

## QUICK SHEET: BULK MESSAGES AND EXPORTS

**Audience:** Grantors (All roles)

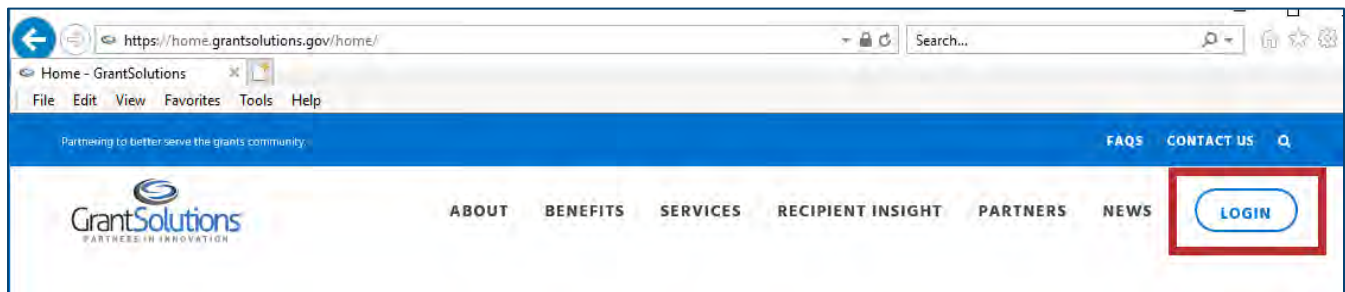
### INTRODUCTION

Through bulk messages, grantors can send messages in bulk to multiple recipients simultaneously. Grantors can also use bulk exports to download a CSV file containing selected grant information. Grantor users must navigate to the “Grants List” screen to access bulk messages and exports functionality on the “Bulk Messages” and “Exports” screen.

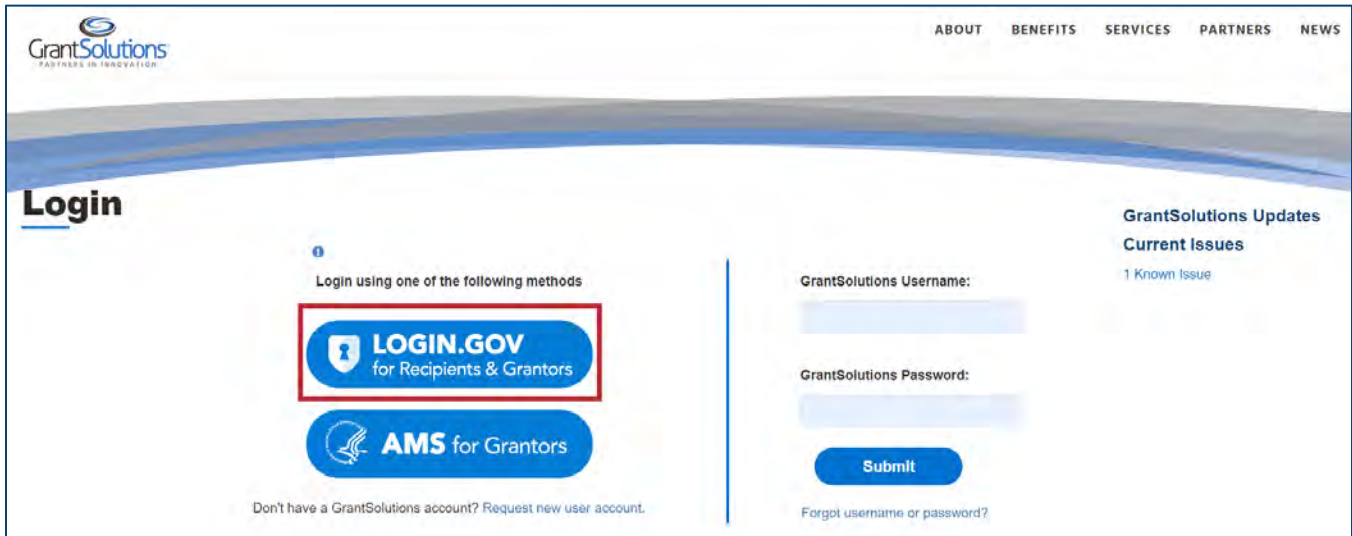
### LOGIN

To log into GrantSolutions and access the “Grants List” screen, follow the steps below:

1. From a browser such as Google Chrome, navigate to [www.grantsolutions.gov](https://www.grantsolutions.gov) and click the **Login** button.




- The “GrantSolutions Login” screen appears. Click the **Login.gov for Recipients & Grantors** button to log in using a Login.gov account.



The screenshot shows the GrantSolutions Login page. At the top left is the GrantSolutions logo. At the top right are navigation links: ABOUT, BENEFITS, SERVICES, PARTNERS, and NEWS. The main heading is "Login". Below it, a message says "Login using one of the following methods". There are two buttons: "LOGIN.GOV for Recipients & Grantors" (highlighted with a red box) and "AMS for Grantors". Below these buttons is a link: "Don't have a GrantSolutions account? Request new user account." To the right of the buttons is a login form with fields for "GrantSolutions Username:" and "GrantSolutions Password:", a "Submit" button, and a link "Forgot username or password?". On the far right, there is a section titled "GrantSolutions Updates Current Issues" with a link "1 Known Issue".

- The “Homepage” appears. Click the **GMM** icon.





JD


Welcome 


Username:


## GrantSolutions Services


  
ARM


  
ARTMS


  
Announcement


  
BI Dashboard


  
Closeout


  
GMM


  
Grants Monitoring

  
MGM

  
OLDC

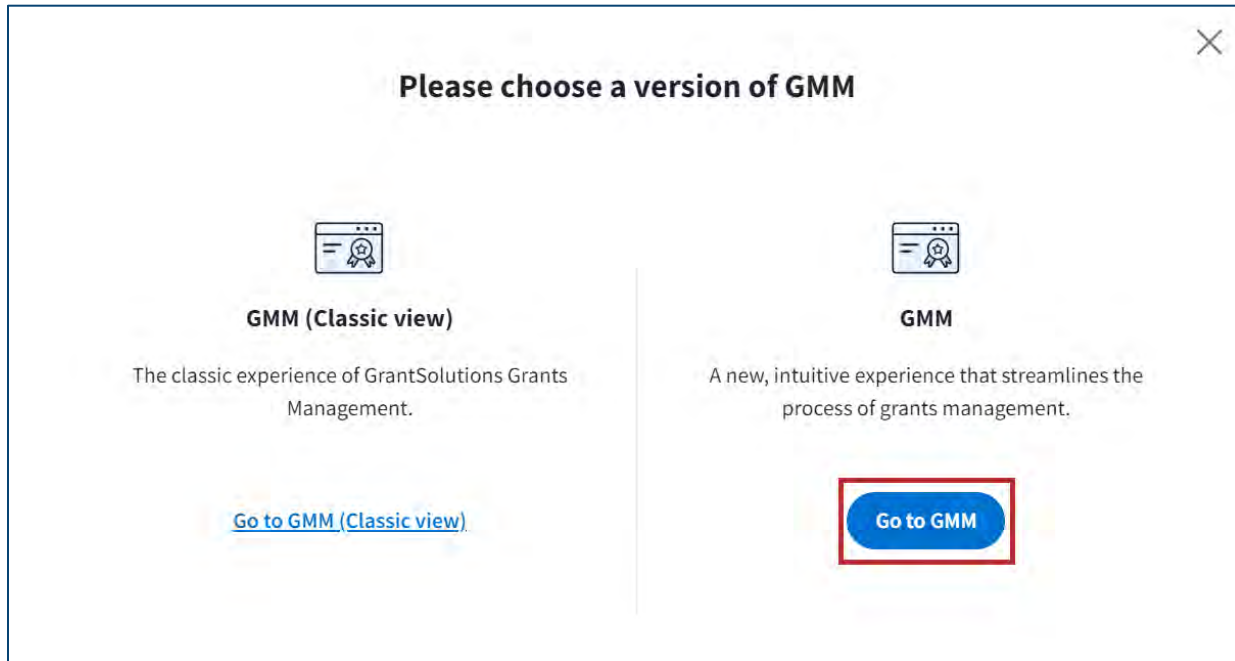
  
PTMS

  
RDI

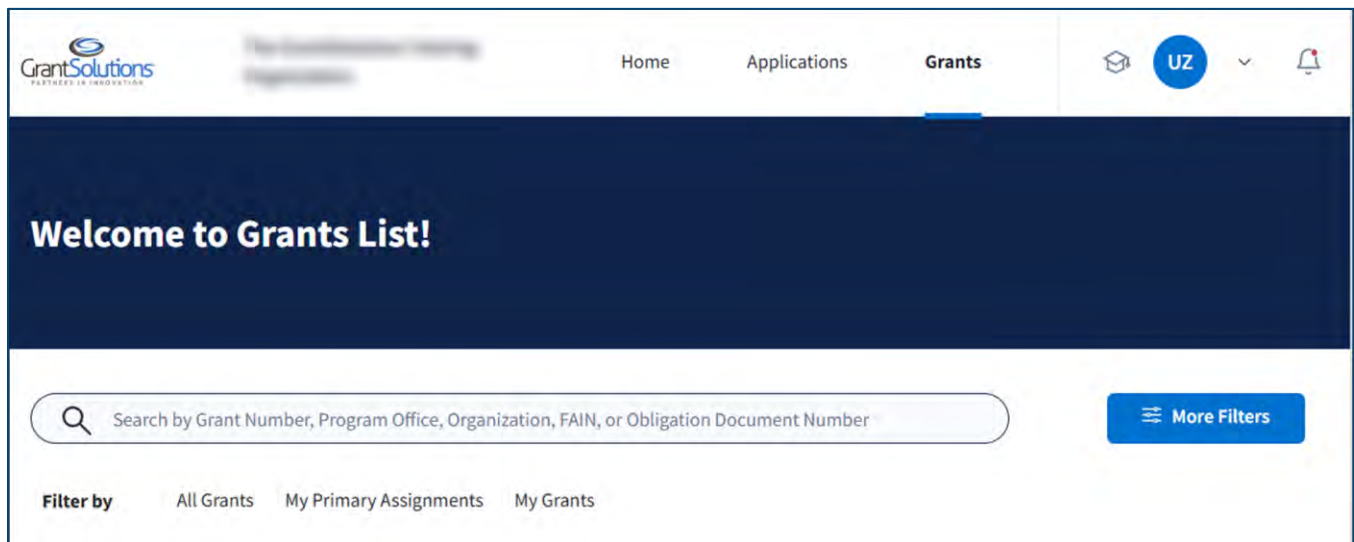
  
RRM

- The “GMM Navigation” window appears. Click the **Go to GMM** button.

