



Grant strategies to bridge the divide between
grant-seekers and **grant-makers**



HOW TO

How To: 2. Using the Salesforce interface

Version: 1.0



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grant-seekers and **grant-makers**

Note

Before using this document for the first time, ensure you have read the associated document

GEM Portal HowTo 1. Connecting to Salesforce

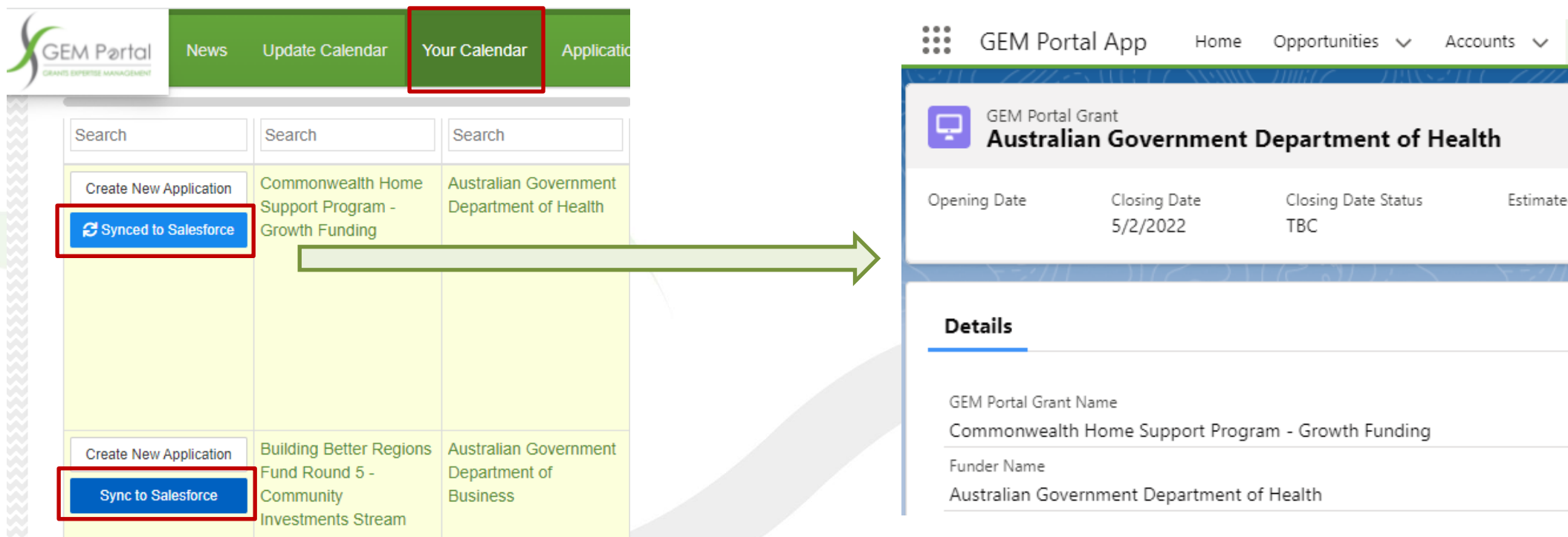
Version: 1.0

How To: 2. Using the Salesforce interface

This How To will explain the steps involved to send **GEM Portal** Funder / Grant information from your GEM Portal grants calendar (**Your Calendar**) into your organisations **Salesforce**.

** These instructions assume that someone in your organisation has completed the **once-off** set up process, documented in **GEM Portal HowTo 1. Connecting to Salesforce**.*

The interface is simple to use. It allows you to push individual grant rows from the **Your Calendar** screen into **Salesforce**.



The screenshot shows the GEM Portal interface. The 'Your Calendar' tab is highlighted with a red box. Below it, a table lists grant applications. Two rows are highlighted with red boxes around their respective 'Sync to Salesforce' buttons. A green arrow points from the first 'Sync to Salesforce' button to the right-hand side of the image, which shows a detailed view of a grant application for the Australian Government Department of Health.

Opening Date	Closing Date	Closing Date Status	Estimate
	5/2/2022	TBC	

Details

- GEM Portal Grant Name: Commonwealth Home Support Program - Growth Funding
- Funder Name: Australian Government Department of Health

