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# NPSP: Create and Manage Grants

Learn how to enter and track new Grant (Opportunity) records, how to enter Payments for a Grant, and how to manage the deliverables to meet the funding organization's application and reporting requirements.

This article includes these topics:

- Grants Overview
- Setup—Before You Begin
- Create a New Grant Opportunity
- Manage Deliverables with Grant Deadline Records
- Update a Grant Record When a Grant is Awarded
- Schedule the Grant Payments
- Receive or Write Off Grant Payments
- Associate a New Grant record with a Previous Grant

## Grants Overview

Not all donations come from individuals or are paid immediately. Grants are donations that typically come from organizations and are usually paid out separately from when they are awarded. Grants are often tied to specific programs and deliverables with important reporting and documentation deadlines that require management.

In the Nonprofit Success Pack, Grants are tracked on the Opportunity object.

## Setup—Before You Begin

If you downloaded a trial organization of the Nonprofit Success Pack at version 3.41 or later, then the Manage Grants feature is ready to use and you can skip this step. (See [Which Version of Nonprofit Success Pack Am I Using?](/articles/Resource/Which-Version-of-NPSP-Am-I-Using) (/articles/Resource/Which-Version-of-NPSP-Am-I-Using) for more information on locating

your precise version.)

If you upgraded to the Nonprofit Success Pack from a previous version, or signed up for your NPSP trial before version 3.41, then you'll need to complete a few preliminary steps before you can track Grant Opportunities:

### **Make Account, Opportunity, and Grant Deadline fields visible**

Make sure that the new fields on Account and Opportunity are visible for all profiles that should have access to them.

For Accounts, these are:

- Funding Focus
- Grantmaker

For Opportunities, these are:

- Requested Amount
- Grant Requirements Website
- Grant Program Area(s)
- Previous Grant Opportunity
- Grant Contract Date
- Grant Period Start Date
- Grant Period End Date
- Next Grant Deadline Due Date
- Is Grant Renewal

For Grant Deadlines, these are:

- Grant Deadline Due Date
- Grant Deliverable Close Date
- Grant Deliverable Requirements
- Grant Opportunity

### **Add the Funding Focus and Grantmaker fields to Organization Account page layouts**

Make sure that you've added the Account fields named **Funding Focus** and **Grantmaker** to the page layout used for Organizations. We recommend creating a separate section in your page layout for **Grantmaking Information**, as shown.

Grantmaking Information		Grantmaker	
Funding Focus	Sample Funding Focus		<input checked="" type="checkbox"/>
System Information		Last Modified By	
Created By	Sample User		Sample User

### Verify or create Opportunity Stage picklist values

Grants use different Opportunity Stage values as compared to one-time donations. From Setup, enter **Opportunities** in the Quick Find box, then select **Fields** under the Opportunities menu. Click on **Stage** in the Opportunity Standard Fields section. You should see these Stage Picklist Values. If not, you will need to create them.

Name	Type	Probability	Forecast Category
Prospecting	Open	10%	Pipeline
LOI Submitted	Open	20%	Pipeline
Application Submitted	Open	30%	Pipeline
Awarded	Closed/Won	100%	Closed
Withdrawn	Closed/Lost	0%	Omitted

**Note:** *You can adjust Names or Probability as you feel appropriate for your organization's processes, just make sure you have a separate stage for when a Grant is Awarded or Lost and one for each Stage in the process you'll want to track.*

### Set up a new Sales Process for Grants

In Salesforce, a Sales Process defines available Opportunity stages, and can be assigned to one or more Record Types. As a Grant will have stages that start long before the check is received, you'll want to have a separate Sales Process from one used for one-time gifts. From Setup, enter **Sales Process** in the Quick Find box, then select **Sales Process**. Your Grants Sales Process should include the Stages in the table above.

### Set up a new Record Type for Grants

From Setup, enter **Record Types** in the Quick Find box, then select **Record Types** under the Opportunities menu. Create a **Grant** Record Type if one does not already exist. The Grant Record Type should use the Grant Sales Process you created in the previous step.

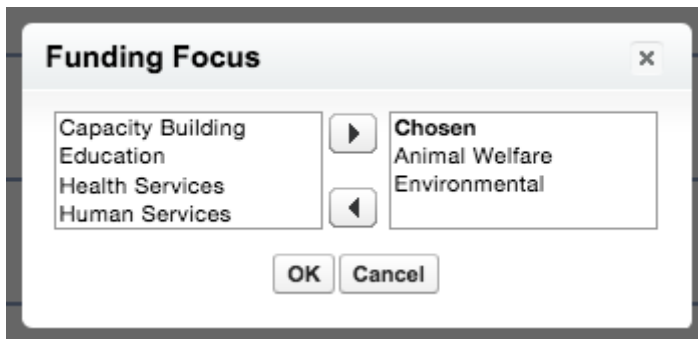
### Assign the Grant Page Layout to the Grant Record Type

From Setup, enter **Page Layouts** in the Quick Find box, then select Page Layouts under the Opportunities menu. Click **Page Layout Assignment** and edit the assignment so the Grant Record Type is using the Grant Page Layout for all appropriate profiles.

