How To Configure Support Areas in CyberGrants

Administrator Instructions

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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

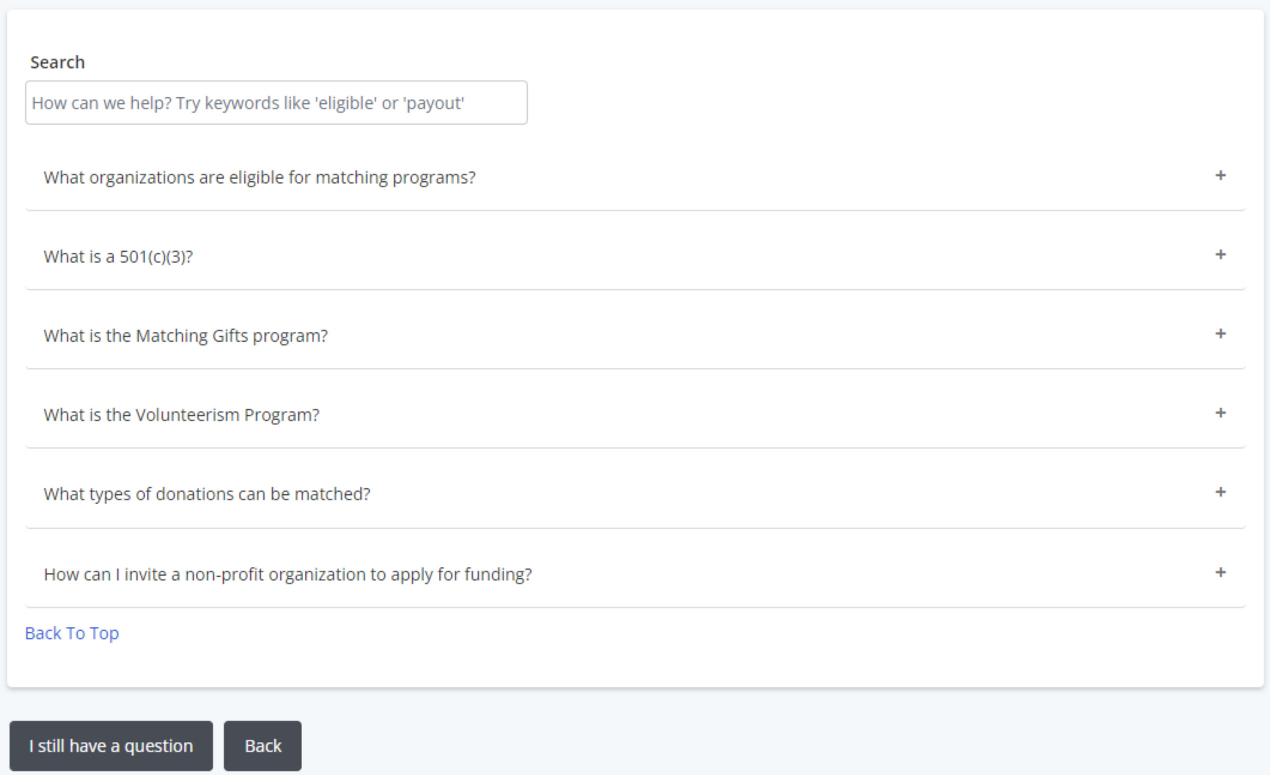
Adding, Editing and Removing FAQs

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



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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?

