding.
Program details	In the **Department** and **Program** fields, you can enter the department and program that requires funding.
Funding plan manager	Enter the constituent who creates the grant proposals and makes sure your organization meets all requirements to maintain grant funding. You can select only individuals with a "Fundraiser" constituency as the funding plan manager.
Site	You can limit access to the funding plan to users with security permissions for a specific site.

Edit a Funding Plan

You can update the funding plan name, description, details, and the manager assigned to the plan on the Edit funding plan screen.

Edit a funding plan

1. Under **Tasks** on the Funding Plan page, click **Edit funding plan**. The Edit funding plan screen appears.
2. In the **Name** field, enter a name for the funding plan.
3. In the **Description** field, enter any details about this plan.
4. In the **Funding need** field, enter the total funding amount you want to obtain with this plan.
5. In the **Date needed** field, enter the date by which fundraisers should meet the funding goal.
6. In the **Department** field, enter the department within your organization to which this funding plan applies.
7. In the **Program** field, enter the program that will receive the funding requested.
8. In the **Funding plan manager** field, enter the name of the fundraiser who creates the grant proposal and makes sure your organization meets the terms of the grant program after you receive an award.

Note: You can only select a constituent with a "Fundraiser constituency as the funding plan manager.

9. In the **Site** field, enter the site that applies to this funding plan.
10. Click **Save**. You return to the Funding Plan page.

Edit a Funding Plan Screen

For information about how to access this screen, see Edit a Funding Plan on page 14.

Screen Item	Description
Name and Description	Enter a name and description for the funding plan.
Funding details	In the **Funding need** field, enter the total amount required to fund the programs or projects in this plan. After you create the plan, you can add a funding request for each grant program you will pursue to meet this need. In the **Date needed** field, enter the end date for locating funding.
Program details	In the **Department** and **Program** fields, you can enter the department and program that

Screen Item	Description
	requires funding.
Funding plan manager	Enter the constituent who creates the grant proposals and makes sure your organization meets all requirements to maintain grant program funding. You can select only individuals with a “Fundraiser” constituency as the funding plan manager.
Site	You can limit access to the funding plan to users with security permissions for specific site.

Delete Funding Plans

You can delete a funding plan only if the plan’s funding requests do not have an associated grant award. To delete a funding plan, click **Delete funding plan** under **Tasks** on the Funding Plan page. The program removes the plan and all funding requests in the plan.

Rather than delete a funding plan, you can mark it as inactive. For information about how to mark a funding plan as inactive, see Mark Funding Plans Inactive on page 15.

Mark Funding Plans Inactive

As an alternative to deleting a funding plan, you may want to make the plan inactive instead. Inactive plans remain in your database, but do not appear in funding plan searches unless you mark the **Include inactive** checkbox on the search screen. From a funding plan record, click **Mark inactive** under **Tasks**. To reactivate the funding plan, click **Mark active**.

Funding Plan Page

From the Funding Plan page, you can add, edit, or delete funding requests.

Funding Requests Tab

From the Funding Requests tab on a funding plan, you can manage the funding requests associated with the plan.

A funding plan is a container for one or more funding requests. While the funding plan includes the overall funding requirement for the programs or projects in the plan, the plan’s funding requests include each grant program applied for and the steps required to successfully complete the request process. For more information about funding requests, see Funding Requests Overview on page 18.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. From a record, select the Documentation tab and click **Add**, **Note**. The Add a note screen appears.
2. Select a note type. Enter the date, title, author, and the content of the note.
3. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types. If you have security rights, click **Type** to add a note type.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

Edit a note

1. On the Documentation tab of a record, select a note and click **Edit**. The Edit note screen appears.
2. Make changes as necessary to the note type, date, title, author, or note content.
3. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

Delete a note

1. On the Documentation tab of a record, select a note and click **Delete**. A confirmation message appears.
2. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. From a record, select the Documentation tab and click **Add**, **Media link**. The Add a media link screen appears.

2. Select a media link type. Enter the date, title, and author. Enter the URL for a website or click the edit media URL icon to search for a linked file.
3. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types. If you have security rights, click **Type** to add a media link type.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

- **Edit a media link**

1. On the Documentation tab of a record, select a media link and click **Edit**. The Edit media link screen appears.
2. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website or the location of a linked file. To search for a linked file, click the edit media URL icon.
3. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

- **Delete a media link**

1. On the Documentation tab of a record, select a media link and click **Delete**. A confirmation message appears.
2. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

- **Add an attachment**

1. From a record, select the Documentation tab and click **Add**, **Attachment**. The Add an attachment screen appears.

2. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
3. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types. If you have security rights, click **Type** to add an attachment type.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**.

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

Edit an attachment

1. On the Documentation tab of a record, select an attachment and click **Edit**. The Edit attachment screen appears.
2. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
3. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

Delete an attachment

1. On the Documentation tab of a record, select an attachment and click **Delete**. A confirmation message appears.
2. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. Select the attachment and click **Open file**.

Funding Requests Overview

After you identify the areas of need and the corresponding funding amounts required, you can create a funding request for each grant program you will pursue to obtain the overall funding need. For each funding request, you enter the grant program name, along with the status, amount, and date submitted. You also create an outline that identifies the steps required to complete the request process.

The step outline defines each action a fundraiser must complete to meet the application requirements for the funding request. For example, you may have a plan step for a fundraiser to submit a letter of intent to the grantor. When the fundraiser submits this letter, you can mark the step complete. With a request outline, you can track completed and pending steps to determine your organization's progress toward the completing the grant program application process.

