

How To Configure Support Areas in CyberGrants Administrator Instructions

Meet Your Trainer

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Learning Objective

To provide instructions for configuring the Support Area section within CyberGrants.

By the end of the session, administrators should be prepared to set up their own Support Area in CyberGrants with relevant and useful FAQ articles. These FAQ oriented support articles empower end users to successfully navigate around and effectively use their platform.

Agenda

Support Areas Overview

Adding, Editing and Removing FAQs

End User Perspective

Support Areas

Support Areas in CyberGrants

- Empowers users to source answers instead of submitting support requests
- Hosts a list of articles outlining program rules for your organization
- Enhances user experience
- Accessible by donors and non-profits

Search

How can we help? Try keywords like 'eligible' or 'payout'

What organizations are eligible for matching programs? +

What is a 501(c)(3)? +

What is the Matching Gifts program? +

What is the Volunteerism Program? +

What types of donations can be matched? +

How can I invite a non-profit organization to apply for funding? +

[Back To Top](#)

[I still have a question](#) [Back](#)

FAQ Examples

Donor Examples

- Are all gifts made to a non-profit organization matched?
- Why am I not able to match donations outside of my country?
- Is my volunteer activity eligible?

Non-profit Examples

- How do I find an application that I started?
- How do I find my organizations Federal Tax ID?
- How do I update or delete a contact in my application?

Adding, Editing & Removing Support Areas

Locating Support Areas – Grant Management

- Accessible via the Admin tab in CyberGrants

The screenshot displays the CyberGrants Admin interface. At the top, a navigation bar includes tabs for Dashboard, Main, Reports, Surveys, Mail, Budget, **Admin** (highlighted with a red circle and '1'), Employee Giving, Access Sandbox, and a user profile for Megan Dodds. Below the navigation bar is an Admin Menu with a search box. The main content area is divided into four columns:

- General Settings**: Establish important security settings for internal users and grant seeking organizations. Define the search criteria and configure the internal and external visual style. Sub-items include Primary Info, Language Management, Alert Management (Organization Alerts, Request Alerts, Employee Giving Alerts, Nomination Alerts), Internal Style, External Styles, and Configure Character Replacement.
- User Management**: Create, manage and organize your users and their abilities. Sub-items include Internal Users (Create New User, Modify/Search Users, Manage Internal User Permissions, Set up User Types, Set up Approver Roles, Editor Linking), Donors (Donor Profile, Create New Donor, Modify/Search Donors, Manage Donor Permissions, Manage Teams), and Configure Login Rules.
- Organization Management**: Manage Organization profiles, relationships and categories. Control duplicate organizations. Sub-items include Organization Profiles, Combine Two Organizations, Combine Organizations in Bulk, Tax ID Mapping, NCES ID Mapping, Manage Organization Relationships, and Organization Category.
- Application Configuration** (highlighted with a red circle and '2'): Create eligibility quizzes, applications and surveys for potential grant seekers. Rename standard fields or create new custom criteria to fit your giving programs. Sub-items include Data Fields, Eligibility Quiz, Proposal Types, Request Snapshots, Impact Report Types, Survey Types, **Support Areas** (highlighted with a red circle and '3'), Invitations, Workflow Status, and Default Website Setup.

Locating Support Areas – Employee Engagement

- Accessible via the Admin tab in CyberGrants

The screenshot displays the CyberGrants Admin interface. At the top, a navigation bar includes tabs for Dashboard, Main, Reports, Surveys, Mail, Bud, **Admin** (highlighted with a red circle and the number 1), and Employee Giving. Below the navigation bar is an Admin Menu section with a search box. The main content area is divided into three columns of support areas:

- 2 Employee Application Configuration** (highlighted with a red circle and the number 2):
 - Create applications for your employee giving programs.
 - General Configuration
 - + Data Fields
 - + Proposal Types
 - Social Activity Feed
- Portal Pages** (highlighted with a red circle and the number 3):
 - Configure the appearance and layout of internal and external facing portal pages. Utilize a variety of tools to help users stay informed.
 - [-] Dashboard
 - View/Edit Portlets
 - View/Edit Portal Pages
 - Import Portal Pages
 - [-] Reports
 - View/Edit Portlets
 - View/Edit Portal Pages
- E-Mail C...** (partially visible):
 - Set up automate...
 - important intern...
 - events. Remind...
 - require their atte...
 - [-] Standard Eve...
 - Request
 - Impact Re
 - Survey
 - Donor
 - Employee
 - Employee

