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Welcome!

Welcome to the CFWM Online Application Portal. The portal can be accessed by clicking the url below:

https://www.grantrequest.com/SID_5424/

If at any point you require technical assistance beyond this manual, please contact out technology support team at tech@communityfoundation.org.

Create A New Account

If this is your first time applying for a grant using our online portal, you will need to create a new account. Click the link “New Applicant?” below the Email textbox.
Enter the email address you would like to use as your primary contact. We recommend that you use an email address that is associated with the organization applying for the grant. All passwords must contain at least 5 characters and include both letters and numbers.

Click the "Continue" button when you have completed the form. An email will be sent to the email address that you specified in this form, confirming your account creation and password. Be sure to save your password, as you will be prompted for it every time you access our online portal.

Once the email is received, you may access the portal in one of two ways:

1 – Click the Account link https://www.grantrequest.com/SID_5424/. This will take you to your account, where all of your submitted and in-progress applications are listed. **Note:** If this is your first time using our online portal, you will not have any activity listed on this page. If you are attempting to create a new application, be sure to use the application link as described below in #2.

2 – Click the Program Application Link that has been provided for the specific program you wish to apply to. **Note:** If you have already started an application for this program, you should not refer to this link, but rather the Account Link, as cited above in #1.
Change your email address or password
Login to your account through the Account Login screen. From the landing screen shown below, click the link in the upper left side.

You will be presented with the form below:

Change Email Address
Complete the top part of the form titled “Change E-Mail Address”, using the new email address you wish to use and existing password for your account. Click “Update”. You will be redirected to the landing page with a message indicating that the update was successful.
Note: If you are unable to make the update and are receiving a message that indicates you are using an invalid email address or password, check to see that you are:

- Not using the existing email account. You must use the new email account that you wish to switch to.
- Using the correct password. It should be the same password you have been using to login to the system

Change Password
Complete the second part of the form titled “Change Password”, and Click “Update”. You will be redirected to the landing page with a message indicating that the update was successful.

Application Views
By using the drop down box on the right side of the view titled “Show”, you can chose to view your in-progress applications or your submitted applications.
In-Progress Applications

<table>
<thead>
<tr>
<th>Application Name</th>
<th>Project Title</th>
<th>Requested</th>
<th>ID</th>
<th>Last Updated</th>
<th>My Role</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leaves and Fishes: Preliminary Application</td>
<td>Project Title</td>
<td>20457</td>
<td>10/19/2016</td>
<td>Owner</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the application name to access the application

1. Transfer application
2. Manage Viewers
3. Delete
3. Email Application

1 - Transfer Application
This action allows the applicant to transfer ownership of the application to another user. The applicant is presented with the following email form:
The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. Enter the email address of the person you are transferring ownership to. While the Subject line and Memo to the new owner is populated, it is available to be edited.

The new owner will receive this email, and from that point, set up an account and proceed.

Some instances when an applicant may choose to transfer ownership of an application are:

- The Applicant is vacating their role at the grantee organization
- The Grant has been awarded, and now the progress reports and other ongoing requirements are maintained by a different staff member at the organization
- The Application is being completed by multiple people at the same organization in sequential order.

2. Manage Viewers

Applicants have the option to share the application with an unlimited number of viewers.
Add multiple viewers by entering the emails in the Email textbox separated by a comma, and click “Add Viewer(s)”. The Viewers will be listed below, with an indication if the viewer will require a new account or already has an existing account. To remove a recipient from the list, click the corresponding “Remove” checkbox to the right of the name, and then click the “Remove” button.

The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. While the Subject line and Memo to New Viewer is pre-populated, it is available to be edited.

The new viewers will receive this email, and from that point, set up an account and proceed.

**Note:** In order to send the email, you must click “Update” at the bottom of the form.

**3. Delete**
Delete any application that is in-progress by clicking the delete icon.

**4. Email**
Applicants may email copies of the application by filling out the form below:
The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. Enter the email addresses that you would like to send a copy of the application to, separated by a comma. While the Subject line and Memo to the new owner is populated, it is available to be edited.

Submitted Applications
Once an application has been submitted, it is no longer available to be accessed in the online form. It is also not able to be deleted. The actions available are as follows:
2. Manage Viewers

1. Transfer application

3. Email Application
1 - Transfer Application
This action allows the applicant to transfer ownership of the application to another user. The applicant is presented with the following email form:

The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. Enter the email address of the person you are transferring ownership to. While the Subject line and Memo to the new owner is populated, it is available to be edited.

The new owner will receive this email, and from that point, set up an account and proceed.

2. Manage Viewers
Applicants have the option to share the application with an unlimited number of viewers.
Add multiple viewers by entering the emails in the Email textbox separated by a comma, and click “Add Viewer(s)”. The Viewers will be listed below, with an indication if the viewer will require a new account or already has an existing account. To remove a recipient from the list, click the corresponding “Remove” checkbox to the right of the name, and then click the “Remove” button.

The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. While the Subject line and Memo to New Viewer is pre-populated, it is available to be edited.

The new viewers will receive this email, and from that point, set up an account and proceed.

Note: In order to send the email, you must click “Update” at the bottom of the form.

3. Email

Applicants may email copies of the application by filling out the form below:
The fields with an asterisk are required. Enter your name as you would like it to appear as the sender. Enter the email addresses that you would like to send a copy of the application to, separated by a comma. While the Subject line and Memo to the new owner is populated, it is available to be edited.