SALESFORCE GUIDANCE

https://charitywater.force.com/grantportal

charity: water

TABLE OF CONTENTS

August 2021

GETTING STARTED

The Salesforce portal is the hub for managing your organization's grants with charity: water.

In the portal you can:
- View all grant related information for open and closed grants.
- Submit proposals, reports, signed grant agreements, amendments and compliance documents.
- View report due dates for open grants and submit upcoming reports.
- Exchange documents with your charity: water contact.
- View information for past and upcoming disbursements.
- Request a amendments to open grants.
- Request a new contact for someone in your organization.

You will only see grant information that is relevant to your country program. Headquarters staff will have the option to access information for country programs with projects funded by charity: water, if needed.

You will receive a Welcome email. Click the link to create a password for your Salesforce account.

Welcome to Charity Water ⅀ [Inbox ×]

Charity Water charitywater@cloud4good.com <u>via</u> ql4ikl3oczc3.1u-oxrfuau.na85.bnc.salesforce.com   5:53 PM (7 minu...

to me ▼

Hi Sasha,

    Welcome to Charity Water! To get started, go to https://charitywater.force.com/grantportal/login?c=ZQA26iD1q1CMEehyICA4f8BjHcY4h4nb0uSQVMoNof9z6VqXgbeBI2fgnK0lQdbTueIw.jTo_4hKQ4kmljsL9Y72F7seFWZM5TJ.6Iw_rQDwNJX1EA24dkVDmsvZzIO71BxooR2AeSmOYJ8JjehanUhDJfepnVoUJT9yjnkRXmwApcMUDKCC5LS_FKbeSgCdAOb2Z2Um

Username: sasha@gmail.com

Thanks,
charity: water

charity: water

3

LOGGING IN

Salesforce portal link:
https://charitywater.force.com/grantportal

Please reach out to your charity: water contact if you have any
trouble logging in or changing your password.

Username is the email address that received the Welcome email. ⟵

Password is the one you created during the initial login. ⟵

Create a new password with this link. ⟵

👤 Username

🔒 Password

Log in

Forgot your password?

02

Navigating Salesforce

WHERE TO FIND GRANT-RELATED
INFORMATION AND TAKE ACTION

When you login, you will be on the Home screen.

| Home | Proposals | Grants ⌄ | Grant Agreements | Reports ⌄ | Disbursements ⌄ | More ⌄ | 🔔 | Sasha Water for Test |

charity: water

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can:
- Edit and submit proposals and reports along with required documentation.
- Find information for both ongoing and closed grants.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

How to use the portal

Use the links at the top of the page in the Home view or in the left-hand menu in all other views to access the following. You can find more information on these sections below.
- Proposals
- Grants
- Reports
- Disbursements

Proposals

The home page has basic guidance on using the partner portal.

charity: water

Click your name in the top right corner of the screen to access the Profile and My Partner Record pages.

| Home | Proposals | Grants ⌄ | Grant Agreements | Reports ⌄ | Disbursements ⌄ | More ⌄ | 🔔 | 👤 Sasha **Water for Test** |

Profile

My Partner Record

Messages

Log Out

charity: water

Profile: View and edit your Name and Title here.

My Partner Record: View and edit information related to your organization here. You can also find links to all relevant records connected to your organization, like Grants, and request new Contacts here.

7

Click the grey pencil icon 🖊 **to edit your Name and Title.**

Sasha
Water for Test

Profile

My Partner Record

Messages

Log Out

Contact
Test Contact

Account Name
Water for Test

Primary Affiliation

Title
Grants Coordinator

Work Email
testcontact@waterfortest.org

⌄ **Contact Details**

Name
Test Contact

Account Name ⓘ
Water for Test

Work Email ⓘ
testcontact@waterfortest.org

Title
Grants Coordinator

Some fields, like Account Name and Work Email, cannot be edited. Let your charity: water contact know if you need either updated.

8

Account
Water for Test

Sasha
Water for Test

Profile

My Partner Record

Messages

Log Out

All information in the Program Information and Address sections can be edited.

When submitting Version 1 of a Proposal, ensure these sections are up to date, or edit them if needed.

