

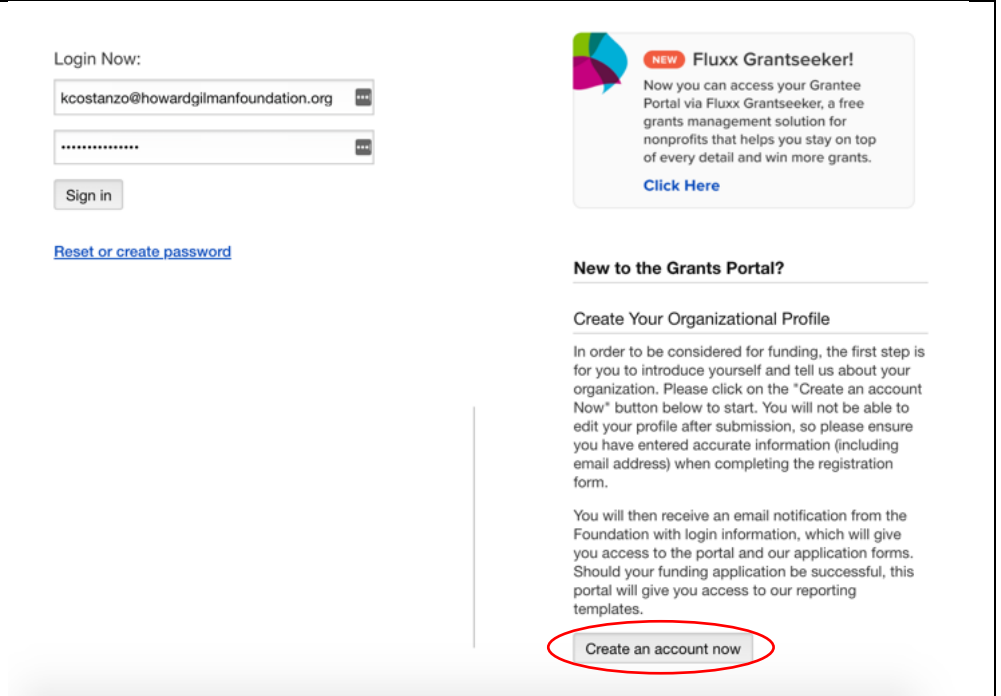
Grants Portal Quick Reference Guide - HOW TO REGISTER AN ACCOUNT

This guide walks new users through the steps of registering your organization profile and primary contacts in Gilman's Grants Portal. Updated 07/19/2022.

Login to Fluxx

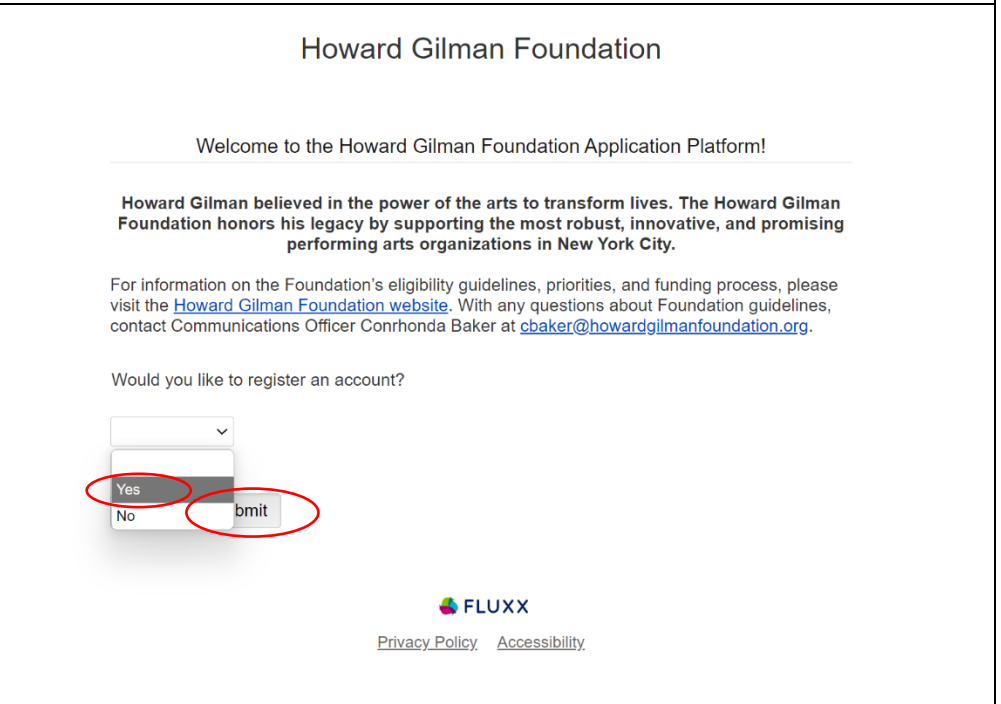
Go to howardgilmanfoundation.fluxx.io.