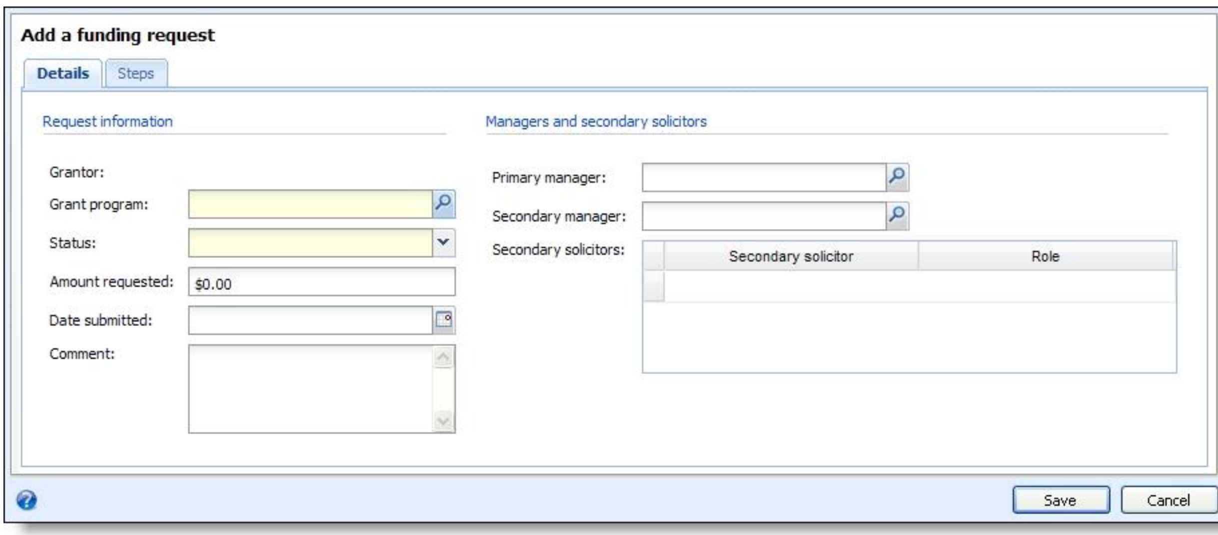
After you create a funding request, you can enter any grant awards received in response to the request, select which designations to associate with this funding, assign additional fundraisers, or add documentation to the request.

Add Funding Requests

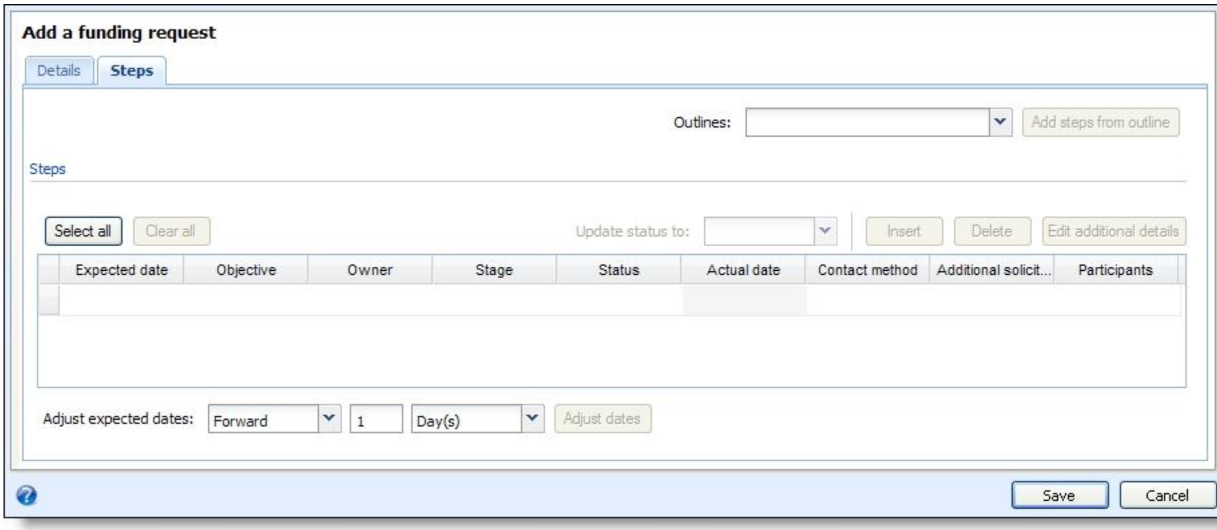
You can add a funding request for each grant program you want to pursue to meet the funding plan's target amount.

Add a funding request

1. From the Funding Requests tab on the Funding Plan page, click **Add**. The Add a funding request screen appears.



2. In the **Grant program** field, enter the name of the grant program for which fundraisers will submit a proposal. For information about how to add a grant program, see Add Grantors on page 6. The grantor you select appears in the **Grantor** display.
3. In the **Status** field, enter the current status of this request.
4. In the **Amount requested** field, enter the total amount of this funding request.
5. In the **Date submitted** field, enter the date your organization submitted the request.
6. In **Comment**, enter any additional information about the request.
7. In the **Primary manager** field, enter the constituent who will coordinate the grant proposal process.
8. In the **Secondary manager** field, enter the constituent who will act as a secondary manager.
9. In the **Secondary solicitors** grid, enter each fundraiser who will assist with the funding request and select a role for each fundraiser you add to the grid.
10. Select the Steps tab.



11. In the **Outlines** field, select the step outline to add to this request. For more information about how to create funding request outlines, see Funding Request Outlines on page 1.
12. Click **Add steps from outline** to add the steps to the grid.

Note: To add steps from multiple outlines, select another outline and click Add steps from outline. You can then delete steps you do not need from the grid, edit the steps you added, or manually add new steps.

13. In the **Expected date** field, enter the due date for the step. The number you entered in the **Days from start** field for this step in the outline determines the date that appears by default.
14. In the **Objective** column, enter the purpose for this step.
15. In the **Owner** column, select which fundraiser performs the step.
16. In the **Stage** column, enter the stage of the request process this step occurs.
17. In the **Status** column, select whether the step is planned, pending, or completed.
18. In the **Actual date** column, enter the number of days after the start date for the step to occur. The start date is the day you add the template step to a funding request.
19. In the **Contact method** column, enter the type of contact required for this step.
20. In the **Additional solicitors** column, select "Yes" if the step requires assistance from multiple solicitors.
21. In the **Participants** column, select "Yes" if the step requires additional participants.
22. Click **Save**. You return to the Funding Plan.

Add a Funding Request Screen

For information about how to access this screen, see Add Funding Requests on page 19.

Screen Item	Description
Grant program	Enter the grant program associated with this funding request. When you select a grant program, the name of the grantor that funds the program appears in the **Grantor** display.
Status	Enter the status of this request.
Amount requested	Enter the total amount of the request.

Screen Item	Description
Date submitted	Enter the date you submitted the request.
Comment	Enter any additional information about the request.
Primary manager	Enter the constituent who will coordinate the grant proposal process. You can select only constituents with a “Fundraiser” constituency as the primary manager.
Secondary manager	Enter the fundraiser who will act as a secondary manager. You can select only constituents with a “Fundraiser” constituency as secondary manager.
Secondary solicitors	Enter each fundraiser who will assist with the funding request. You can select only constituents with a “Fundraiser” constituency as a solicitor.

On the Steps tab, you can add steps from a funding request outline you previously created or manually enter steps for this request.

