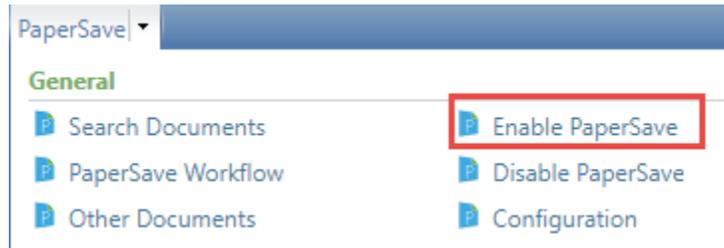


How to View Endowment Agreements in Blackbaud CRM

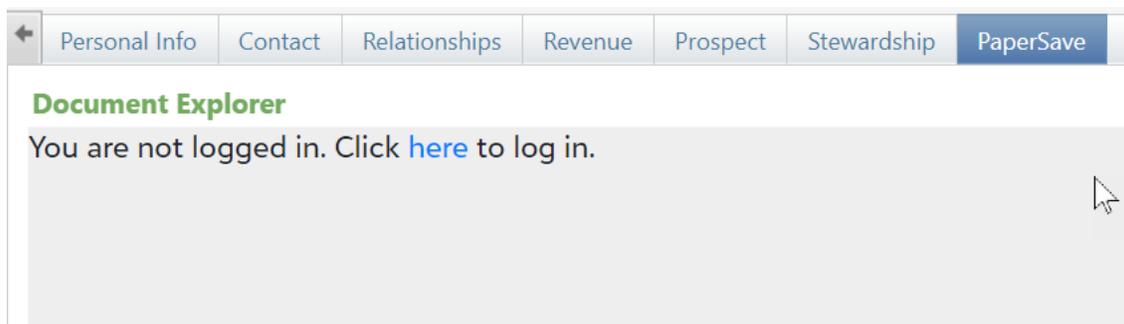
In order to view documents in CRM via the PaperSave document management system, you must first enable PaperSave. Click on the dropdown arrow beside PaperSave on the blue menu bar at the top of the screen. Then click "Enable PaperSave".



A message will appear that says "PaperSave is enabled please refresh the page."



After PaperSave is enabled, you can open up a constituent record and click on the PaperSave tab. If you are not logged in, you will see the message below.



Once you click on the link, a PaperSave login screen will appear. If it does not appear, check to be sure your pop-up blocker is not on.



PAPERSAVE
Efficiency. Simplified.

Sign in to continue to PaperSave

User Name

Password

[Forgot password?](#)

Remember My Login

Sign in

[Need Help?](#)

Your user name will be the same as your BBCRM user name plus 250022. For example, jmorell7250022. Type your password and make sure you check the box beside "Remember My Login". If you have a question about your username and/or password, contact the BB Help Desk at bbgold@gtf.gatech.edu. **Please note:** The "Need Help?" link does not work. We have reported this to PaperSave.

Once logged in, if there are any documents attached to the constituent record, they will appear in the Document Explorer screen under the PaperSave tab. Click on the pdf icon beside the document you want to view.

	Created	Created By	Type of Document	Document Source	Document Date	Physical Document
<input type="checkbox"/>	06/17/2019 05:39:41 PM	ps\mmarion	Other	GT Foundation	01/31/2015	
<input type="checkbox"/>	06/17/2019 05:39:50 PM	ps\mmarion	Other	GT Foundation	01/31/2015	
<input type="checkbox"/>	06/17/2019 05:59:22 PM	ps\mmarion	Other	GT Foundation	05/04/2016	
<input type="checkbox"/>	06/17/2019 06:17:04 PM	ps\mmarion	Gift Planning Document	Development	11/07/2017	

There are two ways to navigate to Endowment agreements in CRM. Endowment agreements are located on the Purpose. If you don't know how to get to the purpose, you can get to them from the constituent record under the Stewardship tab.

- From the Constituent record click on the Stewardship tab.
- Under Stewardled funds click on the hyperlink on the Purpose.

