Contacts in Fluxx

It is very crucial to understand the concept of Contacts in Fluxx in different scenarios and their linkages as well as how they behave in different situations.

Contact vs Account in Blackbaud vs. Fluxx

In WPP's old Grants Management System, **Blackbaud**, an account was a secure place online where **applications** and **requirements** get submitted; there was no direct association between account and any contact. An account was basically identified an email address and that was the only information visible on Blackbaud regarding an "account". A contact on the other hand, was a **record type** that was linked to other record types. It represented a real person. This contact could be linked in different ways to other record types.

In **Fluxx**, on the other hand, **there is a 1:1 correspondence between a User record and an "Account."** Any user that has an email address, a **User Profile**, a **User Role**, and a **Program** will be able to sign into their Fluxx **account** and submit requirements, reviews, etc.

Contact vs Affiliation in Blackbaud vs. Fluxx

In **Blackbaud**, a **contact** contained the information related to an individual from a business point of view. For the most part, it was not concerned about the linkages. An **affiliation** was just a link that created a relationship between the contact record and other record types as needed (e.g. to requests or organizations). It was not concerned with personal information of the contact. It just knew that this contact record is related to that entity.

In **Fluxx**, the concept of an **affiliation** is essentially completely scrapped. Instead, all Users are more or less "Contacts" within the system (hold information related to the individual from a business point of view, i.e. contains their business email address and business phone number). In Fluxx, instead of **affiliations**, **user records are directly "linked" out from the critical records that they need to be connected to** (i.e. Organizations and Grant Requests). Please see the **Data Structure Simplified** page for information on exactly how these linkages work.

Primary Contact

Within **Blackbaud**, the **Primary contact**, from the data structure's stand point, was special type of contact and as an exception to all the other types, at its core, it was linked directly to its primary purpose. For example, in the case of the primary contact of an organization, the contact record itself was directly linked to the organization.

Within **Fluxx**, this works somewhat analogously. The **Primary Contact** on a Grant Request is called the **Grantee Org Owner**; this user is directly linked out from the Grant Request, and is often also linked out from the **Program Organization** (i.e. the Organization that is requesting the Grant Request) as that Organization's Primary Contact (though the Org Primary Contact and the Grantee Org Owner do **NOT** necessarily need to be the same people; they can be different users).

Affiliations in Fluxx

As previously mentioned, the concept of an "Affiliation" as being a separate record type from "Contacts" is completely scrapped in Fluxx. However, within Fluxx there is the concept of a person's **Role** on a Grantee, and in many ways this "corresponds" to the old Blackbaud concept of "Affiliations."

Primary Contact

On every Grant and Grant Application, Fluxx has a field called the **Grantee Org Owner**; this is the Fluxx word for **Primary Contact** (/**Principal Investigator** as these folks are known in the PERC world). In general, this user is also tends to be the **Primary Contact** for the **Organization Record** that is linked to the Application/Grant (however, this does NOT have to be the case and *sometimes* those two people are different).

Primary Evaluation Contact

This is a renaming of a Fluxx field called "**Grantee Signatory**" (which is supposed to be the Signer of any grant forms/agreements with the WPP, but in most cases the Signer is the Primary Contact/Principal Investigator). We only call it "**Primary Evaluation Contact**" on **OAC Grants/Applications**; on PERC Grants/Applications we've simply renamed this field to "Project Staff # 1."

Project Staff # 1 - 3

Within Fluxx, there are a total of **5 fields that can be used to link grantees back to a Grant/Application**. We already discussed the first two (Grantee Org Owner and Grantee Signatory). The other three, within Fluxx, are called **Related User 1, Related User 2,** and **Related User 3**. There is no technical difference between these three users; they're simply core fields allowing multiple grantees to access/edit the same application/grant.

The WPP likes to call these Related Users **Project Staff** instead. Additionally, we've called **Related User 3** the "Financial Contact" on both OAC and PERC Grants. This is so that if we need to reach out specifically to their financial contact, we know to include Related User 3 in the email on all grants (instead of having to manually write an email because the financial contacts are randomly spread across the three possible related user fields). Additionally, as you read above, we've re-purposes some of the **Grantee Signatory** fields to be an additional Related User field to make up for the "loss" of Related User 3 due to it being exclusively for Financial Contacts.

Program Lead

The Program Lead is another user field linked out from Applications and Grants. At the time of writing, this field can be found in the **Internal Section** under the submenu "**Award Information**." This is linked out to the **Primary WPP Program Officer** responsible for the RfP that this application came in for.

Notes on Contacts/Affiliations

If a user no longer needs to be linked to a Grant, you can simply replace them/make blank out the specific user field through which they were linked to the Application/Grant. This will **prevent** them from being able to view/edit the Application/Grant and any related records (i.e. Requirements and Amendments) within their portal. However, Fluxx is smart in that the user can still be listed as having a "Relationship" with the Organization such that they can always be added back onto the Application/Grant at a later time.

To modify the organization of the linked affiliation, the affiliation DOES **NOT** have to be deleted and re-created; the organization can simply be edited and updated. This will populate back to the linked records appropriately.

The benefit to having a full list of "Affiliations" on an Application/Grant filled out is that most of our emails point to **all grantee contacts**, so there's an added benefit that a group of 4 people all receiving an email have a better chance of actually reading that message and taking action than if the email were sent to just 1 grantee contact (as occurred in the old Blackbaud system).