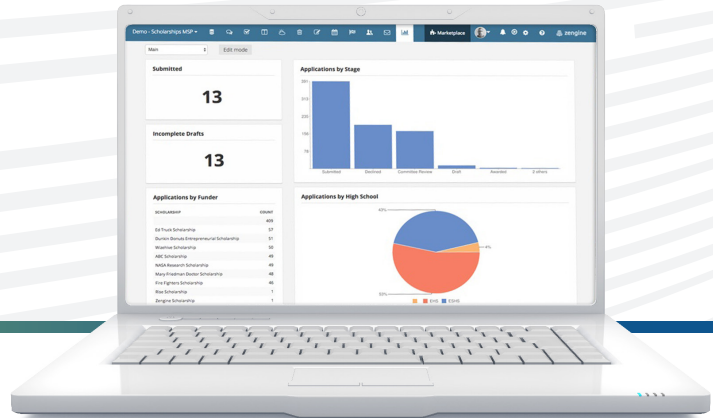


Zengine for Grant Seekers

Organize your planning, tracking, and reporting within one comprehensive database



Obtaining and managing grants for your organization requires far more than simply submitting an application. For grant writers and managers it's a three-ring circus of administrative tasks, from organizing the funding opportunities and capital projects to maintaining your contacts to tracking where awarded funds are utilized.

With Zengine™ from WizeHive, you can keep all this information -- and the important connections between them -- easily and clearly organized. Use our simple sorting and filtering options to get to the information you need quickly. Harness the power of the relational database to link funding organizations, people, projects, funds, expenditures, and more. And keep tabs on it all with helpful reporting dashboards.

Your New CRM

Store the information for all of your “go-to” funding organizations in one place in one place. Clicking on any organization will open a details screen with all their information, as well as sidebars allowing you to connect with linked data such as employees or projects they have contributed to in past.

The screenshot displays the Wizehive CRM interface. At the top, there's a navigation bar with a '+Add Organization' button, a 'View: Main' dropdown, and a status message 'The view has changed. [Save view](#) or [save as new view](#)'. Below this is a table of organizations. The table has columns for Folder, Organization Name, Projects, Address, City, and a search bar. The 'Funder' folder is expanded, showing a list of organizations including Philadelphia Foundation, Big Brothers Big Sisters, Academic Affairs, Siwakoti, Hinnasto, Sopimus, Perustiedot, UPS, FedEx, google, Advanced Micro De, I33T hax0rS, ePets.com, AMD, Inc., PA Horticulture Fou, The Bill & Melinda C, and Home Depot. A modal window is open for 'Big Brothers Big Sisters', showing fields for Organization Name, Address, City, Phone Number, State, ZIP, Website, and Projects. To the right of the modal is a 'Linked Records' sidebar with sections for Grants, Contacts, and In Kind Donations. The 'Grants' section shows two records: 'United Way / Big Brother Big Sisters Grant Part Two:\$500,000' and 'United Way / Big Brother Big Sisters Grant \$500,000'. The 'Contacts' section shows one record: 'Celia Abrams'. The 'In Kind Donations' section shows zero records.

Folder	Organization Name	Projects	Address	City
Uncategorized	Wizehive Music Project	1	1001 East Hector	
Funder	Philadelphia Foundation	1	123 Main St	Mytown
Funder	Big Brothers Big Sisters	2	3150 Sierra Rd	San Jose
Funder	Academic Affairs	1	217 Beatrice Ln	Aston
Funder	Siwakoti	1	1160 Eleanor Cir	Aston
Funder	Hinnasto	2	114 Scheivert Ave	Aston
Funder	Sopimus	2	110 Wedgewood Ln	Medi
Funder	Perustiedot			
Funder	UPS			
Funder	FedEx			
Funder	google			
Funder	Advanced Micro De			
Funder	I33T hax0rS			
Funder	ePets.com			
Funder	AMD, Inc.			
Funder	PA Horticulture Fou			
Funder	The Bill & Melinda C			
Funder	Home Depot			
Partner	New Thought Philan			

Create similar screens for individual contacts, which could include donors, team members, media, or volunteers, as well as your contacts at those original organizations.