### Populate fields on the Organization Account record

Populate fields on the Organization Account record to indicate that a business or foundation is able to provide Grants to your organization. Indicate the Grantor's Funding Focus. (You should have added this field earlier.)

You can edit the picklist values for the **Funding Focus** field on the Account record to best match your organization's processes.



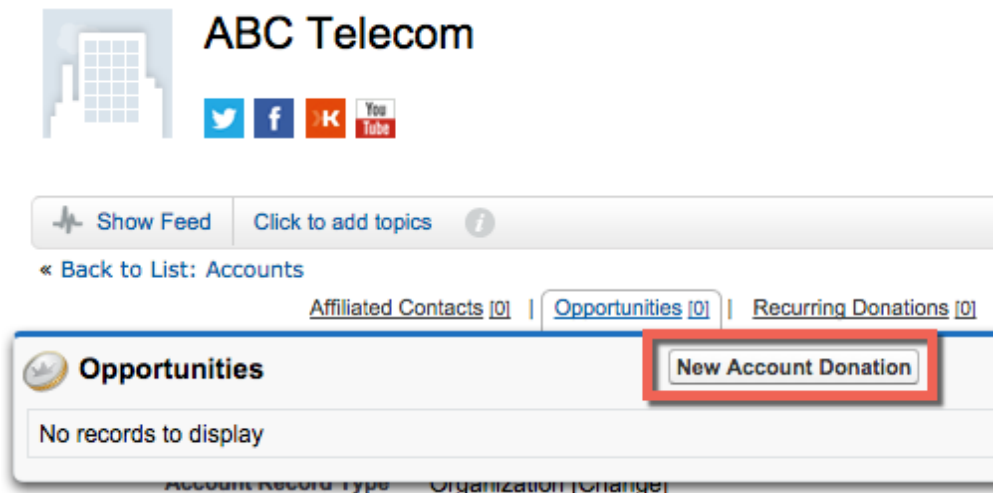
Note that if the grant is through a household, such as through a family foundation, it is best practice to **create a separate organization record for the foundation** and not use the Household record for grant funding.

## Create a New Grant Opportunity

Salesforce stores Grants as Opportunity records, just like donations.

Grants are usually given by institutions, and not families. However, you can associate a Grant record with a Household Account, if appropriate.

1. On the Account tab, locate the Account with which you want to associate the Grant. If you haven't yet created an Account for the organization, create a new one.
2. On the Opportunities related list, click **New Account Donation**.



3. From the list of Record Types, select **Grant** and click **Continue**.

## New Opportunity Select Opportunity Record Type

Select a record type for the new opportunity. To skip this page in the future, che

Select Opportunity Record Type

Record Type of new record

☒ Donation
☐ Grant

4. Salesforce fills in the Opportunity Name and Account Name by default. Enter the following information for your new Grant record:
  - **Requested Amount** - the amount you are requesting for the grant. Because the ultimate amount of the grant may differ from the requested amount, you might want to leave the Amount field blank for now.
  - **Stage** - select **Prospecting**. As long as you don't select a Closed/Won stage such as Awarded, you'll be able to schedule payments for this Grant record.
  - **Close Date** - select a date that indicates when you expect to receive the grant. Don't worry if you don't know the exact date right now. For example, you might want to enter a date that you think is somewhere within the same fiscal quarter. That way your quarterly forecast reporting can include this grant as a possibility. This date is editable later and the changes are tracked in history.
  - **Campaign, Grant Requirements Website, Grant Program Area(s)** - enter if appropriate.
5. Click **Save**.

The new Grant Opportunity is now associated with the Account.

