

## Online Grants Management



Web-based grants management is here and it's customizable to work the way you do, like all our products. Access information from anywhere, even offline! Requires minimal or no IT staff and no server. Manage your grants in a flexible, fast, economical database. This is the new generation of grants management.

### Software that works the way you do

- › Use Akoya.net in the office, at home, or on the road – anywhere, anytime, even when you're not connected!
- › Consolidate all data related to grant-making in one place
- › Customize the design to match your operations.
- › Automate and streamline the full cycle of grant-making
- › Install no software, the updates are automatic, and the data is protected with SSL security
- › Employ industry best practices built right into the software
- › Start quickly and learn fast with familiar Microsoft navigation and functions, including use through Microsoft Outlook
- › Integrate seamlessly with Microsoft Office products
- › Avoid new infrastructure or extensive IT support costs

### Experience the Bromelkamp Company difference – we're more than just software

- › Superior Technical Support
- › Continuous innovation
- › Personalized Training
- › Affordable monthly fees including one free support call each month
- › Free Updates automatically installed
- › Over thirty years of success with hundreds of grant makers

*Beyond Software*

**Bromelkamp  
Company**



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# Online Grants Management

## Automate and Streamline the Entire Grant Process

- › Manage timelines, correspondence and review process
- › Keep accurate, accessible records of requests and grants
- › Alert stakeholders on key granting milestones automatically
- › Schedule and track reports and payments easily and flexibly
- › View complete applicant history
- › Reduce or eliminate paper files with online folders for grant documentation and communications, including reminders
- › Accommodate multi-year, challenge, and matching grants, and grants with multiple and varied installments and contingencies.
- › Analyze past and current activity for research and program evaluation

### Payment Form

Report Due	Report Received	Payment Date	Amount	Pmt	Report Reminder	Payment Sent	Payer
1/1/2010		1/1/2010	\$10,000.00	PAID 10/1/2009		1/2/2009	Imagination Public Library

## Manage Relationships

### Roles Relationships

Role Type	Role Contact	Created On
Guidance Counselor	Matt Van Dyke	7/20/2010
Grant Writer	Tim Browner	7/8/2010
Collaborator	Kari Poole	8/2/2010

- › Map and manage relationships between individuals and organizations, not just your grantees
- › Create and store all letters, emails, phone calls, faxes, and related documents
- › Keep track of promises to follow up using online reminders
- › Categorize contacts with multi-level coding
- › Store multiple addresses per contact



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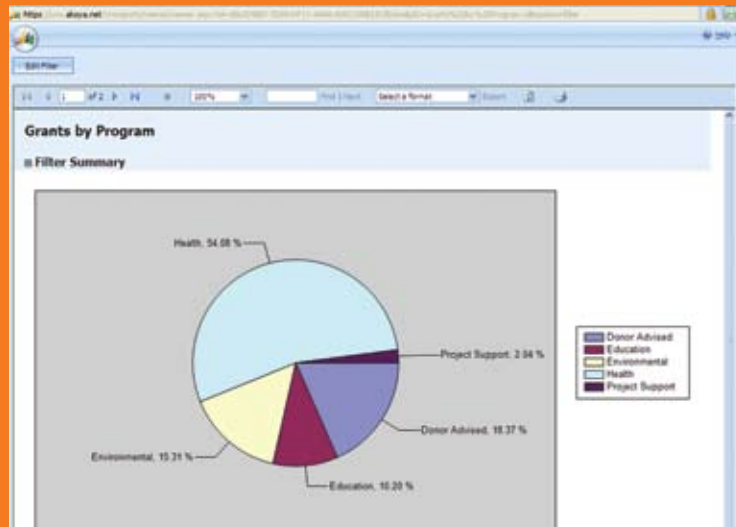
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# Online Grants Management

## Report and Analyze Data

### Reports Form



- › Use built-in reports to easily evaluate programs, allocations, budget performance, grant history, grant summaries, organizational history, grants payable
- › See the data as you like it with reusable personal or public data views
- › Find the data you need with user-friendly filtering and search
- › Create new reports using the intuitive report wizard
- › Export to Excel to create dynamic pivot tables, worksheets and interactive charts and graphs
- › Output to XML, PDF, CSV, Excel, Word, MHTML, TIFF formats

## Automate Correspondence

- › Correspond by letters or entirely paperless using email
- › Customize form communications for content and appearance
- › Use email and word merge templates already included
- › Tailor letter content based on relevant database fields
- › Export lists into multiple formats for bulk email or direct mail communications

### Work Flow Correspondence

Workflow: Grant Award Notification  
Send E-mail

From: [Institution Name] Cc: [ ]  
To: {Primary Contact(Request)} Bcc: [ ]  
Subject: Grant Award Notification

Track the email: [ ]

Regarding: {Request ID(Request)}

Owner: [ ]  
Duration: [ ] Priority: High  
Due: [ ] Category: [ ]  
Sub-Category: [ ]

Congratulations {Primary Contact(Request)}, you have been awarded a grant by Bromelkamp Foundation for your {Title(Request)} project in the amount of {Grant Amount(Request)}.