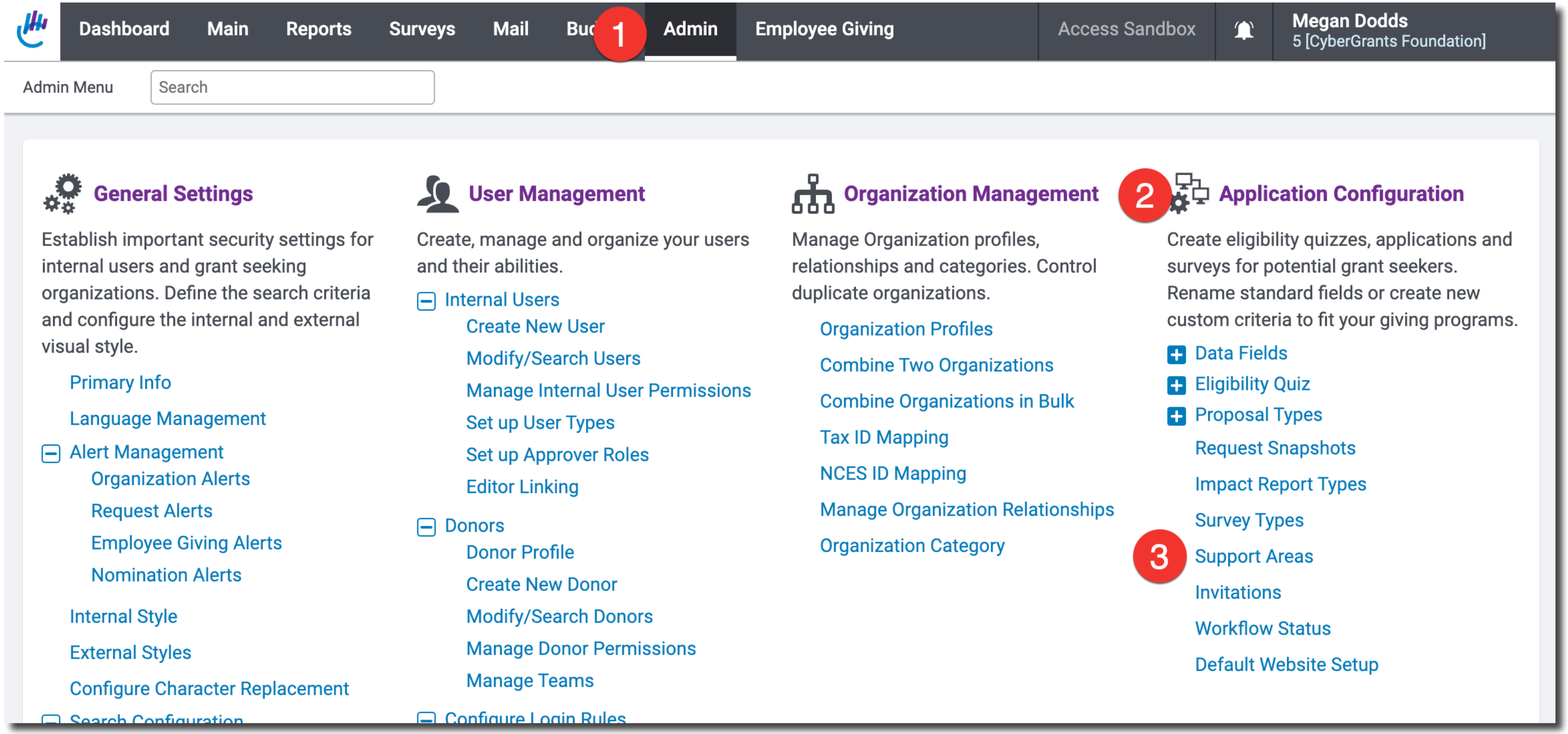
Non-profit Examples

- 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

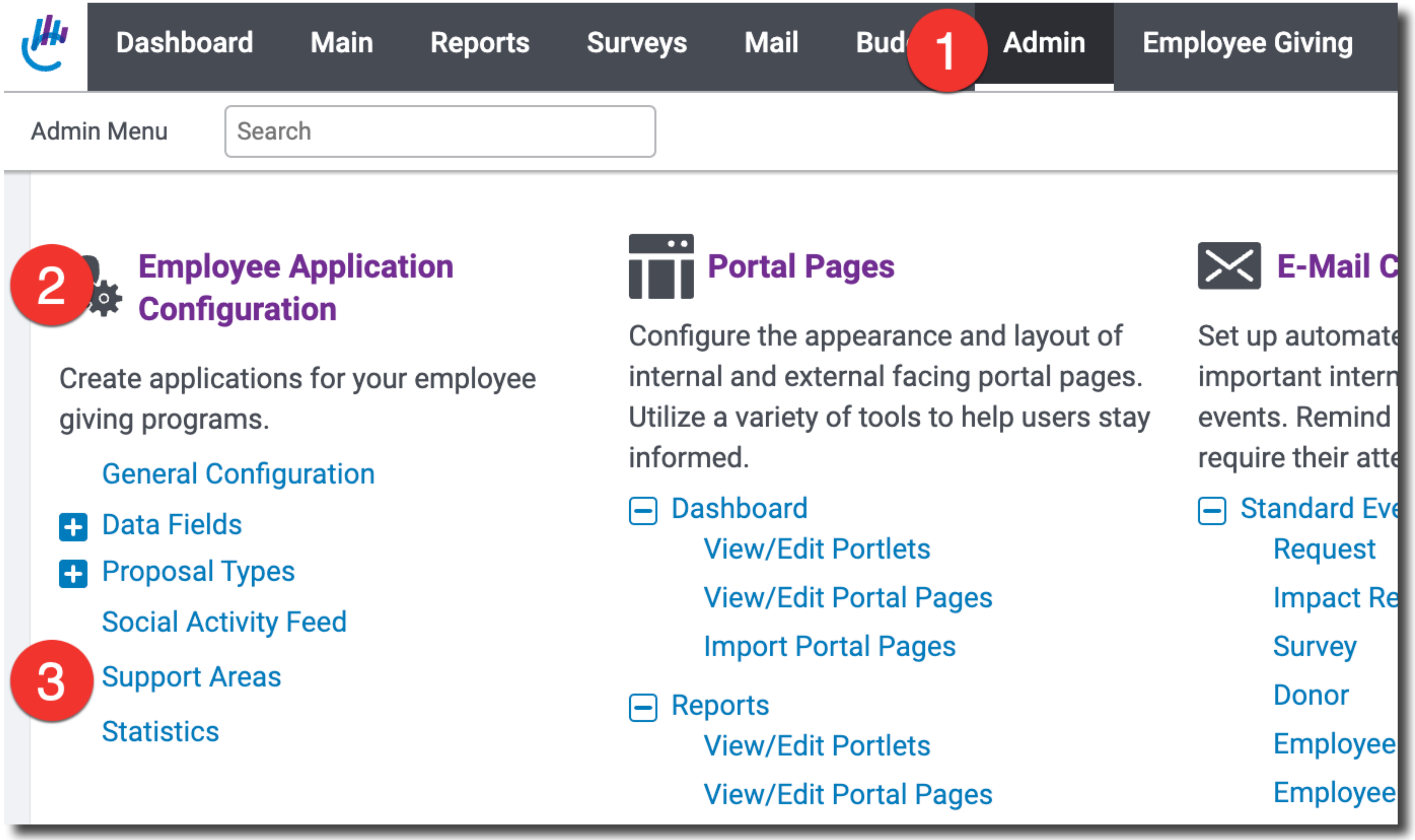
Locating Support Areas – Grant Management

- Accessible via the Admin tab in CyberGrants



