



Product Plans (Priced per user)

| Go | Pro | Enterprise |
|----|-----|------------|
|----|-----|------------|

Starts at \$9,000

Starts at \$15,000

Contact Sales

| 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 Organization Budgets | | ✓ | ✓ |
| | 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

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|------------------------------|---|----|--------|------------|
| 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 | ✓ | ✓ | ✓ |
| | Customized Project Budgets | | | ✓ |
| | Docket Management | | ✓ | ✓ |
| | Required Fields Checklist | | ✓ | ✓ |
| | Expenditure Responsibility Management | | ✓ | ✓ |
| | Direct Charitable Activities | | Add-on | ✓ |
| | Regranting Tracker | | | ✓ |
| | Delegated Authority for Internal Approvals | | | ✓ |
| 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

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|------------------------------|--|--------|--------|------------|
| 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 | | | ✓ |
| Miscellaneous Add-Ons | | | | |
| | Long-Term Data Retention | | Add-on | ✓ |
| | Staging Site | | | ✓ |
| | Offline Database Copy for BI Tool Integration | | | ✓ |
| Support | | | | |
| | Help Desk | ✓ | ✓ | ✓ |
| | Premium Support | | Add-on | Add-on |