Primary Contact
Contact Name

Primary Signatory
Signatory Name

Account Name
Water for Test

Parent Account
Water for Test Headquarters

∨ Program Information

Total Country Budget ⓘ
$5,000,000

Staff in Country
250

Total Country WASH Budget ⓘ
$2,000,000

WASH Staff in Country
15

∨ Address

Billing Address
456 Main Street
New York, NY 90201
USA

Location of Field Offices ⓘ

charity: water

CREATE NEW PARTNER CONTACTS

Sasha
Water for Test

Profile

My Partner Record

Messages

Log Out

From **My Partner Record,** you can create new Partner Contacts for anyone at your organization needing access to Salesforce.

Create new Partner Contact

Fill in their **First Name, Last Name, Email** and **Title.**

Create new Partner Contact

Your charity: water contact will enable the requested contact, which will send the Welcome Email to the provided email address, allowing the new contact to create their unique password and login to Salesforce.

Use this form to request access to the Grant Portal for another user for your Country Program. Fields with red asterisks * are required.

* First Name

* Last Name

* Email

you@example.com

* Title

Next

charity: water

PROPOSALS

Click 'Proposals' to find summary data for your organization's active proposals.

Click the blue text under Grant Name to be taken to that proposal, where you can view and download the Request for Proposal, and upload and submit proposal documents.

When the 'Status' begins with 'cw', the proposal is with charity: water for review. When the 'Status' begins with 'PTR', the proposal is with your organization for your action.

Only edit and upload documents to proposals with a Status beginning with 'PTR'.

Each Proposal has a Compliance Checklist, which you can find in the right hand column of the Proposal.

Compliance Checklist
CC-21-0009

+ Follow

Record Type	Country Program	Grant	Status
Country Program Compliance Checklist- Non US Based	Water for Test	BD.WFT.1H.21.665	In Progress

✓ Governance

Articles of Incorporation ⓘ
☐

Local Registration ⓘ
☐

By-laws ⓘ
☐

W-8EXP ⓘ
☐

List of all Board Members ⓘ
☐

✓ Externally Audited Financial Statements for Past 3 Years

2017 Audited Financial Statement
☐

Approval Authorization Matrix
☐

2018 Audited Financial Statement
☐

2019 Audited Financial Statement
☐

✓ Internal Control

Org Staffing Chart (Headquarters) ⓘ
☐

Code of Conduct and Conflict of Interest
☐

Org Staffing Chart (Country Office) ⓘ
☐

Financial and Accounting Manual
☐

Operations Manual ⓘ
☐

Human Resources Manual/Employee Handbook
☐

Safeguarding Policy ⓘ
☐

Files (0)   Add Files

⬆ Upload Files
Or drop files

Open Activities (0)   New Task   New Event

Activity History (0)

Use the Document Upload Process to add requested documents directly to the Compliance Checklist.

Program Finance will check off each required compliance document on the Compliance Checklist when it has been reviewed and approved.

You can navigate to the Compliance Checklist of a Proposal to see any outstanding documentation required for Proposal approval.

charity: water

charity: water

Click 'Grants' to navigate to Open, Closed, or All Grants.

| Home | Proposals | Grants ⌄ | Grant Agreements | Reports ⌄ | Disbursements ⌄ | More ⌄ | 🔔 | Sasha Water for Test |

Open Grants

Closed Grants

All Grants

Click the blue text under Grant Name to be taken to the grant, where you can find all related information and documentation.

Grants
Open Grants for Country Programs ▼ 📌   Printable View

1 item • Sorted by Grant Name • Filtered by All grants - Status, Record Type, Is Contact the Logged in User • Updated a minute ago

🔍 Search this list...   ⚙ ▾   ⊞ ▾   ↻   ✏   ◔   ▼

	Grant Name ↑	⌄	Country Program	⌄	Status	⌄	Grant Type	⌄	Awarded Amount	⌄	
1	BD.WFT.1H.21.665		Water for Test Bangladesh		Grant Implementation		Water		USD 2,000,000.00		▼

Grants
Open Grants for Country Programs ▼ 📌

1 item •

LIST VIEWS

All Grants for Country Programs

All Proposals for Country Program

Closed Grants for Country Programs

✓ Open Grants for Country Programs

Recently Viewed (Pinned list)

Click the ▼ down icon to change which grants you see. For example, you can select Open Grants to only see grants under implementation, or select Closed Grants to see past grants.

Click 'Grant Agreements' to find all Grant Agreements related to your organization's open and closed grants.