Personal Info	Contact	Relationships	Revenue	Stewardship	Communications	Documentation and Interactions
Stewardship plans (4) Add Filters More						
Constituent	Plan name	Plan manager	Plan type			
Dr. John F. Brock III 1970	2020 Leadership Circle Stewar...	Mr. Colin D. Cumming	Recognition Program			
Dr. John F. Brock III 1970	2021 Leadership Circle Stewar...	Mr. Colin D. Cumming	Recognition Program			
Dr. John F. Brock III 1970	Impact Reports		Impact Report			
Dr. John F. Brock III 1970	The Hill Society					
Stewardled funds (5) More						
Purpose	Stewardship recipient type	Start date				
(556480) ChBE-Brock, John F. End Sch	Fund Contact	8/11/2007				
(558840) BME- Brock Family Nanomedicine Chair	Fund Contact					
(558949) GTF-Brock RC Endowment	Fund Contact					
(55B611) ChBE - Brock Endowed School Chair	Fund Contact	5/27/2015				
(55C225) SCH - Brock Scholarship Endowment	Fund Contact	7/26/2017				

- Once on the Purpose, click on the PaperSave tab.
- Click on the pdf icon to open the document.
- Look for the Endowment agreement in the "Type of Document" column.

Purpose: (556480) ChBE-Brock, John F. End Sch Fund: (556480) ChBE-Brock, John F. End Sch

General Information

Lookup ID: 556480 Accepting funds: Yes
 Category: Foundation Disbursing money: Yes
 Administrator: Description: John Brock Scholarship Endowment
 Site: Development
 Report code 1: College of Engineering
 Report code 2: Chemical and Biomolecular Engineering

Goals Donor Information Hierarchies Financial Information Recipients Naming Opportunities Stewardship Documentation **PaperSave** Opportunity Pyramid Related Staff Attributes Management Steps