**Note:** Users can also access the *Classic view* by clicking the *Go to GMM (Classic View)* link.



The “Grants List” screen appears.

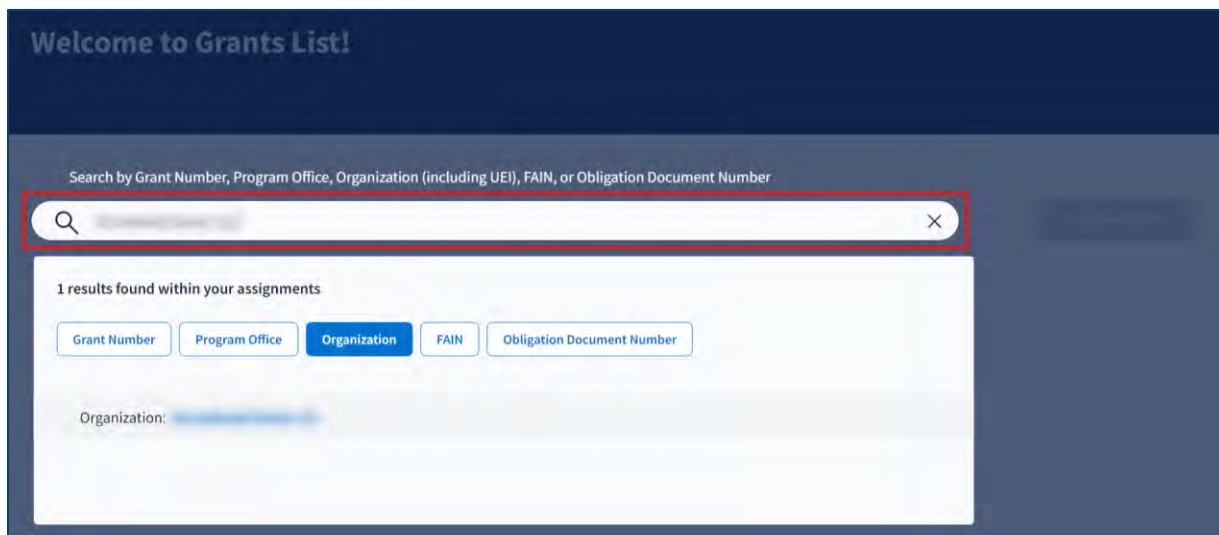


## ACCESS BULK MESSAGES

From the “Grants List” screen, grantor users can add bulk messages to a grant by first searching for the grant and accessing the grant details. To search for a grant and access grant details, follow the steps below:

1. From the “Grants List” screen, search for the **Organization**.

**Note:** Users may search by entering the *Grant Number, Program Office, Organization, FAIN, or Obligation Document Number*. For more information about using the search field, refer to the Grants List Search Quick Sheet.



The screenshot shows the 'Welcome to Grants List!' header. Below it is a search bar with the placeholder text 'Search by Grant Number, Program Office, Organization (including UEI), FAIN, or Obligation Document Number'. The search bar is highlighted with a red rectangle. Below the search bar, it says '1 results found within your assignments'. There are five buttons: 'Grant Number', 'Program Office', 'Organization' (which is highlighted in blue), 'FAIN', and 'Obligation Document Number'. Below these buttons, there is a label 'Organization:' followed by a blurred text field.

2. Click the **organization** search result option.

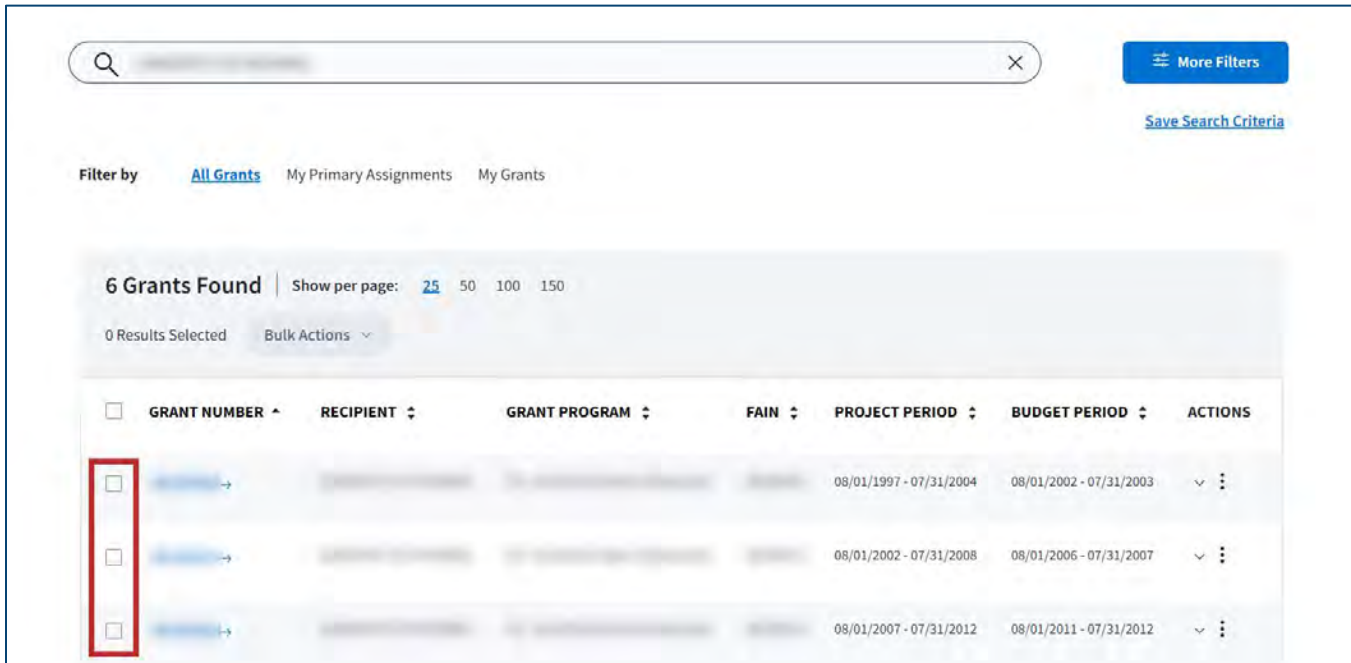
Welcome to Grants List!

Search by Grant Number, Program Office, Organization (including UEI), FAIN, or Obligation Document Number

1 results found within your assignments

Organization:

- A results table appears below with grants matching the search criteria. Select the **bulk checkbox** on the left for each desired grant.



Search:  X

[More Filters](#)

[Save Search Criteria](#)

Filter by [All Grants](#) My Primary Assignments My Grants

6 Grants Found | Show per page: [25](#) 50 100 150

0 Results Selected Bulk Actions

<input type="checkbox"/>	GRANT NUMBER ^	RECIPIENT ^	GRANT PROGRAM ^	FAIN ^	PROJECT PERIOD ^	BUDGET PERIOD ^	ACTIONS
<input type="checkbox"/>					08/01/1997 - 07/31/2004	08/01/2002 - 07/31/2003	⌵ ⋮
<input type="checkbox"/>					08/01/2002 - 07/31/2008	08/01/2006 - 07/31/2007	⌵ ⋮
<input type="checkbox"/>					08/01/2007 - 07/31/2012	08/01/2011 - 07/31/2012	⌵ ⋮

Upon selecting a checkbox in the results table, an optional *Select All Grants* link appears with the total number of grants from the results table. Click the **Select All Grant(s)** link to select all grants in the results, if desired.

**Note:** Users may select desired grants checkboxes on the current results page or click the *Select All Grant(s)* link to select all grants on all pages. Users may not select desired grants from multiple results pages. Upon clicking *Select All Grant(s)*, deselect any grant checkbox to deselect all grants on all pages.



19709 Grants Found
Show per page:
25
50
100
150

3 Results Selected
Bulk Actions
Select All 19709 Grant(s)

	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2002 - 09/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮



4. Click the **Bulk Actions** drop-down.

19709 Grants Found | Show per page: 25 50 100 150

19709 Results Selected **Bulk Actions** [Unselect All 19709 Grant\(s\)](#)

<input checked="" type="checkbox"/>	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2002 - 09/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮

For bulk messages greater than 10,000 grants, an *Export to CSV* option appears. Additionally, a *Send Bulk Grant Message* option appears inactive with a message stating “To enable, ensure that the selection is limited to under 10,000 grants and that they are neither active or expired.”