Configuring Support Areas

- Select the “Edit in Sandbox” to be able to make changes to your Support Areas

Dashboard Main Reports Surveys Mail Budget Admin Employee Giving Access Sandbox Megan Dodds 5 [CyberGrants Foundation]

Admin > Support Areas

Support Areas

To edit an existing support area, click on the corresponding support area. * Indicates a required field

i Cannot edit in Production. To make edits to this content, you will need to go to the Sandbox environment.
[Edit in Sandbox](#)

Non-Profit Support Areas	Active?
How can I continue working on an application I already started?	<input type="radio"/>
How can I delete an application I no longer need?	<input checked="" type="radio"/>
How can I move between sections of the application without completing all req...	<input type="radio"/>

Adding Support Areas

- Now that you are in the Sandbox environment:
 - Scroll to the bottom of your Support Areas list
 - Select “New”
 - Complete Support Area details
 - Select “Active”
 - Save and/or Publish!

New Support Area

 You have pending changes that are not yet published. Would you like to publish these changes?

***Question:**

Answer:

Support Recipient Email:

***Support Area For:**

Non-Profit Organization

Proposal Type:

- Default
- Event Creation
- Log Hours
- Offline Donations
- Sign Up
- Urgent Needs - Credit Card Donations

Active?

Editing Support Areas

In the Sandbox environment:

- Select the applicable support area you wish to Edit
- Make changes to content, proposal type, audience etc.
- Mark as active or inactive
- Save and/or publish!

You are in the Sandbox En

Dashboard Main Reports Surveys Mail Budget Admin Employee Giving

Admin > Support Areas > Edit Support Area

Edit Support Area

Congratulations!
Your support area was saved successfully!

You have pending changes that are not yet published. Would you like to publish these changes?
Publish

***Question:**

My organization is a private grade school or a private high school, b

Answer:

Since you are representing a school, you will use your NCES (National Center for Education Statistics) ID number rather than a Tax ID number.Search for your NCES ID number at the following website: http://nces.ed.gov/globallocator/The NCES ID is 5 digits. If it is presented in 12 digit

Deleting Support Areas

- In the Sandbox environment:
 - Select the support area you wish to delete
 - Select “Delete” at the bottom



Congratulations!

Your support area was deleted successfully!

*Question:

How can I continue working on an application I already started?

Answer:

Follow the directions below to continue working on a previously started but unsubmitted application.Login with the email address and password that was used to create the application.Under 'Applications Requiring Action,' at the bottom of the Welcome Page, look for the application you wish to continue.Click the 'Continue' link next to that application.

Support Recipient Email:

Proposal Type:

Default
12/1/2023AMTEST
2013 Conference email follow up (internal only)
2013 Philanthropy Conference Webinar Registration
2014 International Grantmaking Question
2014 Stump the Chump

Active?

New

Save

Delete

Done

Re-ordering Support Areas

In the Sandbox environment:

- Scroll down to the bottom of the Support Areas list
- Select “Re-order Support Areas”
- Use the arrows to move applicable articles up and down
- Save changes
- Navigate to any Support Areas that you re-ordered from the main page
- Publish!

Reorder Support Areas

To change the display order of the support areas, select the appropriate support areas below



Please note any changes made in this section cannot be published to production area and/or your corresponding proposal type pages.

Questions:

- How can I continue working on an application I already started?
- How can I delete an application I no longer need?
- How can I move between sections of the application without completing?
- How can I print my application?
- How can I see the application before I get started?
- How can I update or delete a contact in my application?
- How do I delete an uploaded file?**
- How do I start an application?
- How do I submit my application once I am done?
- How do I upload a file?
- How will I know if you received my application?
- I am receiving the message that the Federal Tax ID number I entered is not valid.
- I do not know my organization's Federal Tax ID. How can I find it?
- I'm receiving a message that someone is already registered with my organization.
- My organization is a University or College, but my Federal Tax ID number is not valid.
- My organization is a University or College, but my NCES ID number is not valid.
- My organization is a church, but my Federal Tax ID number is not being recognized.
- My organization is a private grade school or a private high school, but my Federal Tax ID number is not valid.
- My organization is a public grade school or a public high school, but my Federal Tax ID number is not valid.
- My organization is a school district, but my Tax ID / NCES ID number is not valid.
- What does it mean I must select the lowest level?



Save

Done

Support Areas from the End User Perspective

End User Perspective

- Accessed via the FAQ tab across the top navigation panel or “Need Support” at bottom of page
- Searchable list
- Can seek further help if needed after reviewing this list

Search

How can we help? Try keywords like 'eligible' or 'payout'

What organizations are eligible for matching programs? +

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[Back To Top](#)

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.