Locating Support Areas – Employee Engagement

- Accessible via the Admin tab in CyberGrants



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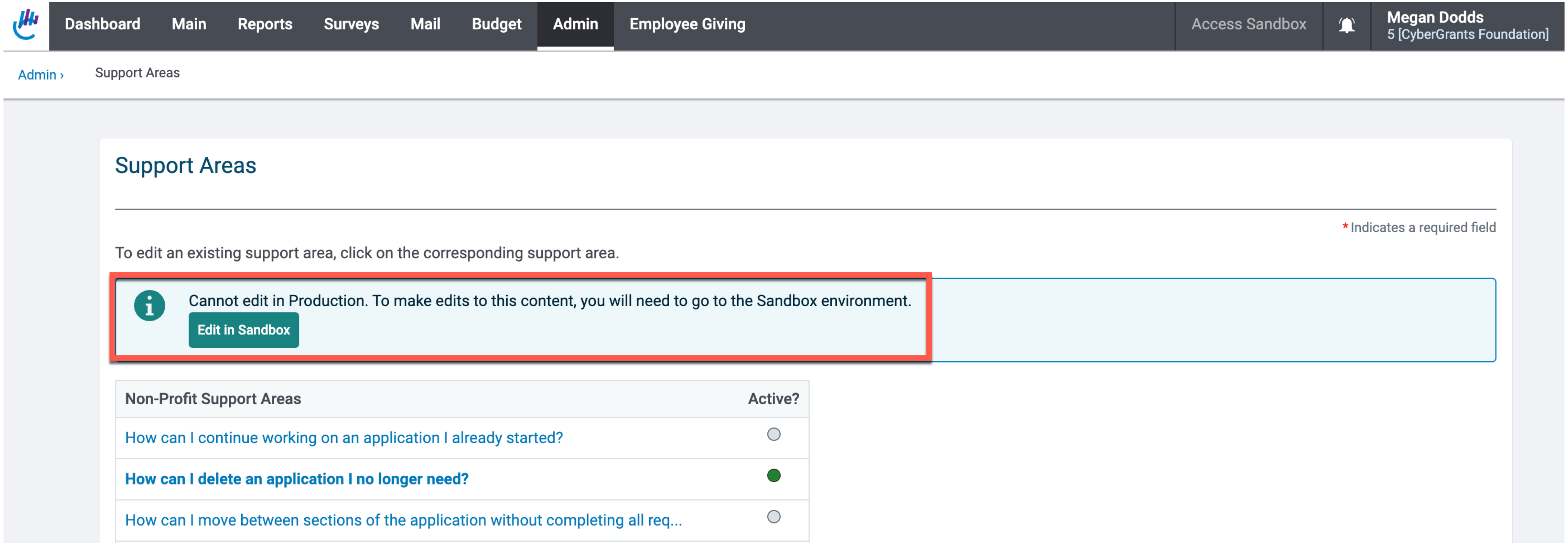
Configuring Support Areas

