

Using Bonterra eSignatures

Cybergrants Webinar for Request Owners



Meet Your Trainer

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Learning Objective

To provide an overview of the new eSignature functionality, specifically focusing on how to use this capability within your everyday workflows.

Agenda

Overview of the eSignature Feature

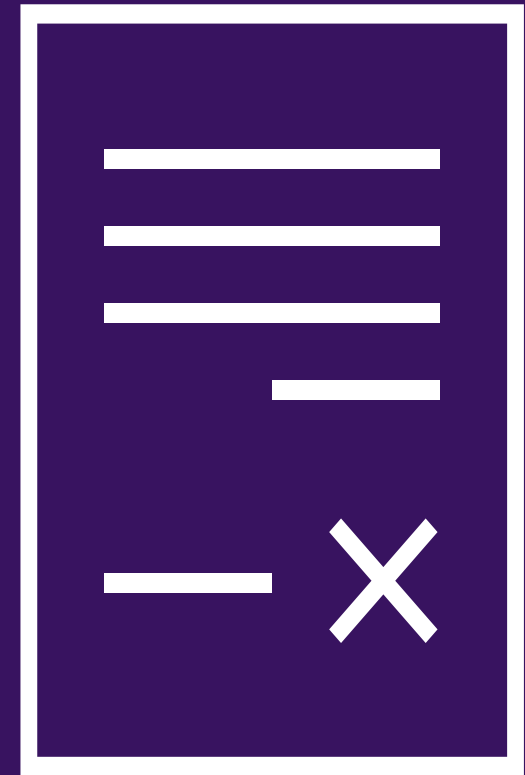
Using eSignatures

Following Up on eSignatures

Overview of the Bonterra eSignature Feature

What is Bonterra eSignature?

- Ability to capture electronic signatures through DocuSign or AdobeSign providers;
- Increases flexibility and accessibility for Grant Seekers and Grant Makers alike;
- Sends a pre-populated template to signatories to capture approvals based on the proposal type they completed;
- Automatically ties fully executed document to the request to be the single source of truth for your grant management!



Using Bonterra eSignatures

Locate the Request

1. Navigate to the Main tab
2. Search for Request
3. Click into Request ID

The screenshot shows the 'CyberGrants - Main' interface. The top navigation bar includes 'Dashboard', 'Main' (highlighted with a red circle '1'), 'Reports', 'Surveys', 'Mail', 'Budget', 'Admin', 'Employee Giving', 'Volunteer Events', and 'Access'. Below the navigation bar, the 'Search' section is highlighted with a red circle '2'. It features a search input field containing 'The Megan Agency', a 'Search' button, and an 'Add Filter' button. Below the search input are several filter dropdowns: 'Proposal Type' (set to '-- All --'), 'FrontDoor Organization' (set to '-- All --'), 'Request Disposition' (set to '-- All --'), 'Request Owner' (set to 'Megan Dodds'), 'Request Year' (set to '-- All --'), 'Organization ID' (set to '-- All --'), 'Request ID' (set to '-- All --'), and 'Submitted/Request Date' (set to '-- All --'). Below the filters is the 'Search Results' section, which shows 'Showing 1-3 of 3 results'. A table of results is displayed with columns: 'Organization Information', 'Submitted/Request Date', 'Project Title', 'Proposal Type', 'Request ID', and 'Grant/Request Amount'. The first result is for 'THE MEGAN AGENCY' with a submitted date of '8/20/2024', a project title of '(None)', a proposal type of 'Megan Agency Grant Proposal', a request ID of '12317392' (highlighted with a red circle '3'), and a grant amount of '\$0.00'.

Organization Information	Submitted/Request Date	Project Title	Proposal Type	Request ID	Grant/Request Amount
<input type="checkbox"/> THE MEGAN AGENCY AKA: THE MEGAN AGENCY 123 LEOSON STREET CALGARY ALBERTA	8/20/2024	<input type="checkbox"/> (None)	<input type="checkbox"/> Megan Agency Grant Proposal	<input type="checkbox"/> 12317392	<input type="checkbox"/> \$0.00

Edit eSignature Fields in Request

4. Edit applicable eSignature fields

- eSignature Template to send?
- Ready to Send for eSignature?
- Signatory name(s) and email address(es)

5. Save!

Request #12317392

Collaboration CC Address: BT60PLF6DWR80

E-Signature template to send (?)

The Megan Agency - Cash Grant Request (2).docx (1622) ▼

Ready to send for E-Signature (?)

Yes ▼

Re-Send LOA Document (?)

▼

E-Signature Signer 1 Name (?)
(1989 character(s) remaining)

Megan Dodds

E-Signature Signer 1 Email (?)
(1972 character(s) remaining)

megan.dodds@bonterratech.com

Following Up on eSignatures

Checking Document Status

Once back in request:

- Sent Date
- Document Status Date
- Document Status
- Signer Order
- Signer Name & Email
- Completed LOA

Request #94416857

Collaboration CC Address: 0K4092CTDK221FVGR3

E-Signature Document Sent Date (?)
8/11/2024

E-Signature Document Status Date (?)
8/11/2024

E-Signature Document Status (?)
completed

E-Signature Current Signer Order (?)

E-Signature Current Signer Email (?)

E-Signature Current Signer Name (?)

E-Signature template to send (?)

E-Signature Completed LOA (?)

- [Grant Approval Letter.docx](#)



Dear The Megan Agency,

We are pleased to inform you that your grant application has been approved by the The Megan Agency Grant Review Committee.

After carefully reviewing your proposal, we believe that your project aligns with our organization's mission and goals, and we are confident that it will have a positive impact on the community. We are excited to support your efforts and look forward to seeing the results of your work.

Accordingly, we are pleased to award you a grant in the amount of \$5000.00 to be used for the purposes outlined in your application. The funds will be disbursed to you within the next 10-12 business days.

As a condition of this grant, we ask that you submit a progress report to us every 3 months, detailing the activities undertaken and the outcomes achieved. Additionally, we require that you acknowledge our organization's support in any public communications or promotional materials related to this project.

Please let us know if you have any questions or concerns regarding the grant or the reporting requirements. We are here to support you throughout the duration of this project.

Congratulations on your successful grant application, and we wish you the best of luck in your endeavors.

Sincerely,

Signed by:
Megan Dodds
CD9BC8405D064D5...

Re-sending LOA

1. Navigate into Request
2. Scroll down to eSignature section
3. Make changes as needed
4. Select “Yes” in the “Re-Send LOA Document” drop down field
5. Save!

The screenshot shows a web interface for a request titled "Request #94347487". The page is part of a "Collaboration" section. It features several form fields:

- E-Signature template to send (?)**: A text input field containing "DocuSign.pdf (2304)".
- Ready to send for E-Signature (?)**: A dropdown menu with "Yes" selected.
- Re-Send LOA Document (?)**: A dropdown menu with a blue highlight on the top option, which has a checkmark. Below it are "No" and "Yes" options.

The "Re-Send LOA Document" dropdown is highlighted with a red rectangular border.

Thank you for attending!

We hope to see you
in future trainings.