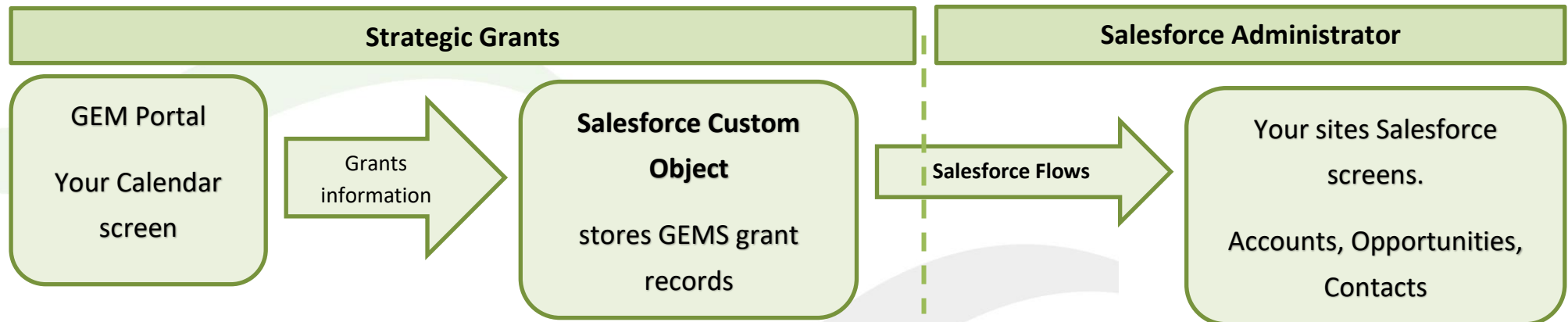
Strategic Grants Pty Ltd | ABN 58 140 784 943

Some background information ...

Before we look at how to push GEM Portal Grant / Funder records to Salesforce (which is very simple), let's look at how the broader interface works.

We have built the interface to allow you complete flexibility and control in how you use the data once we push it into your Salesforce at your organisation.

Each grant that is pushed across by you into **Salesforce** is loaded into what is referred to as a **Salesforce Custom Object**. It's effectively a custom screen in Salesforce, provided by Strategic grants, to store you GEM Portal grants information.





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Think of the **Salesforce Custom Object** as a custom built screen in your Salesforce, built by **Strategic Grants**.

This is a snippet of what it looks like:

We look after the data in this screen for you, by keeping our grants data always up to date in your Salesforce.

Whenever one of our research team makes an update to a grant in GEM Portal, we will also keep it updated for you in this Salesforce screen.

Opening Date	Closing Date	Closing Date Status	Estimated
	5/2/2022	TBC	

Details

GEM Portal Grant Name
Commonwealth Home Support Program - Growth Funding

Funder Name
Australian Government Department of Health

Options

You can choose to keep the GEM Portal to Salesforce interface as simple as the above and do nothing more

or

You can customise the templates (Salesforce Flows) that we have provided, to send the data from the Salesforce Custom Object, into other screens within your Salesforce. ***We recommend that you do take this option!***



What might you do?

If you manage your grant applications to funders through a Salesforce Opportunity, then we suggest you push a selection of the GEM Portal Custom Object Grant fields into an Opportunity.

If you manage relationships with Funders through Salesforce Accounts, then we suggest you push a selection of the GEM Portal Custom Object Funder data into a Salesforce Account.

You could push the GEM Portal Custom Object Contacts into your master Salesforce Contacts list.

We are happy to talk through this with you.

You have complete control and flexibility over how you decide to push our data across your Salesforce screens.

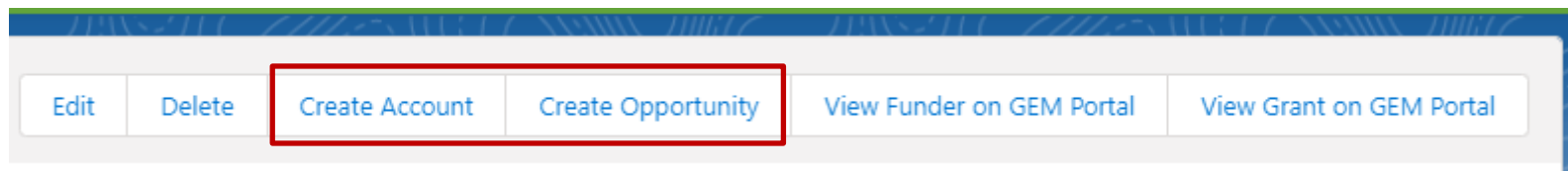
You will need to involve your Salesforce Administrator to build these processes for you.

Salesforce Flows

A Salesforce **Flow** is a software tool that you can use, to push data from one location in Salesforce to another.

For example, if you do want to push information from one of our Funder records into a Salesforce Account, you will need to use a Salesforce Flow.

We have provided a set of basic Salesforce Flow templates for your Salesforce Administrator.



You can use these basic Flows as they are, to:

create a new account, which will create a basic Salesforce Account using our GEM Portal Funder record details

create a new opportunity, which will create a basic Salesforce Opportunity using our GEM Portal Grant details

We recommend that you request your Salesforce Administrator to edit the supplied Salesforce Flow templates and enhance them, to send our GEM Portal data from the GEM Portal Custom Object into the correct location(s) across your Salesforce.

**What it means for you is that Strategic Grants is not touching your organisations Salesforce data.
You keep the control.**

Customising the Flows

You have complete control over where you can push the GEM Portal data. And it will depend on your organisations business rules.

Strategic Grants will keep the grants data up to date, within the Custom Object screen in your Salesforce.

When building your organisations custom Flows, you can use the **Grant Last Updated At** and **Grant Last Synced At** to determine when to trigger your Flows.