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



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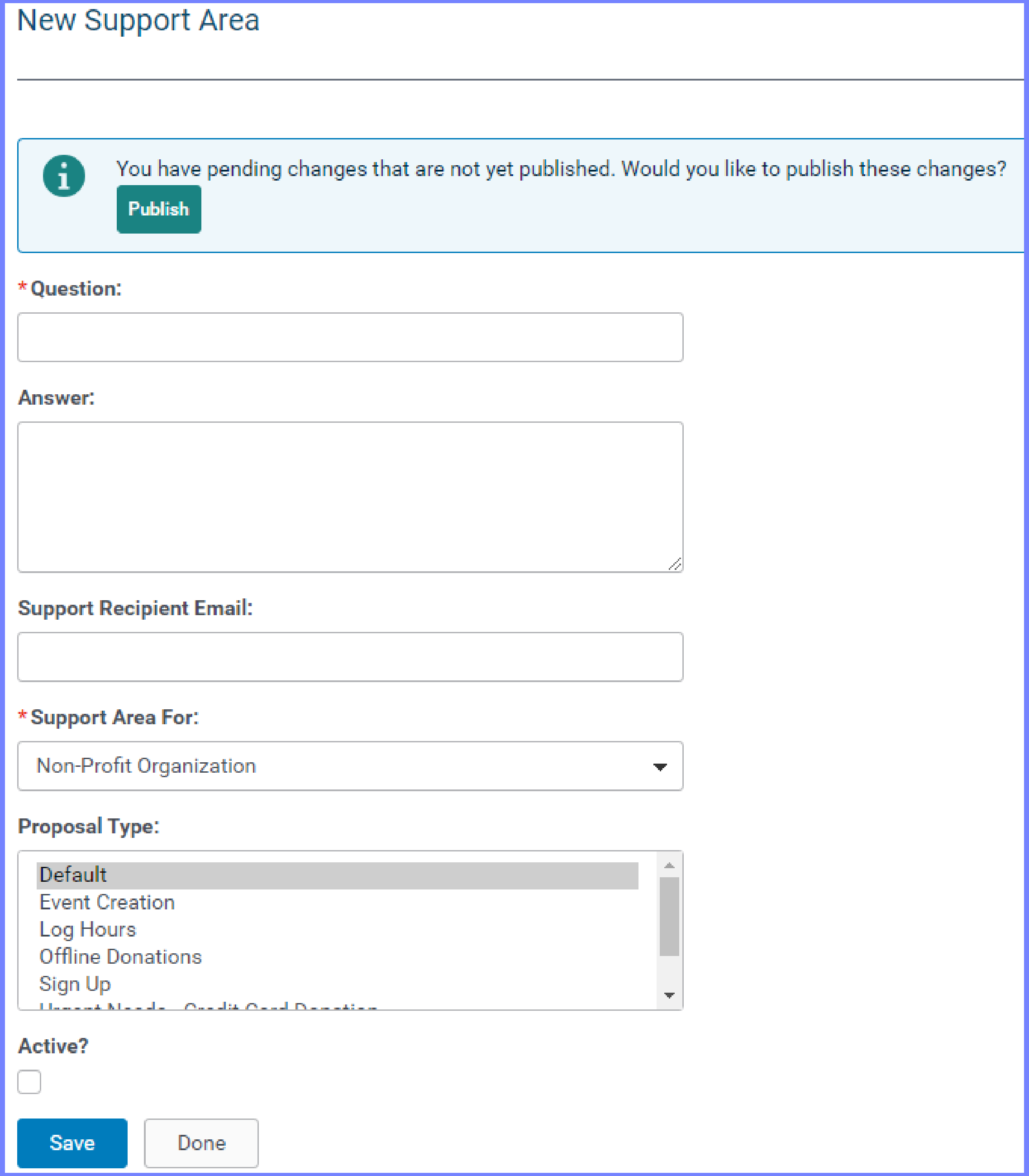
Adding Support Areas