Click the blue text under 'Grant Agreement Name' to see the Grant Agreement in Salesforce, find supporting documents and final signed grant agreements.

Click 'Reports' to see Progress and Completion Reports related to your open or closed grants.

'Reports Due' shows upcoming reports for open grants that have yet to be submitted to charity: water for review, along with their due date.

'Report Revisions' shows reports for open grants which require revision and resubmission.

'Submitted Reports' shows reports for open grants that have been submitted to charity: water for review.

'Approved Reports' shows reports that have been approved and finalized for all grants.

'All Reports' shows all reports, including those due, in progress, or completed for open and closed grants.

Click 'Disbursements' to see Upcoming and Previous disbursements.

| Home | Proposals | Grants ∨ | Grant Agreements | Reports ∨ | Disbursements ∨ | More ∨ | 🔔 | Sasha Water for Test |

Upcoming Disbursements

Disbursements
My Upcoming Disbursements ▼ 📌 Click the down icon to see other list view options.

Printable View

21 items • Sorted by Grant • Filtered by All disbursements - Disbursement Date, Is Contact the Logged in User • Updated a few seconds ago

Disbursement ∨	Grant ↑ ∨	Amount ∨	Disbursement Date ∨	Status ∨	Type ∨	
D-00055	DS.TST.1H.21.666	USD 220,000.00	9/11/2021	Scheduled	Initial	▼
D-00056	DS.TST.1H.21.666	USD 120,000.00	1/11/2022	Scheduled	Interim	▼
D-00057	DS.TST.1H.21.666	USD 100,000.00	4/11/2022	Scheduled	Interim	▼
D-00058	DS.TST.1H.21.666	USD 100,000.00	7/12/2022	Scheduled	Interim	▼
D-00059	DS.TST.1H.21.666	USD 60,000.00	10/13/2022	Scheduled	Final	▼

You will be able to, at a glance, see the following for each planned disbursement:

- '**Amount**' indicates the planned disbursement amount. When Status is 'Scheduled', Amount will match what is planned in the Grant Agreement. When submitting a report for review, Amount will be updated by charity: water to accurately reflect the Request for Next Quarter.

- '**Disbursement Date**' is the planned date the disbursement will be sent. This will be updated by charity: water during the process of reviewing a report.

- '**Status**' indicates where the disbursement is in its approval flow. *Scheduled* means we have not yet received the report tied to that disbursement; *Pending Approval* means the related report is under review; *Approved* means the amount and date of payment are final; and *Paid* means the disbursement has been sent.

- '**Type**' indicates whether the disbursement is tied to a Grant Agreement (*Initial*), Progress Report (*Interim*), or Completion Report (*Final*).

16

charity: water

Click 'More' to find additional resources and guidance.

Click 'Grant Portal Guidance' to access this guidance document.

03

Document Upload

HOW TO UPLOAD AND LABEL DOCUMENTS

When uploading documents, please ensure they are labeled as:

[GRANT ID] PROPOSAL NARRATIVE_V1_[DATE OF SUBMISSION].DOC

[GRANT ID] PROPOSAL BUDGET_V1_[DATE OF SUBMISSION].XLS

charity: water

GRANT ID

You can find this in the grant's Request for Proposal.

DOCUMENT TYPE

This should be Program Profile, Narrative, Budget, Response to Comments, or, if a supporting document, a descriptive name for the document.

VERSION

This is the version of the document being submitted, and numbers should be consecutive. Note the final version of the documents will be updated to say "FINAL" by charity: water.

SUBMISSION DATE

This is the date documents are uploaded to Salesforce for submission to charity: water. While the date can be in any format (ex. DDMONTHYY, DD.MM.YYYY) please be consistent across all documents.

Example: BD.WFT.1H.21.665_ProposalNarrative_V1_26July2021

The process for uploading documents is the same across Salesforce.

Find the 'Files' section in the right column of a Proposal, Grant Agreement, Grant, Report, Amendment, Disbursement, Compliance, Profile, or My Partner record.