Screen Item	Description
Outlines	Select the outline to add to this request and click **Add steps from outline**. The steps appear in the grid. If no outlines exist, you must manually add steps to the funding request.
Update status to	To change the status of one or more entries in the steps grid, select the steps to update, then select a status from the **Update status to** field.
Insert	Click **Insert** to add a step to the grid. To add the step in a specific location, select the row below where you want the step to appear and click **Insert**.
Delete	Select a row in the grid and click **Delete** to remove the step.
Edit additional details	Click to further customize the selected step. You can add comments and enter the solicitors and participants who will assist with the step. For information about the items on this screen, see Add a Step Screen on page 26.
Expected date	Enter a due date for the step. If you added steps from an outline, the program uses the entry in the **Days from start** field on the funding request outline and the date you add the outline to the plan to automatically calculate the expected date.
Objective	Enter the purpose for the step.
Owner	Enter the individual responsible for the step. You can select only constituents with a “Fundraiser” constituency as the step owner. If you import steps from an outline, the name of the individual assigned to the fundraiser role (funding plan manager, primary manager, or secondary manager) associated with the outline step appears in the **Owner** column by default.
Stage	Enter the stage of the request associated with this step, such as “Identification” or “Proposal.”
Status	Select whether the step is planned, pending, or completed.
Actual date	When you mark a step complete, the date completed automatically appears in the Actual date column. This column is read-only.
Contact method	Enter the type of contact required for this step.
Additional solicitors	If the owner requires assistance from your organization’s solicitors to complete the step, select “Yes.”
Participants	If the owner requires assistance from other participants to complete the step, select “Yes.”
Adjust expected dates	Select the steps to update. From **Adjust expected dates**, select “Forward” or “Backward.” Enter the interval of time in days, weeks, or months. To apply your changes, click **Adjust dates**.

Grant Program Search

To locate grant programs you previously created, from the Add a funding request or Edit funding request screens, click the binoculars for the **Grantor program** field. You can search for programs by grantor name, title, or funding type.

Edit Funding Requests

You can edit funding request details and steps.

Edit a funding request

1. From the Funding Requests tab on the Funding Plan page, select a request.
2. Click **Edit**. The Edit funding request screen appears.
3. In the **Grant program** field, enter the grant program associated with the request.
4. In the **Status** field, enter the current status of the request.
5. In the **Amount requested** field, enter the total amount of this request.
6. In the **Date submitted**, enter the date your organization submitted the funding request.
7. In **Comment**, enter any additional information about the request.
8. In the **Primary manager** field, enter the constituent who will coordinate the grant proposal process.

Note: You can select only constituents with a "Fundraiser" constituency as the primary manager, secondary manager, or secondary solicitor.

9. In the **Secondary manager** field, enter the constituent who will act as a secondary manager.
10. In **Secondary solicitors**, enter each constituent who will assist with the funding request and select the constituent’s role in the request process.
11. Click **Save**. You return to the Funding Plan page.

Edit Funding Request Screen

For information about how to access this screen, see Edit Funding Requests on page 22.

Screen Item	Description
Grantor	Displays the name of the grantor that funds the grant program associated with the funding request. This information is read-only.
Grant program	Enter the grant program from which you will request funding. When you enter a new grant program, the **Grantor** display updates to show the name of the associated grantor.
Status	Enter the status of this request.
Amount requested	Enter the total amount of the request.
Date submitted	Enter the date you submitted the request.
Comment	Enter any additional information about the request.
Primary manager	Enter the constituent who will coordinate the grant proposal process. You can select only constituents with a “Fundraiser” constituency as the primary manager.
Secondary manager	Enter the fundraiser who will act as a secondary manager. You can select only constituents with a “Fundraiser” constituency as the secondary manager.
Secondary solicitor	Enter each fundraiser who will assist with the funding request. You can select only constituents with a “Fundraiser” constituency as a solicitor.

Delete Funding Requests

You can delete a funding request only if the request does not have an associated grant award. To delete a funding request, from **Funding requests** on the Funding Plan page, select an entry and click **Delete**.

Funding Requests Page

From the Funding Request page, you can manage and track the progress of steps in the request process, enter information about any grant awards you receive for the request, add constituents who assist in the process, and add documentation about the program that requires funding, the grantor, or other related areas.

Steps Tab

The Steps tab displays the planned, pending, and completed steps for the funding request. From this tab, you can view and manage the steps associated with the funding request. For each funding request you add to a funding plan, you can add steps to manage and track communication deadlines and requirements. These steps detail the tasks required to complete the application and grant proposal process for the selected grant program. For example, you may have a step to submit a letter of intent to the grantor, a step to create the grant proposal, and a step to submit the proposal before the application deadline. As each step owner completes a step, you can change the step's status to complete and attached any associated documentation to the step. If your organization receives the grant award, you create additional steps to manage the requirements your organization must meet as part of the terms and conditions of receiving the award.

Add Documentation to a Step

You can attach specific types of documents to a step. Details for all documents attached to the steps appear on the Documentation tab of the corresponding step page.

For more information about how to manage documentation, see Documentation Tab on page 1.

For information about how to view a step's details, see Step Page on page 30.

Add a note, media link, or attachment to a step

1. From the Steps tab, select a step in the grid.
2. Click **Add documentation** and select the appropriate item type.
   - If you select **Note**, the Add a note screen appears.
   - If you select **Media link**, the Add a media link screen appears.
   - If you select **Attachment**, the Add an attachment screen appears.
3. Enter the necessary information.

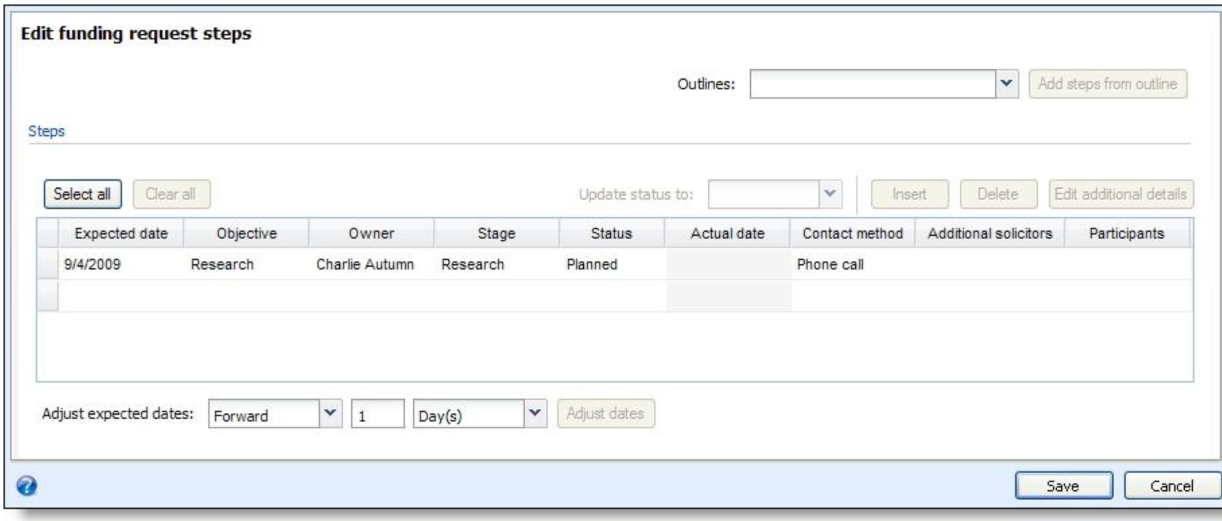
   For more information about the documentation screens, see Documentation Tab on page 1.
4. Click **Save**. You return to the Steps tab.