- 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!



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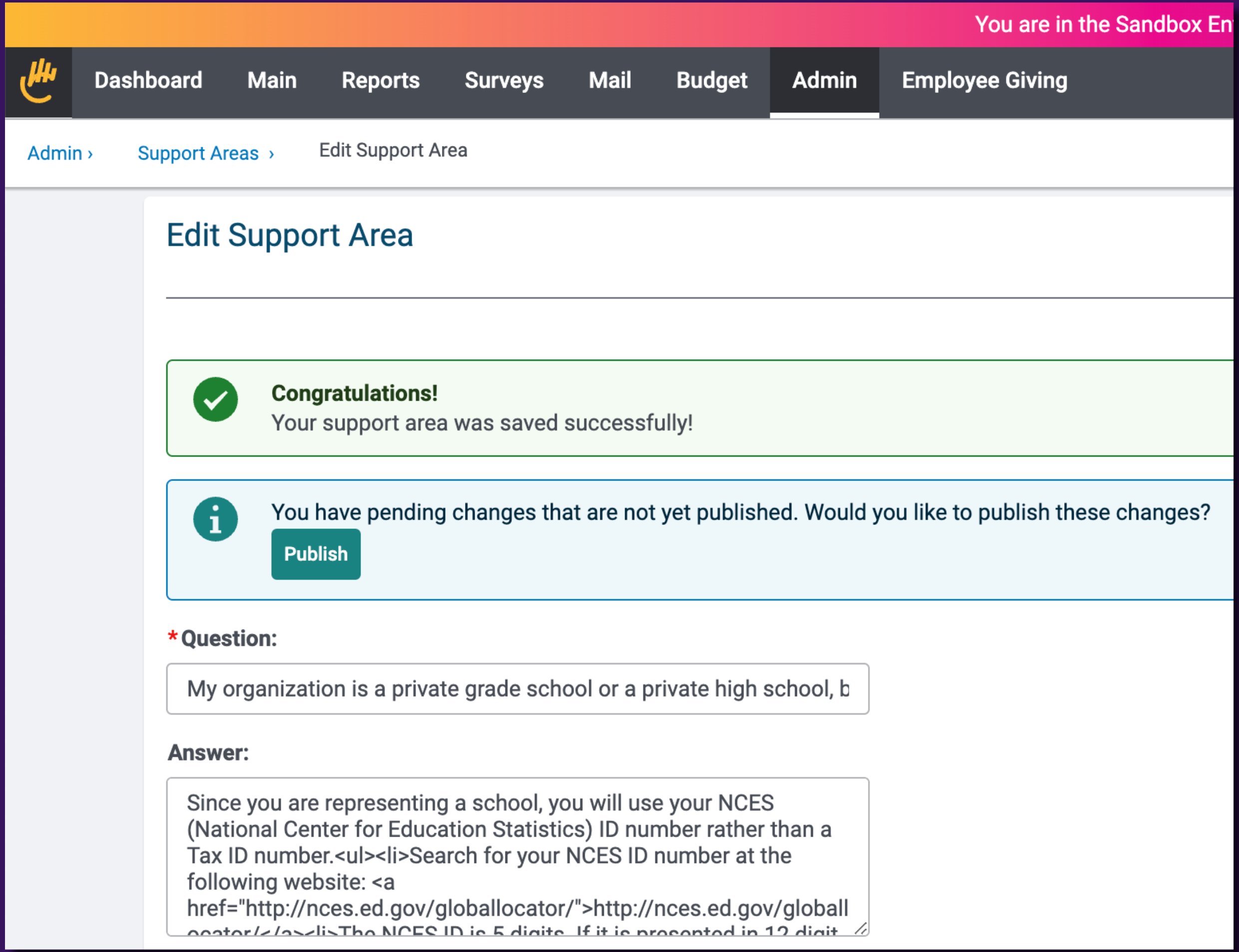
Editing Support Areas