Files (0)   Add Files

⬆ Upload Files

Or drop files
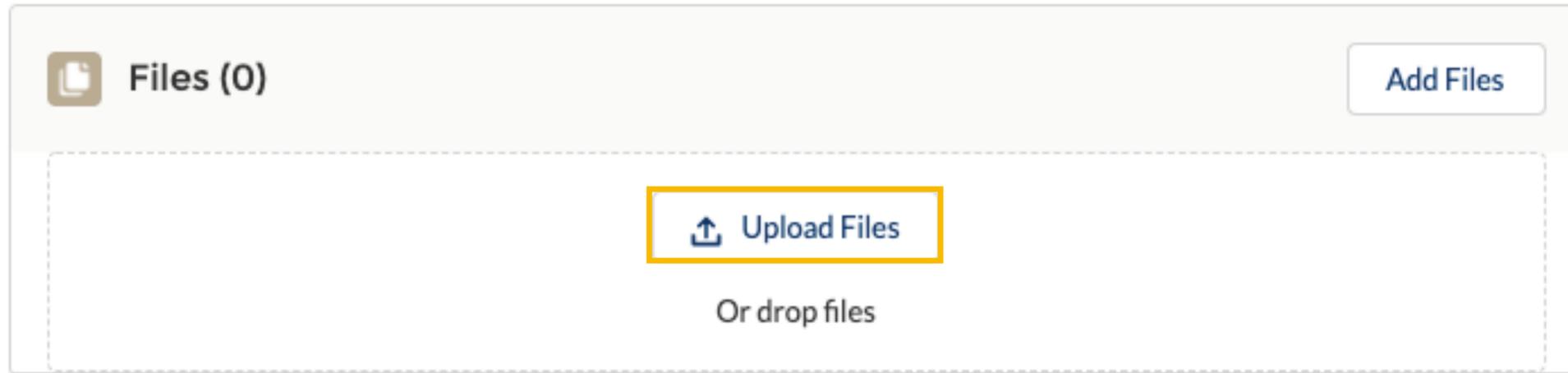
Click 'Upload Files' or drag and drop a file to begin the upload process.

Select the file you want to upload from your computer.

Upload Files

BD.WFT.1H.21.665_ProposalNarrative_22Ju...   Enter details on next page   ✓
11 KB

1 of 1 file uploaded   Next
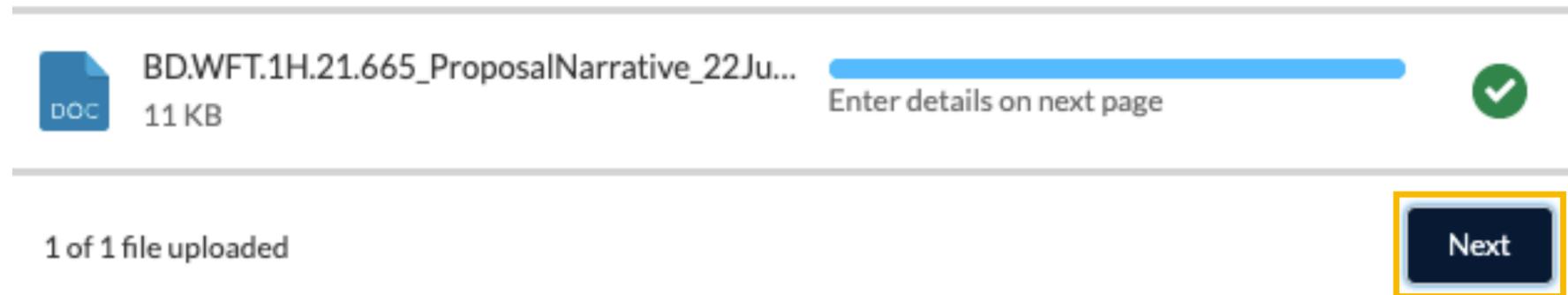
Click 'Next' to advance to the next screen to categorize the file.

charity: water

After clicking 'Next' you will be brought to the 'Add File Details' screen.

Add File Details
BD.WFT.1H.21.665_RequestForProposal_22July2021

Record Type

Programs Team ▼

Information

*Title

BD.WFT.1H.21.665_RequestForProposa

Description

*Category ⓘ

--None-- ▼

View all dependencies

Sub-Category

--None-- ▼

View all dependencies

File 1 of 1

IMPORTANT!

Save

Title, **Category** and **Sub-Category** are required fields.

These fields will help us identify each document, so please label them accurately.

Record Type defaults to 'Programs Team'. *Do not edit.*

Title should follow the <u>Document Naming Convention</u>.

Category is the record to which you are uploading documents. Click the down icon to select this first.

Sub-Category will display different options depending on the Category you select. Click the down icon to select.

