Applicant Instructions
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Applicant Instructions

Login

1. Open a preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the GrantVantage Portal appears.

   ![Image](https://OrganizationName.grantcloud.com/account/announcement)

   **This unique web address is related to your organization and is provided by your grant administrator.**

   *Figure 1: GrantVantage URL*

3. Click **Log In**. The Log In screen appears. From the Log In screen, returning users may log in to the system.

   ![Image](Funder Portal)

   *Figure 2: Public Facing Page*

4. Enter login credentials and select **Log In**.
Figure 3: Login Screen
Register an Applicant Profile

1. Open a preferred web browser.
2. In the URL field of the web browser, enter the web address provided by GrantVantage. The public-facing view of the GrantVantage Portal appears.

   ![GrantVantage URL](https://OrganizationName.gvgrantcloud.com/account/announcement)

   This unique web address is related to your organization and is provided by your grant administrator.

   Figure 4: GrantVantage URL

3. Click Log In. The Log In screen appears. From the Log In screen, new users must register into the system.

   ![Public Facing Page](Figure 5: Public Facing Page)

4. Click Register. You can now begin the registration process.
5. Fill in the necessary fields.

   ✋ **Note:** The black asterisks indicate required fields.

6. Click ✅ **Submit.** You are logged in, and the GrantVantage Funder Portal homepage appears. The homepage displays all available funding announcements. Applicants may navigate the system by using the site map.
Register an Applicant Profile

Figure 7: Applicant Registration

Applicant Registration

- Organization *
- Organization Type *
- First Name *
- Last Name *
- Email Address *
- User Name *
- Password
- Password (repeat)

Please prove you are not a robot

- I'm not a robot

[CAPTCHA]

[Submit] [Cancel]
Homepage

On the homepage, you can view all published funding announcement opportunities, opportunities you have applied for, your profile, and view users, properties, and documents related to the application.
Site Map

The site map displays navigation options relating to the applicant, such as the applicant profile, the internal users, and the contacts. The Applicant site map links to the Funding Announcement and My Applications pages, which opens the applicant dashboards.

<table>
<thead>
<tr>
<th>Site Map Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Announcement</td>
<td>Displays all published announcements.</td>
</tr>
<tr>
<td>My Submitted Application</td>
<td>Displays all the announcements you have saved and/or applied to.</td>
</tr>
<tr>
<td>My Applicant Profile</td>
<td>View your Applicant Profile. You can add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity’s qualifications.</td>
</tr>
<tr>
<td>Users</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>View the active users related to the application.</td>
</tr>
<tr>
<td>Inactive</td>
<td>View the active users related to the application.</td>
</tr>
<tr>
<td>Contacts</td>
<td>View the contacts related to the application.</td>
</tr>
<tr>
<td>Documents</td>
<td>View documents related to the application.</td>
</tr>
</tbody>
</table>

*Table 1: Site Map*
Funding Announcement

You can view announcements you have saved/applied to, your applicant profile, users and contacts associated with the Applicant profile or organization profile, and documents related to the funding announcement or an applicant document library that houses documents submitted with an application.

Figure 10: Funding Announcement Screen 1

Figure 11: Funding Announcement Screen 2
Save an Announcement

1. From the site map, click **Funding Announcement.** The Funding Opportunity for Applicant page appears.

![Figure 12: Site Map – Funding Announcement](image)

2. **Optional:** Use the search bar to find an announcement.

3. Click **Save** to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

![Figure 13: Save Announcement](image)

Save the announcement to the My Application page.
Print the Announcement as a PDF

1. Click Print PDF. The announcement details download as a PDF.

View Attachments associated with the Announcement

1. Click Attachments. The Attachments dialog box appears.

2. Optional: Click the link to view the document.
   Or
   Click Download to download the attachment. The attachment is downloaded.
Submitting an Announcement

1. Click View next to the announcement you wish to view. The Funding Announcement Narrative appears.

2. Click Apply. The Application Details dialog box appears.

4. Enter a project name.
5. Click ![Save](image). The project appears in the grid.

6. Click **Apply**. A warning popup appears telling you which project you are applying with.
7. Click **Yes**. Another popup appears telling you the application is about to begin.

![Application Confirmation Dialog Box](image)

8. Click **Yes**. The application process begins.

9. Answer all the questions and complete the templates. Swap between the tabs to complete them in any order.

   **Note:** Once you complete a tab item, the red x next to the name turns into a green checkmark.

Application Questions:

   a. **Optional:** Use the hamburger menu to see all the questions.

