

Salesforce Grants Management

for Corporations

Salesforce Grants Management is now available to corporations. Companies that disburse awards and grants now have a simple way to track, manage, and deliver funding. Grantees can easily find and apply for grants through a grantee portal, engage directly with you, and share outcomes. It is designed for funders of all kinds, including corporate social responsibility teams that wish to manage their grantmaking program in an efficient and structured way.

Designed for Scale, Ready for Business

Grants Management was built for foundations, nonprofits, and education institutions to help them manage outbound funds at scale. Now, it's available to companies that are committed to giving back to their communities. Salesforce Grants Management is a standalone product and available to both current and new Salesforce customers.

A flexible grantmaking solution
that is built on the world's
#1 CRM and evolves with you
as your philanthropy grows.



Features and Capabilities



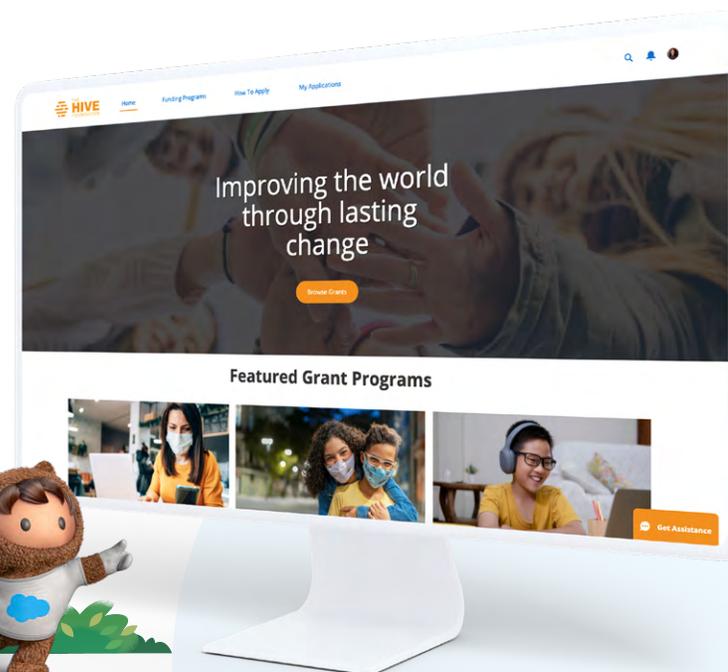
Funds Management

Give your grantmaking team full visibility into the funding lifecycle, so they can see what stage each grant is in. Manage your grants through open application processes or by invitation, view what funds have been requested, and schedule disbursement amounts.



Relationship Tracking

Better steward the relationships between your company and the organizations you invest in by managing stakeholders and funding programs in one system. Track the communications with the grant's main contact, portfolio managers, board members, reviewers, and more.



Features and Capabilities Cont.



Grantee Portal

Improve the grantee experience by adding a portal that is branded to match your company's look and feel. Grantees can find and apply for grants, create an account with profile and login information, gain visibility over their application status and disbursement amounts, and submit ongoing progress reports.



Program Management

Connect programs and awards seamlessly to understand how they are driving your company's philanthropic mission. Gain a holistic view of any associated funding requests, how much has been allocated for each program, and remaining balances.



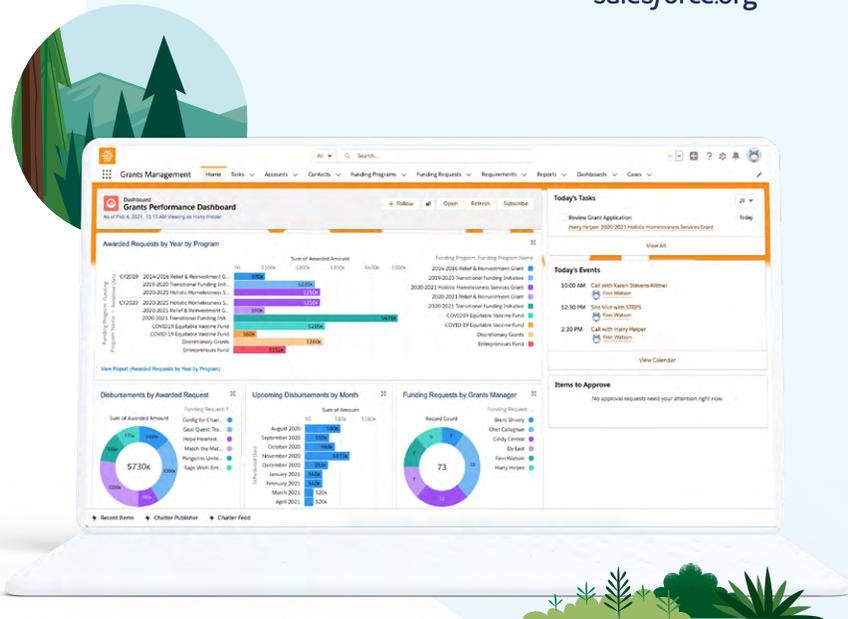
Disbursement Tracking

Determine the number of payments and timeline, note what is required from the grantee prior to receiving funds, and understand upcoming disbursements and commitments. Grantees can also gain visibility into this information through the Grantee Portal.



Due Diligence

Choose from pre-configured templates that differ by program, grant size, budget, and more. Past verification checks are stored automatically, so when a previous applicant applies, grants managers don't have to repeat the process, and they have historical context as to why a partner was funded or not.



Reporting

With out-of-the-box reports, you can gain a unified view of your funding programs. See which grants have upcoming milestones, and run reports to view populations served, awards requested, and total funding by year and program. And know that these reports help lay the groundwork for even more advanced impact measurement tools down the road.



Budgeting

Manage your philanthropic grants by budgeting according to programs and each grantee. Enable grantees to share their planned spend for the awarded grant.

GET IN TOUCH

Visit us at www.salesforce.org/contact-us or call 1-800-667-6389 to learn more.

About Salesforce.org

Salesforce.org is a social impact center of Salesforce focused on partnering with the global community of changemakers. We provide access to powerful technology, community partnerships, and impactful investments that empower changemakers to build a better world. As a social enterprise business unit dedicated to creating solutions for nonprofit, educational, and philanthropic organizations, we innovate on top of the world's #1 CRM, channeling the philanthropic power of our employees, customers and partners to join our global movement for good. Visit www.salesforce.org for more.