All Category Options

✔ Proposals

Progress Reports

Completion Reports

Grant Agreement

Amendments

US-based Compliance Checklist

Non-US-based Compliance Checklist

Sub-Category Options (Proposals)

✔ 1. Request for Proposal

2. Program Profile

3. Proposal Narrative

4. Proposal Budget & Expenditures

5. Proposal Supporting Doc

6. Response to Proposal Comments

7. c:w Proposal Comments

8. c:w Approved Proposal Document

9. Approved Reporting Tool

charity: water

21

If you need to update a file's Title, Category and Sub-Category after uploading, click on 'Files'.

Step 1

📋 Files (1)	Add Files

📄 PDF BD.WFT.1H.21.665_Req...
Jul 26, 2021 • 32KB • pdf

View All

Next, click on the ▼ down icon next to the file you want to edit.

Grants > BD.WFT.1H.21.665
Files

1 item • Sorted by Last Modified • Updated a few seconds ago

Add Files

	Title	Owner	Last Modified ↓	Size	
1	📄 BD.WFT.1H.21.665_RequestForProposal_22July2021	Test Contact	7/26/2021 5:24 PM	32KB	▼

Step 2

Download

View File Details **Step 3**

Upload New Version

Edit File Details

Edit File Details

Click 'View File Details'.

Finally, click 'Edit File Details'. This will give you the same options as shown on the previous page.

📄 PDF **File**
BD.WFT.1H.21.665_ RequestForProposal_22July2021

+ Follow   Download   Upload New Version   **Edit File Details** ▼   **Step 4**

Size
32KB

File Extension
pdf

Owner
Test Contact

PREVIEW   DETAILS

📋 Shared with (2) ▼

If you want to add files that you have already uploaded elsewhere in Salesforce, click 'Add Files'.

charity: water

Files (0)   Add Files

⬆ Upload Files

Or drop files

Select Files

Owned by Me

Shared with Me

Recent

Following

Libraries

🔍 Search Files...

You don't have any files here. Try a different filter, or upload a file.