As a brand-new user, you must click the Create an account now button.



The screenshot shows the login interface. On the left, there is a 'Login Now:' section with a text input field containing 'kcostanzo@howardgilmanfoundation.org', a password field with masked characters, and a 'Sign in' button. Below this is a link for 'Reset or create password'. On the right, there is a 'NEW Fluxx Grantseeker!' banner with a 'Click Here' link. Below the banner is a section titled 'New to the Grants Portal?' with a sub-section 'Create Your Organizational Profile'. This section contains instructions for new users and a 'Create an account now' button, which is circled in red.

Select yes and click submit to register an account.



The screenshot shows the registration page for the Howard Gilman Foundation. At the top, it says 'Howard Gilman Foundation' and 'Welcome to the Howard Gilman Foundation Application Platform!'. Below this is a paragraph about the foundation's mission. A question asks 'Would you like to register an account?' with a dropdown menu showing 'Yes' and 'No' options. The 'Yes' option and the 'Submit' button are circled in red. At the bottom, there is a 'FLUXX' logo and links for 'Privacy Policy' and 'Accessibility'.

Enter Organization Information

Use the Guidestar EIN lookup to complete your organization information or enter it manually.

Organization Information

If you have an Employer Identification Number (EIN), enter it in the GuideStar Profile Lookup and press search to autofill your organization's information. Please review the populated information and ensure it is up-to-date.

GuideStar EIN Profile Lookup

Organization Legal Name*

Organization Common Name*

Tax ID*

Address 1*

Address 2

City*

Country

State

*State is required

Postal Code (Zip)*

Organization Website*

Organization Phone*

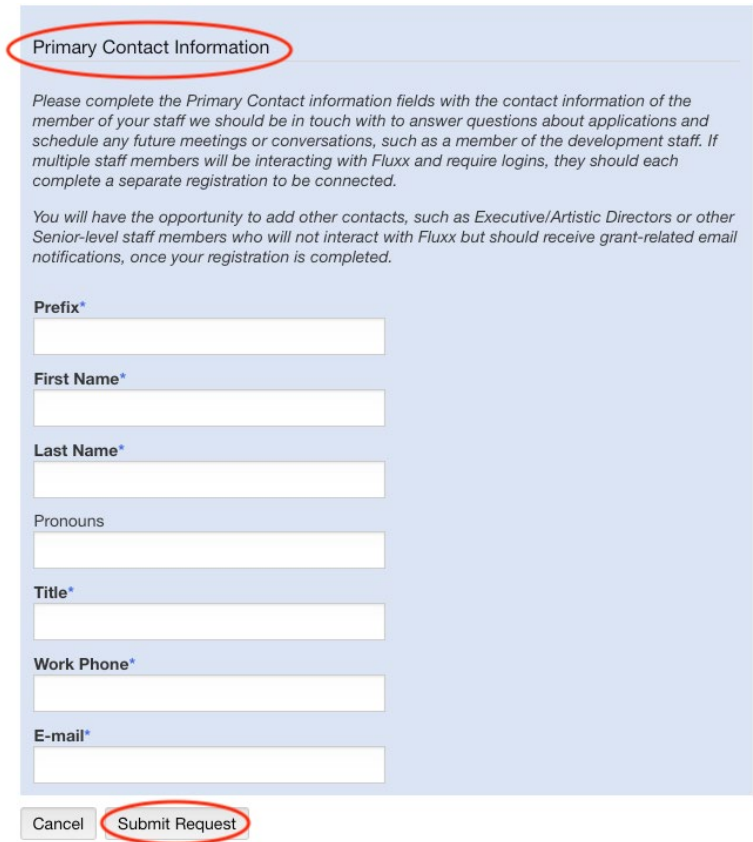
*Phone numbers must be formatted ###-###-#### or ###-###-#### x.###

Enter Primary Contact Information

Note: the Primary Contact should be the contact information of the staff member who will interact most frequently with the application portal.

Once you have full access to your profile, there will be an opportunity to enter the contact information for a Primary Signatory (the Executive and/or Artistic leadership contact, if different, who will be contacted to sign official grant contracts, etc.).

Click Submit Request.