      **Tip:** The questions are color-coded to indicate the completion process.
      - **Blue** – The question is in progress.
      - **Gray** – The question needs to be viewed.
      - **Green** – The question is complete.
b. Use the arrows to navigate the questions

c. Optional: If the question requires you to attach a document, attach it to the question.

   Note: If there is a Not Applicable option, click the radio button to move onto the next question if necessary.
i. Click **Choose File To Upload**. The Documents dialog box appears.

![Figure 28: Add Attachment to Question](image)

ii. Choose from the picklist.

![Figure 29: Choose Attachment for Question](image)

Or

Upload a new document by clicking **Choose File**.

   i. Upload the document.
   
   ii. Click **Save**.
   
   iii. Click **Save**.
Make sure all questions are complete.

Complete the Objective Template:
   a. Click the Objective Template tab. The Objectives template appears.
b. Click Objective Instructions to see how to complete the template. The Objective Instructions dialog box appears.

![Figure 33: View Objective Instructions]

Figure 33: View Objective Instructions

![Figure 34: Maximize or Save Objective Instructions]

Figure 34: Maximize or Save Objective Instructions

c. Click **Maximize** to maximize the window.
   Or
   Click **Close** to close the dialog box.

d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.
   - **Note**: The Goal radio button only appears if the option has been selected when the announcement was made.

e. Add in the objectives, performance measures, and grant activities.
   - **Note**: The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see **Objective Tools**.
f. **Click Save Objective.** The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application.

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<th>Objective Template Command Bar</th>
<th>Description</th>
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<td><strong>Save Objective</strong></td>
<td>Saves the objectives and locks the Objective Template.</td>
</tr>
<tr>
<td><strong>Objective Instructions</strong></td>
<td>Display the instructions on how to complete the Objective Template.</td>
</tr>
</tbody>
</table>

**Table 2: Objective Command Bar**

- **Optional:** You can unlock the Objective Template again if you need to make changes.
  - **i. Click Return to Draft.** The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.
Complete the Budget template.

**Note:** There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see Budget Tools.

a. Click the Budget Template tab. The Budget Template appears.

b. Use the budget tools to add, edit delete parent categories, sub-categories, or sub-sub-categories. For more information, see Budget Tools.

c. **Optional:** Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.
d. Click **Save Budget**. The Budget template is saved and locked. The budget must be saved and locked before you can submit the application.

![Figure 40: Save Budget Template](image)

e. **Optional:** You can unlock the Budget Template again if you need to make change.
   i. Click **Return to Draft**. The Budget Template is locked, and you can edit it. You can go in and out of draft during the application process.

![Figure 41: Return Budget Template to Draft](image)

Finish the application process

10. Once the questions and the templates are saved and locked, click **Next**. A popup appears confirming you have reviewed your answers.

![Figure 42: Finish Application Process](image)

11. Click **Save & Continue**.

![Figure 43: Warning to Check Questions](image)

12. Fill in the necessary fields.
   **Note:** The red asterisks indicate required fields.
13. Click **Finish**. The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.

14. Click **Submit**. A popup appears asking if you are sure you want to submit the application.
15. Click **Yes**. The application will be submitted.

The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the application was submitted successfully.
My Submitted Application

View all the announcements you have applied to. You can view the application report, the objective report, and the budget report.

![My Submitted Application Screen](Image)

View Reports

1. From the site map, click **My Submitted Application**. The Funding Opportunity for Applicant page appears.

![My Site – My Submitted Application](Image)

2. Click the blue arrow to show the application, objective, and budget reports.
3. Click the link to one of the reports. The appropriate report appears.
My Applicant Profile

Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user’s applications. My Applicant Profile is a tool designed to enhance a user’s application. Here, applicants may add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity’s qualifications. All applicant users must upload their documents to their User Profile before they begin a funding announcement application. Applicant’s will not be able to upload documents directly to the application. Instead, the system will look to the user’s profile.

1. From the site map, click My Applicant Profile. The Applicant Profile page appears.

![My Applicant Profile](image)

**Figure 53: Site Map – My Applicant Profile**

2. On the Organization Information tab, fill in the necessary fields.
   
   **Note:** The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.
3. **Optional**: On the Address tab, fill in the necessary fields.
4. **Optional**: On the Users tab, add a user. The user you registered with is automatically a user.
a. Click **New**. The Create New User dialog box appears.

