How to Recommend a Grant & Grantee in Donor View

How to Recommend a Grant

1. To log into DonorView.

2. Click on Recommend a Grant on your Donor Dashboard.

3. Search for your favorite charity in our database by using the Search by Keyword. Using the ein or a combination of the name and location can help narrow it down. Less is more when using the search function.
This search will yield a list of charities. Once you find your charity on this list, click **New Grant**.

Complete the fields as appropriate and click **Submit Recommendation**.

- Single or Recurring Grant - *if recurring, specify the frequency of the payments and when recurring payments should end.*
- Grant amount
- Process date - asap or future date
- Contact – if one is listed, the grant letter will be addressed to this individual.
- Grant Purpose – this will be listed on the grant letter
- Anonymity – can select full or partial (if nothing is selected, Fund and Donor names will appear in the grant letter)
- Special Instructions – this field is an internal field in which you can add a note for the Grants Dept. This field has no effect on the grant check or letter.

Clicking submit recommendation is **NOT** the last step in submitting your grant request!!
Once you click submit recommendation, you will get a review screen in which you will confirm your grant recommendation and acknowledge the grant purpose per iGiftFund’s Grant Making Guidelines. After you review, click **Confirm Grant Recommendation**.

You will receive a confirmation with a transaction ID. Your grant request should now appear on the **Grant History** tab of your Dashboard.
How to Recommend a Grantee

If you cannot find your favorite charity in our database, you can recommend it.

1. Log into DonorView.

2. Click on Recommend a Grant on your Donor Dashboard.

3. Click Add a Grantee to request we add it to our database.
Now click Suggest a Grantee from your dashboard.

Complete the fields with as much information as you have available and click Submit.

Once you click submit, you will receive a confirmation stating that your grantee suggestion has been received. Click back to grantees.
The grantee you recommended should now appear on your Grantee List now.
Click New Grant to recommend a grant.