Edit All Steps

From the **Steps** grid on the Steps tab of the Funding request page, you can edit individual steps or all steps in the plan.

▸ Edit all steps in a funding request

1. In the **Steps** grid on the Steps tab of the Funding request page, click **Edit steps**. The Edit funding request steps screen appears.



2. In the **Outlines** field, select the step outline to add to this request. For more information about how to create funding request outlines, see Funding Request Outlines on page 1.
3. Click **Add steps from outline** to add the steps to the grid.

Note: To add steps from multiple outlines, select another outline and click **Add steps from outline**. You can then delete steps you do not need from the grid, edit the steps you added, or manually add new steps.

4. In the **Expected date** field, enter the due date for the step. The number you entered in the **Days from start** field for this step in the outline determines the date that appears by default.
5. In the **Objective** column, enter the purpose for this step.
6. In the **Owner** column, enter the constituent responsible for the step.
7. In the **Stage** column, enter which stage of the request process this step occurs.
8. In the **Status** column, select whether the step is planned, pending, or completed.
9. In the **Actual date** column, enter the number of days after the start date for the step to occur. The start date is the day you add the template step to a funding request.
10. In the **Contact method** column, enter the type of contact required for this step.
11. To edit solicitor and participant information, click **Edit additional details**. The Edit step screen appears. For more information, see Edit Steps on page 27.
12. Click **Save**. You return to the Steps tab.

Edit Funding Request Steps Screen

For information about how to access this screen, see Edit All Steps on page 23.

Screen Item	Description
Outlines	Select the outline to add to this request and click **Add steps from outline**. The steps appear in the grid. If no outlines exist, you must manually add steps to the funding request.

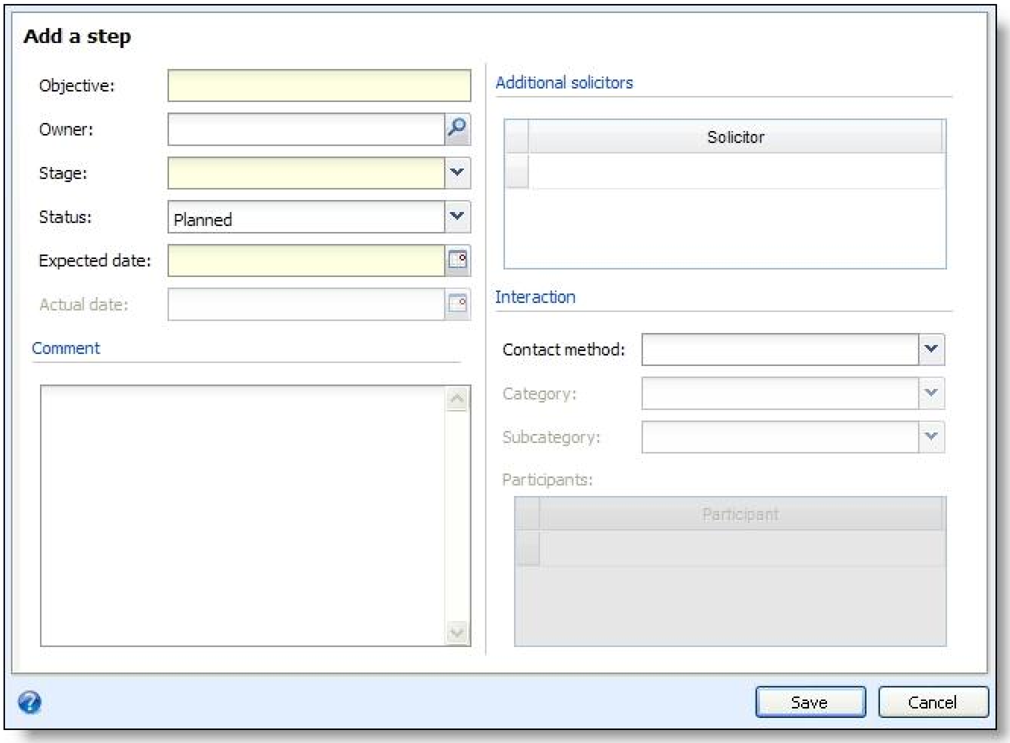
Screen Item	Description
Update status to	To change the status of one or more entries in the steps grid, select the steps to update, then select a status from the **Update status to** field.
Insert	Click **Insert** to add a step to the grid. To add the step in a specific location, select the row below where you want the step to appear and click **Insert**.
Delete	Select a row in the grid and click **Delete** to remove the step.
Edit additional details	Click to further customize the selected step. You can add comments and enter the solicitors and participants who will assist with the step. For information about the items on this screen, see Add a Step Screen on page 26.
Expected date	Enter a due date for the step. The program uses the entry in the **Days from start** field on the funding request outline and the date you add the outline to the plan to automatically calculate the expected date.
Objective	Enter the purpose for the step.
Owner	Enter the constituent responsible for the step. When you import steps from an outline, the fundraiser role the step is assigned to changes to the name of the constituent assigned this role. The constituent's name appears in the **Owner** column by default.
Stage	Enter the stage of the request associated with this step, such as "Identification" or "Proposal."
Status	Select whether the step is planned, pending, or completed.
Actual date	When you mark a step complete, the date completed automatically appears in the Actual date column. This column is read-only.
Contact method	Enter the type of contact required for this step.
Secondary solicitors	If the owner requires assistance from your organization's solicitors to complete the step, select "Yes."
Participants	If the owner requires assistance from other participants to complete the step, select "Yes."
Adjust expected dates	Select the steps to update. From **Adjust expected dates**, select "Forward" or "Backward." Enter the interval of time in days, weeks, or months. To apply your changes, click **Adjust dates**.

Add Steps

You can add individual steps to the **Steps** grid.

Add a step

1. In the **Steps** grid on the Steps tab of the Funding request page, click **Add step**. The Add a step screen appears.