GEM Portal Grants
Recently Viewed ▾

15 items • Updated 4 minutes ago

	<input type="checkbox"/> GEM Portal Grant Name ▾	<input type="checkbox"/> Funder Name ▾	<input type="checkbox"/> Closing Date ▾	<input type="checkbox"/> Closing Date Status ▾	<input type="checkbox"/> Grant Last Updated At ▾	<input type="checkbox"/> Grant Last Synced At ▾
1	<input type="checkbox"/> Wellcome Trust - The Hub Award	Wellcome	31/10/2021	TBC;EOI/Enquiry	2/7/2021, 5:00 PM	15/10/2021
2	<input type="checkbox"/> The Ian Potter Foundation Public Health Research Projects ...	The Ian Potter Foundation	6/11/2021	TBC;EOI/Enquiry	31/1/2021, 10:53 PM	19/10/2021
3	<input type="checkbox"/> Annie Danks Trust and Danks Trust 3/2/2022	Annie Danks Trust and Danks...	3/2/2022	TBC;EOI/Enquiry	19/10/2021, 11:50 AM	19/10/2021
4	<input type="checkbox"/> Annie Danks Trust and Danks Trust	Annie Danks Trust and Danks...	1/2/2022	TBC;EOI/Enquiry	15/10/2021, 3:11 PM	19/10/2021

Grant Last Synced At = the date when you pushed the grant from GEM Portal into Salesforce

Grant Last Updated At = the date when a Strategic Grants researcher last made an update to the grant record within GEM Portal (this can change over time, as we work to keep our records up to date)

Grant Last Updated At

A grant record within GEM Portal will first be created on Date A.

It may subsequently be updated on Date B, Date C, Date E

Each time we update one or more of the data fields within our grant record, we will update the **Grant Last Update At** so that you know that the grants data has changed.

Let's look at an example.

Let's say you build a Flow that lets you push an identified grant (Grant ABC), from the Custom Object, into an existing Account in your Salesforce.

You can have a Flow that will push Grant ABC into Salesforce Account XYZ and create an attached Opportunity ABC.

At the time that you push the data across, the values in Grant ABC will be those from the **Grant Last Update At** date.

If our research team then subsequently update one or more values in Grant ABC, within our GEM Portal, we will update the **Grant Last Update At** date with the new date.

At this point in time you will likely need to trigger another Flow, to update the previous grant values that you had previously pushed across into your Opportunity. So that they reflect the latest data values.

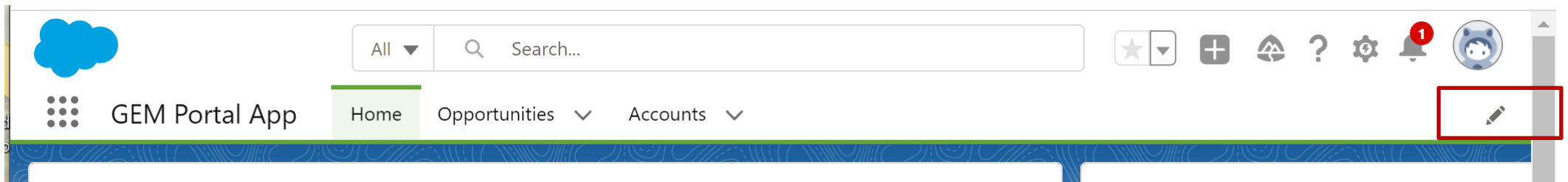
If you would like to talk through this more with Strategic Grants, [call out](#). We'd love to chat it through with you.