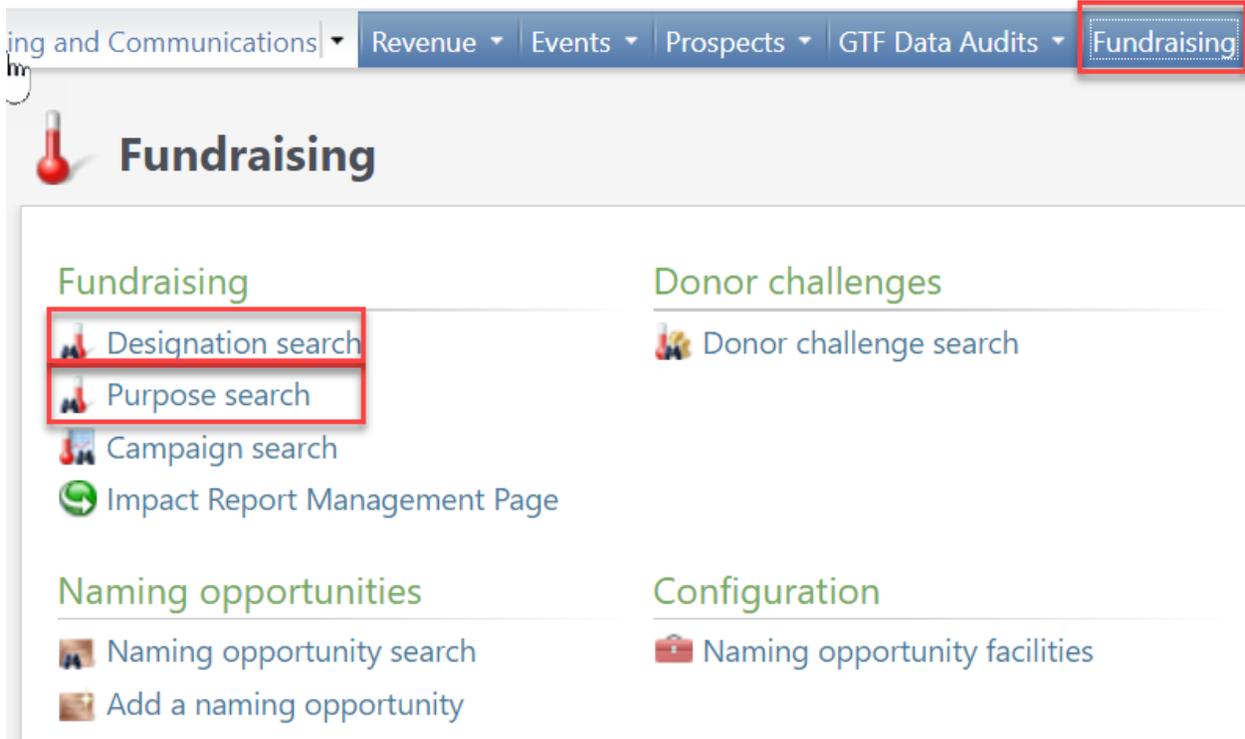
Document Explorer

Find in this list [+](#) [-](#) [Refresh](#) [Print](#) [Export](#) [Import](#)

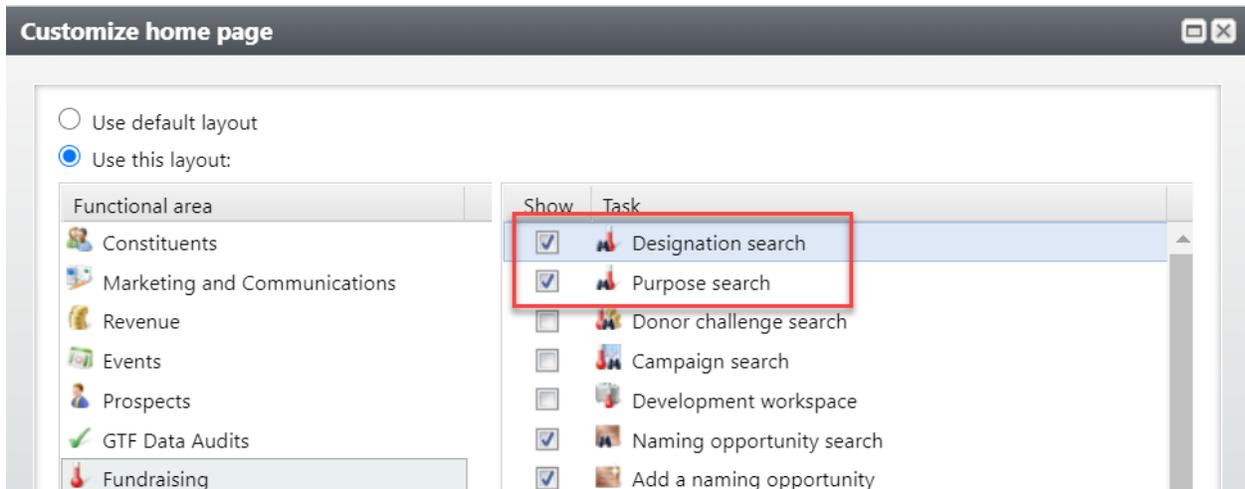
ID	Created	Created By	Type of Document	Document Source	Document Date
 110402	10/14/2019 09:43:34 PM	ps\mmarion	Foundation Accounting Internal Document	GT Foundation	01/27/2016
 110403	10/14/2019 09:43:34 PM	ps\mmarion	Fund Management Documents	GT Foundation	01/27/2016
 110404	10/14/2019 09:43:35 PM	ps\mmarion	Endowment Agreement	GT Foundation	01/27/2016

If you know the Purpose where the endowment agreement is located, you can navigate to the purpose without opening the constituent record.

To navigate to the Purpose, click on "Fundraising" on the top blue menu bar and click on "Purpose search".



You can also add the designation and purpose search to your home page. Click on "customize" beside Home. When the "Customize home page" form appears, click on "Fundraising" and check the box beside "Designation search" and "Purpose search".



From the Purpose search screen

- Type in part of the name, public name or Lookup ID in the "Search for" box and click "Search".

- Click on "Show advanced search options" to search by category or site. Note: This search screen only shows 100 records so it is best to narrow your search.