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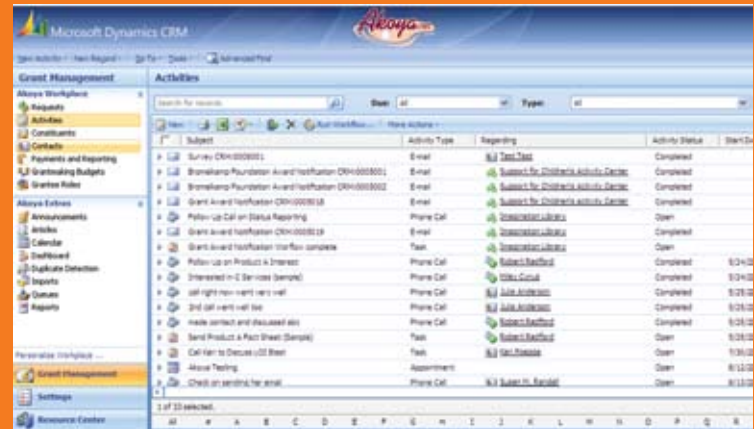


# Online Grants Management

## Manage Tasks and Activities

- › Automatically schedule tasks and notifications
- › Dynamically assign tasks to the right person using configurable rules
- › Employ potent workflow functions to be sure each step in the process is taken
- › Use strong role and group based permissions for easy information distribution

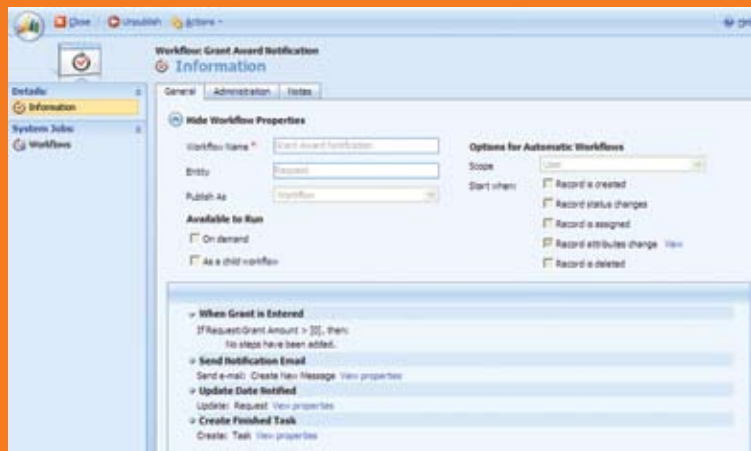
### Activities Form



Subject	Activity Type	Reporting	Activity Status	Start Date
Survey CRM000001	Email	Bill Gates	Completed	
Bromelkamp Foundation Award/WorkPlan CRM000001	Email	Submit for Children's Activity Center	Completed	
Bromelkamp Foundation Award/WorkPlan CRM000002	Email	Submit for Children's Activity Center	Completed	
Grant Award WorkPlan CRM000018	Email	Submit for Children's Activity Center	Completed	
Follow up Call on Status Reporting	Phone Call	Submit Status	Open	
Grant Award WorkPlan CRM000019	Email	Submit Status	Completed	
Grant Award WorkPlan Workflow complete	Task	Submit Status	Open	
Follow up on Product & Interest	Phone Call	Submit Status	Completed	8/24/10
Increased on-C Service Demand	Phone Call	Call Contact	Completed	8/24/10
Call right now very well	Phone Call	Call Appointment	Completed	8/25/10
2nd call very well too	Phone Call	Call Appointment	Completed	8/25/10
make contact and discuss all	Phone Call	Submit Status	Completed	8/25/10
Send Product & Fact Sheet (Sample)	Task	Submit Status	Open	8/25/10
Call Van to Discuss Call Sheet	Task	Call Status	Open	8/25/10
Above Testing	Appointment		Open	8/25/10
Check on pending for email	Phone Call	Bill Gates in Social	Open	8/25/10

## Administer your database

### Administer Database



**Workflow: Grant Award Notification**

**Information**

**Workflow Properties**

Workflow Name: Grant Award Notification

Entity: Request

Publish As: Workflow

**Available to Run**

On demand

As a child workflow

**Options for Automatic Workflows**

Scope: User

Start when:

Record is created

Record status changes

Record is assigned

Record attributes change

Record is deleted

**When Grant is Entered**

If Request Grant Amount > [0], then  
to stage have been added.

**Send Notification Email**

Send e-mail: Create New Message View properties

**Update Date Notified**

Update: Request View properties

**Create Pending Task**

Create: Task View properties

- › Modify code lists with ease
- › Automatically identify and delete duplicated records
- › Easily import and export data
- › Set language and currencies
- › Manage record access with user security settings
- › Manage access to workflows



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