Once-off set up

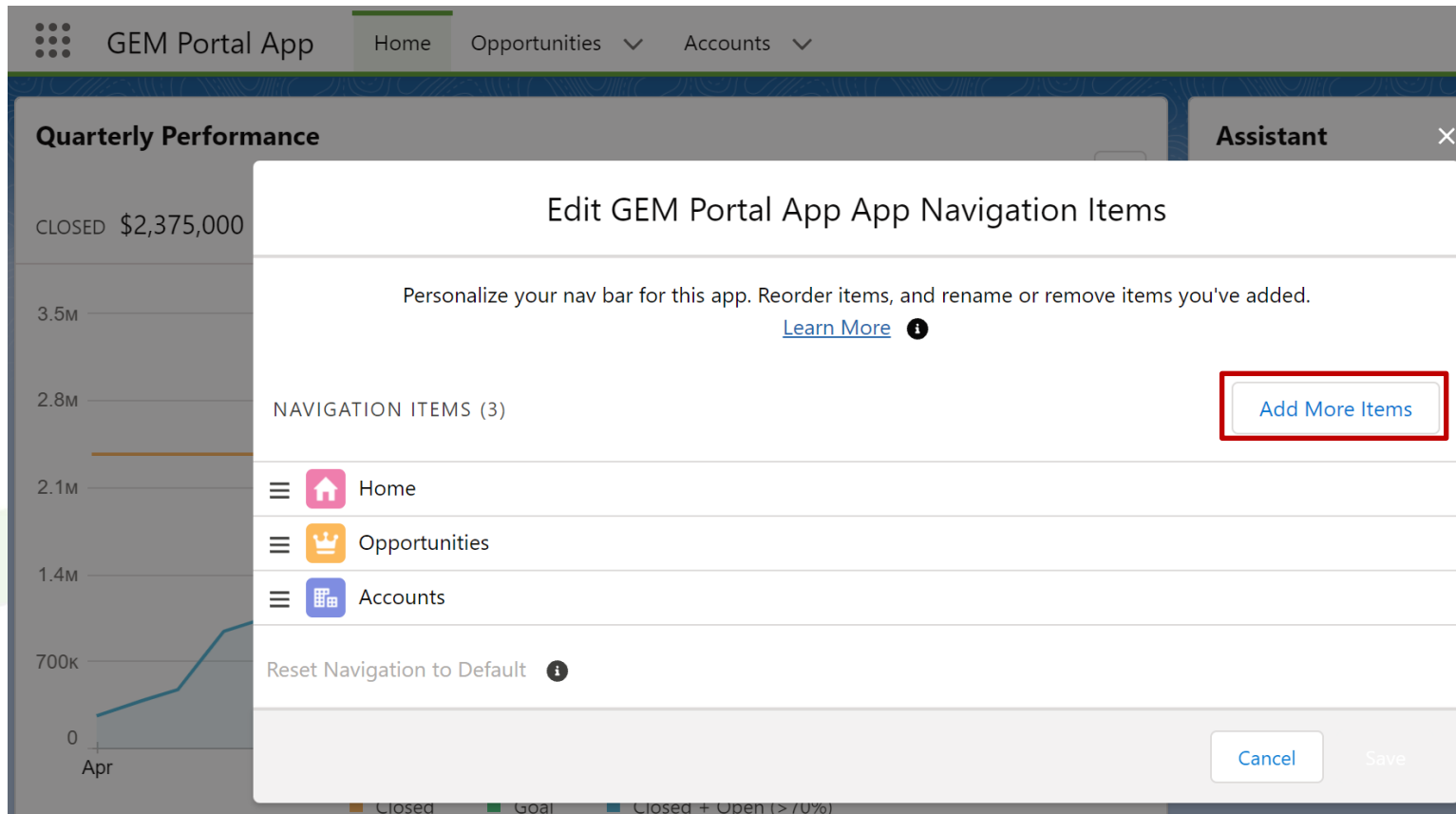
One more step before you start pushing grants across to Salesforce.

You should only need to do the following process once, to set up some associated screens.

Click on the pencil / edit button in the top right of your screen:



Click on Add More Items

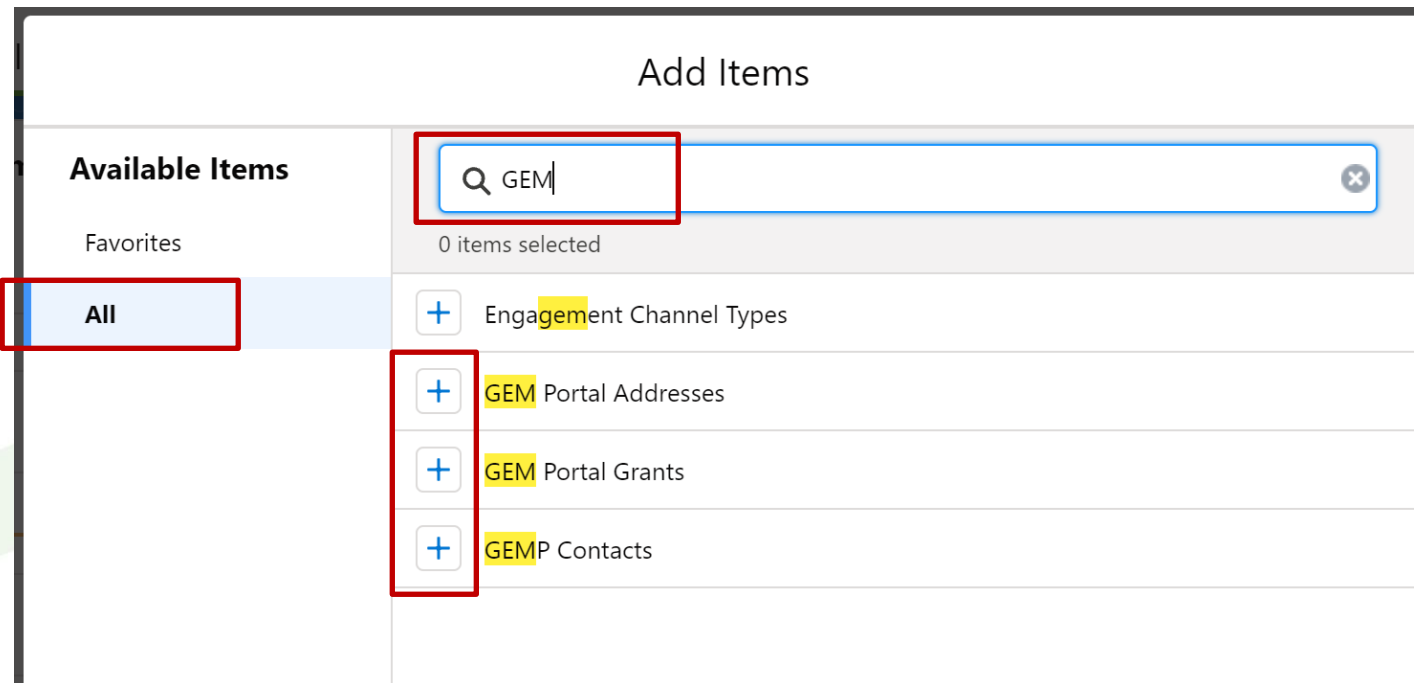


The screenshot shows the 'GEM Portal App' interface with a navigation editor modal open. The modal title is 'Edit GEM Portal App App Navigation Items'. Below the title, there is a description: 'Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.' with a 'Learn More' link and an information icon. Under the heading 'NAVIGATION ITEMS (3)', there is a list of items: 'Home' (with a house icon), 'Opportunities' (with a crown icon), and 'Accounts' (with a grid icon). Below the list is a 'Reset Navigation to Default' option with an information icon. At the bottom right of the modal, there are 'Cancel' and 'Save' buttons. The 'Add More Items' button is highlighted with a red rectangular box.

Click on **All**

Then type **GEM** into the search box.

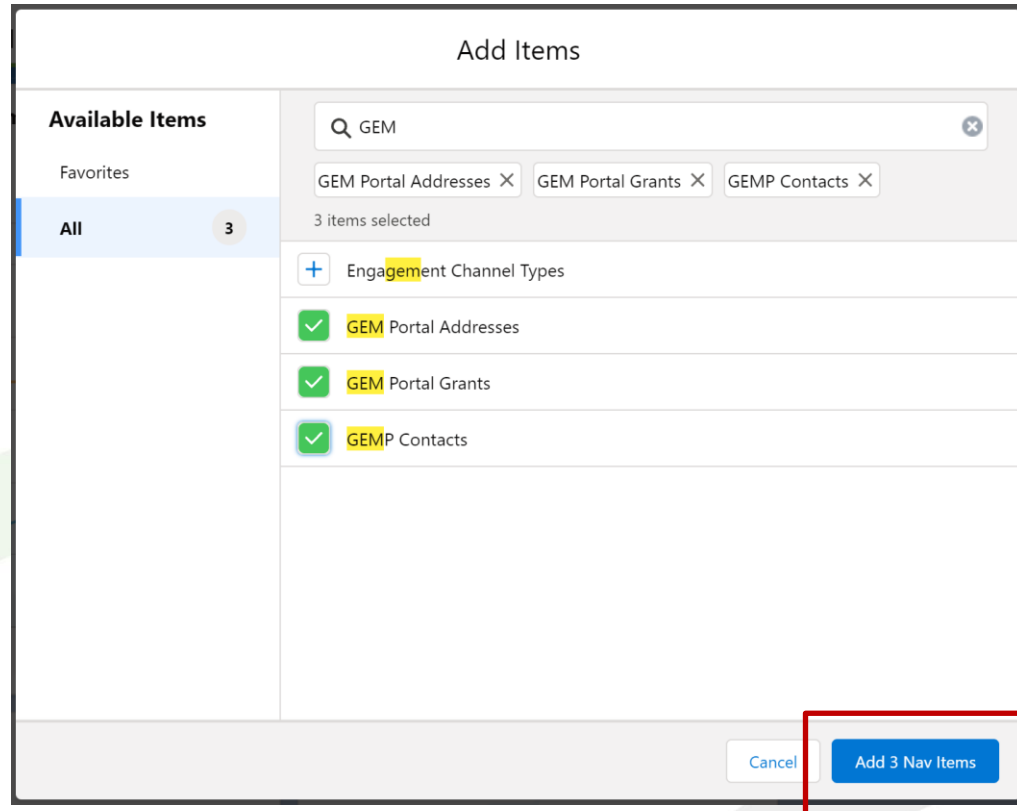
Click the plus + sign next to each of the 3 GEM Portal items to add them all to your screen



The screenshot shows a web interface titled "Add Items". On the left, there is a sidebar with "Available Items" and "Favorites" sections. The "All" item in the "Available Items" section is highlighted with a red box. In the main area, a search bar at the top contains the text "GEM" and is also highlighted with a red box. Below the search bar, there is a list of items with plus signs next to them, indicating they can be added. The items are: "Engagement Channel Types", "GEM Portal Addresses", "GEM Portal Grants", and "GEMP Contacts". The plus signs for the three GEM Portal items are highlighted with a red box.

The three plus signs will turn to green ticks, to indicate they are selected.