2. In the **Objective** field, enter the purpose for this step.
3. In the **Owner** field, enter the individual responsible for the step. You can assign steps to only individuals with a constituency of "Fundraiser."
4. In the **Stage** field, enter which stage of the request process this step occurs.
5. In the **Status** field, select whether the step is planned, pending, or completed.
6. In the **Expected date** field, enter the due date for the step.
7. In **Comment**, enter any additional information about the request.
8. In the **Additional solicitors** grid, enter each fundraiser who will assist with the step. You can select only individuals with a constituency of "Fundraiser" as solicitors on the request.
9. In the **Contact method** field, enter the type of contact required for this step. If your organization defines categories and subcategories for contact methods, you can select the type of contact.
10. In the **Participants** grid, enter each constituent who will assist with the step.
11. Click **Save**. You return to the Steps tab.

Add a Step Screen

For information about how to access this screen, see Add Steps on page 25.

Screen Item	Description
Objective	Enter the purpose for the step.
Owner	Enter the fundraiser responsible for the step. You can assign steps to only individuals with a constituency of "Fundraiser."
Stage	Enter the stage of the request associated with this step, such as "Identification" or "Proposal."

Screen Item	Description
Status	Select whether the step is planned, pending, or completed.
Expected date	Enter a due date for the step.
Actual date	If you select “Completed” in the **Status** field, you can enter the date completed in the **Actual date** field. If the step has a status of “Planned” or “Pending,” the **Actual date** field is disabled.
Comment	Enter any additional information about the step.
Additional solicitors	Enter each fundraiser who will assist with this step. You can select only individuals with a constituency of “Fundraiser” as a step solicitor.
Interaction	Enter the type of contact required for this step in the **Contact method** field. If your organization defines categories and subcategories of contact types, you can enter this information in the **Category** and **Subcategory** fields.
Participants	Enter each constituent who will assist with this step.

Mark Steps Complete

To mark a step as complete, from the **Steps** grid of the Funding request page, select the step and click **Step**, **Mark complete**. Enter the date the owner completed the step and click **Save**. The date you entered appears in the **Actual date** field on the Edit funding request steps screen.

Edit Steps

You can edit individual steps as needed to manage funding request tasks.

Edit a step

1. In the **Objective** field, enter the purpose for this step.
2. In the **Owner** field, enter the constituent responsible for the step.
3. In the **Stage** field, enter which stage of the request process this step occurs.
4. In the **Status** field, select whether the step is planned, pending, or completed.
5. In the **Expected date** field, enter the due date for the step.
6. In the **Actual date** field, enter the date the owner completed this step.
7. In **Comment**, enter any additional information about the request.
8. In the **Additional solicitors** grid, enter each fundraiser who will assist with the step.
9. In the **Contact method** field, enter the type of contact required for this step. If your organization defines categories and subcategories for contact methods, you can select the type of contact.
10. In the **Participants** grid, enter each constituent who will assist with the step.
11. Click **Save**. You return to the Steps tab.

Delete Steps

To delete a step from a funding request, select a step in the **Steps** grid and click **Step**, **Delete** on the Funding request page. The program removes the step from the grid.

Manage Step Responses

You can track responses you receive for each. For example, if a grantor calls your organization in response to a letter of an intent, you can enter this interaction for the step. From the Funding request page, select a step in the

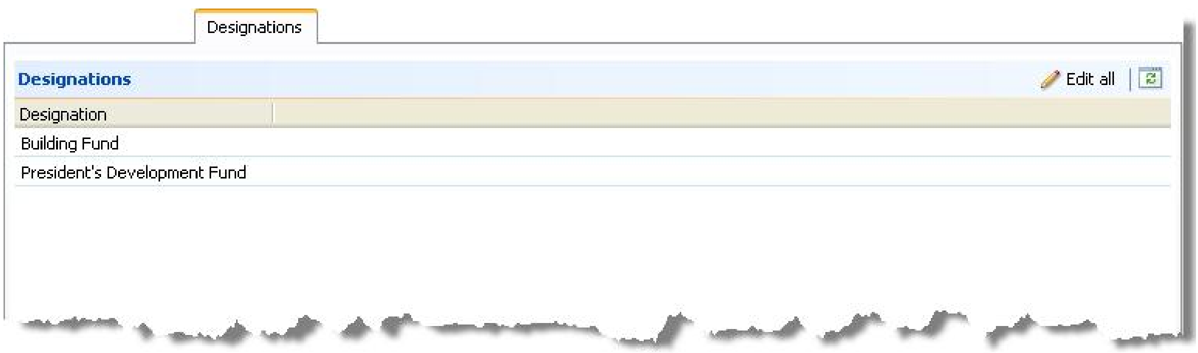
Steps grid and click **Step**, **Responses**. On the Edit responses screen, you can enter the date you received the response, the type of response, and the content.

Grant Awards Tab

When you receive notification of grant award, you can enter the award details on the Grant Awards tab on the Funding request page. For information about how to manage grant awards, see Grant Awards on page 32.

Designations Tab

You determine which designations to associate with the funding request from the Designations tab. When you receive a grant award, you can apply the award payments to this designation.



▸ **Add designations**

1. From a funding request, select the Designations tab.
2. Click **Edit all**. The Edit funding request designations screen appears.
3. Enter each designation to credit when you receive a grant award payment.
4. Click **Save**. You return to the Designations tab.

Secondary Solicitors Tab

From the Additional Solicitors tab, you can add constituents who are involved with the funding request. The constituent must have a constituency of “Fundraiser” to be added as a solicitor.

Click **Edit all** to add, edit, or delete solicitors. You can also assign a role to each solicitor you add to the funding request.