Opportunity

ABC Telecom Grant 09/30/2015

Customize Page

Show Feed
Click to add topics

[Contact Roles \(0\)](#) | [Payments \(1\)](#) | [Grant Deadlines \(0\)](#) | [Previous Grant Opportunities \(0\)](#) | [GAU Allocations \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes](#)

Opportunity Detail

Edit Delete Clone Matching Donation

▼ Donation Information

Opportunity Name	ABC Telecom Grant 09/30/2015	Primary Campaign Source	
Account Name	ABC Telecom	Stage	Prospecting
Amount		Probability (%)	10%
Close Date	9/30/2015	Type	
Description			

▼ Grant Information

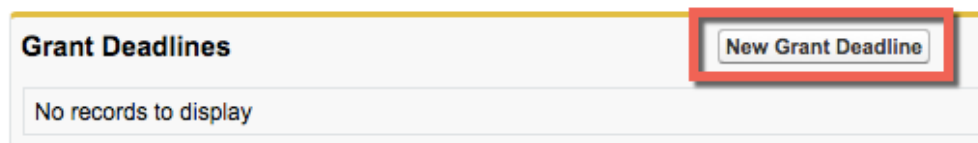
Requested Amount	\$50,000	Grant Contract Date	
Grant Requirements Website	http://www.abctelecom.com/grant-requirements	Grant Period Start Date	
Grant Contract Number		Grant Period End Date	
Grant Program Area(s)	Road to Success program at the Orchard Middle School	Next Grant Deadline Due Date	
Previous Grant Opportunity		Is Grant Renewal	<input type="checkbox"/>

# Manage Deliverables with Grant Deadline Records

As you communicate with the funding organization and your Grant moves along in its process from Prospecting to Awarded, you'll want to keep key data on the Grant record up to date. In the Nonprofit Success Pack, you keep track of these deadlines by creating separate Grant Deadline records.

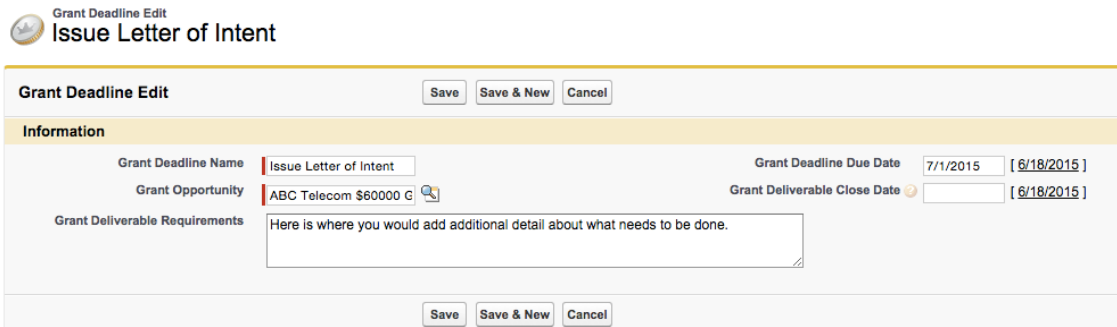
Let's say your organization needs to have a Letter of Intent (LOI) for this ABC Telecom grant issued by July 1st. If the LOI is approved, you'll then need to apply for the grant by August 1st, for a decision on September 30th. Here is what you'll need to do to make sure everything is completed on time.

1. Open a Grant record that's been set to Prospecting.
2. Scroll to the Grant Deadlines related list and click **New Grant Deadline**



The screenshot shows a section titled "Grant Deadlines" with a sub-header "No records to display". To the right, a button labeled "New Grant Deadline" is highlighted with a red rectangular box.

3. Give the deadline record a Name and add additional detail. Be sure to indicate the **Grant Deadline Due Date**.

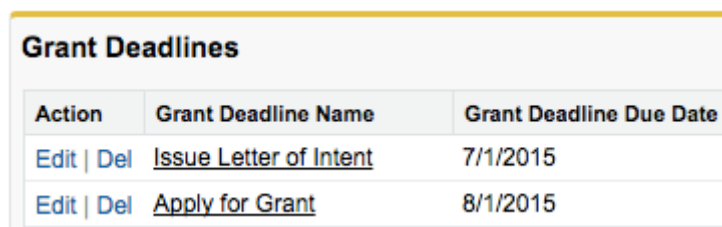


The screenshot shows the "Grant Deadline Edit" form. At the top, there's a header "Grant Deadline Edit" with a "Save" button. Below it, the "Information" section contains the following fields:

- Grant Deadline Name:** Issue Letter of Intent
- Grant Opportunity:** ABC Telecom \$60000 G
- Grant Deliverable Requirements:** Here is where you would add additional detail about what needs to be done.
- Grant Deadline Due Date:** 7/1/2015 [ 6/18/2015 ]
- Grant Deliverable Close Date:** [ 6/18/2015 ]

At the bottom, there are "Save", "Save & New", and "Cancel" buttons.