Click the **Add 3 Nav Items** button at bottom right



The screenshot shows a modal window titled "Add Items". On the left, there is a sidebar with "Available Items" and "Favorites". Under "Available Items", the "All" category is selected, showing a count of 3. The main area contains a search bar with "GEM" and a list of items. Three items are selected, indicated by green checkmarks: "GEM Portal Addresses", "GEM Portal Grants", and "GEMP Contacts". At the bottom right, there are two buttons: "Cancel" and "Add 3 Nav Items". The "Add 3 Nav Items" button is highlighted with a red box.

Next, click the **Save** button (to add these 3 GEM Portal items to your Navigation bar)

Edit GEM Portal App App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) ⓘ

3 items added to your list. Save your updates.

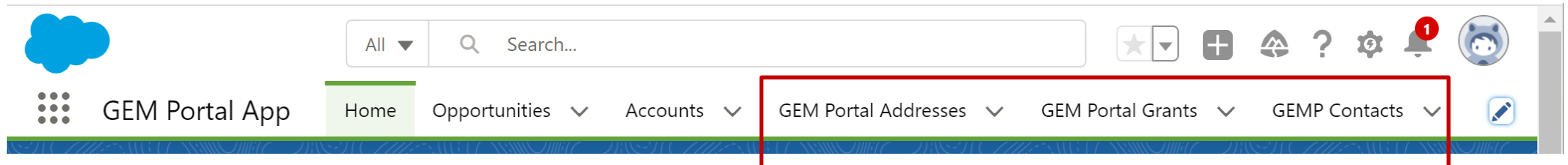
NAVIGATION ITEMS (6) Add More Items

- Home
- Opportunities
- Accounts
- GEM Portal Addresses ×
- GEM Portal Grants ×
- GEMP Contacts ×

[Reset Navigation to Default](#) ⓘ

Cancel Save

After saving, you will be returned to your main Salesforce screen, where you will see the 3 newly added tabs:



You should not need to do this step again.

That's it. All set up.

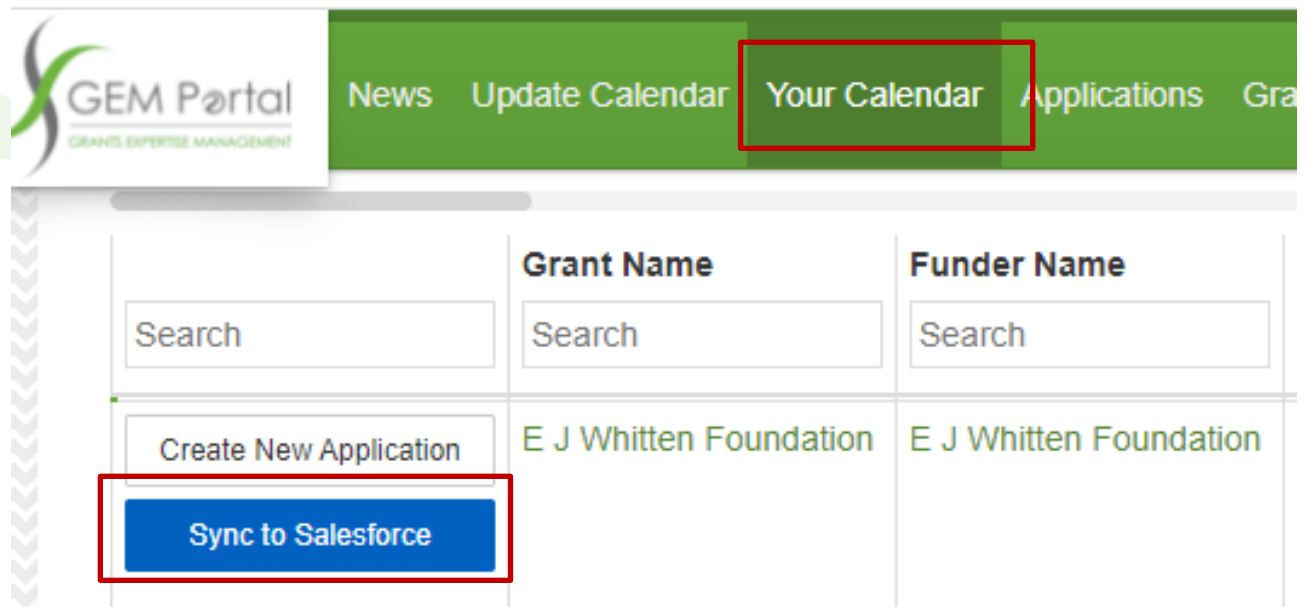
Now, let's get back to pushing Grants into Salesforce from GEM Portal.

Push a Grant from GEM Portal to Salesforce

Tip: Whenever working in your calendar we recommend that you keep your calendar up to date. If the Update Calendar process has not been run recently, it is worthwhile doing an update. It won't affect the interface. But you will ensure you are looking at the latest grant records on screen.

Within **Your Calendar**, identify the grant you would like to push to Salesforce.