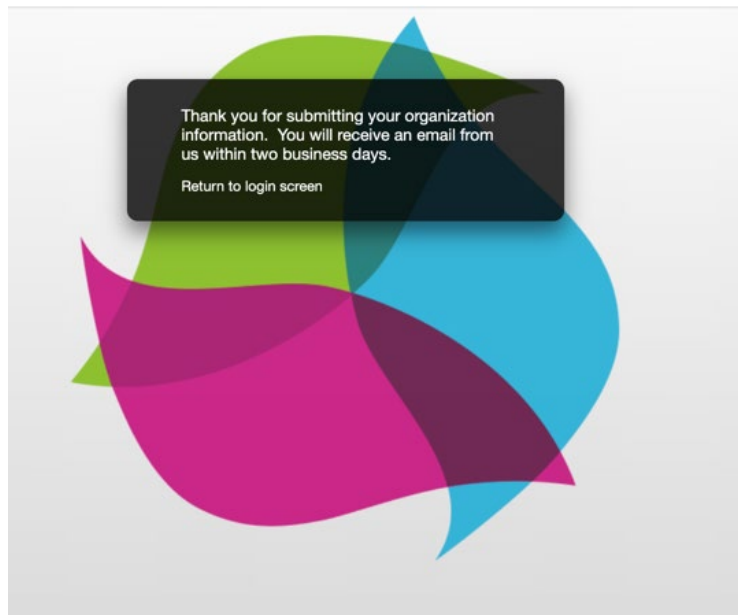


The screenshot shows a form titled "Primary Contact Information" with the following fields: Prefix*, First Name*, Last Name*, Pronouns, Title*, Work Phone*, and E-mail*. Below the form are "Cancel" and "Submit Request" buttons. The "Submit Request" button is circled in red. The form includes instructions: "Please complete the Primary Contact information fields with the contact information of the member of your staff we should be in touch with to answer questions about applications and schedule any future meetings or conversations, such as a member of the development staff. If multiple staff members will be interacting with Fluxx and require logins, they should each complete a separate registration to be connected." and "You will have the opportunity to add other contacts, such as Executive/Artistic Directors or other Senior-level staff members who will not interact with Fluxx but should receive grant-related email notifications, once your registration is completed."

Confirm Submission

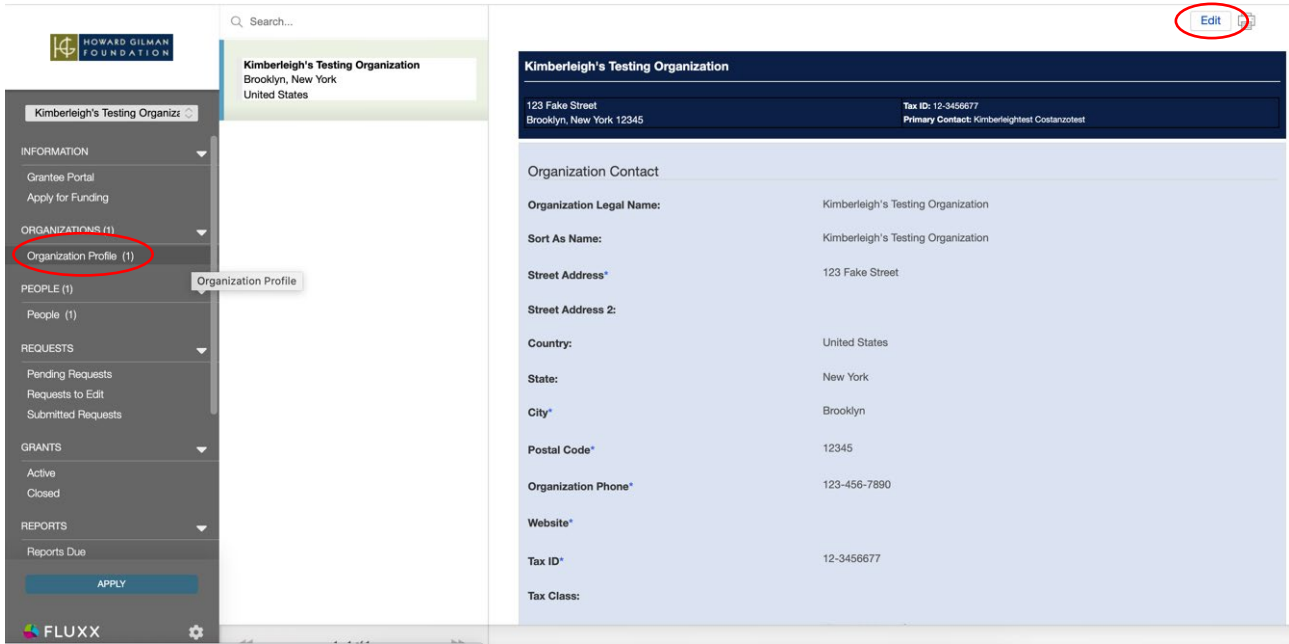
After clicking Submit Request, this screen appears.

Once HGF staff review and approve, you'll receive an email with your login and a link to create a password.