![Figure 57: Add User](image)

b. On the User information tab, fill in the necessary fields.

   **Note:** The red asterisks indicate required fields.
c. **Optional:** On the Address information tab, fill in the necessary fields.
d. Click **Save** to save the user. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 4a-4d for each user.
5. **Optional**: On the Contact tab, add a contact. The user you registered with is automatically a contact.

   a. Click **New**. The Create New Contact dialog box appears.
b. **On the Contact Details, fill in the necessary fields.**

   **Note:** The red asterisks indicate required fields.

   ![Create new contact screenshot](image)

   Figure 62: Create New Contact – Contact Details Tab

   c. **Optional:** On the Address Details, fill in the necessary fields.

d. Click **Save** to save the contact to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 8a-8d for each contact.
   a. Click **Choose File.**
   b. Upload the file. The name of the file replaces the Choose File button.
Applicant Instructions

My Applicant Profile

Figure 64: Add Attachment to Profile

c. Click ✉️ Save to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 6a-6c for document.

Figure 65: Save Attachment to Profile
7. Optional: Check the status of an award.

a. Click the Award Status tab.

b. Use the Announcement drop-down list to choose an announcement.
   Or
   Use the search bar to find an announcement.
8. Click **Save** to save the applicant profile and close the dialog box. A blue Saved Successfully popup appears at the bottom right of the screen.
Users

View the users related to the application. You can view active or inactive users.

1. From the site map, click [Users] and choose [Active] from the drop-down list. The Active Users screen appears.
**Inactive**

You can view inactive review panels.

1. From the site map, click [Users](#) and choose [Inactive](#) from the drop-down list. The Inactive Users screen appears.
Figure 73: Site Map – Inactive Users
Create a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. From the site map, click **Users** and choose **Active** from the drop-down list. The Active Users screen appears.

![Image: Site Map – Active Users](image)

2. Click **New**. The Create New User dialog box appears.

![Image: Create User](image)

Under the Active column:
- ![Image: inactive](image) indicates the user is inactive.
- ![Image: active](image) indicates the user is active.
3. On the User information tab, fill in the necessary fields.
   \[\text{Note: The red asterisks indicate required fields.}\]

4. On the Address tab, fill in the necessary fields.
   \[\text{Note: The red asterisks indicate required fields.}\]
5. Click **Save** to save the user. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each user.

![Create New User – Address Tab](image)

*Figure 77: Create New User – Address Tab*
Edit a User

1. **Optional**: Use the search bar to find a user.
2. **Double-click** the user to edit it. The Edit User dialog box appears.

3. Edit the necessary fields for each tab.
   - **Note**: The red asterisks indicate required fields.
4. Click **Save**. The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.
Activate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.

   ![Command bar](image)

   **Figure 80: Display User Commands**

   - **Use the search bar to find a user.**
   - **Single-click the user to display the command bar.**

3. **Click** **Activate ✓**. A message popup asks if you are sure you want to activate the user.

   ![Activate User](image)

   **Figure 81: Activate User**

4. **Click** **Yes**. The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.

   ![Warning to Activate User](image)

   **Figure 82: Warning to Activate User**
Deactivate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional**: Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.

![Figure 83: Display User Commands](image)

3. **Click** ![Deactivate](image). A message popup asks if you are sure you want to deactivate the user.

![Figure 84: Deactivate User](image)

4. **Click Yes**. The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each reviewer you wish to deactivate.

![Figure 85: Warning to Activate User](image)
Contacts

View the contacts related to the application.

![Contacts Screen](image)

Add a Contact

1. From the site map, click **Contacts**. The Contacts for Applicant page appears.

![Site Map - Contacts](image)

2. Click **New**. The Create New Contact dialog box appears.
3. On the Contact Details tab, fill in the necessary fields.
   
   **Note:** The red asterisks indicate required fields.

4. **Optional:** On the address tab, edit the necessary fields.
   
   **Note:** The red asterisks indicate required fields.

5. Click **Save** to save the contact. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each contact.
Contacts

Save the contact to the grid.

Figure 90: Create New Contact – Address Tab
Edit a Contact

1. **Double-click** the user to edit it. The Edit User dialog box appears.