**Note:** A bulk message can be sent to a maximum of 10,000 selected grants that are either active or expired.

19709 Grants Found | Show per page: 25 50 100 150

19709 Results Selected **Bulk Actions** [Unselect All 19709 Grant\(s\)](#)

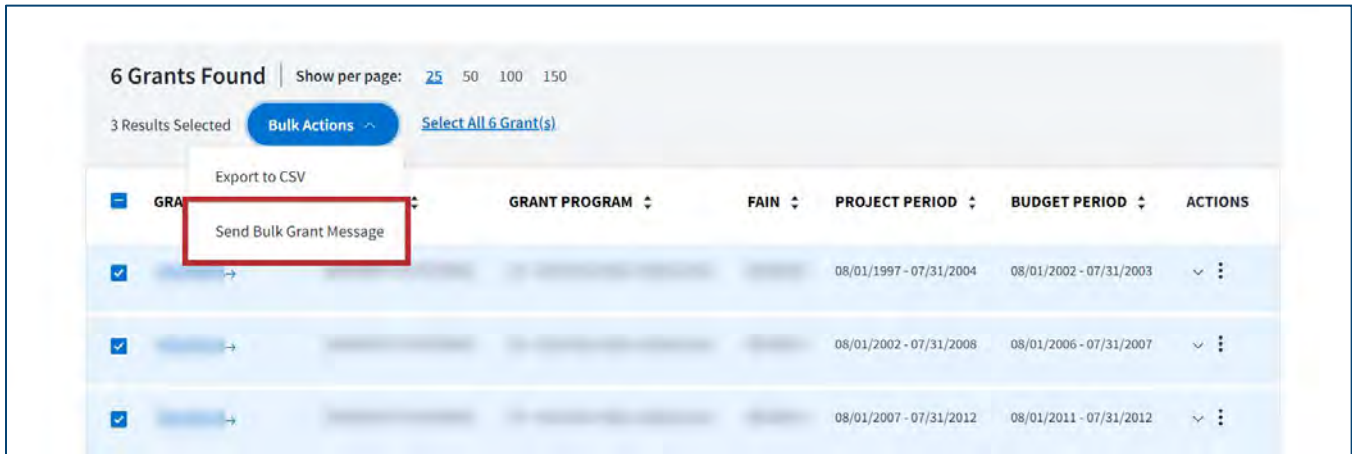
Export to CSV

Send Bulk Grant Message

To enable, ensure that the selection is limited to under 10,000 grants and that they are neither active or expired.

<input checked="" type="checkbox"/>	GRANT N	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>				10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>				10/01/1999 - 09/30/2000	07/01/2002 - 09/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>				10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮

- For bulk messages less than or equal to 10,000 grants, the *Select Bulk Grant Message* option appears active. Select the **Send Bulk Grant Message** option.



The “Bulk Messaging” screen appears.

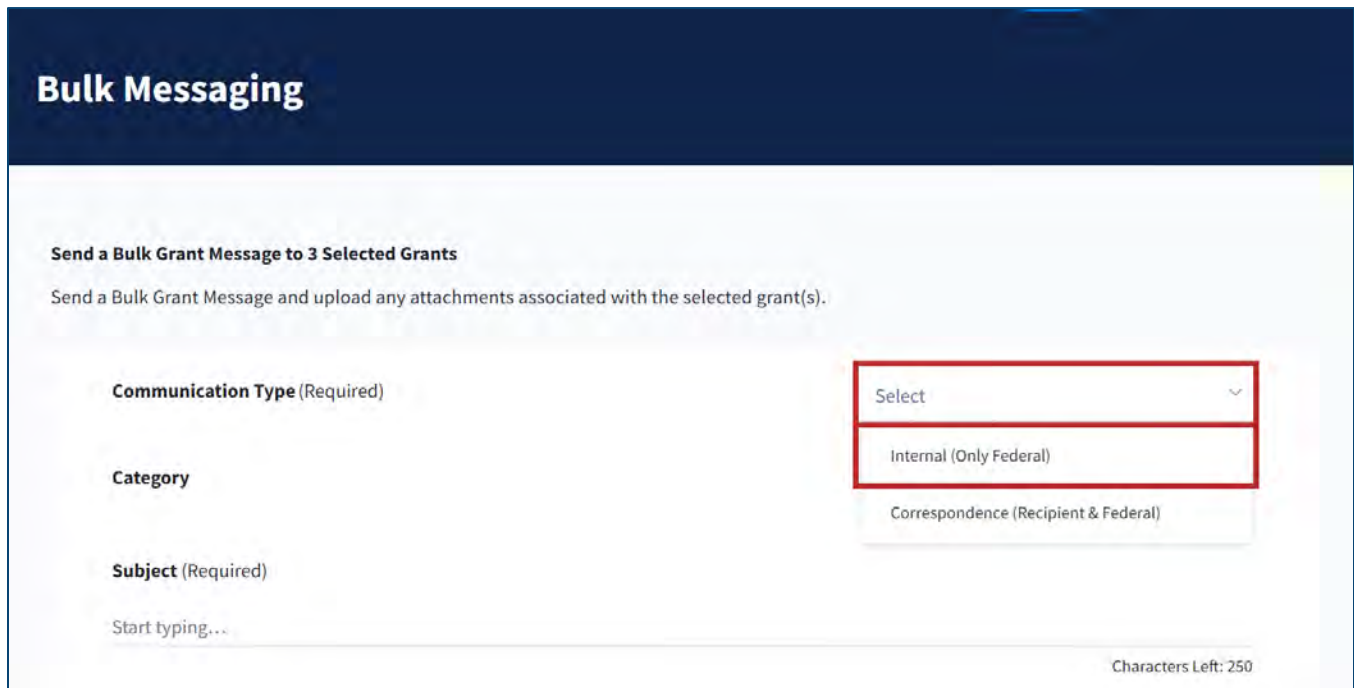
The 'Bulk Messaging' screen displays the following information:

- Send a Bulk Grant Message to 3 Selected Grants**
- Send a Bulk Grant Message and upload any attachments associated with the selected grant(s).
- Communication Type (Required)**: Select
- Category**: Bulk Message
- Subject (Required)**: Start typing...

## CREATE A BULK MESSAGE

To create a bulk message from the “Bulk Messaging” screen, follow the step below:

1. Click the **Communication Type** drop-down and select an **option** from the choices.



**Bulk Messaging**

**Send a Bulk Grant Message to 3 Selected Grants**  
Send a Bulk Grant Message and upload any attachments associated with the selected grant(s).

**Communication Type** (Required) Select v

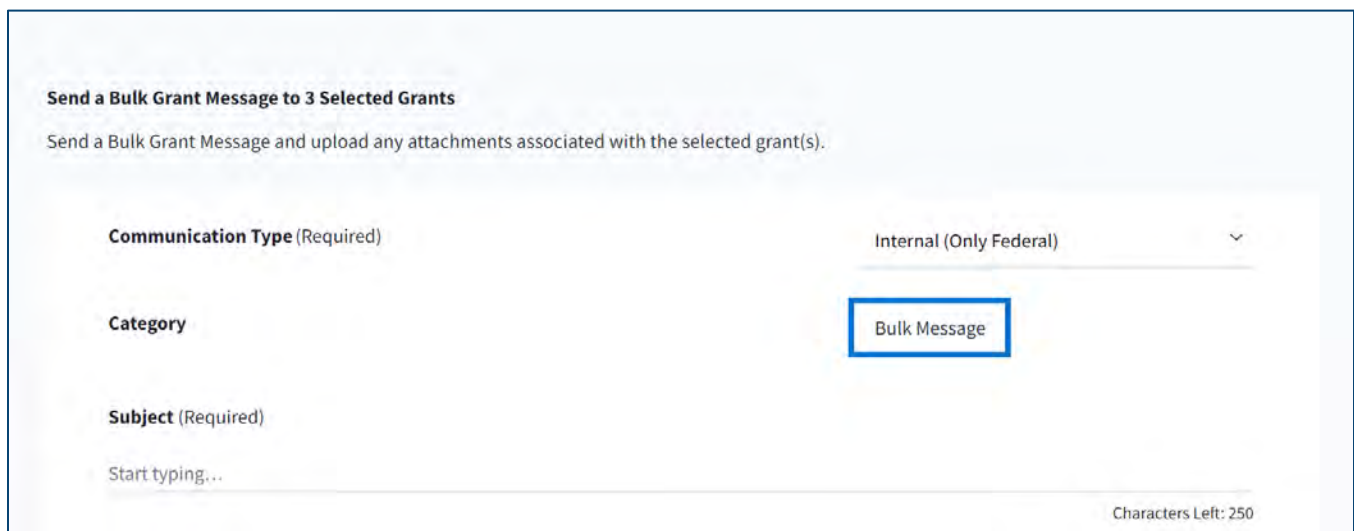
**Category**

**Subject** (Required)

Start typing...

Characters Left: 250

*Bulk Message* appears in the *Category* field.



**Send a Bulk Grant Message to 3 Selected Grants**  
Send a Bulk Grant Message and upload any attachments associated with the selected grant(s).

**Communication Type** (Required) Internal (Only Federal) v

**Category** Bulk Message

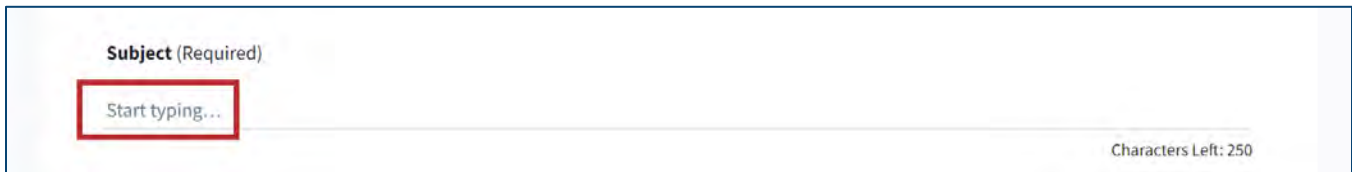
**Subject** (Required)

Start typing...

Characters Left: 250

2. Enter a subject in the **Subject** field.

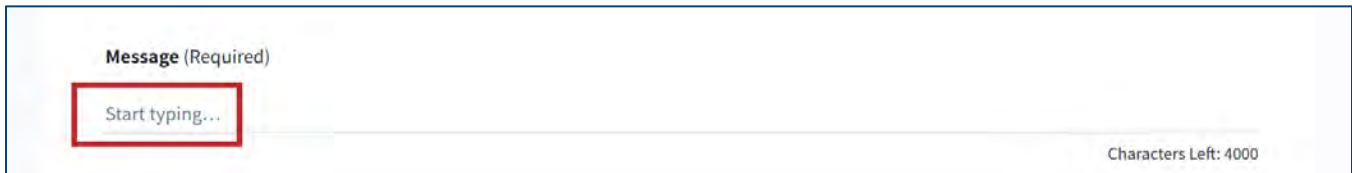
**Note:** The *Subject* field has a 250-character limit.