The screenshot displays the Wizehive CRM interface. At the top, there's a navigation bar with a 'Grouped by: Organization' dropdown. Below this is a table of contacts. The table has columns for Name, Organization, Title, and Type. The 'Academic Affairs' folder is expanded, showing a list of contacts including Michael Allman, Christine Acquarola, Robin Addison, Jenny Apostolopoulos, Theodore Arrington, and Carolyn Bailey. A modal window is open for 'Michael Allman', showing fields for Name, Organization, Title, Type, Email, Phone, and Address. The 'Organization' field is set to 'Academic Affairs'. The 'Title' field is set to 'Fund Administrator'. The 'Type' field is set to 'Fund Administrator'. The 'Email' field is set to 'Michael.Allman@email.com'. The 'Phone' field is set to '(521) 684-2412'. The 'Address' field is set to 'Organization Address'.

Name	Organization	Title	Type
Michael Allman	Academic Affairs	Fund Administrator	
Christine Acquarola	Academic Affairs	Program Director	
Robin Addison	Academic Affairs	Board Member	
Jenny Apostolopoulos	Academic Affairs	Board Member	
Theodore Arrington	Academic Affairs	Program Director	
Carolyn Bailey	Academic Affairs	Executive Director	
Shaun Barden	American Association of Blacks in Energy	Program Director	
Celia Abrams	Big Brothers Big Sisters	Program Director	
James Abboud	L2 Solutions	Executive Director	
Todd Appleton	L2 Solutions	Volunteer Coordinator	
Irati Arlekani	L2 Solutions	Fund Administrator	

Manage Projects Past & Present

Working towards a project or program goal? Organize your funding by creating profiles for past, in-progress, and future projects.

	Folder	Project Name	Start Date	End Date	Project Leader	Country	Region	Project Budget	Number of Schools	Total Grant Amount	# Grants
📁	Active	Community Gardens Program	02/14/2017	02/14/2018	Al Ternative	US	Northwest	\$25,000	21	450.00	2
📁	Needs Attention	Headquarters Capital Campaign	05/24/2017	01/02/2020	Bill Marchiony	BD	North	\$5,000,000	125	1,750,000...	2
📁	New	Tuesday's Demo Grant	11/28/2017	04/06/2018	Ian Witthoef	US	National	\$15,000	2	0.00	0
📁	New	Cristo Rey	01/23/2018	06/29/2018	Ian Witthoef			\$100,000	2	150,000.00	1
📁	New	The Village	01/24/2018	05/31/2018	Ian Witthoef			\$100,000	2	100,000.00	1
📁	New	Reid Foundation	02/07/2018	02/21/2018	Steve Reid	US		\$25,000	10	0.00	0
📁	New	Tuesday's Music Concert	04/03/2018	10/01/2018	Ian Witthoef	US		\$25,000		25,000.00	1
📁	Preparing	Virginia Lawrence Project	04/16/2018	02/28/2019	Al Ternative	US	National	\$2,000	3	0.00	0
📁	Complete	Scholarships for Hagan	04/16/2018	02/28/2019	Coe Operator	US	National	\$10,000	3	150,000.00	1
📁	Active	Grants Management for Travel Or...	04/16/2018	02/28/2019	Bill Marchiony	US	Northwest	\$10,000	2	17,500.00	1
📁	Preparing	Picking the right Grant Manageme...	04/16/2018	02/28/2019	Al Ternative	US	National	\$6,000	1	0.00	0
📁	Complete	Internships	04/16/2018	02/28/2019	Coe Operator	US	Northeast	\$10,000	2	97,500.00	1
📁	Preparing	The Josh Projects	04/16/2018	02/28/2019	Ian Witthoef	US	National	\$1,000	2	0.00	0
📁	New	Wizahive Main Site	04/16/2018	02/28/2019	Al Ternative	US	Northeast	\$100	2	0.00	0

Selecting a project takes you to its details screen, as well as it's linked information, such as planned funding, received grants, and tasks.

Headquarters Capital Campaig...

Needs Atte...

Project Name

Headquarters Capital Campaign

Description

Build a new facility.