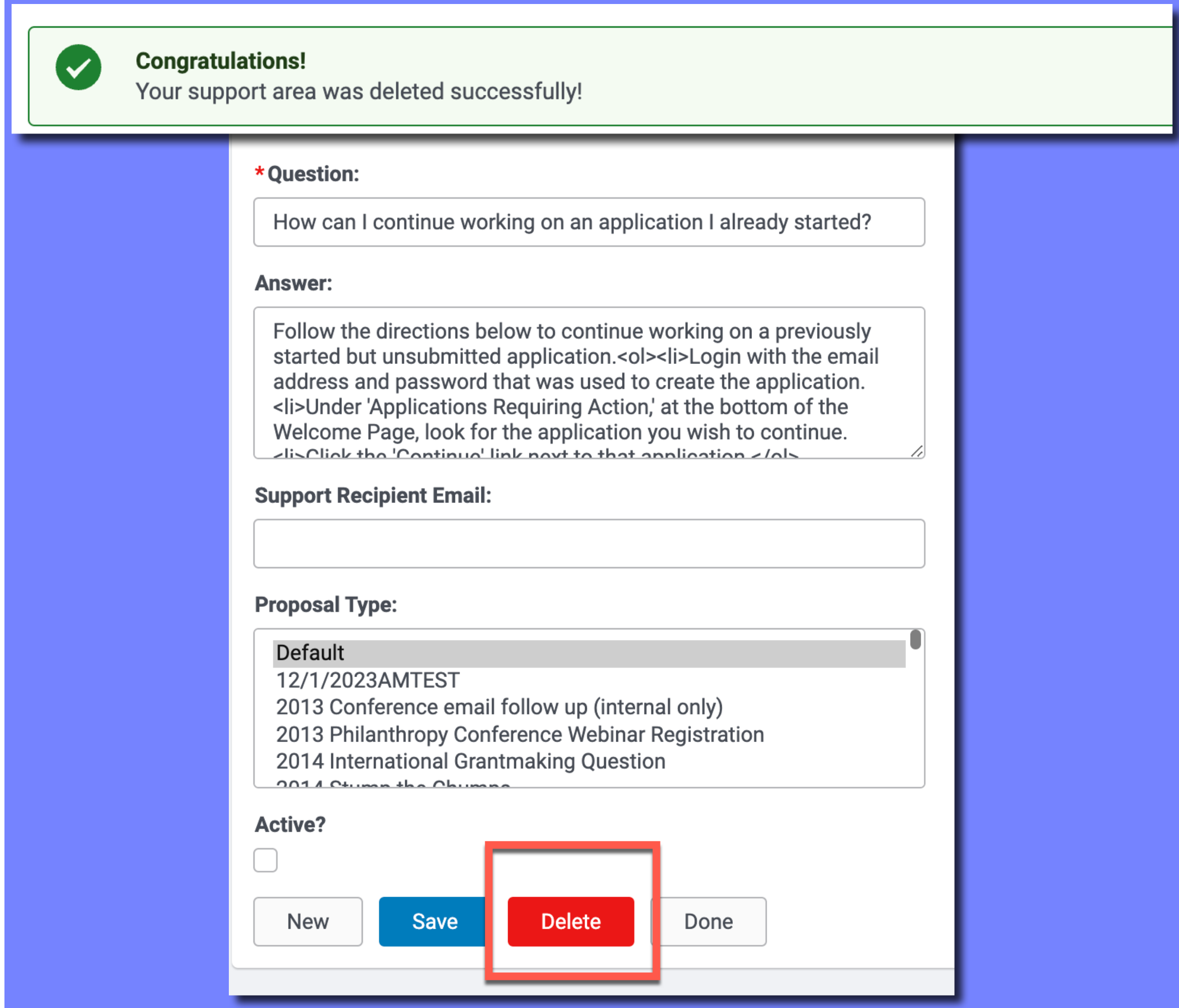
In the Sandbox environment:

- 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!