Documentation Tab

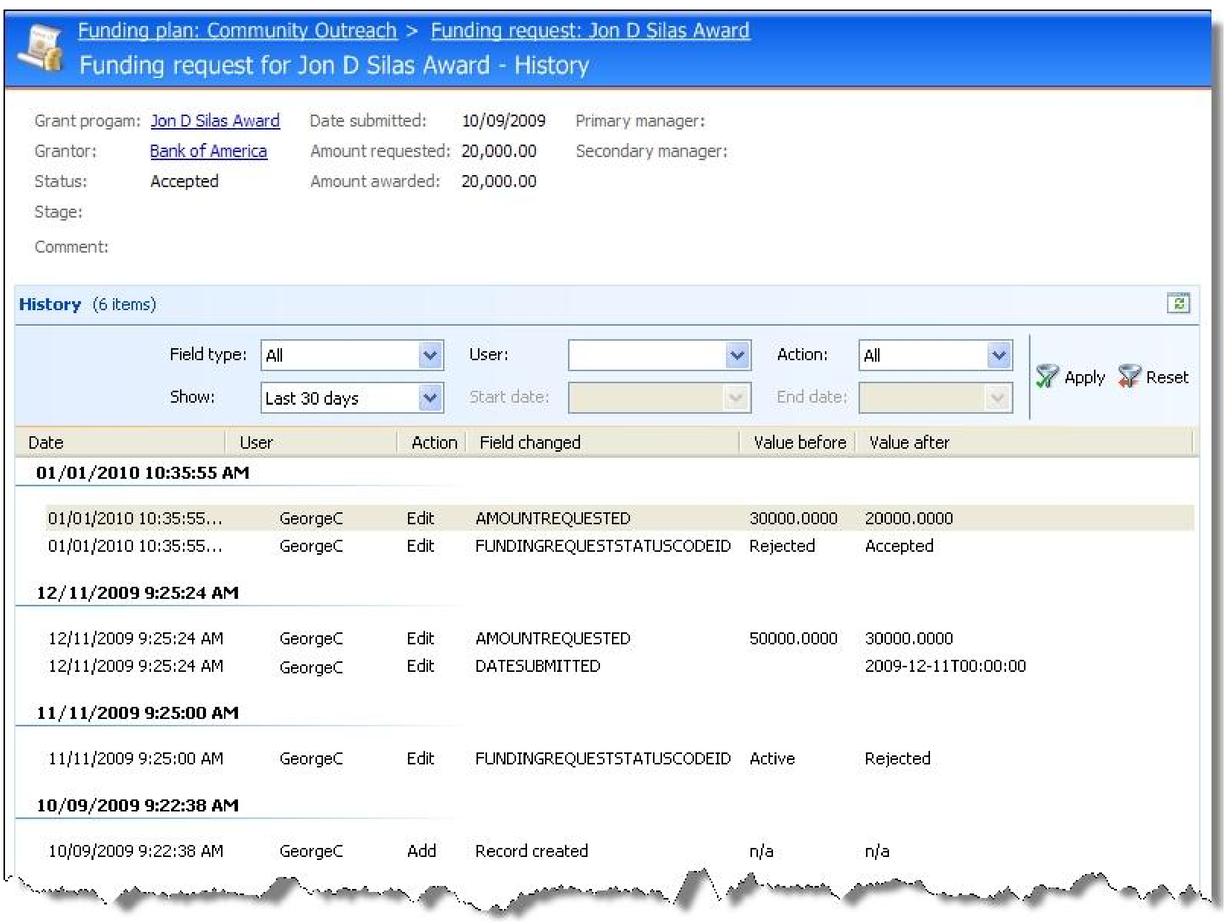
You can attach specific types of documents to a funding request. For more information about how to manage documentation, see Documentation Tab on page 1.

Attributes Tab

You can include additional details about a funding request in the form of attributes. Because you can search and report on attributes in the program, you can easily locate records based on this information. For more information about how to manage attributes, see Attributes Tab on page 11.

Funding Request History

From the Funding request - History page, you can view changes made to a funding request over time. The **History** grid displays the date and time a staff member created the funding request, as well as the initial amount requested and the date the request was submitted. You can also view any changes to the request's status or amount. For example, you submitted a request for $50,000. The grantor rejected the request, so your organization reviewed the funding request and submitted an updated request for $25,000, which the grantor accepted. The Funding request - History - page for this request shows each change. You can use this information to determine the amounts and types of requests a specific grantor will most likely fund.



You can filter the results in the **History** grid to customize the information that appears. For example, you can select to view only changes made to a specific field on the funding request, such as an updated amount in **Amount requested**. You can also limit the entries to changes made during a specific period of time or by a specific user, or you can view certain actions, such as edits made to the funding request information.

To access the Funding request - History page, from a funding request click **History** under **More information**.

Step Page

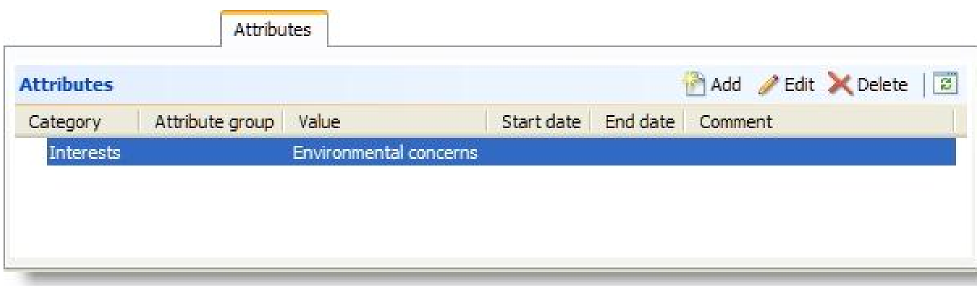
From the Step page, you can view details about the selected step.

Details Tab

From the Details tab, you can view the step's objective, owner, status, interaction information, and any comments.

Attributes Tab

You can use attributes to store details about a funding request step when no field or tab exists for the information. For example, you may use attributes to record the interests of the grantor discussed during an interaction. To view the attributes associated with a plan step, select the Attributes tab.

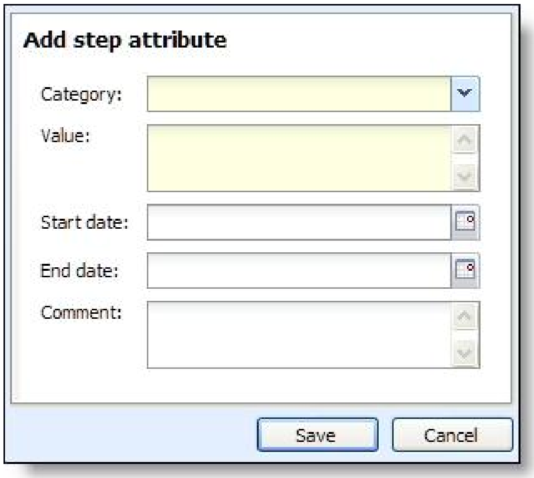


Note: The Attributes tab appears only if your system administrator configured attributes for the appropriate category.

Under **Attributes**, you can view attributes assigned to the funding request step. For each attribute, you can view its value, group, and valid date range. You can also view any comments entered about the attribute. From the grid, you can also manage the attributes assigned to the request step.

Add attributes for a funding request step

1. On the record of the request step to which to add an attribute, select the Attributes tab.
2. Under **Attributes**, click **Add** on the action bar. The attribute screen appears.



3. In the **Category** field, select the type of attribute to assign to the request step. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the request step.
5. If the attribute applies to the plan step for a specific duration, select the start and end dates of the attribute.
6. In the **Comments** field, enter any additional information to record about the attribute.
7. Click **Save**. You return to the Attributes tab.

