




2022 APRIL Product Update Briefings

YourCause® GrantsConnect® Highlights

In this April’s Product Update briefing, you heard our product experts give us a look at GrantsConnect functionality that has recently been released and is available now, as well as a preview of exciting enhancements that are coming soon. Our current priorities for developing GrantsConnect are to continue to build and enhance features that **Evolve the Product Through Continued Maturation**, help customers **Expand With a Global by Design Approach**, and **Engage Users with Increased Innovation**. Below, you’ll see a quick snapshot of the near-term focus we have under those three Key Themes.

### Key themes for GrantsConnect and near-term focus

 <b>EVOLVE THROUGH CONTINUED MATURATION</b>	 <b>EXPAND WITH A GLOBAL BY DESIGN APPROACH</b>	 <b>ENGAGE USERS WITH INCREASED INNOVATION</b>
Expanded reporting capabilities	Broadened integration tools	Enhanced user experience
Increased data access	Enriched data sharing options	Advanced control
Extended visualization options	Increased localization and translations	Improved accessibility

Available Now

Below is a subset of the full 2022 April Product Update Briefing.

LEGEND	
Generally available	●
Not available	○
In development	◐
Customer Request	★

CAPABILITIES + CUSTOMER OUTCOMES

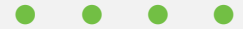
AVAILABLE MARKETS

US EMEA CAN APAC

<p><b>STREAMLINED FORM BUILDER CAPABILITIES – <i>Evolve Through Continued Maturation</i></b>                      Implemented an in-house form renderer to improve the user experience and enable us to better support, make changes to, and innovate on GrantsConnect forms capabilities.</p>	<p>● ● ● ●</p>
<p><b>EXPANDED CONDITION LOGIC OPTIONS – ★ <i>Evolve Through Continued Maturation</i></b>                      Improved the Conditional Logic Builder to help users better control form behavior including the ability to set a field’s value to the value of another field or hard-coded value set. This also introduces the ability to configure date fields to be a set number of days, weeks, or months from another date field or hard-coded value set. Our logic builder allows users to control the behavior of their forms, with no code required!</p>	<p>● ● ● ●</p>
<p><b>DOWNLOAD APPLICATIONS &amp; AUDIT TRAILS IN BULK – ★ <i>Evolve Through Continued Maturation</i></b>                      Streamlined application management by allowing users to download up to 10 applications at a time (including attachments) and added the ability to export an activity trail for a single application as a CSV file.</p>	<p>● ● ● ●</p>

**INCREASED ACCESS TO DATA – *Evolve Through Continued Maturation***

Introduced a new Tableau data source – *GrantsConnect DataSource* – which contains the fields available in the Grants data feeds and introduces new dimensions for GrantsConnect standard product fields. This data source is intended to replace the four Grants data sources currently in use. No deprecation date has been set for the current data sources at this time.



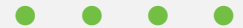
**EXPERT TRANSLATIONS – *Expand With A Global By Design Approach***

Clarified the global user experience by replacing machine translations with expert translations in 26 languages.



**READY TO USE OUT-OF-THE-BOX – *Engage Users With Increased Innovation***

Expanded standard out-of-the-box functionality with new dashboards and form templates to make implementing and using GrantsConnect easier. Recently released dashboards include Applications, Impact, Payments, Programs, and Year to Date Overview. Newly added form templates include an eligibility form, employee assistance request form and review scoring, and a sponsorship + CRA form.



**ELECTRONIC SIGNATURES – ★ *Engage Users With Increased Innovation***

Improved efficiency with a secure and efficient way to require and collect electronic signatures at ANY step in the grant making process. Capture a digital acknowledgement from the person completing the application or form, demonstrating that they have agreed to any stipulations presented in the form or to identify them as the individual completing the form. Enable signatures on a per-form basis and allow users to sign using multiple signature methods. Capture detailed information about the signature to ensure e-signature compliance.



Coming Soon

Below is a subset of development efforts currently underway or planned over the next 3-6 months.

CAPABILITIES + CUSTOMER OUTCOMES	AVAILABLE MARKETS			
	US	EMEA	CAN	APAC
<p><b>CONTINUED EXPANSION OF STANDARD FORMS &amp; FIELDS – <i>Engage Users With Increased Innovation</i></b></p> <p>Improving efficiency and growing the out-of-the-box functionality available in GrantsConnect by continuing to release new fields, forms, ad hoc reports, and dashboard templates to make implementing and using GrantsConnect easier for our clients.</p>	🕒	🕒	🕒	🕒
<p><b>DRIVE APPLICANTS TO PROGRAMS THAT MEET THEIR NEEDS – <i>Engage Users With Increased Innovation</i></b></p> <p>Improving flexibility in screening for specific programs and making eligibility screening more intuitive by automatically guiding applicants to the appropriate programs.</p>	🕒	🕒	🕒	🕒
<p><b>HELP WHERE AND WHEN YOU NEED IT – <i>Engage Users With Increased Innovation</i></b></p> <p>Guiding users to help information and release updates in context of the GrantsConnect application. This in-context help will meet you where you are to help you get up to speed with GrantsConnect quickly, inform you when new updates are available, and provide access to the information you need to use the software as effectively and efficiently as possible.</p>	🕒	🕒	🕒	🕒
<p><b>EXPANDING AUTOMATION &amp; DATA SHARING – <i>Expand With A Global By Design Approach</i></b></p> <p>Enhancing our GrantsConnect APIs allowing you to connect GrantsConnect data to 3rd party tools to access and work with your data in an interface that is most effective and efficient for you including analytics and BI tools or other business applications. Users can connect external APIs to use relevant data from other sources or business applications to prefill forms– speeding up the application process.</p>	🕒	🕒	🕒	🕒