

Blackbaud Grantmaking

- Overview
 - Record Types
 - Forms and Forms Manager
 - Reports
 - Search
 - Correspondence

Overview

Blackbaud Grantmaking is a software designed to manage the grants workflow from end to end.

Some concepts to note are included in this page.

Record Types

To organize data properly, the data is scattered between record types:

Organization

Request

Contact

Affiliation

Requirement

etc.

There is a relationship between these records types. When looking at each record type opening them in their own modular form:

The screenshot displays the Blackbaud Grantmaking software interface for a 'Request' record. The interface is divided into several sections:

- Top Ribbon:** Contains action items such as 'Set Alert', 'Approve', 'Decline', 'Create Requirements', 'Create/Edit Payments', 'Lock', 'Transfer Grantee Account', 'Generate Stage 2', and 'Reset Grantee Password'.
- Left Panel (DETAIL):** A navigation menu with options like 'General', 'Request', 'Coding', 'Meeting', 'Evaluation', 'Renewal', and 'Wire Transfer'. A green box (2) highlights the 'RELATED' section, which lists 'Payments', 'Requirements', 'Reviews', 'Documents' (3), 'Activities' (4), and 'Affiliations' (2).
- Main Content Area:** Displays the 'General' and 'Request' tabs. The 'General' tab shows fields for 'Type' (Other), 'Status' ([Pending] Proposed), 'Reference No.', 'WISDM PROJECT NUMBER', 'WISDM Proj Num Secondary', 'PO Number', and 'Staff'. The 'Request' tab shows fields for 'Request Date' (4/17/2019), 'Project Budget' (\$0.00), 'Requested Amount' (\$0.00), 'Recommended Amount' (\$0.00), 'Project Title' (Test - Affiliation carry over with checkbox checked and edited), 'Project Description', 'Fiscal Year', 'Term (Months)' (12), 'Project Start Date' (4/30/2019), 'Project End Date' (4/30/2020), and 'Complete' (checkbox). A 'Complete Notes' field contains the text 'Request created from Stage 1 application'.
- Right Panel (CONTACT):** Shows a list of contacts, with one contact highlighted in a red box (1). The contact information includes 'Madison, WI' and a search icon.
- Annotations:** Numbered callouts are present: '3' points to the 'General' tab, '4' points to the 'Type' dropdown, and '1' points to the contact list.

The right hand side panel showing in red box on the right hand side (1), shows all the one-to-one associations. So, for example, for this request there is one organization.

The left bottom section showing in green box (2), shows the many to one associations and it gives a count also. For example, for this request, we have 2 Affiliations.

The right top section, shown in brown box (3), is about the record itself. For example, this is a request and that section shows the the details of the request itself and not the associated records.

The ribbon on top is specialized based on record type we are in. For example, this is a request record type, so we have the Action item of Decline or Approve, etc.

It also shows at the very top left hand side, what type of record this is together with the ID number and something to identify the record better. For example, on request, it shows the name of the organization.

Forms and Forms Manager

These are any online forms that allows the applicants/grantees to interact with the system.

There are Application Forms and Requirement Forms. The detailed explanation of forms is under [Forms page](#).

There are additional settings that can be applied through ribbon menu. These forms have a link attached to them usually, unless they have to be automatically assigned, for instance on some stage 2 applications.

Reports

There are two types of reports: Standard reports and Ad Hoc reports

Report Manager lists them all. The Standard ones do not have the option to be modified or even copied. The Ad Hoc ones will have the 'Edit' and 'Copy' options available under Action ribbon.

Reports can run manually or by scheduled report.

Search

There are three different search types:

Simple Search: Can search by Contact, Organization or Request

Full Search: Can search within a record Type

Advanced Search: Can go beyond search and can handle somewhat complex sql queries

More on Searches under [Search Functionality](#) page.

Correspondence

There are different ways to generate correspondence:

Quick Email: This will use user's device main email client to send an email

Email from a Template: This one sends and records the correspondence within Blackbaud. It uses templates from Document Template Manager.

Letter: The user can also print letters and mail them manually themselves to the grantee. ***The system does not send them.*** The user has to do that on their own. The system generates them and allows the user to print them off. That's all!

Reminders: Also, an email can be set to be sent as a reminder. IT can be scheduled and be sent in bulk to specific roles at certain date relative to dates on the request.