Documents you have uploaded elsewhere in Salesforce will appear here.
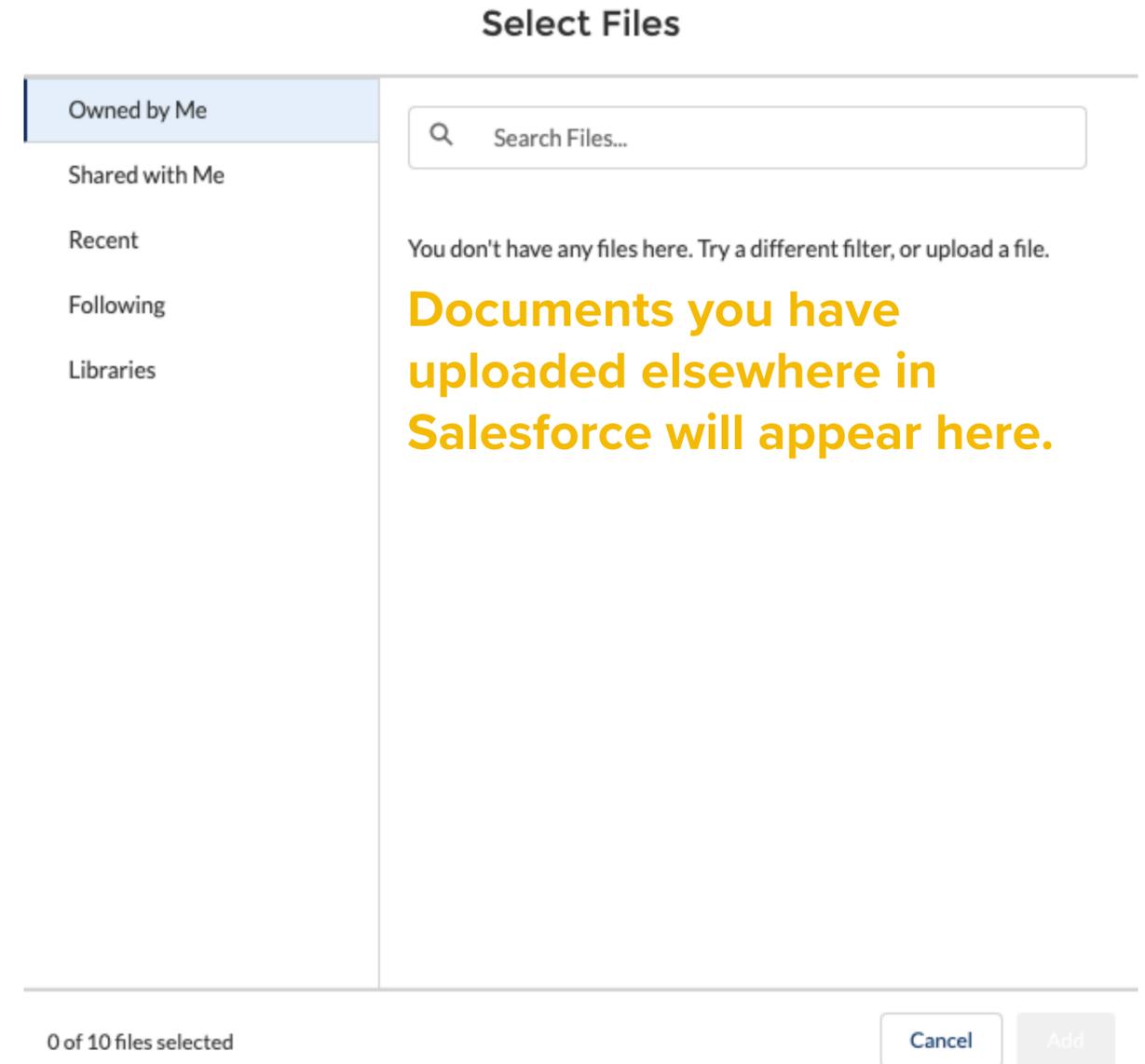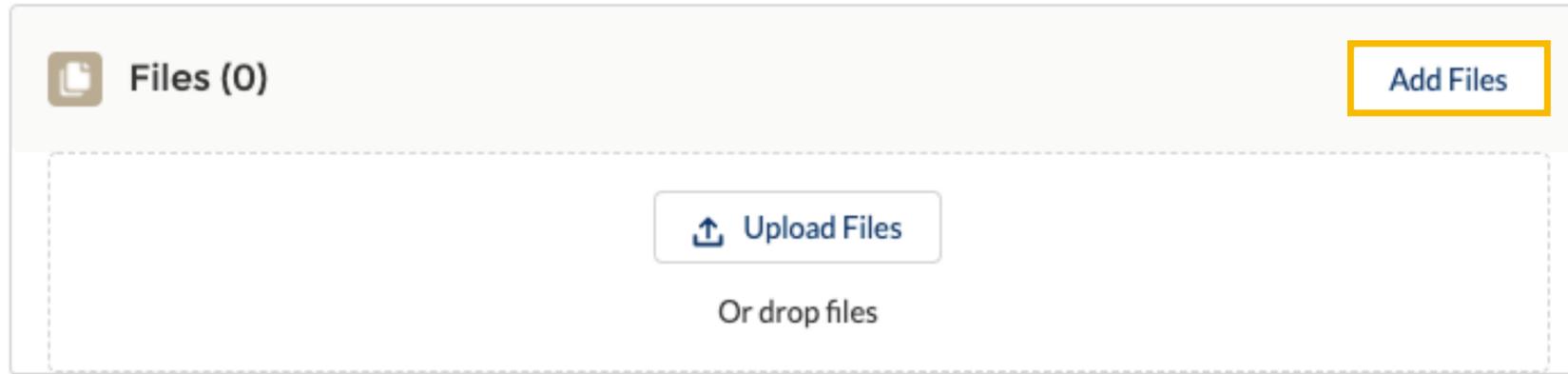
The file you select will maintain the Category and Sub-Category you selected when you originally uploaded the document.

Follow the instructions on the previous page if either needs to be updated.

0 of 10 files selected   Cancel   Add

Tasks are how charity: water alerts you that your action is needed.

You will receive an email when you are assigned a task. A red notification will also appear over the bell icon at the top of the screen. Click the bell icon to see a summary of tasks assigned to you, and click on any task to open it.

