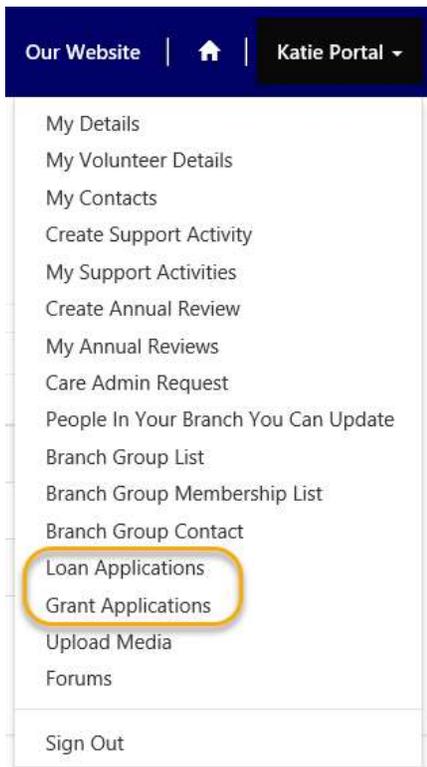**Loan Applications and Grant Applications**

The Volunteer Portal gives nominated B/G committee members visibility of any Loan and Grant Applications which have been requested through National Office. This provides an overview of applications both active or going through the process
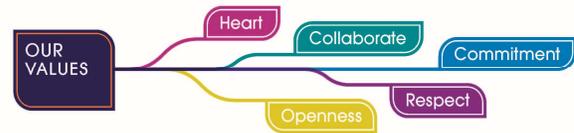
To view details of either, use the drop-down list and choose either Loan Applications or Grant Applications

Clicking either Loan Applications or Grant Applications will redirect you through to a new page, which will show a list of all the loans or grants

View information about equipment loan applications in your area

Name ↑	PwMND	ID (PwMND)	Loan start date	Loan end date	
Erin Smart / iPads / 08/06/2018 08:07	Erin Smart	500074	15/06/2018		⌄
Stephen King / Eye gaze / 13/06/2018 13:14	Stephen King	000619			⌄
Tom H Martin / Home Adaptations / 01/06/2018 08:03	Tom H Martin	500138	15/06/2018		⌄

For loans, the menu provides a brief overview of the person affected, the name of the application (which gives insight to the type of loan), user's Raiser's Edge ID, and the loan start/end dates

To view more detailed information, click the drop-down arrow to the right of the page and click view details
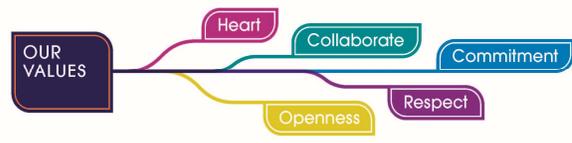
In the loan application, there are two main elements to the view, these are Loan Details and Transactions

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ⓘ View Details

Loan details

Name *	**Created On**
Erin Smart / iPads / 08/06/2(	08/06/2018 9:07 AM
PwMND *	**Received Date ***
Erin Smart	08/06/2018
Asset category *	**Loan start date**
iPads	15/06/2018
Asset	**Loan end date**
iPads / Test / A-000001	—

The loan details view is essentially an extension of the details on menu page, this time giving further information such as the asset category and asset number
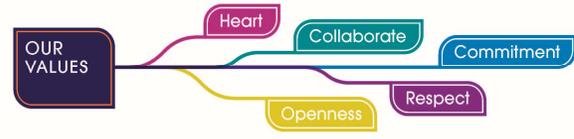
Transactions

Name ↑	Transaction type	Date dispatched	Date received	Created On	Status
iPads / Test / A-000001 / Customer Receives Asset / 08/06/2018 08:11	Customer Receives Asset			08/06/2018 9:11 AM	Active
iPads / Test / A-000001 / Customer Requests Collection / 08/06/2018 08:14	Customer Requests Collection			08/06/2018 9:14 AM	Active
iPads / Test / A-000001 / Equipment Return & With Manufacturer / 08/06/2018 08:15	Equipment Return & With Manufacturer		08/06/2018	08/06/2018 9:15 AM	Active
iPads / Test / A-000001 / Receive Loan & Allocate / 08/06/2018 08:10	Receive Loan & Allocate	11/06/2018		08/06/2018 9:10 AM	Active

Transactions essentially build a history of the application. Transactions are managed by Equipment Loan and Support Services team. At each stage of an application, they will add a transaction to update the history of the asset and the progress of the application. This helps to manage stock levels and provides a transparent log of the application status

The Grant Application menu looks very similar to the Loan Application menu, again providing an overview of grants as relevant. Click the drop-down arrow again to view further information

View information about support grant applications in your area

Name ↑	Person applying	ID (Person applying)	Application type	Amount requested	
Chrissy Williams/ Support grant / 01/06/2018 07:49	Erin Smart	500074	Support grant	£500.00	⌄
Stephen King/ Support grant / 13/06/2018 13:06	Katie Portal	000463	Support grant	£500.00	⌄

General

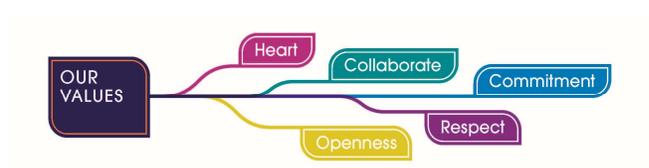|	
Grant Recipient *	**Requested £**
Chrissy Williams	£500.00
Application type *	**Default offer £**
Support grant	£300.00
Category	**Offered support £**
—	£300.00
Branch	**Support £ difference**
Corby and Kettering Branch	£0.00
	Payment method
	—

The general section of the grant application view gives an overview of the funding requested and the funding offered, as well as what the grant is required for

Under Grant Funding, information can be found on where the funding has come from. So, if the Branch has funded some, or all of the loan, this information would be found here

Grant Funding

Name ↑	Branch	Amount pledged	Amount given	Status Reason	Created On
Corby and Kettering Branch / 01/06/2018 07:50	Corby and Kettering Branch	£200.00	£200.00	Active	01/06/2018 8:50 AM

The last area on grant applications is Grant Invoices, this is where any information of invoices would be held when the grant has been paid

Grant Invoices

Name ↑	Grant application	Invoice amount	Invoice number	Invoice date	Status Reason	Term months	Branch	Created On

There are no records to display.

When funding has come from the branch, this is a great and easy way for them to keep track of funding amounts and invoice for any grants they have contributed to