![Double-click the contact to edit it.](image)

2. Edit the necessary fields for each tab.
   - **Note:** The red asterisks indicate required fields.
3. Click **Save**. The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

![Save the contact to the grid.](image)
Delete a Contact

1. Click the radio button next to the name of contact to display the command bar.

![Figure 93: Click Contact](image)

Click the radio button next to the name of contact to display the command bar.

2. Click Delete  . A message popup asks if you are sure you want to delete the contact.

![Figure 94: Delete Contact](image)

3. Click Yes. The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.

![Figure 95: Warning to Delete Contact](image)
Documents
View documents related to the application.

![Documents Screen](image)

**Table 3: Document Command Options**

<table>
<thead>
<tr>
<th>Command Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose File</td>
<td>Choose the file you want to upload.</td>
</tr>
<tr>
<td>Save</td>
<td>Save the file you want to upload.</td>
</tr>
<tr>
<td>Cancel</td>
<td>If you choose a file you do not want to upload, you can cancel uploading the file.</td>
</tr>
</tbody>
</table>

**Add a Document**

1. From the site map, click **Documents**. The Attach Document for Applicant page appears.
2. Click **Choose File**.
3. Upload the file.
4. Click **Save**. The file appears in the grid. Repeat steps 2-4 for each document you wish to add.

**Delete a Document**

1. Click the radio button next to the name of document to display the command bar.
2. Click Delete. A message popup asks if you are sure you want to delete the document.

3. Click Yes. The document is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each document you wish to delete.
Objective Tools

You can add, edit, or delete parts of the Objective template. Use the arrows to expand the list of objectives, performance measures, and grant activities. When you are done modifying the Objective template, save it to lock it.
Use the arrow to expand the list of performance measures.

Add a performance measure.

Edit or delete the performance measure.

Figure 103: Performance Measures
Use the arrow to expand the list of grant activities.

Edit or delete grant activity.

Figure 104: Grant Activities
Add a Goal
You can only add a goal if the Goal checklist is ticked.

1. Click **Add Goal**. The Goal dialog box appears.
2. Fill in the necessary fields.
   - **Note**: The red asterisks indicate required fields.
3. Click **Save**. The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.
Add an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Click **Add Objective.** The Objective dialog box appears.

![Figure 107: Add Objective](image)

3. Fill in the necessary fields.
   - **Note:** The red asterisks indicate required fields.
4. Click **Save.** The objective appears in the grid. Repeat steps 2-4 for each objective you wish to add.

![Figure 108: Objective Dialog Box](image)
Add a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **Add Measure.** The Performance Measure dialog box appears.

4. Fill in the necessary fields.
   - **Note:** The red asterisks indicate required fields.

5. Click **Save.** The performance measure appears in the grid. Repeat steps 3-5 for each performance measure you wish to add.
Add a Grant Activity

1. **Optional:** Use the arrow to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **Add Activity.** The Grant Activity dialog box appears.

4. Fill in the necessary fields.
   - **Note:** The red asterisks indicate required fields.
5. Click **Save.** The grant activity appears in the grid. Repeat steps 2-5 for each grant activity you wish to add.
Edit an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to modify.
4. Click **Edit**. The Objective dialog box appears.

5. Edit the necessary fields.
   - **Note:** The red asterisks indicate required fields.
6. Click **Save**. The changes to the objective appear in the grid. Repeat steps 3-6 for each objective you wish to modify.
Edit a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to modify.
5. Click **Edit** 📝. The Performance Measure dialog box appears.

6. Edit the necessary fields.
   - **Note:** The red asterisks indicate required fields.
7. Click **Save**. The changes to the performance measure appear in the grid. Repeat steps 4-7 for each performance measure you wish to modify.
Edit a Grant Activity

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to modify.
5. Click **Edit**. The Grant Activity dialog box appears.

6. Edit the necessary fields.
   - **Note:** The red asterisks indicate required fields.
7. Click **Save**. The changes to the grant activity appear in the grid. Repeat steps 4-7 for each grant activity you wish to modify.
Delete an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to delete.
4. Click **Delete** 🗑️. A warning appears asking if you are sure you want to delete the objective.

5. Click **Yes**. The objective disappears from the grid. Repeat steps 3-5 for each objective you wish to delete.
Delete a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to delete.
5. Click **Delete** (🗑). A warning appears asking if you are sure you want to delete the performance measure.