Return to Fluxx

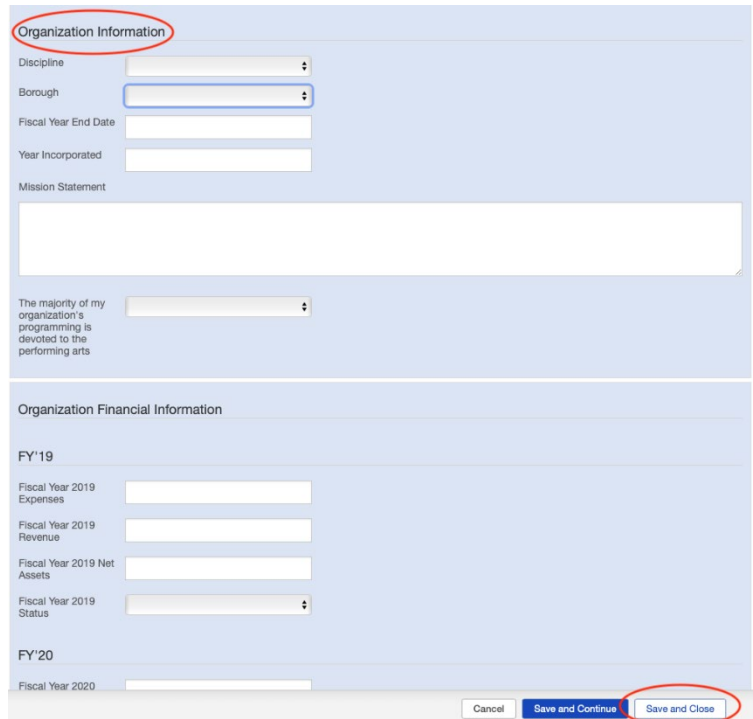
Once you create the password of your choice, return to the Fluxx login page to sign in. Go to howardgilmanfoundation.fluxx.io. Navigate to the Organization Profile section in the left-side menu. Click Edit in the upper right-hand corner.



Complete Organization Information

Complete the Organization Information and click Save and Close once complete.

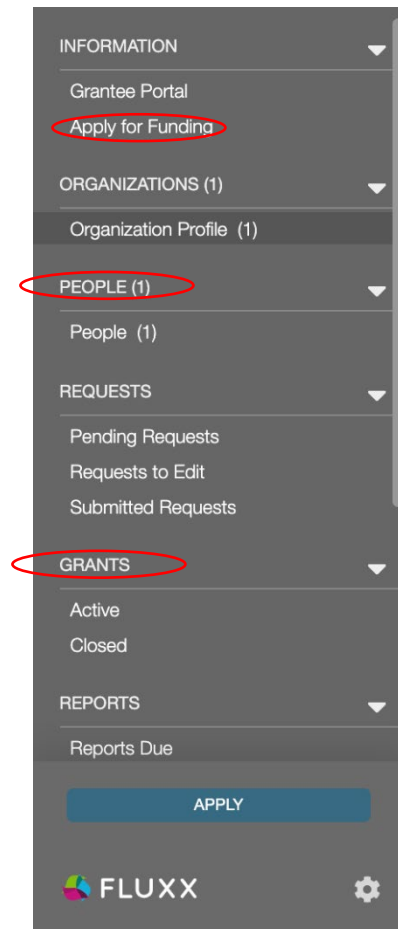
You'll be reminded to update this information at the time of each future application submission.



Navigating the Menu

You can navigate the left-side menu to

- view and add contacts (in the People section),
- view active and closed past grants (in the Grants section), and
- once available, open and submit applications for funding (in the Apply for Funding section).



Updating Contacts

Please note you may need to add multiple staff members to your profile.

When submitting applications or letters of inquiry, we ask you to designate a Grant Contact (Primary Contact) and a Executive Leader Contact (Primary Signatory).

The Grant Contact is the member of your staff we should be in touch with to answer questions about the application and schedule any future meetings or conversations, such as a member of the development staff.

The Executive Leader Contact, such as an Executive Director, is the staff member that should be addressed in any future award letters and should act as the signatory for any grant contracts.

We know that staff changes happen throughout the year. When someone leaves the organization, please notify your Program Officer of the departure and please don't overwrite names in the system. All new staff should be added to the people section in the grants portal.

If the new Grant Contact or Executive Leader will be logging into the grants portal, reviewing or submitting grant materials, and/or receiving future email notifications, have the new contact

- click the "Create an Account Now" button from the button right corner of the [main login screen of the grants portal](#).
- Next, they will create and submit a new registration- this is the same process starting on page 1.
- Once submitted, we will connect the new contact to your organization's record.

If the new contact won't be logging into the grants portal but you want to list them on grant materials as the grant contact or Executive Leader contact, then please have the primary user:

- [log in to the grants portal](#)
- click "People" from the left side menu
- click the "Create New User" button on the bottom right of the screen.
- Then they can add the contact information for the new contact (so they can receive notifications) without giving them a login to the system.

As a reminder, notification emails are only sent to the Grant Contact and Executive Leader Contact that your organization designates on your grant applications.