The Grant Scoop

GrantVantage
EASY • POWERFUL • COMPLETE

Hello GrantVantage Users!

Hope everyone had a happy holidays and a grantastic new year! We at GrantVantage are excited to announce a couple of new features:

- Changes to Transactions
- SAM Registration
- Drawdowns, Reimbursements, & Disbursements
- A New Way to Communicate
- Budget Revision Response
- Source Allocation by Budget Category

Changes to Transactions

Due to a need for a more structured workflow, GrantVantage has removed the ability to add transactions to revision draft budgets. Now transactions are added against the Initial Draft & Approved Budget. The Transaction Detail Report should only display current budgets when Status = Initial Draft *or* Status = Approved Budget.

SAM Registration

To better assist you we have implemented a way to track your SAM Registration, including a New Date field on the Organization Form called: "SAM Registration Expiration Date".

And we will be adding a yes/no option for the "Active Exclusion".

Drawdowns, Reimbursements, & Disbursements

The "Cash Match Amount" & "In-Kind Match Amount" will now auto-populate the sum of all Cash Match & In-Kind transactions that exist between the "Period Start" and "Period End" dates of a reimbursement request for a particular funder when source allocation is enabled.

A New Way to Communicate

We are pleased to announce our redesigned communication message! Now you will receive the message not only on your GrantVantage account but a copy will be sent to your email in real time! The communication feature is designed to assist GrantVantage users with user-directed workflows! Remember, you must login to your GrantVantage account in order to respond to any inquiries, requests, or to accept/decline requests.

Budget Revision Response

The "Budget Revision Response" field and the "Approve" & "Decline" options have been created! You may now create and review budget changes, and explain within the form what the budget change is for or why the budget change is being approved/declined.

Source Allocation by Budget Category

You may now manage multiple project budgets in a single budget! To do so make sure you have selected the Source Allocation by Budget Category when creating the initial budget. This will give you the option to pre-allocate funds to different revenue sources.

To pre-allocate funds select the fund you wish to pre-allocate, for example the Travel Fund. In the popup menu you may choose where you want the funds to pre-allocate and what amount.

Then in the Reports section you may utilize the Revenue Source to distinguish information based on the selected funder record. This gives you the ability to see all budgets as a single budget _or_ as multiple mini budgets depending on revenue source selection.

Thank you for using GrantVantage Solutions!
If you have any questions, comments, or concerns feel free to reach out to us!