

Grants Management – Get value in 5 steps

Adopting a grant management solution streamlines the entire grant lifecycle, and minimize the risk of errors or missed deadlines. It also gives teams real-time visibility into budgets, compliance, and performance—helping organizations secure more funding and manage it with confidence.

Reality is implementing software can be intimidating. That's why we broke down the process into 5 steps:

1. Build the Foundations

- Log-in and explore your Euna Grants account.
- Get familiar with Euna Grants' [terminology](#)
- Does everyone on your team have a Euna Grants Log-in?
 - Guide to [Create Users](#)
- Start with a solid foundation and ensure all your Master Data elements are complete and up to date:
 - [Organizations](#) & [Individuals](#)
 - [Staff & Users](#)
 - ***Pro-tip:*** Staff can get email notifications but do not interact with the system. Users can access grant records and report against those.
 - [Budget Categories](#)
- If you are not tracking Compensation in Euna, the following are optional:
 - [Compensation](#)
 - [Benefits](#)
- Subjects and Departments unlock quick reporting capabilities using [views](#):
 - [Subjects](#) and [Departments](#)
 - ***Pro-tip:*** All of these elements can be imported, make sure to explore our import [templates](#).

2. Add your Grants Portfolio

- The [Research](#) tool can help you find new sources of funding for your organization! (optional)
- [Add grants](#) in your account. Euna allows you to track grants in a pre-award and post award status.
- Configure [grant settings](#) for every grant and forget about missing deadlines when using [Tracking Periods](#)

- Visit each of the [grant tools](#) for extra value. These include:
 - Documents (unlimited storage!)
 - Tasks & Remainders
 - Email manager & Notes
 - eSignature

3. Track Grant Performance Plans

- Create Performance Plans for your grants. You can have performance plans for grants in both pre-award and post-award status.
- Configure Performance plan settings
- Select from a variety of [performance types](#) and measures. The most popular types are Milestone, Numeric, and Percentage Achieved.

4. Stay in Budget with Financials Management

- Configure [budget settings](#) to add budget categories; these are a pre-requisite to build your budget
- Create the budget
 - Add [Budget categories](#)
 - Add [Non-Personnel line-item](#) or [Personnel line-item](#)
 - ***Pro-tip:*** Budget categories are at the top level of your budget; expenses are tracked against line items.
- Track [Expenses](#)
- Configure [GL structure](#) to import expenses or get ready for an expense integration (optional).

5. Optional Advanced Features

- Payment Requests serve as a planning tool to gather materials to formally request payment from your funder
- Cash Receipts enable tracking receipt of funds for your grants
- Security Roles and assignment on a grant dictate what access a user has and what actions they can take.
- Custom Forms enable users to capture additional data and information that is not standard within Euna Grants.
- Custom Form Extensions (custom fields) can be added to existing records in Euna Grants such as grants, reporting periods, expenses, and more.