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Portal Login & Navigation
Note: Fluxx works best using the Google Chrome internet browser

- Log-in using **Google Chrome** internet browser (click here to download Chrome)
- Enter user name (email address) and password.
    - To reset password:
        1. Click link on login page.
        2. Login and password will be sent by email.
        3. Reset password.
        4. Return to the login screen; enter username (email) and password.
- Click Login.
- You are now in your account! The welcome page describes the site layout.
  *Always select your organization from the drop-down menu in upper left corner.
  *The dark grey bar along the left is the navigation.
  *Each of the links is clickable and takes you to a different place in the portal.
  *At the bottom are the links to change your password or logout.

Tips: Saving **PROPOSALS**: Save often when you are working in the portal; there is no auto-save.
Saving **REPORTS**: Please refer to the Tips & Tricks document embedded in the **"Submit a Monitoring Report"** section, as the save process is different.
Ensure pop-ups are enabled in your google chrome browser

Update Organization Information

- To review your organization's information, click on "Organization Info" under Organizations.
- Click the organization name to see the details.
- Click "Edit" in the upper right corner.
    - Grantee Moderators can add/ update banking information here.
- Make any changes and click "Save" in the upper right corner.

Update/Create Contact Information

- Select an organization name in the upper left drop down on the navigation bar. You must choose your organization name before moving to next steps!
- Click on "People" under Users.
- To **update contact** record(s) click into a contact to see the details
- Click "Edit" in the upper right corner
- To **add a new contact** click "create new" in the bottom right corner on the contact screen
- Only "moderators" for your organization are able to add new contacts
    - If you would like to request login credentials for a contact, enter "Yes" in the "Request Grantee Login" field
- Only the "Primary Contact" assigned to each grant record will receive request/grant related communications; if grant request is approved, the grant agreement will be addressed to the "Signatory".

Apply!

- To submit a new request, click "Apply" on the bottom of the navigation menu.
- There are a few ways to apply:
    - For unsolicited requests, Letters of Inquiry, click "Create LOI."
    - If you are responding to an RFP, click "Respond to RFP."
    - For staff-invited proposals, click "Create Proposal."
    - For organizations invited to apply for core support, click "Apply for Core Support" (when active).
- Complete the details and attach documents (see "Uploading Documents" below).
    - The "Organization" field will pull the official organization name. If the legal name is different, please update it in the organization information and attach DBA documentation if needed.
    - The "Primary Contact" will receive all request/ grant related communications; if approved, the grant agreement will be addressed to the "Signatory."

- If responding to an RFP, take special note of the "RFP Responses" field. Above the field will be a PDF document with additional questions to respond to in this field.
- Download the relevant document and input responses to these questions in the "RFP Responses" field of your application and preface your entries with the number or text in bold to separate them within the field
- Click "Save" in the upper right corner; you can return to work on the request at a later time; the request will appear under Requests, and "Draft Requests."
- When the request is complete, click "Submit" in the upper right corner; the request will appear under "Submitted Requests."

Tip: Narrative fields have rich text formatting options and can be expanded for editing by placing your cursor on the lower right corner of the box and dragging down.

Uploading Documents

- Find the document section(s).
  - Note: For requests organization related documents (i.e. organization budget, 990, financial statements should be uploaded under organization documents; project –specific documents (i.e. project budget, project budget narrative, project timeline) should be uploaded under project documents.
- Click on the green plus sign and the document upload window appear.
- Click "Add Files" to browse for the file on your computer.
  - You can upload multiple at one time either by selecting them or dragging and dropping them into the upload pane.
  - **Assign each document a type using the dropdown menu next to the filename.**
- Click "Start Upload."
- Once you see the green check signs, the documents are uploaded.
- Close the upload window.
- To confirm upload, **complete document checklist** (note not required).
  Note: You must complete document checklist in order to submit request

Unable to Submit? If you received a compliance warning when trying to submit, it is likely that the check boxes in the organization and/or project documents sections have not been selected. Please scroll down to these sections to verify you've uploaded these documents and then select the boxes (entry is not needed in the note popup). Once complete, click save on the record and then click the "submit" button again.

Submit a Monitoring Report

- Under Monitoring Reports, click "Reports Scheduled."
  - Note: All scheduled reports will appear here.
- Click on the upcoming report in the list.
- Click "Edit" in the upper right corner to add information to the report.
- Attach report documents by clicking the green plus sign and browsing for the file on your computer.
  - A project budget vs. actual document is required for reports; ensure you assign this document type to your uploaded file.
- Click "Save" in the upper right corner; the report will stay saved in "Reports Scheduled." **Note: Report must be complete prior to saving – refer to Tips & Tricks document in the link below.**
- Click "Submit" in the upper right corner; the report will show in "Submitted Reports."
- If there are edits requested by Foundation Staff, you will receive an email that there are revisions requested; the report will be located under "Reports for Revisions."
- Reports reviewed by Foundation staff will appear under "Reports Reviewed."

Important Tip: Review Tips and Tricks document before starting your report!

Request an Amendment

- Click on "Active" under Grants."
- In order to submit an amendment, you must be a "primary contact" for the grant record.
- Click on the grant for which you would like to request an amendment.
- Click "Edit" in upper right corner to request amendment and attach document(s).
- Click "Save" in upper right corner.
- Click "Request Amendment" in the upper right corner.
- If there are revisions requested by Foundation staff, you will receive an email; changes can be made under "Amendments to Revise."

Tip: Ensure pop-ups are enabled in your Google Chrome browser