4. Enter additional Grant Deadline records. You can enter as many as is appropriate.



Action	Grant Deadline Name	Grant Deadline Due Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Issue Letter of Intent</a>	7/1/2015
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Apply for Grant</a>	8/1/2015

Notice that Salesforce automatically updates the **Next Grant Deadline Due Date** field on the main Grant Opportunity record to reflect the next deadline date.

▼ Grant Information	
Requested Amount ⓘ	\$75,000
Grant Requirements Website ⓘ	<a href="http://www.abctelecom.com/grant-requirements">http://www.abctelecom.com/grant-requirements</a>
Grant Contract Number ⓘ	
Grant Program Area(s) ⓘ	Road to Success program at the Orchard Middle School
Previous Grant Opportunity ⓘ	
Grant Contract Date ⓘ	
Grant Period Start Date ⓘ	
Grant Period End Date ⓘ	
Next Grant Deadline Due Date ⓘ	8/1/2015
Is Grant Renewal ⓘ	<input type="checkbox"/>

## Best practices for Grant records

Be sure to update Grant Deadline records as deadlines are met. For example, in this case even though the deadline was 7/1/2015, we are noting that it was in fact submitted successfully on 6/25/2015.

Grant Deadline Due Date	7/1/2015	[ 6/18/2015 ]
Grant Deliverable Close Date ⓘ	6/25/2015	[ 6/18/2015 ]

Feel free to use this record to assign tasks to other staff members or attach relevant documents. (For more information, see the documentation for assigning tasks ([https://help.salesforce.com/apex/HTViewHelpDoc?id=tasks.htm&language=en\\_US](https://help.salesforce.com/apex/HTViewHelpDoc?id=tasks.htm&language=en_US)) or attaching documents ([https://help.salesforce.com/HTViewHelpDoc?id=notes\\_add.htm&language=en\\_US](https://help.salesforce.com/HTViewHelpDoc?id=notes_add.htm&language=en_US)) in Salesforce Help & Training.)

Also, keep in mind that when you populate a Grant Deliverable Close Date and save a Grant Deadline record, Salesforce automatically updates the main Grant Opportunity record to show the date of the next deadline. Be sure to also keep the Opportunity Stage updated. For example, when a Letter of Intent is submitted, update the Stage to LOI Submitted. You can use Salesforce workflow rules or Process Builder to automate this functionality.

## Update a Grant Record When a Grant is Awarded

You have received word that your grant has been Awarded. Congratulations! Now you need to update your work-in-progress Grant record to indicate that you expect payment and when. There may be additional reporting requirements that you need to keep track of as well.

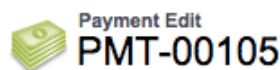
1. Navigate to the Opportunity record for the Grant that's been awarded, and then click **Edit**.
2. Enter the amount of the final, total grant amount in **Amount** field. This number does not necessarily have to be the same as the Requested Amount previously entered.
3. Change the Stage of the Grant Opportunity to **Awarded**. Doing this will tell Salesforce to assign the Opportunity a Closed/Won state. The total amount will then roll up to the grantor's Account record.
4. Schedule the Grant Payments (see next section for more details).

5. If you've enabled GAU Allocations in NPSP Settings, you should double-check the GAU Allocations related list to see that your allocations are correct. You can also add allocations at this point to indicate how funds should be distributed within your organization. See [Create and Manage Donation Allocations \(/articles/Resource/NPSP-Manage-Allocations\)](/articles/Resource/NPSP-Manage-Allocations) for more information.
6. Update the Grant record's **Grant Contract Number**, **Grant Contract Date**, **Grant Period Start Date**, **Grant Period End Date** as appropriate.
7. Add additional Grant Deadline records to track post-award requirements such as when interim reports are due.

## Schedule the Grant Payments

Very often, grants are disbursed as partial payments over a fixed schedule. Once you've marked the Grant record with the Awarded stage (or a stage where the Type is Closed/Won), the Nonprofit Success Pack may assume that the record contains only Paid payments. When the Grant record is in this state, you can't schedule additional payments, so you'll need to edit the record slightly before you can schedule the grant payments.

1. On the Grant record, go to the Payments related list, and edit any existing Payment record to uncheck the **Paid** field.



Payment Edit		Save	Save & New	Cancel
Information				
Opportunity	ABC Telecom Grant 09/30/2015			
Payment Amount	<input type="text" value="60,000.00"/>			
Paid	<input type="checkbox"/>			

2. Now you can return to the Grant record and click the **Schedule Payments** button. The Schedule Payment screen appears.