Deleting Support Areas

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



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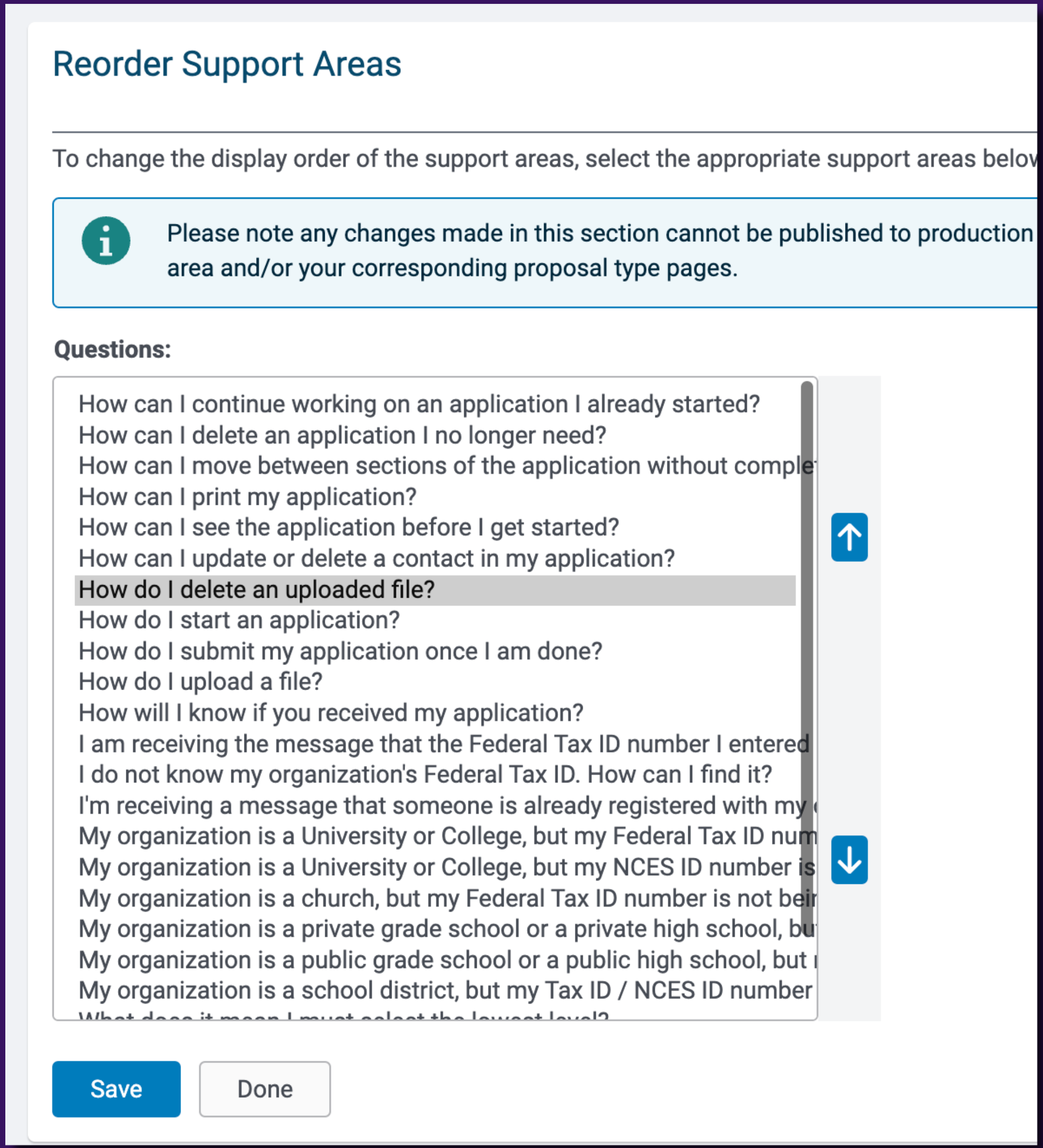
Re-ordering Support Areas

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!



