Grant Application and Final Report

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AGENDA

1. Accessing Grants Module
2. Adding Club Signatures
3. Change to current org year
4. Create new Application
5. Complete Budget
6. Add Documents
7. Submit Application to District
8. Complete Final Report
9. Submit Final Report to District
10. Promos-Mike

GRANT APPLICATION

- Accessing the Grants Module
- Go to My Club, Grants Icon

GRANT APPLICATION

- This will take you to the District Grants Overview Page
- Check the date and make sure it is your current date
- If not click Change org year on the top right
- Select the current year, make it your working year and click on Change OrgYear on bottom

District Grants Overview [2018-19]

Change OrgYear

Grant Org Year

Select the OrgYear to update the list on this page with the grants for that org year.

OrgYear: 2020-21

Option: ☑ Save this as my working OrgYear

Cancel   Change OrgYear

GRANT APPLICATION

- First, Add your club signatures, those individuals in the club who will sign and submit the documents to the District. In some cases this is one name and in others it is two names. Your District will define how many signatures are needed.

- Click on Admin on the left, then Club Signatures
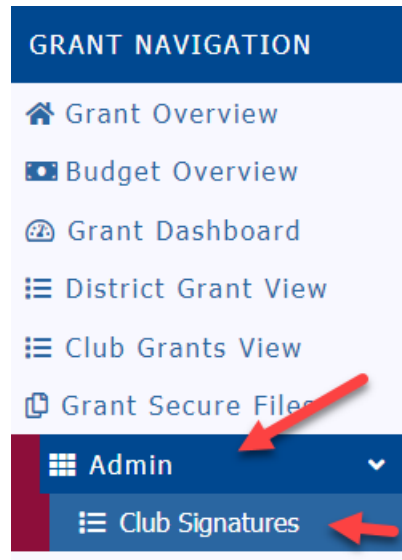
GRANT APPLICATION

- Select the names on the left and move them to the right. Click the save on top right of page

GRANT APPLICATION

- Next click on Club Grants View on the left. You will see the New Club Grant Request on the top right of the page. Click that on.

New Club Grant Request - Click Here to Create Grant

- If you did not set up your signatures you will get a message like this

www.dacdb.com says

At least 2 Club Signatures must be authorized before creating a Grant. Select "Admin" in the right sidebar menu and then "Club Signatures".

OK

GRANT APPLICATION

- If you added the correct amount of signatures you will be taken to the details tab of the application

- You will see 4 tabs going across the top of the page

- To start you must at least complete the Details Tab. Then you can save your grant and work on it later.

GRANT APPLICATION

- Details Tab

GRANT APPLICATION

- Clubs Involved Tab
- If there are other clubs involve, select them from the left and move them to the right

GRANT APPLICATION

- Contacts Tab
- Enter those working on this grant on this tab. It can be other individuals who are not on the signature list

GRANT APPLICATION

- Application Tab
- This tab has a little more information that you need to complete

GRANT APPLICATION

- Save the application
- Once you save the grant, you will see two more tabs appear on the top of the page
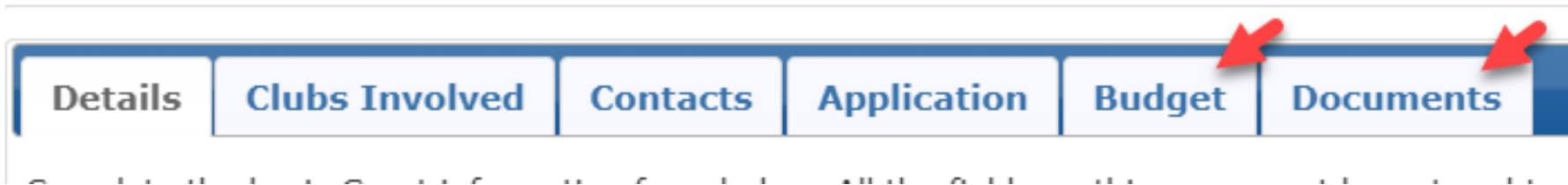
- Budget Tab
- To add your income sources click on the Add Income Source Link