Payments

Create one or more Payments for this Opportunity}

Current Opportunity Info				
Opportunity	ABC Telecom Grant 09/30/2015		Amount	\$60,000.00
Stage	Awarded		Payment Amount Received	\$0.00
Close Date	6/12/2015		Remaining Balance	\$60,000.00

Create a Payment Schedule	
# of Payments	4
Date of First Payment	9/30/2015 [ 6/12/2015 ]
Interval	3 Month
Payment Method	Check
<button>Calculate Payments</button>	

- To create a quarterly payment schedule over a single year, enter the following information:
  - For **# of Payments**, select **4**.
  - For **Date of First Payment**, enter the date you expect the first payment.
  - For **Interval**, select **3** and **Month**.
  - For **Payment Method**, select how you anticipate the payments will be made. Leave blank if unsure.
- Click **Calculate Payments**.  
The **Payments to be Created** dialog appears.

Payments to be Created					
Payment Number	Payment Amount	Scheduled Date	Payment Date	Paid	
1	15,000.00	9/30/2015 [ 6/12/2015 ]	9/15/2015 [ 6/12/2015 ]	<input checked="" type="checkbox"/>	
2	15,000.00	12/30/2015 [ 6/12/2015 ]	[ 6/12/2015 ]	<input type="checkbox"/>	
3	15,000.00	3/30/2016 [ 6/12/2015 ]	[ 6/12/2015 ]	<input type="checkbox"/>	
4	15,000.00	6/30/2016 [ 6/12/2015 ]	[ 6/12/2015 ]	<input type="checkbox"/>	
<button>Create Payments</button>					

- You can accept these default calculations or modify them as you see fit to match the grant payment dates. In the example above, we entered the date and checked the Paid checkbox for the first quarterly installment of this grant.
- Click the Create Payments button to create the 4 Payment records associated with the grant.

Payments							
<button>New Payment</button> <button>Schedule Payments</button> <button>Writeoff Payments</button> <span>Payments Help ?</span>							
Action	Payment Number	Payment Amount	Payment Date	Payment Method	Paid	Written Off	
<a>Edit</a>   <a>Del</a>	PMT-00107	\$15,000.00	9/15/2015	Check	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a>Edit</a>   <a>Del</a>	PMT-00108	\$15,000.00		Check	<input type="checkbox"/>	<input type="checkbox"/>	
<a>Edit</a>   <a>Del</a>	PMT-00109	\$15,000.00		Check	<input type="checkbox"/>	<input type="checkbox"/>	
<a>Edit</a>   <a>Del</a>	PMT-00110	\$15,000.00		Check	<input type="checkbox"/>	<input type="checkbox"/>	

Notice that the Grant record has been updated to show the total completed payments and remaining balance.

#### ▼ Payment Information

Number of Payments 4

Remaining Balance \$45,000.00

Payment Amount Received \$15,000.00

Payment Writeoff Amount \$0.00

## Receive or Write Off Grant Payments

From here, as you receive payments, you can click **Edit** to record the details for each payment (payment date for example).

If the grant schedule changes after a while, or if you won't be receiving the rest of this grant for some reason, write off an individual payment by clicking the **Edit** option next to the payment. You can also write off (i.e. cancel) ALL of the remaining payments by clicking the **Writeoff Payments** button above the list of payments. More information on writing off multiple payments (</articles/Resource/NPSP-Manage-Multiple-Payment-Donations>) is available [here](#).

## Associate a New Grant record with a Previous Grant

As great relationships are maintained with funders, Grants are often renewed year after year. Each year or funding period, you should create a new Grant Opportunity to take advantage of those great relationships. You should also keep your Grant records related to each other by updating the **Previous Grant Opportunity** and **Is Grant Renewal** fields for easy access to historic records.

▼ Grant Information	
Requested Amount	\$75,000
Grant Requirements Website	<a href="http://www.abctelecom.com/grant-requirements">http://www.abctelecom.com/grant-requirements</a>
Grant Contract Number	
Grant Program Area(s)	Read to Succeed program at the Orchard Middle School
Previous Grant Opportunity	ABC Telecom \$60000 Grant 06/12/2015
Grant Contract Date	6/12/2016
Grant Period Start Date	7/1/2016
Grant Period End Date	7/1/2017
Next Grant Deadline Due Date	
Is Grant Renewal	<input checked="" type="checkbox"/>

Special thanks to Dennis Jeske ([https://powerofus.force.com/\\_ui/core/userprofile/UserProfilePage?u=005800000007UpQr](https://powerofus.force.com/_ui/core/userprofile/UserProfilePage?u=005800000007UpQr)) and Sam Knox ([https://powerofus.force.com/\\_ui/core/userprofile/UserProfilePage?u=005800000005PnJX](https://powerofus.force.com/_ui/core/userprofile/UserProfilePage?u=005800000005PnJX)) for their great contributions to this documentation.



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