Edit a plan step attribute

1. On the record of the request step with the attribute to edit, select the Attributes tab.
2. Under **Attributes**, select the attribute to edit and click **Edit** on the action bar. The attribute screen appears.
3. Edit the information as necessary.
4. Click **Save**. You return to the Attributes tab.

Delete a plan step attribute

1. After you add an attribute to a request step, you can delete it as necessary. To delete an attribute from the record of a plan step, on the Attributes tab, select the attribute to delete.
2. On the action bar, click **Delete**.
3. When a message appears to ask whether to delete the attribute, click **Yes**. You return to the Attributes tab.

Documentation Tab

You can attach specific types of documents to a step. For more information about how to manage documentation, see Documentation Tab on page 1.

Grant Awards

When you receive notice that your organization will receive a grant award, you can enter the award and installment information on the corresponding funding request. From the Grant Awards tab, you can add and manage grant award information.

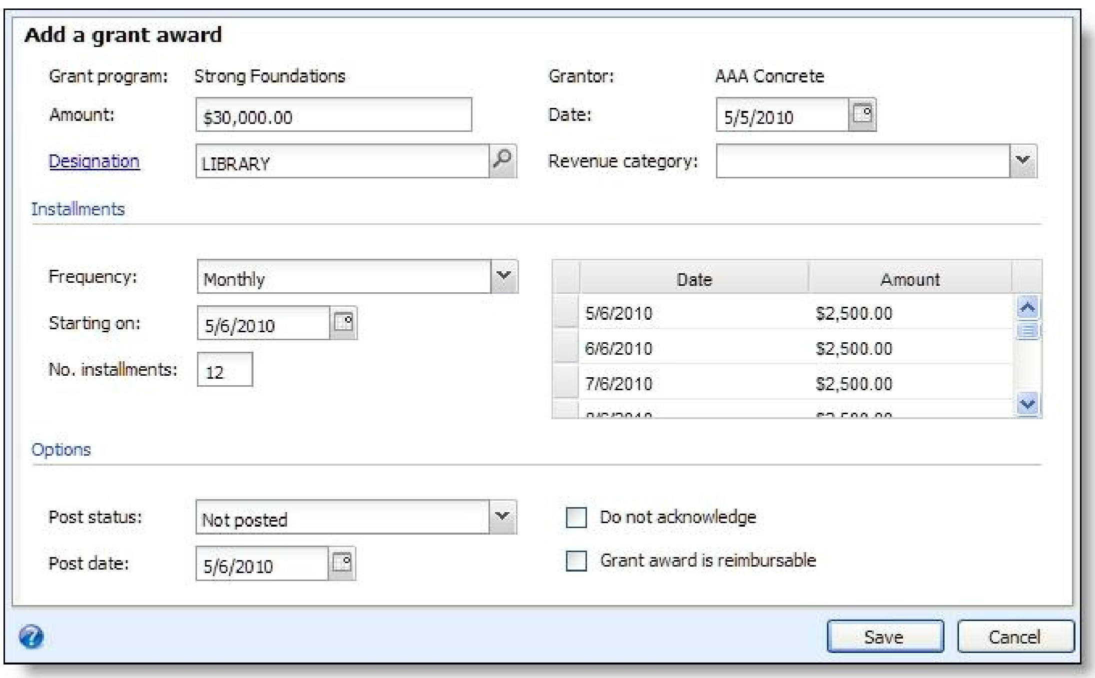
Add Grant Awards

From the Grant Awards tab on a funding request record, you can add the grant awards toward the funding request. The grantor determines the amounts and installment schedule for each grant program.

After you add a grant award, you can apply the payments received as installments toward the award. If you do not receive payments in advance but instead request reimbursement from the grantor for expenses that qualify, you can indicate that the grant is reimbursable. Because a grant award is a specific revenue type, revenue toward grant award installments can appear in revenue reports.

▸ Add a grant award

1. On the record of the funding request, select the Grant Awards tab.
2. Under **Grant awards**, click **Add** on the action bar. The Add a grant award screen appears.



3. If your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the **Account system** link appears and displays the default account system. To apply the grant award to another account system, click the link and select the account system to use.

Warning: After you save the grant award, you cannot edit its account system. To apply a saved grant award to a different account system, you must delete the grant award and add it again.

Note: We recommend each site in your organization be associated with one general ledger account system.

4. In the **Amount** field, enter the grant award amount.
5. In the **Designation** field, search for and select the designation to which to apply the grant award.

   To apply the grant award to multiple designations, click **Designation** and select the applicable designations and amount distribution.
6. In the **Date** field, select the date your organization receives notification of the grant award.
7. In the **Revenue category** field, select the revenue category for the award. Your system administration configures the selections available in the **Revenue category** field.
8. Under **Installments**, set up the installment schedule for the grant award.
   a. In the **Frequency** field, select the frequency of the award installments, such as Monthly.
   b. In the **Starting on** field, enter the due date of the first installment.
   c. In the **No. installments** field, enter the number of installments into which to divide the grant award.

Note: If you select a frequency of irregular or Single installment, you cannot enter a number of installments for the grant award.

   d. The grid uses the frequency, start date, and installment number to calculate and display the regular installment schedule for the grant award. To set up an irregular installment, such as if the constituent requests to skip a month in the schedule, edit the **Date** and **Amount** columns as necessary.
9. Under **Options**, select whether to post the grant award to the general ledger and whether to send an acknowledgement for the award.
   a. In the **Post status** field, select whether to post the grant award to the general ledger. To post the award to the general ledger, select Not posted. To not post the award, select Do not post.
   b. If you select a post status of Not posted, in the **Post date** field, enter the date to indicate the accounting period in which the revenue will post to the general ledger, such as when all installments are paid.
   c. To not send an acknowledgement for the grant award, select **Do not acknowledge**.
   d. If you submit expenses to the grantor for reimbursement, select **Grant award is reimbursable**.
10. Click **Save**. You return to the funding request record.

Add a Grant Award Screen

The table below explains the items on the Add a grant award screen and Edit a grant award screen. For information about how to access this screen, see Add Grant Awards on page 32 or Edit a Grant Award on page 35.

Screen Item	Description
Account system	If your organization configures multiple general ledger account systems and you have rights to multiple account systems, this link appears. To select the account system to which to apply the award, click this link. After you save the grant award, you cannot edit its account system. To apply the grant award to a different account system, you must delete the grant award and add it again. For more information about general ledger account systems, see the *Administration Guide*.