A screenshot of the 'Subject (Required)' field. The field is a text input with the placeholder text 'Start typing...'. A red rectangular box highlights the input area. To the right of the input, the text 'Characters Left: 250' is displayed.

3. Enter a message in the **Message** field.

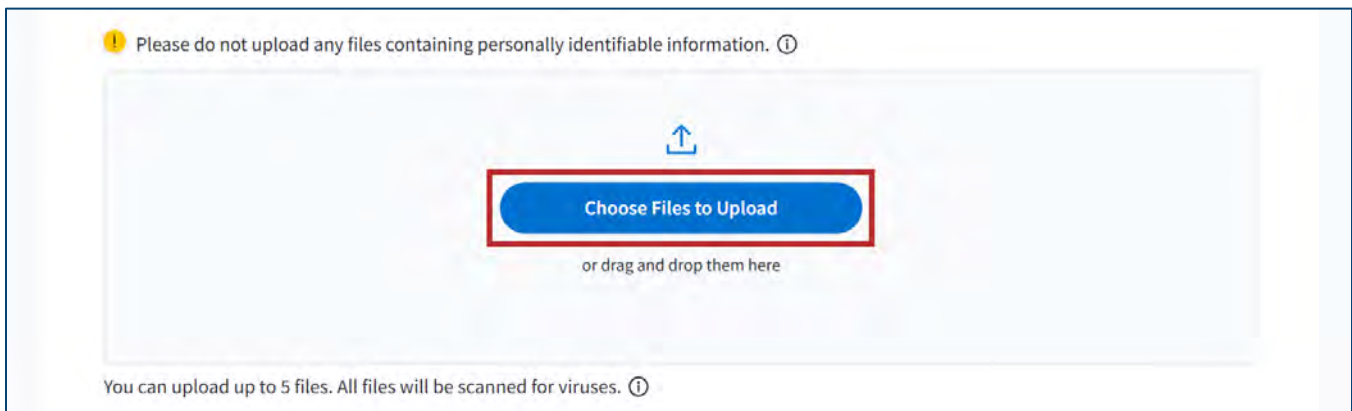
**Note:** The *Message* field has a 4000-character limit.



A screenshot of the 'Message (Required)' field. The field is a text input with the placeholder text 'Start typing...'. A red rectangular box highlights the input area. To the right of the input, the text 'Characters Left: 4000' is displayed.

4. Uploading a file is optional. To attach a file, users may drag and drop a file into the *Choose File to Upload* section or click the **Choose Files to Upload** button.

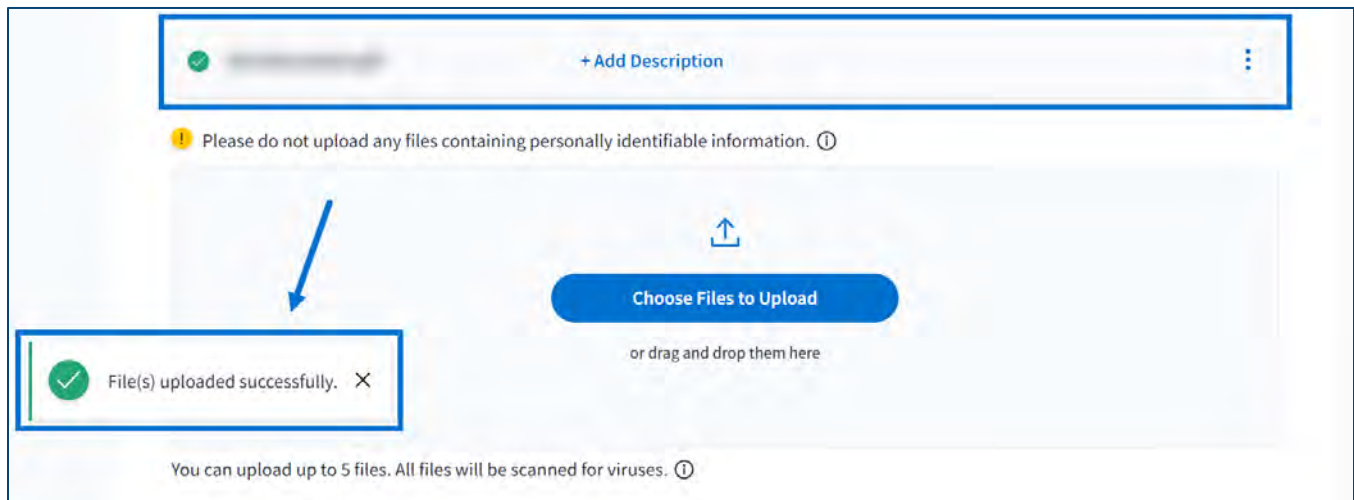
**Note:** Up to 5 files at 1GB each can be uploaded. Supported formats include .bmp, .txt, .csv, .jar, .odt, .ods, .odp, .msg, .potx, .pptx, .ppt, .rtf, .tif, .gif, .jpeg, .png, .docm, .docx, .doc, .pdf, .jpg, .xlsx, .xltx, .xls, and .xml.



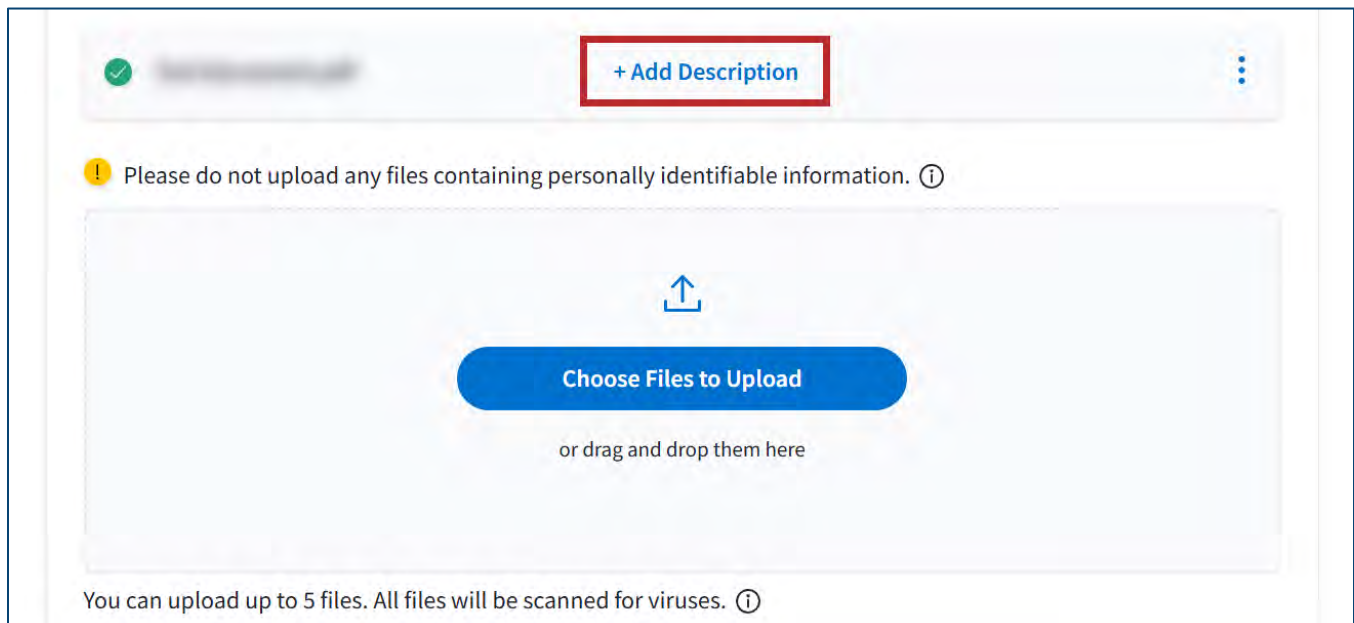
A screenshot of the file upload section. At the top, there is a warning icon and the text 'Please do not upload any files containing personally identifiable information. ⓘ'. Below this is a large light blue rectangular area. In the center of this area is a blue upward-pointing arrow icon. Below the arrow is a blue button with the text 'Choose Files to Upload'. A red rectangular box highlights this button. Below the button is the text 'or drag and drop them here'. At the bottom of the section, there is a line of text: 'You can upload up to 5 files. All files will be scanned for viruses. ⓘ'.

Upon uploading an attachment, the attachment appears in a row. Simultaneously, a “File(s) uploaded successfully” message appears in the lower-left corner of the screen. Add additional attachments as needed.

**Note:** Download or delete attachments using the *Actions List* icon (three vertical dots) on the right.



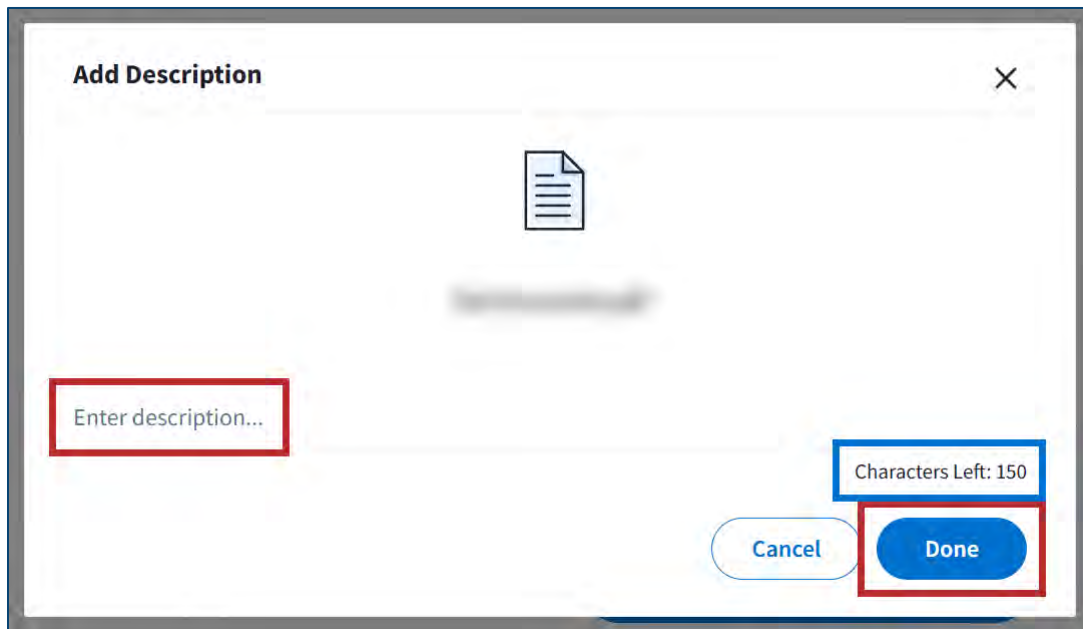
5. Click the **Add Description** button.



