Applicant and Grantee Portal Transition Checklist

|  |  |
| --- | --- |
| Status | Task |
|  |  |
| Not started | **Review** current Active and Inactive forms in *Applications > Forms Manager*Identify forms to move. (TIP: Consider condensing and removing unnecessary forms). |
| Not started | **Export** all forms to be migrated into the *Manage Forms* Custom Form Builder* [Migrating Application Forms from Legacy Portal](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/migrating-application-from-legacy.html) (Product Help Documentation)
 |
| Not started | **Setup branding settings** in *Applications > Portal Settings** [Portal Settings](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/gc-account-settings.html) (Product Help Documentation)
 |
| Not started | **Import** forms into the *Manage Forms* Custom Form Builder in *Applications > Manage Forms** [Migrating Application Forms from Legacy Portal](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/migrating-application-from-legacy.html) (Product Help Documentation)
 |
| Not started | **Update imported forms** and **publish**.* Review Coding; Contact Tables; Content Text; Layout.
* [Program Setup (Worksheet)](https://hello.blackbaud.com/rs/053-MXJ-131/images/Blackbaud%20Grantmaking%20Applications%20Program%20Settings%20Worksheet.docx?version=0)
* [Applications: Creating Custom Forms / Blackbaud Grantmaking](https://learn.blackbaud.com/learn/courses/14987/applications-creating-custom-forms-blackbaud-grantmaking) (Instructor led course)
 |
| Not started | **Setup Programs** in *Applications > Program** Each Application will need a program
* [Setting up New Application Forms](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/starting-new-applications.html) (Product Help Documentation)
 |
| Not started | **Review Forms Emails** in the *Program > Communications options** [Set Up Program Emails](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/gc-grant-programs-set-up-emails.html) (Product Help Documentation)
 |
| Not started | **Publish Programs** in Applications > Program* [Publish Programs](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/gc-grant-programs-publish.html) (Product Help Documentation)
 |
| Not started | **Test** entire forms workflow for each program* **Submit and** [**Consider**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/pending-submissions.html)applications
* [**Publish**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/publishrequestform.html?Highlight=publish%20request%20form)additional request forms as applicable, submit and consider
* **Schedule and** [**Publish to Web**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantmaking/content/publishrequirementform.html?Highlight=publish%20to%20web)all applicable requirement forms
* **Complete and Submit** requirements
 |
| Not started | **Launch Programs!** Make program links available to applicants. Party popper |