Fundraising Purpose Search

Search for: Search Clear

Show advanced search options

Results (More than 100 records found; only the first 100 rows are shown) + Add

Name	Type	Category	Lookup ID	Site	Public name
(359600) SCH- Mary Melinda "Mel" C...	Fund	Foundation	359600	Alumni Association	
(359887) SCH - Bras Scholarship End...	Fund	Foundation	359887	Alumni Association	
(35A360) ME- Danyluk Scholarship En...	Fund	Foundation	35A360	Alumni Association	
(35A972) BME- Giddens Scholarship ...	Fund	Foundation	35A972	Alumni Association	
(35C033) SCH - Long Family Scholars...	Fund	Foundation	35C033	Alumni Association	
(35C689) DoPP - Glass Scholarship En...	Fund	Foundation	35C689	Development	

If you do not know the Lookup ID or name of the purpose, you can perform a designation search instead and enter part of the project number.

Designation Search

Search for: Include inactive

Advanced search options

Lookup ID: VSE category:

Designation: Use code:

Public name: Purpose type:

Report code 1: Purpose category:

Report code 2: Purpose site:

Hide advanced search options

Results (More than 100 records found; only the first 100 rows are shown)

Lookup ID	Designation	Public name	Is active	VSE category	Alternate lookup IDs	Report code 1
359319	(359319) CoB -Brent a...	Brent and Amelia Zel...	Yes	Current Operations - ...	9970011601000 (GTF ...	College of Business
359521	(359521) CoB - Salbu ...	Enid and Harold Salbu...	Yes	Current Operations - ...	9970012231000 (GTF ...	College of Business
35A127	(35A127) CoB-Cowan ...	Joel H. Cowan Interna...	Yes	Capital Purposes - En...	9970014004000-000 (...	College of Business
35A379	(35A379) CoB-Barrett ...	Kelly H. and Rick Barr...	Yes	Capital Purposes - En...	9970014614000 (GTF ...	College of Business
35A568	(35A568) CoB-Pelton ...	John D. Pelton Schola...	Yes	Capital Purposes - En...	9970015324000 (GTF ...	College of Business

You can also narrow down your search by choosing a Report code 1 (College) or Report code 2 (Dept.). **Note:** No more than 100 records appear in the results window so it is best to narrow your search.

If you are on the designation, you will need to click on "Go to purpose" on the left side of the screen under "Other information". All documents are attached to the purpose.

- Other information
 - Go to purpose
 - Fundraising hierarchies
 - Donor list
- Reports
 - Fundraising hierarchy progress
 - Designation progress
 - Fundraising hierarchy

Designation: (55A336) CoB- Zelnak Dean's S

Lookup ID: 55A336
 Public name: Judy D. and Stephen P. Zelnak, Jr. Dean's Undergraduate Scholarship
 Site: Development
 Report code 1: College of Business Start date: 3/21/2012
 Report code 2: College of Business - College Level End date:
 Use code: Scholarships, Merit - Endowed

On the Purpose

- Click on the "PaperSave" tab to view all documents attached to the purpose.
- Click on the pdf icon or the ID hyperlink to open the document.
- Look for the Endowment agreement in the "Type of Document" column.

Purpose: (55A336) CoB- Zelnak Dean's Scholarship End Fund: (55A336)

General Information

Lookup ID: 55A336 Accepting funds: Yes
 Category: Foundation Disbursing money: Yes
 Administrator: Description: Judy D. and Stephen P. Zelnak Jr. Dean's Scholarship Endowment
 Site: Development
 Report code 1: College of Business
 Report code 2: College of Business - College Level

Financial Information Donor Information Recipients **PaperSave** Management Steps Documentation

Document Explorer

Find in this list

<input type="checkbox"/>	ID	Created	Created By	Type of Document
<input type="checkbox"/>	 115643	10/14/2019 11:03:12 PM	ps\mmarion	Fund Management Documents
<input type="checkbox"/>	 116131	10/14/2019 11:07:57 PM	ps\mmarion	Endowment Agreement