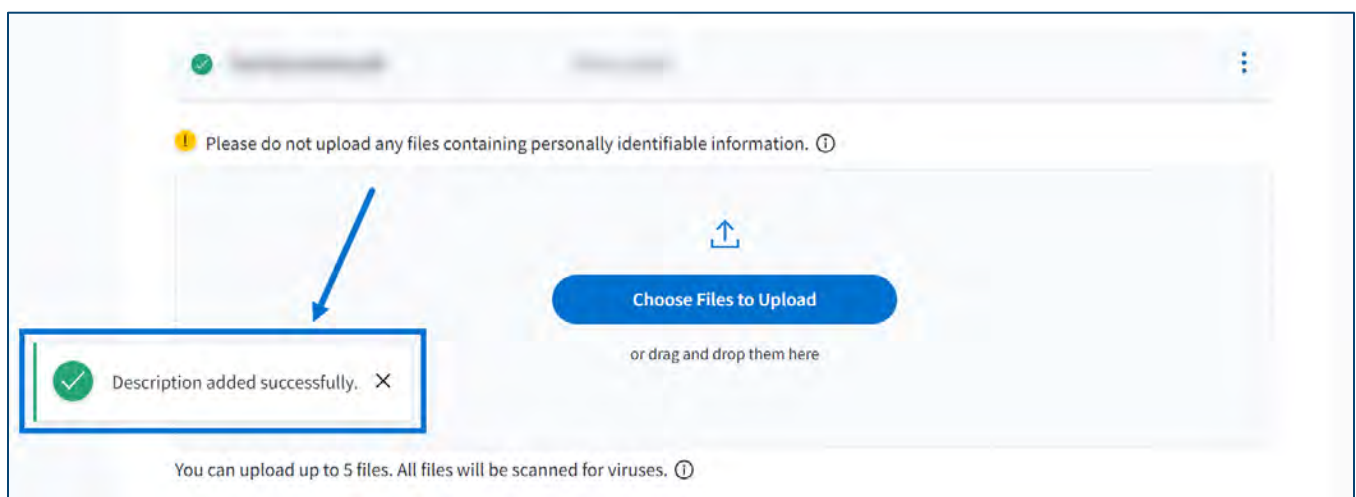


- The “Add Description” window appears. Enter text in the **Enter description** field and click the **Done** button to save and close the screen.

**Note:** The *Enter description* field has a 150-character limit.

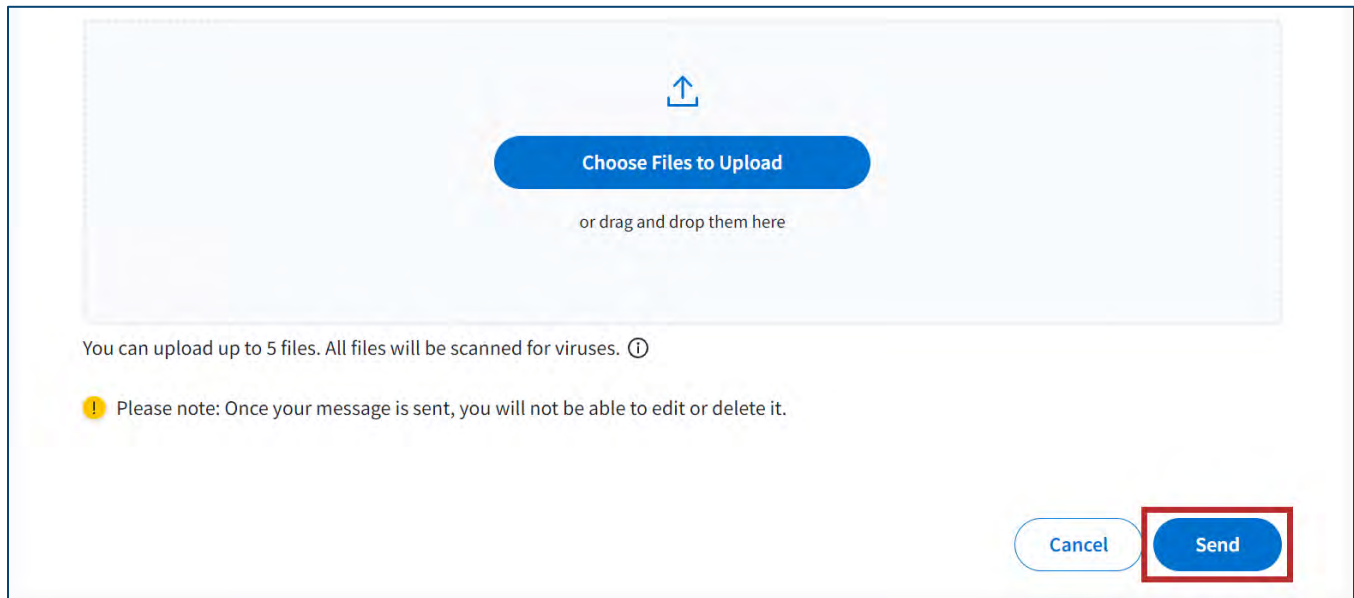


The description is added and a “Description added successfully” message appears in the lower-left corner of the screen.



7. Click the **Send** button at the bottom to send the message.

**Note:** The *Send* button only appears after all required fields are completed.



The screenshot shows the Bulk Messaging interface. At the top, there is a light blue box with an upload icon and a button labeled "Choose Files to Upload". Below this, it says "or drag and drop them here". Further down, a message states: "You can upload up to 5 files. All files will be scanned for viruses. ⓘ". Below that, a yellow warning icon is followed by the text: "Please note: Once your message is sent, you will not be able to edit or delete it." At the bottom right, there are two buttons: "Cancel" and "Send". The "Send" button is highlighted with a red rectangular border.

The “Bulk Messaging” screen reappears with a message stating “Bulk Message is Sending. You can now close this tab; GrantSolutions will continue sending your message. You can check its status in the Messages section of the Notification Center.”

**Note:** After a bulk message is sent, users cannot edit or delete the message.



The screenshot shows the Bulk Messaging screen with a dark blue header containing the text "Bulk Messaging". Below the header, there is a light blue box with a paper airplane icon. Inside this box, the text reads: "Bulk Message is Sending." followed by a smaller message: "You can now close this tab; GrantSolutions will continue sending your message. You can check its status in the Messages section of the Notification Center."

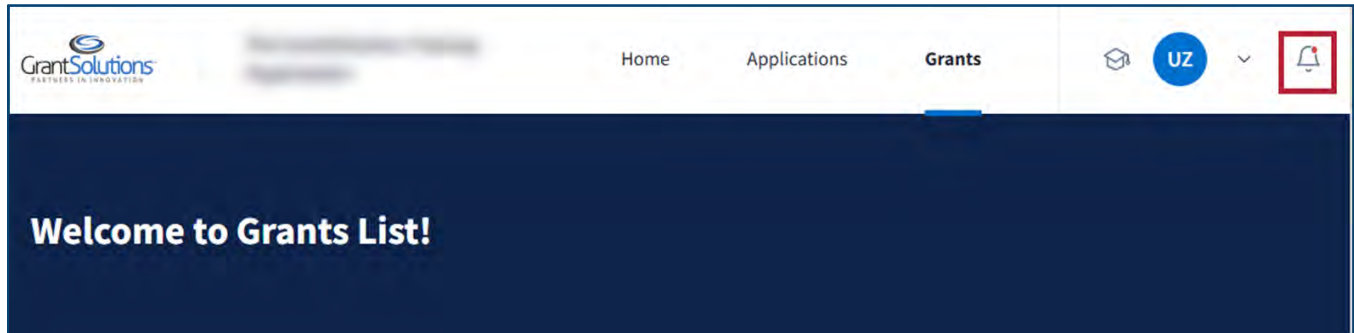


## REVIEW A SENT BULK MESSAGES IN THE NOTIFICATION CENTER

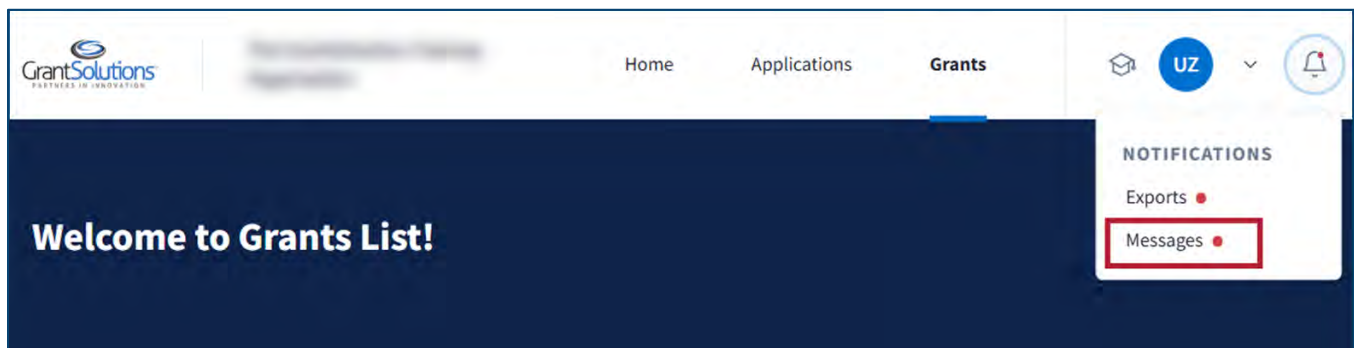
To review a sent bulk message in the Notification Center, follow the step below:

1. Click the **alerts** icon in the Global Navigation bar.

**Note:** An alert icon with a red dot indicates new notifications.



2. The *Notifications* drop-down expands. Click the **Messages** option.



3. The “Notifications” screen appears with the *Grant Messages* tab open by default. Click the **Bulk Messages** tab.

## Notifications ×

Grant Messages ●

Application Messages ●

**Bulk Messages ●**

### Grant Messages Notifications 1

You have new grant messages. To view them, click "Go to Messages" under the Actions column, which will take you to the Grant Messages tab for the associated grant project and remove the notification from this list.