Project Type

☐ Conventional
☐ Rapid Response
☒ Chairman's Grant

Start Date

05/24/2017

End Date

01/02/2020

Project Leader

Bill Marchiony

Linked Records

Grants

2

Sopimus Charities Community Grant:\$750,000

Philadelphia Foundation:\$1,000,000

Activities

5

Get the second payment

July progress update

Quarterly Report Due

Team meeting

Brainstorming

Transactions

4

Groundbreaking

August 2017 Phila Foundation

If you aren't currently working on a specific project, you can omit this section and instead focus directly on the individual grants only (see below).

Follow Grants From Start to Finish

From the moment you identify a potential grant opportunity to the day you submit your final grantee progress report, track a grant's status with Zengine.

<div> +Add Grant <div> <div>View: Main</div> <div>Grant Name</div> <div>Search</div> </div> <div>Form T</div> </div>								
Grouped by: Folder								
	Folder	Grant Name	Grant Amount	Project	Funder	Description	Label	D
	New	KSM National	\$100,000	Krtista's Scholarship Mgmt.	I33T haw0rS	Call me Ishmael. Some yea...	KSM National:\$100,000	11/01
	New	Greenings Across America	\$125,000	Green Projects National	AMD, Inc.	Castle Elsinore. Officer Bar...	Greenings Across America:...	05/01
	New	Madison County Scholars	\$27,850	Grants and Scholarships for	Sopimus	Some years ago--never min...	Madison County Scholars:\$...	08/15
	New	CASAworx	\$150,000	Grants and Interns at CASA	Perustiedot	Some years ago--never min...	CASAworx:\$150,000	10/24
	New	WizeHive Fun Grant	\$150,000	Cristo Rey	WizeHive			01/23
	New	WizeHive We Need Some Money Grant	\$100,000	The Village	WizeHive			01/24
	New	New Music Grant	\$25,000	Tuesday's Music Concert	WizeHive Music Project	This is a grant	New Music Grant	04/03
Letter of Intent								
	Letter of Intent	The Chairmans Award	\$17,500	Grants Management for Tr	Home Depot	When in the course of hum...	The Chairmans Award:\$17,...	11/02
	Letter of Intent	Nelson Grant	\$300	Community Gardens Progr	Nelson Foundation			01/24
Submitted								
	Submitted	United Way / Big Brother Big Sisters Grant Part Two	\$500,000	Keep America Beautiful Na	Big Brothers Big Sisters	When in the course of hum...	United Way / Big Brother BL...	06/16
Awarded								
	Awarded	Philadelphia Foundation HQ North	\$1,000,000	Headquarters Capital Cam	Philadelphia Foundation	Community Improvement ...	Philadelphia Foundation:\$1...	04/01

Select a grant to view the details screen, along with its status, action items, and expenditures that have been made with awarded funds.

Philadelphia Foundation:\$1,0...

Awarded

Grant Name

Philadelphia Foundation HQ North

Grant Amount

\$1,000,000

Project

Headquarters Capital Campaign North

Funder

Philadelphia Foundation

Description

Community Improvement Grant

Label

Philadelphia Foundation:\$1,000,000

Will be updated automatically.

Date

04/01/2017

Linked Records

Activities

2

+

▲

Q1 Report

2018 Funding

Transactions

3

+

▲

Groundbreaking

August 2017 Phila Foundation

May 2017 Phila Foundation

Keep Your Team Organized

One of the most important features in our system is an activity tracker that lets you create tasks, associate them with grant, a program, or both, and assigned them to a team member.

+

Add Activity

View

The view has changed. You may [save as new view](#).

