



## Online Grants System – New Applicant Training Materials

### Creating a Profile and Setting Up an Organization

Welcome to the Community Foundation’s new online grant system. 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.

### Logon Page

Email Address\*

Password\*

Log On

Create New Account

[Forgot your Password?](#)

**Welcome to the Community Foundation Serving Greeley and Weld County’s online grants system!**

**First time here?**

Click "Create New Account". If you need assistance, please refer to the **New Applicant** training materials. Be sure to keep this login information for your organization’s records.

*TIP: This email address is the one we will use to communicate with you if we have questions, which sometimes require immediate response. We suggest using an email address that is available to anyone at your organization who needs to access the application.*

**Been here before?**

If you have already used our new online grant system, but have forgotten your password, please click "Forgot Your Password?" and follow the instructions.

**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.

The screenshot shows the 'Organization Information' form. It contains several input fields: Organization Name\* (with 'test' entered), EIN / Tax ID (##-#####), DUNS Number (#####), Web Site, Telephone Number (###-###-#### x###), Fax Number (###-###-####), Organization Email, Address 1, Address 2, City, State, Postal Code, and Country. A yellow arrow points to the 'Next >' button at the bottom right of the form.

- 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.

The screenshot shows the 'User Information' form. It features a 'Copy Address from Organization' button at the top, highlighted by a yellow arrow. Below the button are input fields for: Prefix (Mr, Mrs, Ms, etc.), First Name\*, Middle Name, Last Name\*, Suffix (Sr, Jr, III, etc.), Business Title, Email / Username\*, and Email / Username Confirmation\*.

- 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.

Applicant

Suffix (Sr, Jr, III, etc.) Business Title

Program Manager

Email / Username\* Email / Username Confirmation\*

molly@test.com molly@test.com

Telephone Number (###-###-#### x###) Mobile Number (###-###-####)

Fax Number (###-###-####) Address 1

Address 2 City

State Postal Code

Country

< Previous Next >

- 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.

Executive Officer Question

Are you the Organization's Executive Officer?\*

Yes  No

< Previous Next >

- Once the executive officer's information is entered, click on the "Next" button to create a password.

Additional Executive Officer Information

Copy Address from Organization

Prefix (Mr, Mrs, Ms, etc.)\* Ms First Name\* Sally

Middle Name Last Name\* Fields

Suffix (Sr, Jr, III, etc.) Business Title\* Executive Officer

Email\* test@testing.org Telephone Number (###-###-#### x###)

Mobile Number (###-###-####) Fax Number (###-###-####)

Address 1 Address 2

City State

Postal Code Country

< Previous Next >

Password

- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.

Password

Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%^&\*()\_

Password\* Confirm Password\*


< Previous Create Account

- Once the password is created, the applicant clicks the "Create Account" button.

**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

 You will be receiving emails from this system about your request.

To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from, 'Hanna Demo Site, Inc. (administrator@grantinterface.com)', look in your junk or spam folder. To remove 'Hanna Demo Site, Inc. (administrator@grantinterface.com)' from your spam filter, use the link below.

[Click Here](#) for a tutorial about removing email addresses from spam filters.

I have received the email  
 Continue without checking  
 I have not received the email