Show 25 per page ▾

[Clear All Notifications](#)

GRANT#

LATEST MESSAGE DATE / TIME

ACTIONS

12/02/2024

09:31 PM

[Go to Messages](#)

[Clear](#)

The *Bulk Messages Status* section appears. A results table appears below with the following columns:

- **Status:** The status of the bulk message, which may appear as *Request Pending*, *Successfully Sent*, or *Request Failed*.
- **Subject:** The subject entered by the sender of the bulk message.
- **Communication/Message Type:** May appear as *Internal (Only Federal)* or *Correspondence (Recipients)*.
- **Date/Time Sent:** The date and time when the bulk message was sent.
- **Actions:** Contains a *Download* icon and a *Clear* link.
  - **Download:** Click to download a CSV file of organizations for sent bulk messages.
  - **Clear:** Click to clear the message for the associated grant project.

**Note:** To erase all notifications within the Notification Center for a specific status, click the *Clear Request Pending*, *Clear Successfully Sent*, or *Clear Request Failed* link, respectively. Clearing using this method only applies to the Notification Center, and grant and application messages remain on the “Grant Messages” and “Application Messages” screens for the associated grant project.

### Notifications ✕

Grant Messages ●
Application Messages ●
Bulk Messages ●

#### Bulk Messages Status

Bulk Message status will be displayed as Request Pending, Successfully Sent, or Request Failed. Messages that fail to send will be automatically removed from the list after 90 days.

Show 25 per page ▼ [Clear Successfully Sent](#)

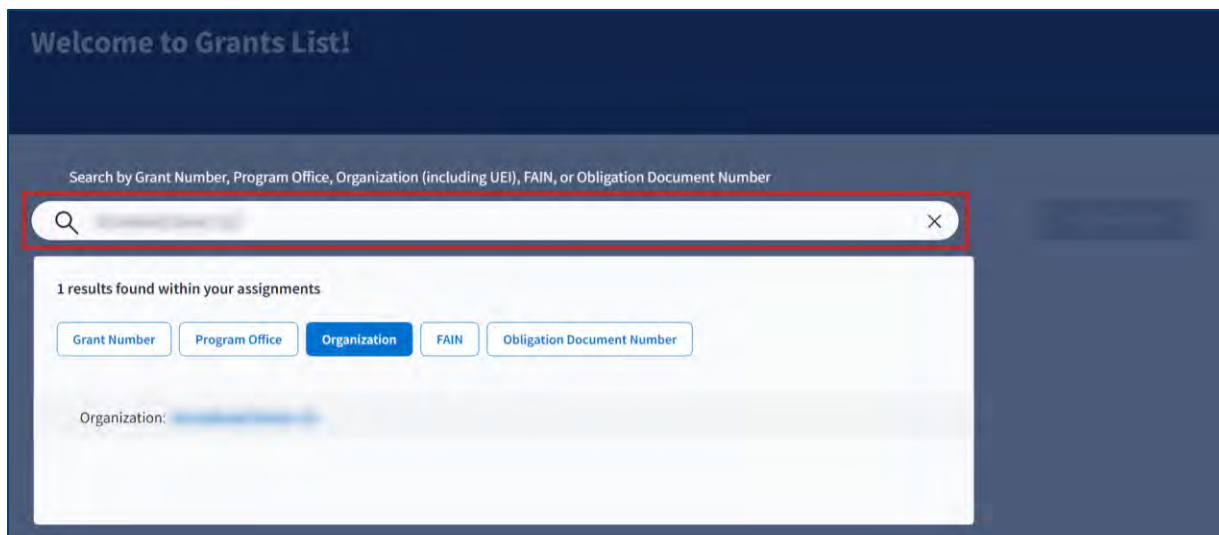
STATUS	SUBJECT	COMMUNICATION / MESSAGE TYPE	DATE / TIME SENT	ACTIONS
● <span style="color: green;">✔</span> Successfully Sent	[REDACTED]	Internal / Bulk Grant Message	12/04/2024 06:00 PM EST	<a href="#">Clear</a>

## BULK EXPORTS

Users can download a CSV file of bulk organizations using the bulk export feature. To bulk export organizations, follow the steps below:

1. From the “Grants List” screen, search for the **Organization**.

**Note:** Users may search by entering the *Grant Number, Program Office, Organization, FAIN, or Obligation Document Number*. For more information about using the search field, refer to the Grants List Search Quick Sheet.



Welcome to Grants List!

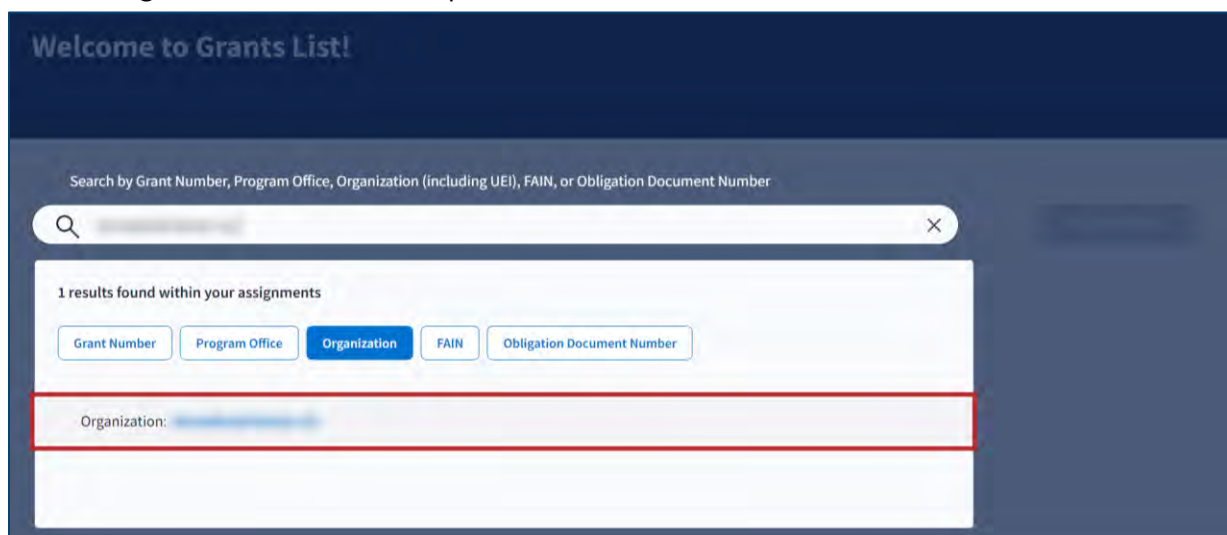
Search by Grant Number, Program Office, Organization (including UEI), FAIN, or Obligation Document Number

1 results found within your assignments

Grant Number Program Office **Organization** FAIN Obligation Document Number

Organization: [redacted]

2. Click the **organization** search result option.



Welcome to Grants List!

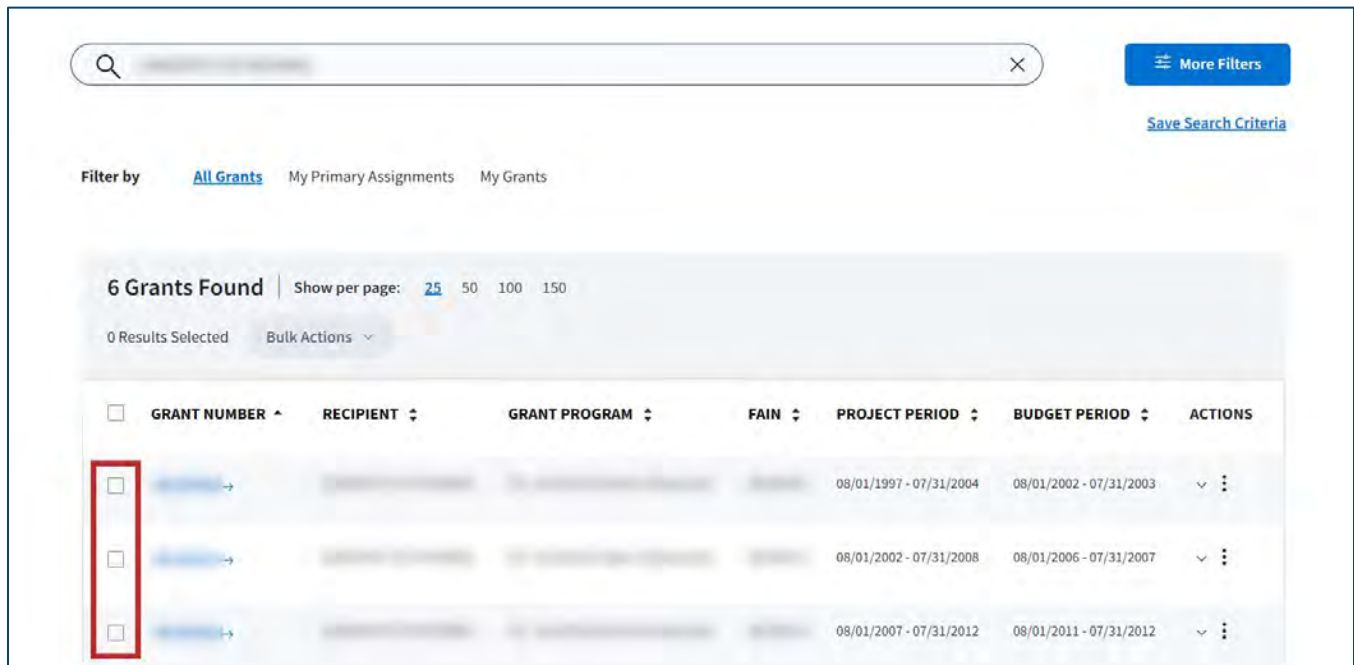
Search by Grant Number, Program Office, Organization (including UEI), FAIN, or Obligation Document Number

1 results found within your assignments

Grant Number Program Office **Organization** FAIN Obligation Document Number

Organization: [redacted]

- A results table appears below with grants matching the search criteria. Select the **bulk checkbox** on the left for each desired grant.