GRANT APPLICATION

- First add your DDF Request

GRANT APPLICATION

- Next add your club contribution if applicable

GRANT APPLICATION

- Now add your expenses

GRANT APPLICATION

- Your Budget page should be in balance:

Income Items

Add Income Source

Action	Item Name	Club	DDF	Amount	Created	Modified
✏️ ❌	DDF Request	Hollywood	✔	$500.00	Cage, Nicolas 07/13/20 07:26 PM	
✏️ ❌	Club Contribution from Fundraisers	Hollywood		$500.00	Cage, Nicolas 07/13/20 07:27 PM	
	Income Total:	1 out of 1 club(s) contributed		**$1,000.00**	(DDF Request: **$500.00**, Other Funding: **$500.00**)	

Expense Items

Add Expense

Action	Item Name	Club	Amount	Created	Modified
✏️ ❌	Backpacks	Hollywood	$500.00	Cage, Nicolas 07/13/20 07:29 PM	
✏️ ❌	School Supplies	Hollywood	$500.00	Cage, Nicolas 07/13/20 07:30 PM	
	Expense Total:		**$1,000.00**		

Budget Summary

Description	Amount
Total Income (DDF+Club Funding):	$1,000.00
Expenses Items:	($1,000.00)
Cash Flow (Income - Expense):	**$0.00**

GRANT APPLICATION

- Documents Tab
- If you have any initial documents, you can add them now. When the project is over you will upload all receipts and pictures to this section before submitting the final report. You can add folders or just add documents to the folders already there.

GRANT APPLICATION

- Documents Tab
- Remember the file name can contain no special characters like , ";:*%@!
- Instead of spaces when naming the document use the underscore
- Now you can save the document and click the collect grant signatures on the top right of the page

  Club: Collect Grant Signatures   Save

- You will get this message – say OK

  www.dacdb.com says

  Please confirm - you are about the start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?

  OK   Cancel
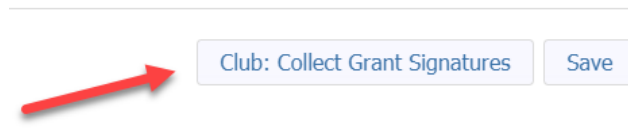
GRANT APPLICATION

- Signing the Grant
- Now you can save the document and click the collect grant signatures on the top right of the page

Club: Collect Grant Signatures   Save

- You will get this message – say OK

www.dacdb.com says

Please confirm - you are about the start the process to collect the club signatures on this Grant application. If you continue, the next step is for the Club to get the required number of signatures so the Grant can be submitted to the District for Approval. OK, to Continue?

OK   Cancel
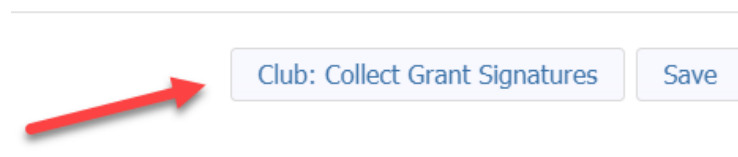
GRANT APPLICATION

- Signing the Grant
- Once you close the box you will see two new tabs

| Details | Clubs Involved | Contacts | Application | Budget | Documents | Activity Log | Signature Log |
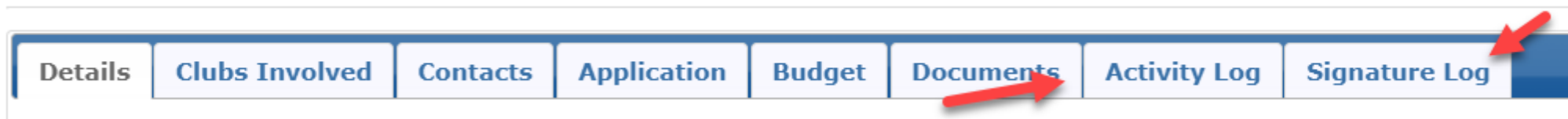
- You will also see a new button on the top right of the page- Sign Grant Application. You can also revert back to a draft

Club: Sign Grant Application   Revert To Draft
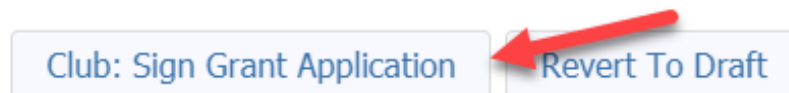
GRANT APPLICATION

- Signing the Grant
- When you click on Sign Grant Application, this box will pop up. Click on Sign Grant

Grant Signatures

A list of users who have signed this grant is shown below. To add your signature to the list, click the "Sign Grant" button below. If you have already signed the grant, the "Sign Grant" button is not visible.