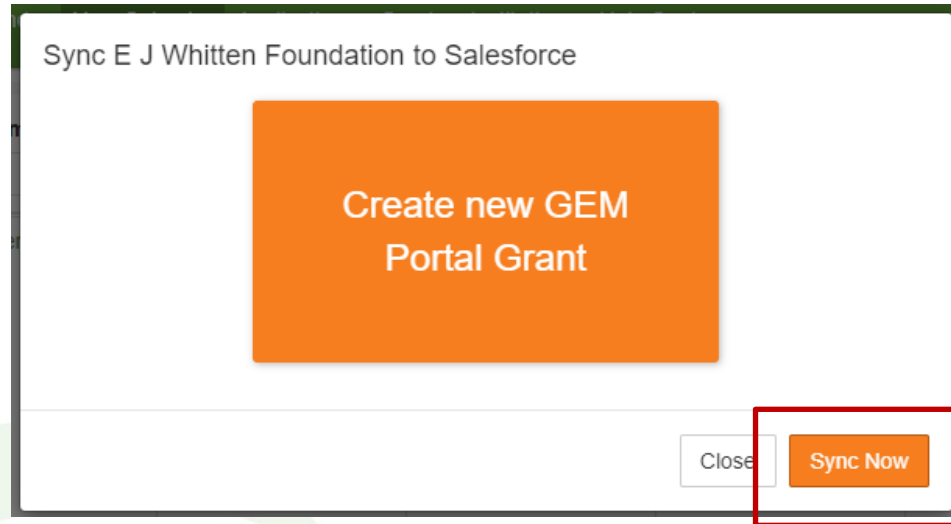
Click the **Sync to Salesforce** button



The screenshot shows the GEM Portal interface. The top navigation bar includes 'News', 'Update Calendar', 'Your Calendar', 'Applications', and 'Grants'. The 'Your Calendar' tab is selected. Below the navigation bar is a table with columns for 'Grant Name' and 'Funder Name'. The table contains one row with the grant name 'E J Whitten Foundation' and funder name 'E J Whitten Foundation'. A blue button labeled 'Sync to Salesforce' is located below the table, highlighted with a red box. A green arrow points from the text 'Click the Sync to Salesforce button' to this button.

	Grant Name	Funder Name
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
<input type="button" value="Create New Application"/>	E J Whitten Foundation	E J Whitten Foundation
<input type="button" value="Sync to Salesforce"/>		

You are prompted with a form like this:

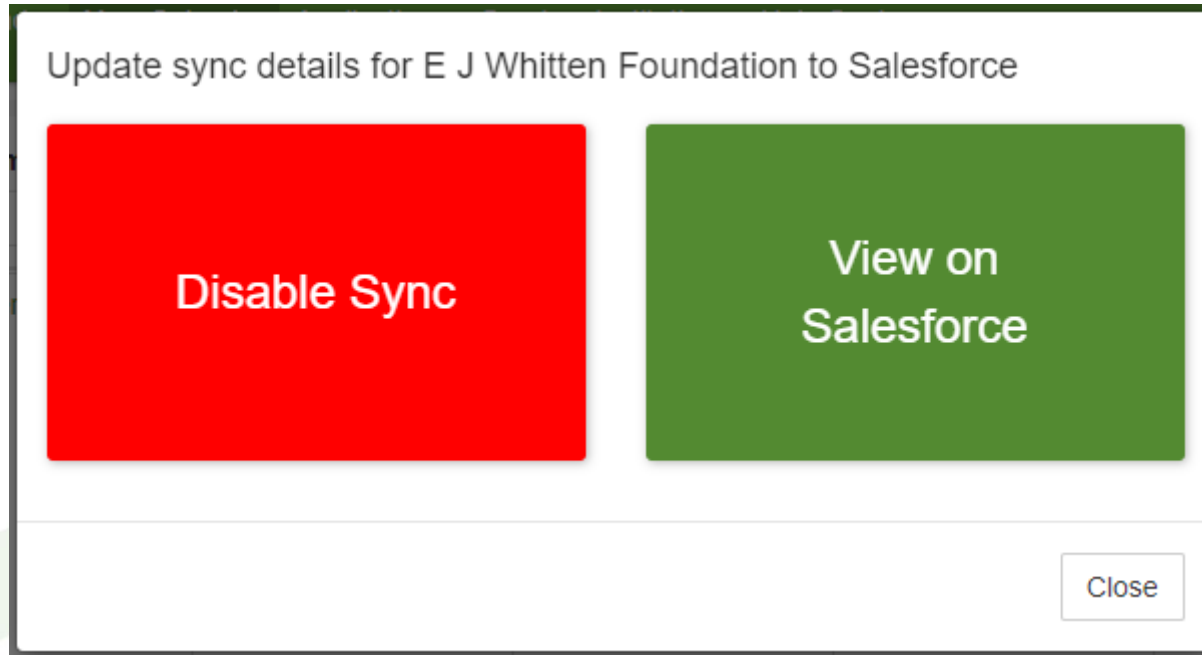


A screenshot of a dialog box titled "Sync E J Whitten Foundation to Salesforce". The dialog box has a white background and a dark border. In the center, there is a large orange button with the text "Create new GEM Portal Grant". At the bottom right of the dialog box, there are two buttons: a white "Close" button and an orange "Sync Now" button. The "Sync Now" button is highlighted with a red rectangular border.