Search bar: [Search] X

More Filters

Save Search Criteria

Filter by: [All Grants](#) My Primary Assignments My Grants

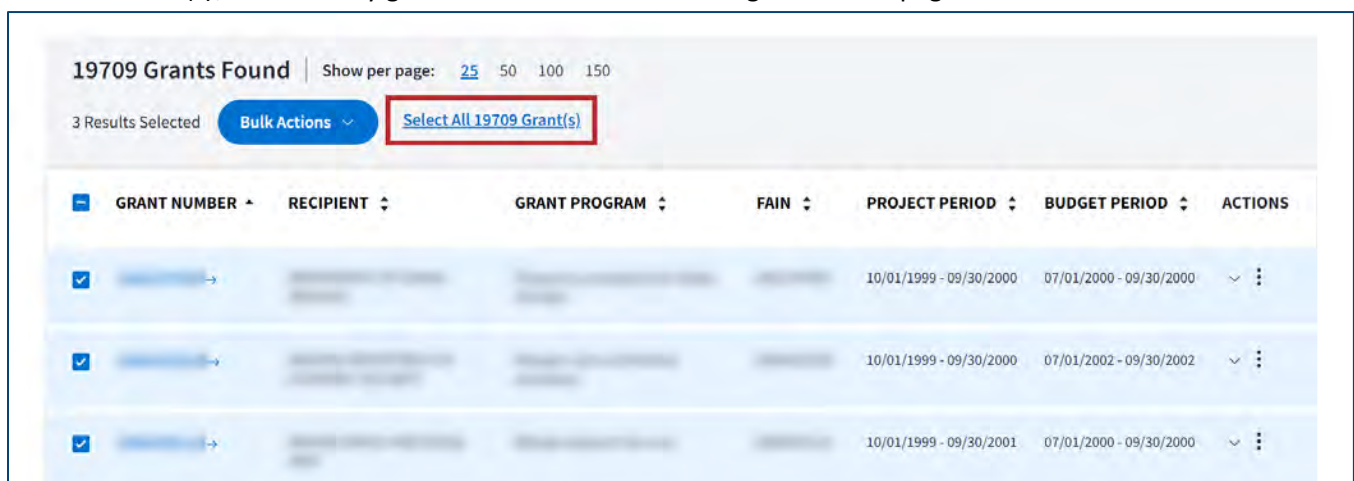
6 Grants Found | Show per page: 25 50 100 150

0 Results Selected Bulk Actions

<input type="checkbox"/>	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input type="checkbox"/>					08/01/1997 - 07/31/2004	08/01/2002 - 07/31/2003	⌵ ⋮
<input type="checkbox"/>					08/01/2002 - 07/31/2008	08/01/2006 - 07/31/2007	⌵ ⋮
<input type="checkbox"/>					08/01/2007 - 07/31/2012	08/01/2011 - 07/31/2012	⌵ ⋮

Upon selecting a checkbox in the results table, an optional *Select All Grants* link appears with the total number of grants from the results table. Click the **Select All Grant(s)** link to select all grants in the results, if desired.

**Note:** Users may select desired grants checkboxes on the current results page or click the *Select All Grant(s)* link to select all grants on all pages. Users may not select desired grants from multiple results pages. Upon clicking *Select All Grant(s)*, deselect any grant checkbox to deselect all grants on all pages.



19709 Grants Found | Show per page: 25 50 100 150

3 Results Selected Bulk Actions [Select All 19709 Grant\(s\)](#)

<input type="checkbox"/>	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2000	07/01/2002 - 09/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>					10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮



- Click the **Bulk Actions** drop-down.

19709 Grants Found | Show per page: 25 50 100 150

19709 Results Selected **Bulk Actions** [Unselect All 19709 Grant\(s\)](#)

<input checked="" type="checkbox"/>	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2000	07/01/2002 - 09/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮

- Click the **Export to CSV** option.

52979 Grants Found | Show per page: 25 50 100 150

25 Results Selected **Bulk Actions** [Select All 52979 Grant\(s\)](#)

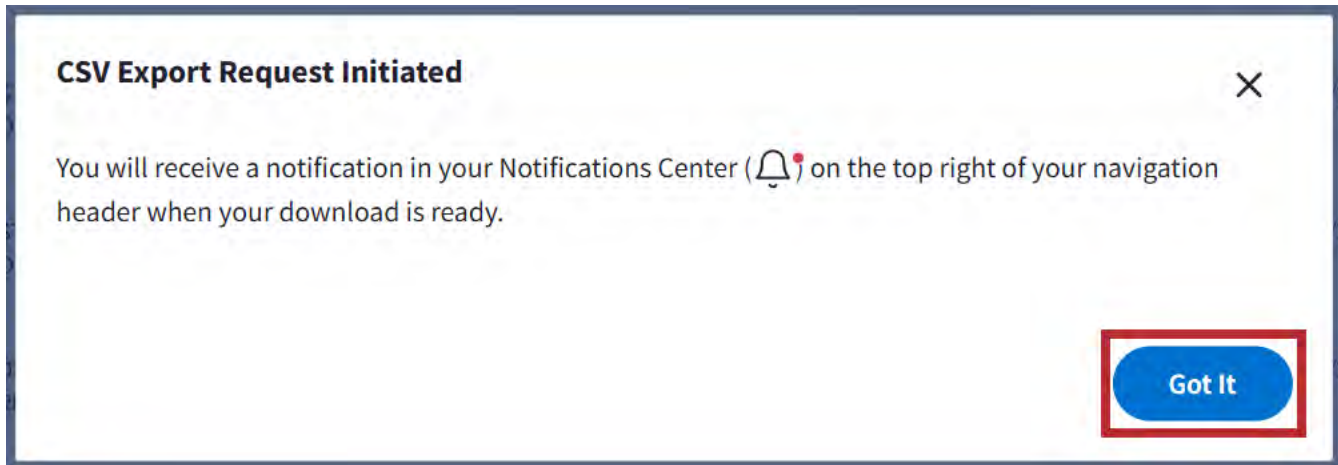
Export to CSV

Send Bulk Grant Message

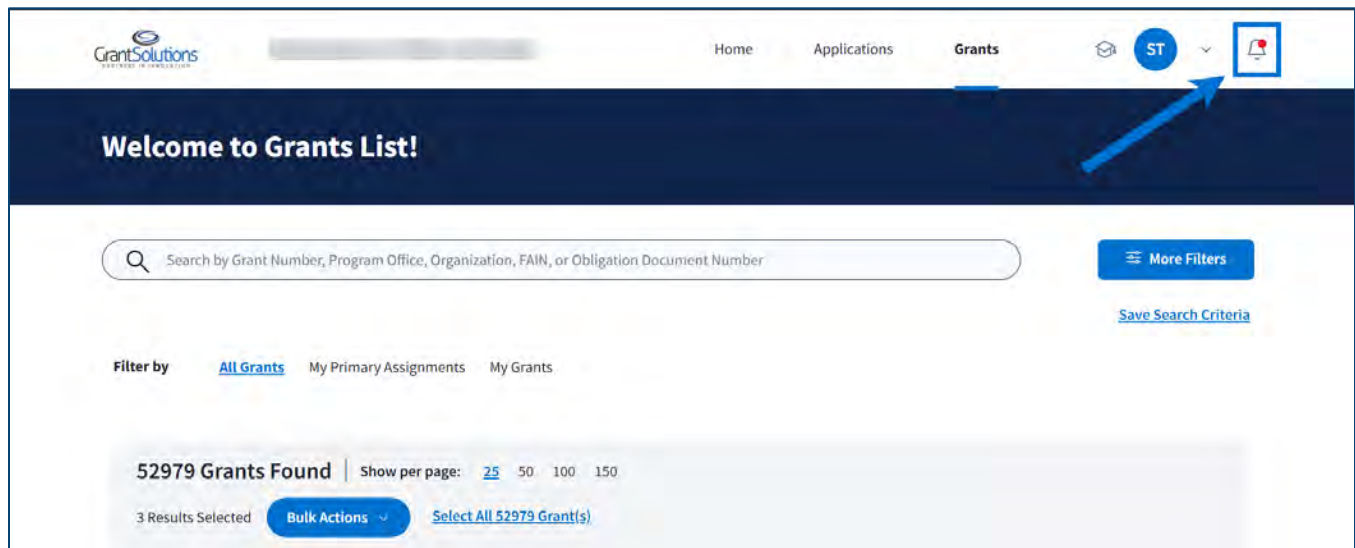
To enable, select at least 2 and fewer than 10,000 grants. Ensure that the selected grants are active or expired.