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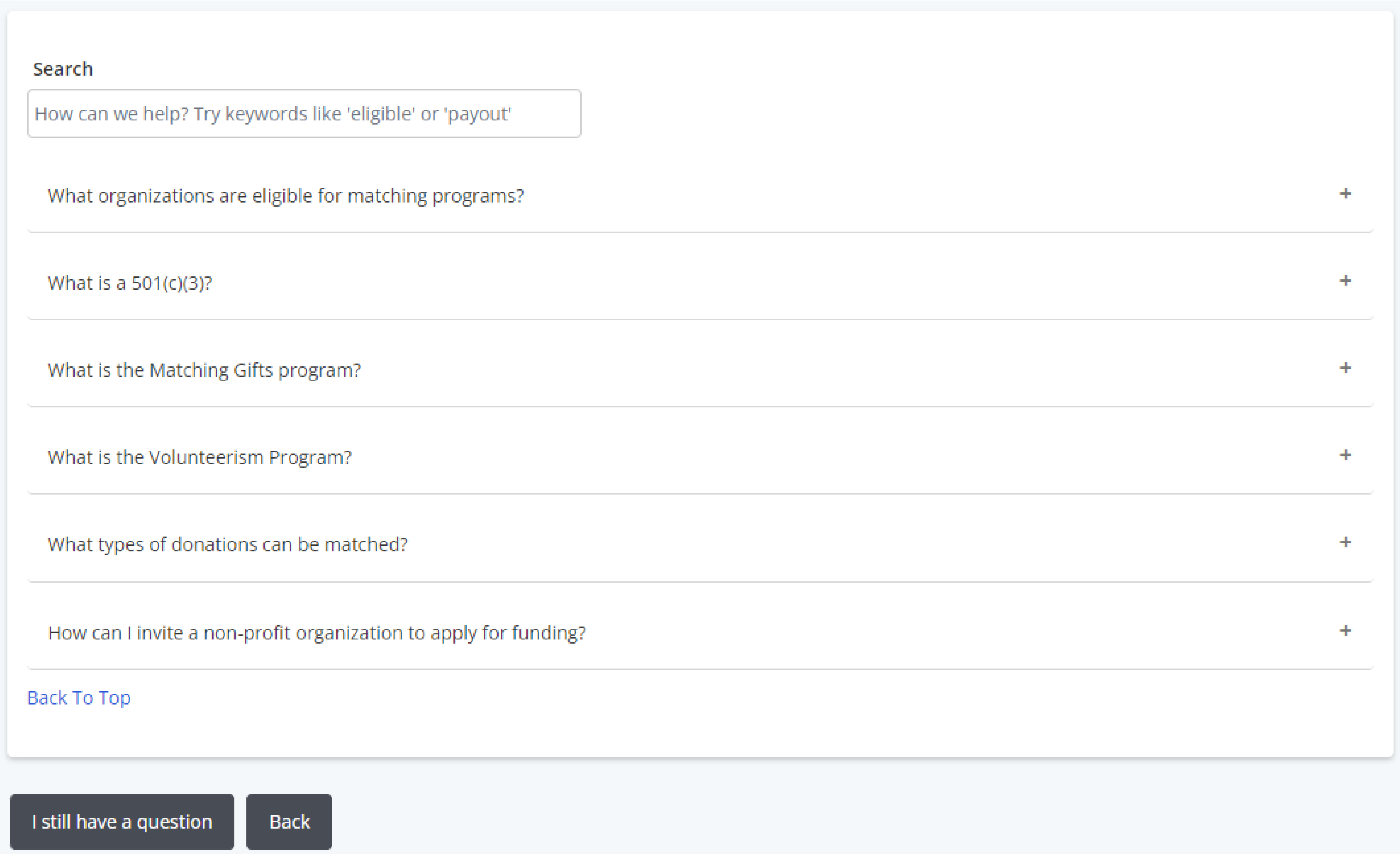
Support Areas from the End User Perspective

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



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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.

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