Title

Search

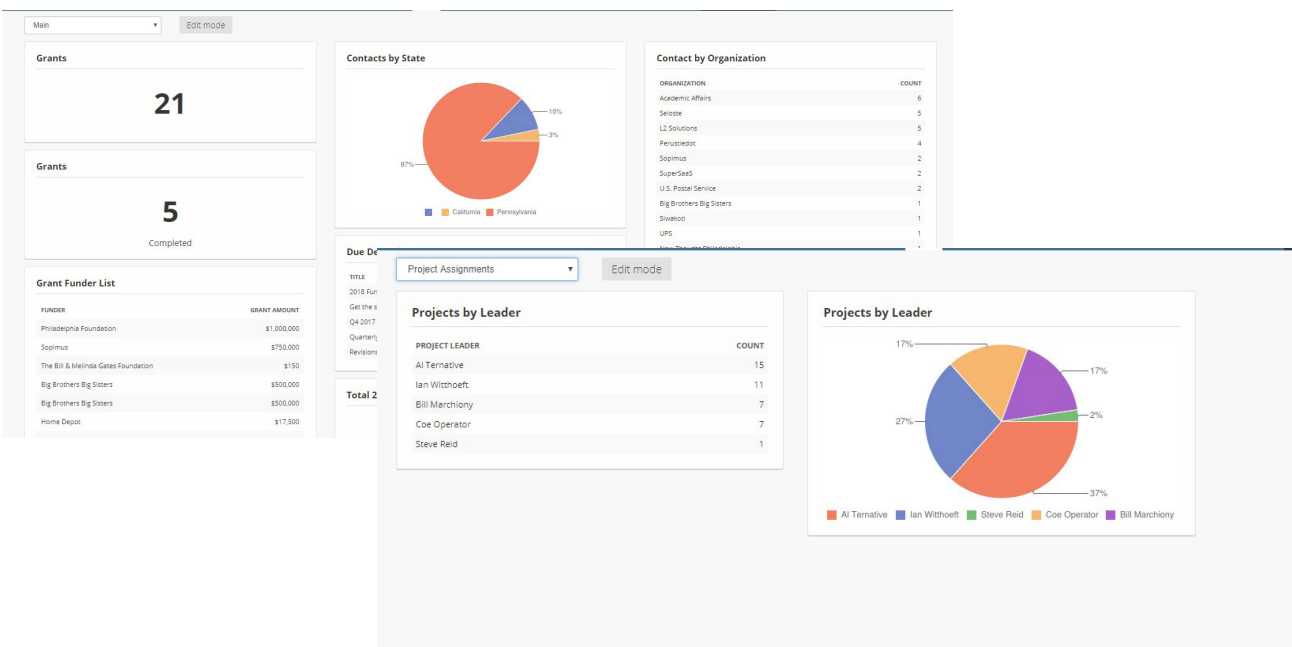
Form T

Drag a column header here and drop it to group by that column.

	Title	Type	Date	Detail	Created by	Program	Grant
	Q2 Report	Report	07/16/2018		Bill Marchiony	American Liver Fund Grant	
	Call to discuss grant	Interaction	04/03/2018		Ian Witthoef		New Music Grant
		Milestone	02/02/2018		Ian Witthoef		(untitled)
	Email for updated funding ...	Milestone	01/25/2018				
	Q1 Report	Report	01/12/2018	Report on budget for Phila...	Scott Totten		Philadelphia Foundation:\$12...
	LOI Due	Milestone	03/01/2018	The forms are generic NIH ...	Bill Marchiony		Women of the World:\$200...
	2018 Funding	Milestone	01/01/2018	Get the 2018 payment	Bill Marchiony		Philadelphia Foundation:\$12...
	Get the second payment	Milestone	12/22/2017	Reports are due 12/31. Che...	Bill Marchiony	Headquarters Capital Cam	
	Final Report Due	Milestone	11/16/2017		Alex Fromm	American Liver Fund Grant	
	One	Milestone	11/22/2017		Ian Witthoef	Krtista's Scholarship Mgmt	
	Revisions Round 1	Milestone	12/01/2017		Kristen Knouft	Grants for Bloomington Mi	
	Initial Draft	Milestone	11/15/2017	Yadda	Ian Witthoef	Grants for Bloomington Mi	
	Grant Research	Event	11/17/2017	Researching grants to assis...	Scott Totten	Grants for NEO National	

See & Share Your Stats

With the customizable dashboard, create visual reports for key data, goals, or KPI. You can create multiple dashboards, allowing you to sort data by project, grant, team, or any other theme.



Other Valuable Features:

- Use the bulk email tool to quickly reach out to numerous contacts or organizations
- Enter and track as many notes as you like against any item (contact, organization/funder, grant, program)
- Check the activity feed to see everything happening inside your organization
- Integrate using our open API or partnership with Zapier and share data with your other systems, including accounting programs
- Add on the Guidestar module and quickly check EINs from within the platform
- Rely on the robust permissions system to manage your team and their unique roles, determining how they may add, edit, or change data.

The Choice of 750+ Organizations