Task
Revise Grant 665 Proposal

Related To
BD.WFT.1H.21.665

DETAILS   RELATED

Assigned To
Test Contact

Related To
BD.WFT.1H.21.665

∨ Task Information

Subject
Revise Grant 665 Proposal

Due Date
7/30/2021

Type
Proposal Submission

Status
Not Started

Priority
Normal

Notes

1   Test Contact
Water for Test

Notifications   Mark all as read   ✕

Shannon Wheeler assigned you a task
Revise Grant 665 Proposal

4 minutes ago ●

✓ Mark Complete   Edit   Edit Comments   Create Follow-Up Task

When you have completed the requested task, hit the 'Mark Complete' button at the top of the Task's screen and then select "Completed".

'Related To' will link the task to the record where your action is needed.

'Due Date' is the requested date to complete the task.

'Status' can be updated to mark a task *In-Progress* by clicking the grey pencil icon.

04

Submission & Revision

WHERE TO FIND GRANT-RELATED
INFORMATION AND TAKE ACTION

SUBMISSION & REVISION

The ability to submit and revise grant-related information is the key function of the partner portal.
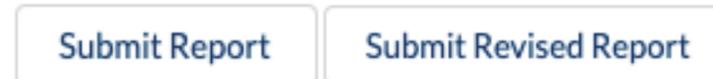
Process:

1. If you are assigned a task to submit or revise grant information, first navigate to the Task and click the text under 'Related To'. This will bring you to the location where your action is needed.

2.a. If *submitting* documents for the first time, upload documents to the 'Files' section following the Document Upload process.

2.b. If *revising* documents, first navigate to the 'Files' section to preview and download charity: water's comments, which will be in a document labeled 'Comments'. Revise documents accordingly, then upload to the 'Files' section.

3. Click back to exit the 'Files' section. At the top, you will find buttons that will say some variation of "Submit Documents" depending on where you are submitting the documents and what the status is (initial submission or revision). Click this button to submit the documents to charity: water.

Example Proposal buttons:	Example Report buttons:	Example Amendment buttons:
Submit Proposal Documents Submit Revised Proposal	Submit Report Submit Revised Report	Submit Amendment Documents Submit Signed Amendment

4. You will know you are successful because the 'Status' at the top of the screen will update from 'PTR - ...' to 'cw - ....', indicating the record is with charity: water for review.

Submission buttons can be found on Proposals, Grant Agreements, Reports, and Amendments.

05

Requesting an Amendment to a Grant

NEW PROCESS FOR REQUESTING GRANT
AMENDMENTS DIRECTLY IN SALESFORCE

Navigate to any open grant to request an amendment for that grant. Click 'Request Grant Amendment' at the top of the screen.

Grant
Test Approved Grant

+ Follow   Request Grant Amendment

Status	Grant Start Date	Grant End Date	Awarded Amount	Final Amount
Grant Implementation	6/2/2021	10/29/2021	USD 90,000.00	

charity: water

Request Grant Amendment

What type of Amendment are you requesting?
*Amendment Type

✓ No Cost Extension 3 months or less
No Cost Extension more than 3 months
Budget Revision 20% Cost Chapter Overage
Amendment to Grant Amount

Next

Select the amendment type from the dropdown menu.

NOTE: If you need a No Cost Extension and another amendment type, please select 'No Cost Extension' from this menu. We are working to improve this functionality so you can select more than one amendment type if needed.

Click 'Next'.

You will receive an email with the subject 'Documentation required for your requested grant amendment'.

Documentation required for your requested grant amendment 📨 Inbox ×

Sean Lee via k949331boqg806.1u-oxrfuau.na85.bnc.salesforce.com   Thu, Jul 22, 12:42 PM
to me ▾

Please submit a Word document at the link below that includes the
following information:

- Amount and percentage of grant funds expensed to date

- Explanation of why more time is needed

- Plan to complete the activities within the new timeframe

- Number of outputs that would be completed by original completion
  date

View Grant Amendment

charity: water will review your submission and follow up if there are
additional questions or if additional information is needed.

Review the requested information and prepare the necessary documentation for submission.

Click 'View Grant Amendment' to navigate to the amendment where you will submit documentation.

Follow the Document Upload process to add the requested documentation to the 'Files' section on the amendment.

Click [Submit Amendment Documents] **to submit the documentation to charity: water for review.**

charity: water will assign you a task if resubmission is needed, or if your review and signature is requested on an approved amendment.

charity: water

29

Thank you!

EMAIL
SHANNON.WHEELER@CHARITYWATER.ORG
FOR QUESTIONS AND TROUBLESHOOTING.