<input checked="" type="checkbox"/>	GRANT NUMBER	RECIPIENT	GRANT PROGRAM	FAIN	PROJECT PERIOD	BUDGET PERIOD	ACTIONS
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2001	04/01/2002 - 06/30/2002	⌵ ⋮
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2000	07/01/2000 - 09/30/2000	⌵ ⋮
<input checked="" type="checkbox"/>	<a href="#">[Link]</a>	[Name]	[Program]	[FAIN]	10/01/1999 - 09/30/2001	07/01/2000 - 09/30/2000	⌵ ⋮

6. The *CSV Export Request Initiated* window appears. Click the **Got It** button.

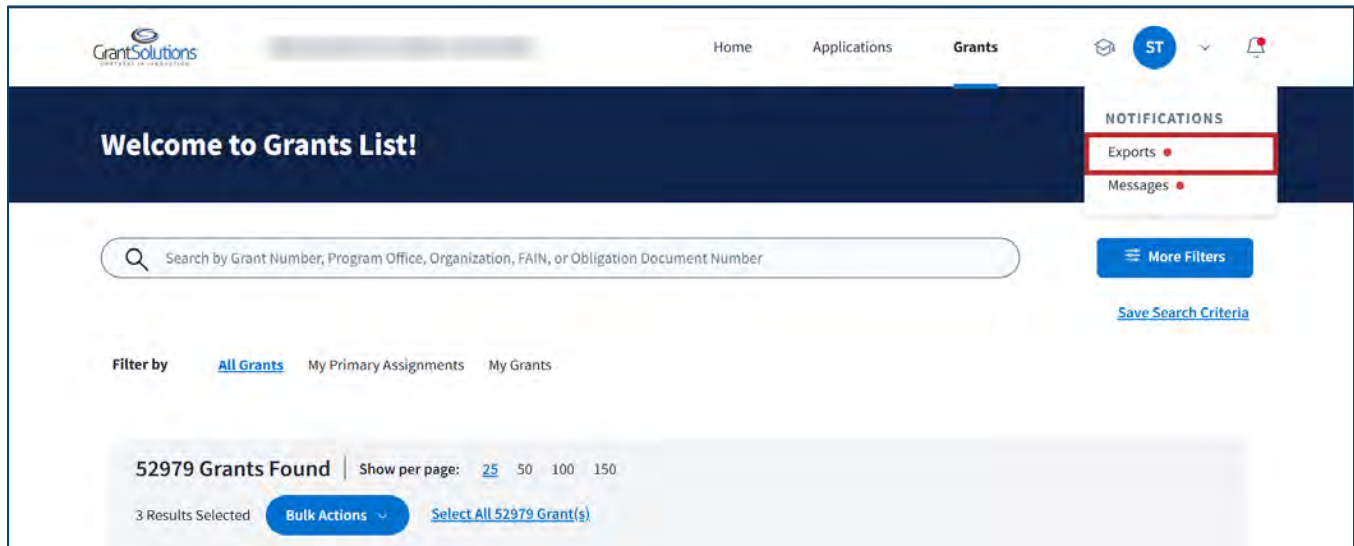


7. A notification appears in the Global Navigation bar. Click the **alerts** icon.



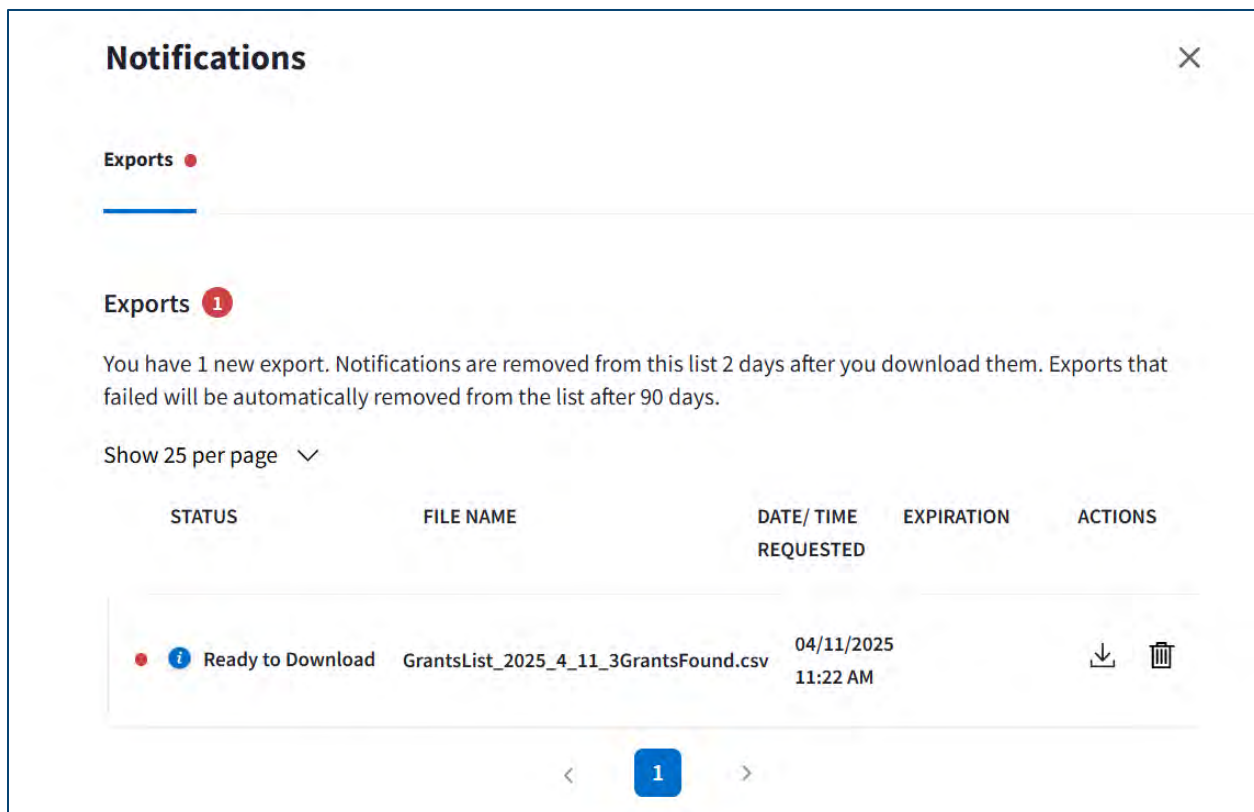


8. From the *Notifications* drop-down, select the **Exports** option.





The screenshot shows the 'Grants' tab selected in the top navigation bar. A 'NOTIFICATIONS' dropdown menu is open, with 'Exports' highlighted in a red box. The main content area displays 'Welcome to Grants List!' and a search bar. Below the search bar, there are filter options: 'All Grants', 'My Primary Assignments', and 'My Grants'. A summary bar indicates '52979 Grants Found' and '3 Results Selected'. A 'Bulk Actions' button is visible.

The “Notifications” screen appears with the *Exports* tab.



The screenshot shows the 'Notifications' screen with the 'Exports' tab selected. The page title is 'Notifications'. Below the tab, there is a message: 'You have 1 new export. Notifications are removed from this list 2 days after you download them. Exports that failed will be automatically removed from the list after 90 days.' A 'Show 25 per page' dropdown is visible. Below the message is a table with the following columns: STATUS, FILE NAME, DATE/ TIME REQUESTED, EXPIRATION, and ACTIONS.

STATUS	FILE NAME	DATE/ TIME REQUESTED	EXPIRATION	ACTIONS
Ready to Download	GrantsList_2025_4_11_3GrantsFound.csv	04/11/2025 11:22 AM		 

At the bottom of the table, there is a pagination control showing '1' in a blue box, indicating the first page of results.

In the *Exports* section, a results table appears with the following columns:

- **Status:** The status of the export, which may appear as *Request Pending*, *Ready to Download*, or *Downloaded*.
- **File Name:** The name of the CSV file.
- **Date/Time Requested:** The date and time when the bulk export was created.
- **Expiration:** The date the file expires and is no longer available for download.
- **Actions:** Contains a *Download* icon and a Delete icon.
  - **Download:** Click to download the CSV file.
  - **Delete:** Click to delete the export file.

## Notifications ×

Exports ●

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Exports 1

You have 1 new export. Notifications are removed from this list 2 days after you download them. Exports that failed will be automatically removed from the list after 90 days.

Show 25 per page ▼

STATUS	FILE NAME	DATE/ TIME REQUESTED	EXPIRATION	ACTIONS
<span>●</span> <span>i</span> Ready to Download	GrantsList_2025_4_11_3GrantsFound.csv	04/11/2025 11:22 AM		<span>↓</span> <span>🗑️</span>

< 1 >

9. The CSV file is *Ready to Download*. Click the **Download** icon.

**Note:** Files are available to download for two business days.

## Notifications ×



**Exports** ●

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**Exports** 1

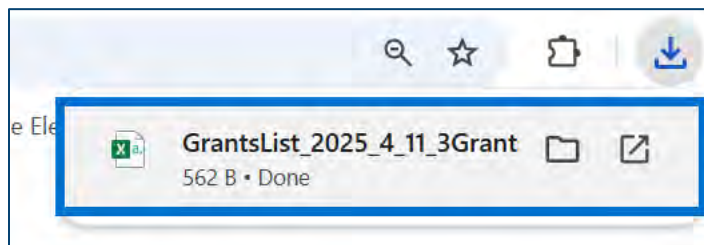
You have 1 new export. Notifications are removed from this list 2 days after you download them. Exports that failed will be automatically removed from the list after 90 days.

Show 25 per page ▾

STATUS	FILE NAME	DATE/ TIME REQUESTED	EXPIRATION	ACTIONS
● <span>i</span> Ready to Download	GrantsList_2025_4_11_3GrantsFound.csv	04/11/2025 11:22 AM		<div>   </div>

< 1 >

The CSV file downloads to your internet browser and is available to open and view.



## APPENDIX

The following is additional information regarding the statuses in the *Bulk Messages Status* section of the “Notifications” screen:

Status	Note
Request Pending	The bulk message has been sent but is not finished.
Successfully Sent	The bulk message has been successfully sent, and the <i>Actions</i> column contains a <i>Download</i> icon.
Request Failed	The bulk message did not go through. Users must resend the message, or it will be removed from the list after 90 days.