

# Email Notification Guide

This guide explains who receives email notifications when actions are taken in Euna Grants. For actions with multiple outcomes, the recipient depends on which roles are assigned to the record.

## Grants & Tracking

| Action                      | Who receives the email                     |
|-----------------------------|--|
| Grant Amendment — Finalized | No email is sent.                          |
| Payment Request — Submitted | The Account Owner receives a notification. |
| Payment Request — Approved  | No email is sent.                          |
| Tracking Period — Closed    | No email is sent.                          |

## Opportunity Applications

| Action                        | Who receives the email   |
|-------------------------------|--|
| Application — Submitted       | <p>If an Opportunity Manager is assigned, both the Opportunity Manager and the applicant's primary email address receive a notification.</p> <p>If no Opportunity Manager is assigned, only the applicant's primary email address receives a notification. The funder does not receive an email.</p> |
| Application — Funder Approves | If the Change Submission Status field in the workflow is set to a value other than No Change, the applicant's primary email address receives a notification. If set to No Change, no email is sent.  |
| Application — Funder Rejects  | The applicant's primary email address receives a notification.   |
| Application — Funder Reopens  | The applicant's primary email address receives a notification.   |

## Award

| Action            | Who receives the email                               |
|-------------------|--|
| Award — Activated | The Recipient Account Owner receives a notification. |

## Award | Payment Requests

**Note:** When a payment request is submitted, Funder Additional Users are never notified — only the Funder Manager or, if none exists, the Funder Account Owner.

| Action                                   | Who receives the email  |
|--|---|
| Payment Request — Submitted by Recipient | If a Funder Manager is assigned, the Funder Manager receives a notification.                |
|  | If no Funder Manager is assigned, the Funder Account Owner receives a notification instead. |
| Payment Request — Approved by Funder     | If a Recipient Manager is assigned, the Recipient Manager receives a notification.          |
|  | If no Recipient Manager is assigned, the Recipient Additional Users receive a notification. |
| Payment Request — Rejected by Funder     | If a Recipient Manager is assigned, the Recipient Manager receives a notification.          |
|  | If no Recipient Manager is assigned, the Recipient Additional Users receive a notification. |

## Award | Reporting Periods

| Action                                   | Who receives the email  |
|--|---|
| Payment Request — Submitted by Recipient | If a Funder Manager is assigned, the Funder Manager receives a notification.                |
|  | If no Funder Manager is assigned, the Funder Account Owner receives a notification instead. |
| Payment Request — Approved by Funder     | If a Recipient Manager is assigned, the Recipient Manager receives a notification.          |
|  | If no Recipient Manager is assigned, the Recipient Additional Users receive a notification. |

## Award | Amendments

| Action                                 | Who receives the email  |
|--|---|
| Amendment — Funder Creates & Finalizes | If a Recipient Manager is assigned, the Recipient Manager receives a notification.    |
|  | If no managers are assigned, the Recipient Org Primary Email receives a notification. |

|  |  |
|--|--|
| Amendment — Recipient Submits                | If both a Funder Manager and Recipient Manager are assigned, both managers receive a notification.                     |
|  | If only a Funder Manager is assigned, the Funder Manager and the Org Primary Email receive a notification.             |
|  | If no managers are assigned, both the Funder Org Primary Email and Recipient Org Primary Email receive a notification. |
| Amendment — Recipient Submits, Funder Denies | If a Recipient Manager is assigned, the Recipient Manager receives a notification.                                     |
|  | If no Recipient Manager is assigned, the Recipient Org Primary Email receives a notification..                         |

## Custom Forms

| <b>Action</b>           | <b>Who receives the email</b>   |
|-------------------------|---|
| Custom Form — Reopened  | If a Recipient Manager is assigned, the Recipient Manager receives a notification.          |
|                         | If no managers are assigned, no email is sent regardless of whether Additional Users exist. |
| Custom Form — Submitted | If a Funder Manager is assigned, the Funder Manager receives a notification.                |
|                         | If no managers are assigned, no email is sent regardless of whether Additional Users exist. |