Signed By	Club	Date

[Sign Grant] [Cancel]

- If more than one signature is required, you will continue to see the Sign Grant Application Button. You will make sure you second signee now goes into the grant to sign it.

GRANT APPLICATION

- Signing the Grant
- When the second signee goes in to sign the grant this box will pop up and they will see the person who has already signed the grant.

GRANT APPLICATION

- Signing the Grant
- Once the second person signs a new warning box will pop up. Click the appropriate answer

GRANT APPLICATION

- Final Report
- Now that you have completed your project you need to complete the final report
- 1st update your expenses with the actual receipts from your project
- Add all the pictures and receipts to your documents tab
- Now complete the final report.
- Items 1 and 3 will be auto populated. Complete line 2, 4, 5 and 6

GRANT APPLICATION

- Final Report

Project Description

1. Describe the project. What was done, when, and where did project activities take place? If this is a progress report, what remains to be done?

> Nice description go here

2. How many people benefited from this project? 500

3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?

> Complete this

4. How many Rotarians participated in the project? 30

5. What did they do? Please give at least two examples, not including financial support provided to the project.

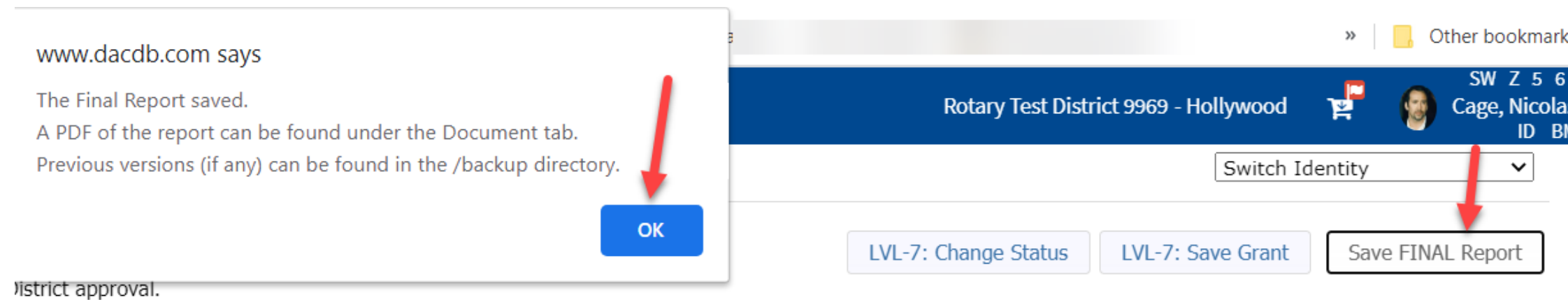> Taught them how to use the tools in the garden, to plant the plants, and to set the irrigation system

6. If a cooperating organization was involved, what was its role?

> n/a

GRANT APPLICATION

- Final Report

- Now click on save Final Report on the top right. You will get the following pop-up box

- You will have a new button – Collect Final Signatures

GRANT APPLICATION

- Final Report
- After you click the button a new button will appear. Sign Final Report. Similar to the application, the first club signee signs it.
- This time a box pops up with all previous signatures. Click Sign Grant

GRANT APPLICATION

- Final Report

- The second person signs the grant.

- A new box pops up reminding you to check to make sure everything is completed and if it is you can submit to the District for Approval

DACDB SUPPORT

- Go to Help tab
  - Contact our support team
  - Email our support
  - Create a ticket for an issue or enhancement
  - Read our documentation
  - View our videos

Please feel to contact the DACdb Support Team

General DACdb Support: support@dacdb.com
Easy & Beautiful, WordPress Support: websites@dacdb.com

Phone: +1 (720) 504-7300 Ext 2