Screen Item	Description
Grant program	When you add a grant award from a funding request, this field appears and displays the grant program associated with the funding request.
Grantor	When you add a grant award from a funding request, this field appears and displays the grantor associated with the funding request.
Prospect	When you add a grant award from a major giving opportunity, this field appears and displays the prospect associated with the opportunity.
Amount	Enter the total amount of the grant award.
Designation	Select the designation, such as a campaign and initiative, to apply the grant award to. You can apply a grant award to multiple designations. To split the award between multiple designations, click **Designation**.
Date	Select the date your organization receives notification of the grant award.
Revenue category	To further define the grant award, select the category for the revenue. You can use the revenue category to properly map the revenue to the general ledger. Your system administrator configures the selections available in the **Revenue Category** field. For information about how to configure revenue categories, see the *Revenue Guide*.
Frequency	Select the frequency of the award installments, such as Annually or Single Installment.
Starting on	When you add a grant award, enter the date the first installment is due. By default, the current date appears.
Next installment date	When you edit a grant award, this field displays the due date of the next unpaid installment remaining for the award. If no unpaid installments remain, this field is disabled and displays the date of the last installment. If you select **Reschedule remaining installments** and the award has unpaid installments remaining, you can edit the due date of the next installment.
No. installments	When you add a grant award, enter the number of installments into which to divide the award. If you select a frequency of Irregular or Single installment, you cannot enter a number of installments for the award.
No. installments remaining	When you edit a grant award, this field displays the number of unpaid installments remaining for the award. If no unpaid installment remain, this field is disabled and displays "0". If you select **Reschedule remaining installments** and the award has unpaid installments remaining, you can edit the number of remaining installments. If you select a frequency of Irregular or Single installment, you cannot enter a number of installments for the award.
Date and **Amount**	These columns display the installment schedule for the grant award. To divide the award into irregular installments or irregular installment amounts, edit the values these columns.
Applied	When you edit the grant award, this column displays the amount applied to each installment.
Edit installment designations	When you edit the grant, click this button to edit the designations for an unpaid installment.
Post status	If the post status of the grant award is Not posted or Do not post, this field is enabled. Select whether to post the award to the general ledger. To include the award when your organization next posts revenue to the general ledger, select Not posted. To not post the award, select Do not post.
Post date	If you select a post status of Not posted, enter the date to indicate the accounting period in which the revenue will post, such as when the grantor pays all installments. The post date is not necessarily the same as the date the post process is run, or the date the grant award enters the system. By default, today's date appears.
Do not acknowledge	To indicate that the program should not send an acknowledgment for the grant award, select this checkbox. When you select this checkbox, any acknowledgement processes run will not assign a letter to the award.
Grant award is reimbursable	If the terms of the grant award require that your organization incurs all expenses for the grant program and then submits a request for reimbursement to the grantor, select this checkbox.

Grant Award Record

A grant award record contains several tabs that contain information about a specific award. The record displays any recognition credits, solicitors, letters, general ledger distribution, documentation, and campaigns for the award. On the grant award record, you can manage additional information such as installments, write-offs, designations, and payment information. For information about the tabs on a grant award record, see the *Revenue Guide*.

At the top of the grant award record, the name of the grantor associated with the award appears. The grantor's name provides a link to detailed constituent information about the grantor. To view the constituent record of the grantor, click the link.

The table below explains the items in the summary section on a grant award record.

Screen Item	Description
Grant award amount	This field displays the total amount of the grant award.
VAT amount	This field displays the value added tax (VAT) amount charged for the grant award. VAT is the amount that is subject to tax as a result of goods or services, such as benefits received.
Date	This field displays the date associated with the grant award, such as the date your organization receives notification of the award.
Batch number	If the grant award is added as part of a batch, this field displays the number of the batch associated with the award. If the award is not added as part of a batch, this field is blank.
Revenue ID	Displays the lookup ID assigned the grant award, such as when added to the database. When you search for the award, you can use the lookup ID to quickly find it.
Funding request	Displays the funding request associated with the grant award. To access the record of the funding request, click the link.
Summary	Displays the total outstanding balance of the grant award, the total amount paid toward the award, and the total amount past due.
Status	Displays whether the program generated acknowledgements for the grant award and the post status and post date of the award. You can also view whether the grant award is reimbursable. To view a list of all transactions posted to the general ledger through this process, click the ID in the **Post process** field. The Post to GL – Included Transactions report for the post process appears.

From the grant award record, you can add, edit, and delete information as necessary.

Edit a Grant Award

After you add a grant award, you can edit its details as necessary. If the award has unpaid installments remaining, you can edit its schedule and the designations of its installments.

After you post a grant award to the general ledger, you can still edit its information. If the change affects the general ledger, the program automatically creates the adjustment and records the change on the Revenue History page to provide an audit trail.

Edit a grant award

1. Access the record of the grant award to edit.

2. Under **Tasks**, click **Edit grant award**. The Edit grant award screen appears. The items on this screen are the same as the Add a grant award screen. For information about the items on this screens, see Add a Grant Award Screen on page 33.
3. Edit the grant award information as necessary.
4. If the award has unpaid installments remaining, under **Installments**, edit the schedule or designations of the remaining installments as necessary.
   - If the award has unpaid installments remaining, the **Frequency**, **Next installment date**, and **No. installments remaining** fields are enabled. Edit the schedule as necessary.
   - To change the designations for an installment or the amounts applied to installments, click **Edit installment designations**.

Warning: When you edit the designations for a paid or partially paid installment, the program creates a new record of the payment application and deletes the existing application record. To avoid loss of information about the original application, such as solicitors or recognition credits, we recommend you record this information before you edit the designations for the installment.

5. If the grant award posted to the general ledger, the **Adjustment details** frame appears. When you edit a field that affects the general ledger, such as **Amount** or **Designation**, these fields are enabled so you can enter information about the adjustment.
   a. Enter the dates to associate with the adjustment and the posting of the adjustment to the general ledger.
   b. In the **Adjustment reason** field, select the reason code to explain the need for the adjustment.
   c. In the **Adjustment details** box, enter any additional information about the adjustment.

Note: If you edit the designations of a paid installment that has posted to the general ledger, the Edit application adjustment details screen appears when you click **Save**. From this screen, you can enter information about the adjustment.

6. To save your changes, click **Save**. You return to the grant award record.

Delete a Grant Award

After you add a grant award, you can delete it as necessary. If you delete an award that has already been posted to the general ledger, the program automatically sends a reversal to the general ledger.

Warning: You cannot delete a grant award if a paid installment exists for the award. To delete the award, you must first delete all associated payments.

▸ Delete a grant award

1. Access the record of the grant award to delete.
2. Under **Tasks**, click **Delete grant award**. A message appears to ask whether to delete the award.
3. Click **Yes**.

View Grant Activity

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. For information about how to consolidate your view of grants and major giving management, see Consolidate Grants and Major Giving on page 4.

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