



Product Plans

Go	Pro	Enterprise
Starts at \$9,000 billed annually Up to 20 Users	Starts at \$15,000 billed annually Up to 50 Users	Starts at \$50,000 billed annually Price based on total users

Dashboards			
Payments Dashboard	✓	✓	✓
Approvals Dashboard	✓	✓	✓
Requirements Dashboard	✓	✓	✓
Scenario Planning		✓	✓
Portals			
Grantee Portal	✓	✓	✓
Grantee Portal Intake Dashboard	✓	✓	✓
Invited Grant Applications	✓	✓	✓
Application and Report Notification Reminders	✓	✓	✓
Unlimited Grantee User Accounts	✓	✓	✓
Grantee Reports Submissions	✓	✓	✓
In-portal Contact Management	✓	✓	✓
Grant and Payment History	✓	✓	✓
Unsolicited Grant Applications/Campaigns	Add-on	✓	✓
In-form Chat/Discussions		✓	✓
Bank Account Information		✓	✓
Customized Budgets (Organization and Request)			✓
Grantee-initiated Form Submissions			✓
Intake Forms	Up to 250	Up to 500	Up to 750
External Reviewer Portal	Add-on	Add-on	Add-on
Board Portal		Add-on	Add-on



Product Plans

Product Plans		Go	Pro	Enterprise
Grantee Organizations				
	Tax Status Verification	✓	✓	✓
	Grantee 360	✓	✓	✓
	Organization Financials	✓	✓	✓
	Organization Bank Account Management (for Electronic Payment)		✓	✓
	Organization Financial Health			✓
Grants				
	Required Codes for Approval	✓	✓	✓
	Grant Renewals	✓	✓	✓
	Matching Gifts	✓	✓	✓
	Project Budgeting		✓	✓
	Custom Fields		✓	✓
	Docket Management		✓	✓
	Required Fields Checklist		✓	✓
	Expenditure Responsibility Management		✓	✓
	Direct Charitable Activities		Add-on	✓
Contacts and CRM				
	Contact Management	✓	✓	✓
	Interactions	✓	✓	✓
	Email Send/Receive		✓	✓
	Microsoft Outlook Add-in		✓	✓
	Contact De-duplication and Merge		✓	✓
Search and Reporting				
	Quick Search	✓	✓	✓
	Super Search	✓	✓	✓
	Saved Searches	✓	✓	✓
	Customizable List Views	✓	✓	✓
	Premium Reporting		Add-on	✓

Product Plans

Product Plans		Go	Pro	Enterprise
Workflows				
	My Tasks	✓	✓	✓
	Workflow Editor		✓	✓
	Workflow Dashboard		✓	✓
Additional Modules				
	Portfolio Management		Add-on	✓
	Monitoring & Assessments		Add-on	Add-on
Utilities				
	Super Docs		✓	✓
	Batch Email Templates		✓	✓
	Publish Grants API		✓	✓
	Custom Fields		✓	✓
	Payments Import		✓	✓
	Advanced Code Assignment Rules			✓
Integrations				
	Single Sign On (Microsoft 365, Okta, OneLogin, Google)	✓	✓	✓
	Document Management Integrations (OneDrive, Box)	✓	✓	✓
	Salesforce Integration			Add-on
	e-Signature (Adobe Sign & DocuSign)		Add-on	✓
	OFAC Checking (Bridger Insight API Integration)	Add-on	Add-on	Add-on
	Intacct Integration			✓



Product Plans

Product Plans		Go	Pro	Enterprise
Miscellaneous Add-Ons				
	Long-Term Data Retention			✓
	Staging Site			✓
	Offline Database Copy for BI Tool Integration			✓
Support				
	Help Desk	✓	✓	✓
	Premium Support		Add-on	Add-on