6. Click **Yes**. The performance measure disappears from the grid. Repeat steps 4-6 for each performance measure you wish to delete.
Delete a Grant Activity

1. **Optional:** Use the arrow next to the goal to expand the goal’s objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to delete.
5. Click **Delete**. A warning appears asking if you are sure you want to delete the grant activity.

6. Click Yes. The grant activity disappears from the grid. Repeat steps 4-6 for each grant activity you wish to delete.
**Budget Tools**

**Note:** The items you can add/change depend on the properties selected when the announcement was made.

You can add, edit, or delete parts of the Budget Template. Enter the amounts of money in the cells that are white. Cells that are light blue are not editable. You can also add sub-categories and sub-sub-categories, edit sub-categories and sub-sub-categories, and/or delete sub-categories and sub-sub-categories. Single-click the green BN symbol next to a category to show budget calculations and the budget narrative.

![Budget Tools Diagram](image)

- **Use the drop-down list to choose a budget year.**
- **View the Budget Instructions for specific guidelines to prepare your budget for submission.**
- **Type in amount in cells that are white.**
- **Single-click the green BN symbol next to a category to display budget calculations and the budget narrative.**
- **Name of category.**
- **Budget calculations**

*(Figure 125: Budget Tools, Figure 126: View Budget Calculations)*

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Add Budget Calculations and Budget Narratives

1. Single-click the green BN symbol next to a category. The Budget Categories dialog box.  
   **Note:** The dialog box fields are different based on the budget category.

   ![Figure 127: Add Budget Calculations and Narrative](image)

2. Fill in the necessary fields and add the appropriate information.

   Example dialog box

   ![Figure 128: Budget Categories Dialog Box](image)
3. Click **Save**. The budget calculations and budget narrative appears in the table at the bottom of the page. Repeat steps 1-3 for each budget calculation and narrative.

<table>
<thead>
<tr>
<th>Budget Categories</th>
<th>Budget Calculations</th>
<th>Budget Narrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fringe</td>
<td>Displays the total amount of budget calculations</td>
<td>Displays the budget narrative about the specific budget category</td>
</tr>
<tr>
<td></td>
<td>Total Cost: $0.00</td>
<td>Example test.</td>
</tr>
<tr>
<td></td>
<td>Cash Match Funds: $100.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In-Kind Match Funds: $1,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Requested Amount: $0.00</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 129: Save Budget Calculations and Narrative*
Add a Parent Category

1. Hover over a parent category to display the budget tools.
2. Hover over New +.
3. Click New Parent Category.
4. Type in the new name for the parent category.
5. Click Save 🗼.

Edit a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click Edit.
3. Type in the new name for the parent category.
4. Click Save 🗼. The new parent category appears.
Delete a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click **Delete** 🗑️. A popup appears asking if you are sure you want to delete the sub-category.
3. Click **Yes**. The parent category is deleted.
Add a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Hover over New +.
4. Click New sub-Category.
5. Type in the name of the sub-category.
6. Click Save  . The sub-category is added to the grid.

Edit a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click Edit  .
4. Type in the name of the sub-category.
5. Click Save  .
Delete a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Click **Delete** 🗑️. A popup appears asking if you are sure you want to delete the sub-category.

4. Click **Yes**. The sub-category is deleted.
Add a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Click the blue arrow next to a sub-category category to expand the list.
3. Hover over New. 
4. Click New sub-Sub-Category. The new sub-category is added to the grid.

5. Type in the name of the sub-category.
6. Click Save . The new sub-sub-category is added to the grid.

Edit a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click Edit .

4. Type in the name of the sub-category.
5. Click Save .
Delete a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-sub-category to view the budget tools.
3. Click Delete . There is a warning asking if you are sure you want to delete the sub-sub-category.
4. Click Yes. The sub-category is deleted.
Move a Category Up or Down on the Grid

1. Hover over a category to display the budget tools.
2. Hover over Move Up \( \uparrow \) to move the category up the grid.
   Or
   Click Move Down \( \downarrow \) to move the category down the grid.

<table>
<thead>
<tr>
<th>Budget Categories</th>
<th>Direct</th>
<th>Cash Match</th>
<th>In-Kind Match</th>
<th>Total</th>
<th>Leveraged</th>
</tr>
</thead>
<tbody>
<tr>
<td>BN Fringe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BN Supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

*Figure 148: Category Commands*