Click the **Sync Now** button.

It may take several seconds. The grants data is being pushed across to Salesforce.

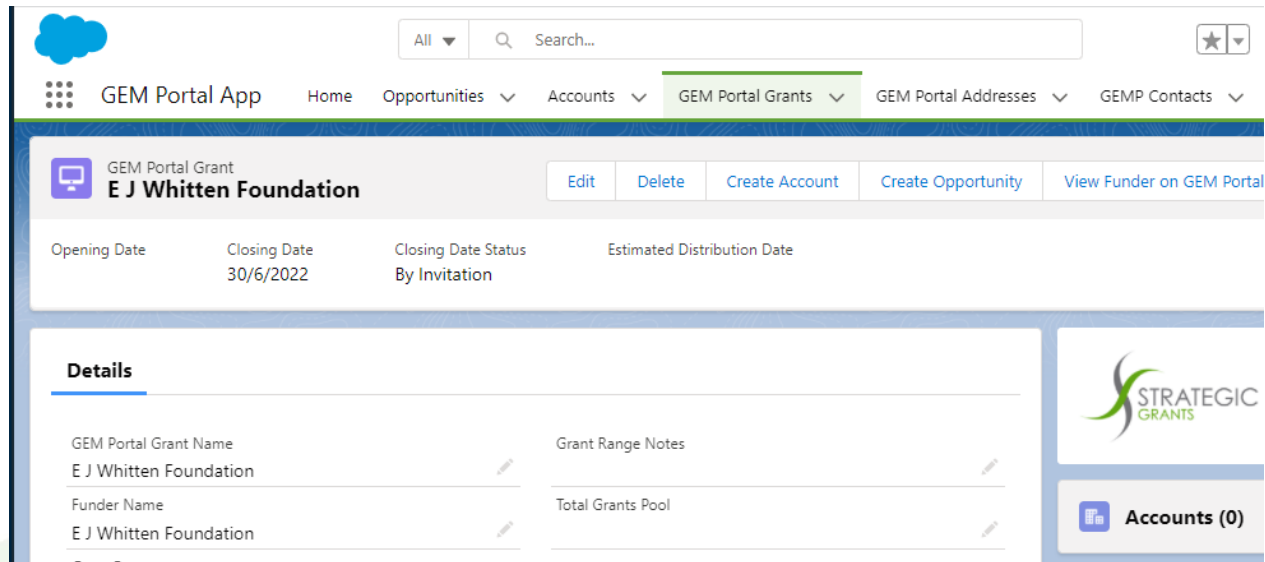
If the process is successful, you will be presented with a form with one red and one green button:



Click the **View on Salesforce** button, to open Salesforce onto a Strategic Grants GEM Portal page. You will see that the data from GEM Portal now sits in your Salesforce. (This is the Custom Object screen).

If you would like to remove the grant from Salesforce, you can click the **Disable Sync**.

When you click **View on Salesforce**, a Salesforce screen opens and the Grant / Funder / Contact information is presented:



The screenshot shows the Salesforce GEM Portal App interface. At the top, there is a search bar and navigation tabs for 'GEM Portal App', 'Home', 'Opportunities', 'Accounts', 'GEM Portal Grants', 'GEM Portal Addresses', and 'GEMP Contacts'. The 'GEM Portal Grants' tab is active, displaying a record for 'E J Whitten Foundation'. The record includes fields for 'Opening Date', 'Closing Date' (30/6/2022), 'Closing Date Status' (By Invitation), and 'Estimated Distribution Date'. Below this, a 'Details' section shows 'GEM Portal Grant Name' and 'Funder Name' both set to 'E J Whitten Foundation'. To the right, there is a 'Grant Range Notes' field and a 'Total Grants Pool' field. A sidebar on the right contains the Strategic Grants logo and an 'Accounts (0)' button.

Now that a link is established for this grant, even if your GEM Portal is not open, any updates made by Strategic Grants in our grants database will be reflected in the Salesforce GEM Portal screen.



That's the process completed. You've pushed your first grant record from GEM Portal into Salesforce

Keeping your GEM Portal calendar updated.

You still need to regularly run the Update Calendar in GEM Portal, to keep your full calendar updated with the latest opportunities for your prospect research.

As we mentioned on the previous page

Even if your GEM Portal is not open, Salesforce will continue to present the latest available data.

The specific grants you have linked to Salesforce will now always be kept up to date.

It is important that you continue to regularly run the **Update Calendar** with GEM Portal, so that you are actively prospect researching, bringing in any new opportunities to your calendar.

Need further help?

[Contact the Strategic Grants Team](#) any time if you would like additional support.