

LOGON PAGE:

You will access the system via the log on page. The Foundation may have provided you with a link to this page, or it may be hyperlinked on their Foundation website. It's recommend that you bookmark this page in your internet browser for ease of access. If you've already created an account you may enter your email and password and log right in. Otherwise you'll want to click on the Create New Account button. If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address and will be sent a link to reset your password.

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Technology for Doing Good, Better.

Logon Page

Email Address*

Password*

[Forgot your Password?](#)

[Log On](#) [Create New Account](#)

Welcome to the Foundation's Online Grant portal.

New Users: Please "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact our Grant Administrator at siteadmin@test.org to receive your username and password.

CREATE NEW ACCOUNT:

- Creating a new account is a multi-step process;
 - with the first section collecting **Organization Information**;
 - the second section collecting **User Information**;
 - and sections three and four collecting **Executive Officer** information.
- After Organization Information has been entered click on the "**Next**" button.

Organization Information

Organization Name* EIN / Tax ID (##-#####)*

DUNS Number (#####) Web Site*

Telephone Number (###-###-#### x###)* Organization Email

Address 1 Address 2

City State

Postal Code Country

Next >

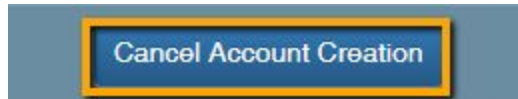
User Information

Executive Officer Question

Additional Executive Officer Information

Password

- The next section is the “**User Information**” section, or YOUR information.
 - If your address is the same as your organization you may use the “**Copy Address from Organization**” button to automatically pull the address information from the organization address fields into the address fields in this section.
 - It is very important to note that the email address entered in the **email/username** field becomes the Applicant’s **Username** in the system.
- Once the fields on the “**User Information**” section are completed, click on the “**Next**” button.
 - Please note that should you need to navigate to previous section in the registration process, you must use the “**Previous**” button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using their browser's “back” button you will lose all registration information entered..
- In the next section you indicate if you are the Organization’s Executive Officer.
 - If you are the executive officer select “**Yes.**” You are taken to a section of optional fields that includes only the fields that were not required in the “User Information” section.
 - If you are not the executive officer select “**No,**” and complete the Executive Officer’s fields.
- Once the executive officer’s information entered, clicking on the “**Next**” button to create a password.



- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the **"Create Account"** button.

A form titled "Password" with a header box containing password requirements: "Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%&*()_". Below this are two input fields labeled "Password*" and "Confirm Password*". At the bottom left is a "< Previous" button, and at the bottom right is a "Create Account" button, which is highlighted with a yellow arrow.

EMAIL CONFIRMATION:

Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

Email Confirmation

An "Email Confirmation" page. It features an information box with an "i" icon stating: "You will be receiving emails from this system about you". Below this, it says: "To ensure you receive emails from this system we have (administrator@grantinterface.com)' from your spam filter," followed by a link: "Click Here for a tutorial about removing email addresses from". Below the information box are three radio button options: "I have received the email", "Continue without checking", and "I have not received the email". The first option is selected. At the bottom left is a "Send Email Again" button, and at the bottom right is a "Continue" button, which is highlighted with a yellow border.

APPLY PAGE:

- Now you have an account in this system, and remember, this is an account that you will use for both current and future applications.
- Upon accessing the system for the first time, you will land on the Apply Page. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines or other information related to them.
- If you've been provided an access code, you may enter it in the upper right hand corner to reveal the opportunity you have been invited to apply to.
- You can preview the application without having to save any work by clicking on the "Preview" button. To start a request click on the blue "Apply" button under the opportunity you'd like to apply to.
- Please note that if the foundation you are applying to may require an LOI. If so, when you click Apply you may be taken into the LOI form. If the foundation does not utilize an LOI stage, you will be taken into an Application form. In this example, you are taken directly into the application.

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Application Page

Enter Access Code

If you have been provided with an Access Code, you may enter it in the box at the top of the page.

Search

Extra info here.

2017 Summit Grant Accepting Submissions from 12/01/2016 to 01/31/2017

All requests are submitted on-line and must be completed by Tuesday, January 31st, 2016 for consideration.

If you are having any trouble with this application or are unable to meet the 01/31/2017 deadline, please contact the administrator.

APPLICATION FORM:

Once in the application, note, that your contact information and organization information automatically populates at the top of the form.

- If you'd like a copy the application, you can click the Question List button.
- Once you've completed the form, you may click the Application Packet button to download a copy of the questions and your responses.
- You may also update your contact information, and view your email history.
 - If the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
 - If not, you must contact the Foundation directly to change organization information.

LOI

2017 Competitive Grant

Public Profile

LOI Packet Question List

Project Name: asdf
Process: 2017 Competitive Grant

Applicant:
Test Thursday
test@gmail.com

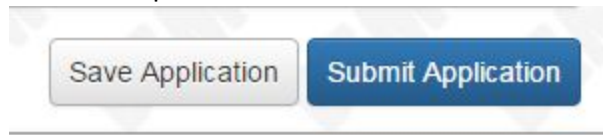
Organization:
Reina's Test
47-4720831
406-579-9999
test test
tet, MT 59715 USA

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

- Next, you will simply work your way through the form responding to the fields.
 - Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you've finished all of the questions in that group, as an indicator to yourself that you've completed that section and reduce scrolling time
- Some fields may have character limits.
 - Responses that are longer than the set limit will be saved, **but** an error message will appear informing the applicant the the limit has been exceeded.
 - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file, per field.
 - Upload fields have size limits.
 - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
 - Upload fields may also have File Type restrictions.
 - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
 - Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.
- Even though the system is auto-saving there is still a **"Save"** button at the bottom of the form.
 - When you click save you are taken to a confirmation page so you know the save was successful.
 - If you click **"Continue"** you will be taken back into the form so you can continue working.

- If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
 - Pick back up where you left off by clicking “**Edit**” link to the right of the request.



- When all of the fields are complete, submit the application.
 - If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
 - An error message appears listing the fields that need to be completed or edited.
 - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
 - When a form is submitted successfully, the applicant will be taken to a confirmation page.
 - When you click “**Continue**” you are taken to your dashboard where you can VIEW your submitted request.
 - Note, that once a application has been submitted you can no longer edit it.

Confirmation Page



Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending “time out”).

APPLICANT DASHBOARD:

- After you’d submitted or saved your application you can return to your applicant Dashboard by clicking on the “Home” icon link in the navigation menu.
 - On your Dashboard you can view requests that have been submitted,
 - Or you can edit applications that you have saved but have not submitted.
- If your request is approved you may be assigned Follow Up Reports to be completed and submitted through the system.

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Apply Organization History Fax to File

Applicant Dashboard

Public Profile

Applicant:
Mr. Joe Thomas
test@joe.com
123-123-1234
123 S 3rd.
MT 59718

Organization:
aSZDFzXGCFV
12-2346736
123-123-1234
123 S 3rd.
MT 59718

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

asdfasd

Process: 2017 Example Process

Application	Draft	01/05/2017
Decision	Undecided	12/13/2016

Edit Application

EDITING YOUR PROFILE:

If you wish to edit your account information or change your password, click your name in the type right. This will expand a drop-down menu. If you click Edit my profile, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you've finished.

Joe Thomas

aSZDFzXGCFV

- Edit My Profile
- Edit Organization
- Sign Out

Change Password Save