

Sage Intacct for Grantmakers

Effectively manage your entire grant cycle and advance your mission

To maximize impact and mission achievement, grantmaking organizations need solutions to manage and connect key development and operational processes with their financial processes. Powered by Sage Intacct Forms and Operational Flows, organizations can execute grants and donor advised funds through automated, transparent, and collaborative workflows connected to their financials in Sage Intacct.

A fully automated grant lifecycle

Sage Intacct Forms and Operational Flows powers a fully automated grant life cycle, from funding opportunities and application review to award decisions and notifications to implementation, reporting, and closeout. Infuse efficiency into the pre-award phase with customized eligibility quizzes and grant applications. Verify the legitimacy of a grant applicant through an automated grantee verification process. Once grantees are in the network, contract review and electronic signatures can be done collaboratively.

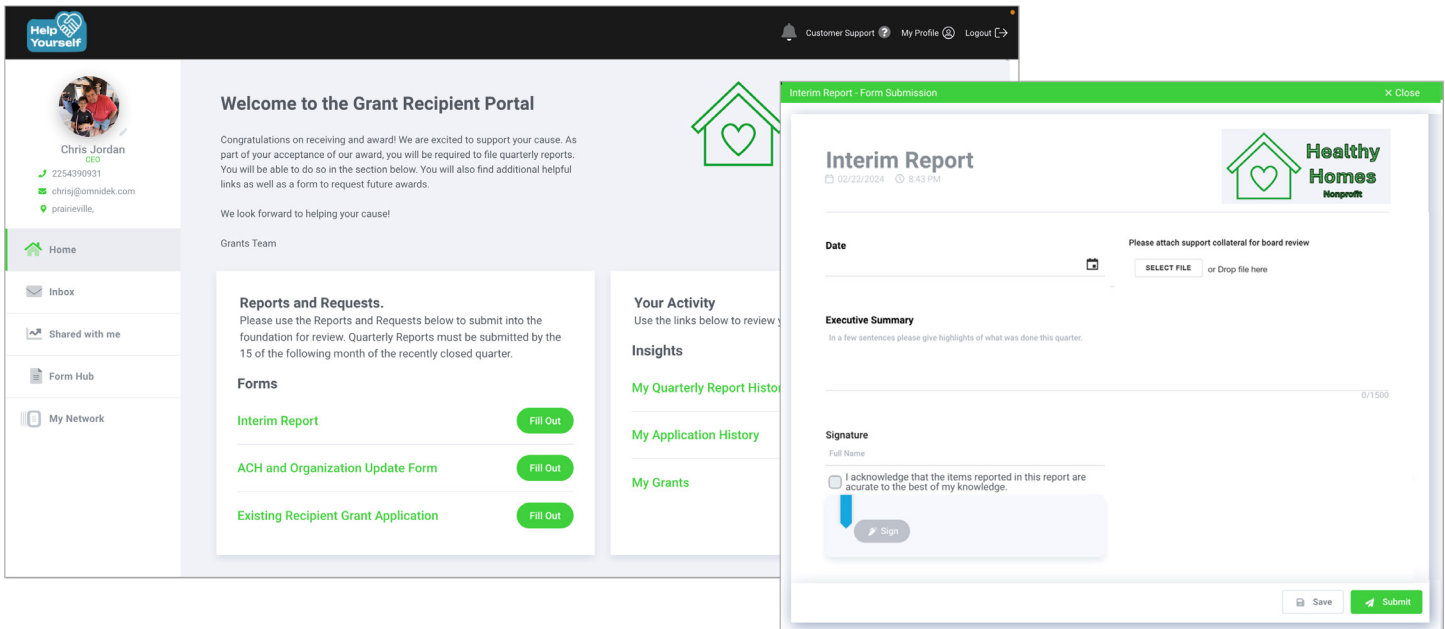


Get the transparency and insights you need with all your data in one place

Experience fully digitized workflows that allow information to flow directly into the appropriate Sage Intacct application areas including vendors or grantees and grant award payments. Reduce the dependencies of costly add-on applications and simplify your IT stack with all of your grantmaking technology in one place. In addition, community foundations can streamline their donor advised funds by creating a two-way communication portal to interact with donor advisors for award notification requests.

Increase collaboration across your organization

Improve collaboration and communication between finance and program staff with open information sharing to ensure everyone is on the same page. Eliminate process bottlenecks and drive momentum with employees, grant applicants, fund advisors, vendors, and more. When everyone has access to the information they need, the next steps are clear and action can be taken. Plus, easily create and deploy new forms or operation flows with a no-code form and workflow designer and no-code portal builder.



Grantmakers can use pre-built or fully configurable forms and portals to manage the entire grant life cycle from eligibility to application to interim reports and draw requests.

Grantmaking:

- Grant applications
- Eligibility quiz
- Award letters
- Interim reporting
- Final reporting
- Grant and payment history portal

Donor-advised funds:

- Applications
- Award acceptance letter
- Change forms
- Contribution pledge
- Grant requests
- Portal with contribution history and giving details

Vendor or grantee contracting:

- Registration
- ACH information
- Contracts
- Portal with contract and payment history
- Contract template library

Other use cases:

- Volunteer requests
- Volunteer waivers
- Meeting minutes
- Board member applications
- Board member nominations
- IT service requests
- PTO requests

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877-437-7765

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