

Getting Started, Let's Create an Account

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In this guide, you'll see step by step how to create your GivingHub account (Applicant Portal).

A few key things to keep in mind:

- Use Create Account when setting up and Sign In every time after
- You will receive a **Temporary Password**
 - Be sure you copy and paste exactly
 - Make sure there are **no spaces** after the last character
- If you started an Application or Outcome report before June 21st, follow these steps:
 - Click on original link from whatever email you received
 - Create Account as outlined here
 - You will not see your Application / Outcome immediately this is expected
 - Use the original link to Sign Back in
 - The pre-existing Application or Outcome will open and now be associated with your account

Let's get started!

The default screen will be **Create a New Account**.

| | GIVING HUB | - |
|------------------|--------------------------------|---|
| Create | a New Account | |
| Email * | | |
| Enter your Email | | |
| Phone Num | ber * | |
| +1 • | phone number | |
| | Create Account | |
| Alı | ready have an account? Sign in | |

When you click in the phone number field, there will be info text to note that the phone number provided must be able to **receive text messages**.

| GivingHub | | | | |
|-----------------------------------------------------------------------------------------|--|--|--|--|
| WELCOME TO YOUR APPLICANT PORTAL | | | | |
| Create a New Account | | | | |
| cschultz@foundationsource.com This must be a phone that Can receive text messages | | | | |
| +1 • Must be mobile phone | | | | |
| Create Account | | | | |
| | | | | |
| Already have an account? Sign in | | | | |
| Need help signing in? Contact Support | | | | |

Learn more about the GivingHub

FOUNDATIONSOURCE

Once you have entered your email and phone number, you will get a **confirmation** screen.



WELCOME TO YOUR APPLICANT PORTAL

Success!

Your account has been created successfully. A temporary password has been sent to your email at cschultz+1@foundationsource.com. To complete registration, follow the link below, and use the temporary password to Sign In.

<u>Continue to Sign In</u>→

Need help signing in? <u>Contact Support</u> Learn more about the <u>GivingHub</u>

The confirmation will also send an **email**, with a **temporary password**.

Welcome to Grantee Portal!

○ Foundation Source Authorization authorization@foundationsource.com To: cschultz+1@foundationsource.com $\odot \, \leftarrow \, \ll \, \rightarrow$

Today at 1:44 PM

GivingHub

Welcome to the GivingHub - A special place created just for you!

Your username is <u>cschultz+1@foundationsource.com</u> and temporary password is dfhx1P?G

We wanted to make it easy for you to track and manage your Applications and Outcome Reports. In the GivingHub you will be able to:

- · Complete Applications and Outcome Forms
- View and Track the Status of your Applications
- Track Payment Status and Amount
- Complete Saved Documents
- Download Completed Documents
- · Enjoy Specially Curated Resources

This is just the beginning. In the future, you will be able to communicate directly with your grantor from the GivingHub.

If you work with other Foundations in the Foundation Source network, your future applications will take you to the Giving Hub. All you need to do is log in.

Yours truly, Foundation Source Next you will **login** with your email and the **temporary password** from the email you received.

| | GivingHub |
|-----------------|--------------------------------|
| Sign i Email | n with your email and password |
| nam | e@host.com |
| Passw | ord |
| Pass | word |
| Forgot | your password? |
| | Sign in |
| | Need an account? Sign up |

Then you will be prompted to **change your password** to something you can remember and for security purposes.

| GivingHu | b |
|-------------------------------------|------|
| Change Passv | vord |
| Please enter your new password belo | ow. |
| New Password | |
| | |
| Enter New Password Again | |
| | |
| | |
| Send | |
| | |

Last step is to check your **text** messages for the authentication code and enter it here.

This will happen for most logins in the future, so have your mobile handy.

We have delivered the authentication code by SMS to +******5091. Please enter the code to complete authentication.

Sign in

Next you will **create your GivingHub account**. Start by selecting Organization or Individual, then add your First and Last Name, and Organization information (if relevant).

| Giving | Hub |
|------------------|-----|
| FOUNDATIONSOURCE | |

| Please select one. I'll be submittin | GivingHub | |
|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| tease select one. I ti be submittin | TO BE A DE STATE | |
| For An Organization • For Myself | Create your account to submit application | |
| Personal Info | The information you provide may be found and updated in your profile. | |
| First Name * | Please select one. I'll be submitting applications | |
| Mark | • For An Organization For Myself | |
| .ast Name * | | |
| Darcy | Personal Info | |
| Phone * | First Name * | |
| 555-867-5309 | Enter Here | |
| mail Address * | Last Name * | |
| 710gracestreet@gmail.com | Enter Here | |
| | Phone * | |
| | 555-867-5309 | |
| Create Account | Email Address * | |
| | 710gracestreet@gmail.com | |
| _ | Organization Info | |
| | Organization Name | |

Enter Here

Create Account and Start Application 🤿

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After you are all set up, the GivingHub will direct you to your application.

Good News, next time you just need to login. Plus, you now have access to view and track status, plus download and complete your applications and outcomes.

More features coming soon.

| Organization and Contact Information | * Required Field 🔒 Printable Version | | |
|--------------------------------------|--------------------------------------------------------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Application Information | Organization Information | | |
| | Tax ID / EIN * | | |
| | Enter Tax Id Number Onknown Organization | | |
| | Organization Name * | | |
| | organization rearrie | | |
| | DBA Name if Applicable | | |
| | | ontact Information | * Required Field 🔒 Printable Version |
| | Fiscal Sponsor Name, if applicable | tion | Application Information |
| | | | Request Amount * |
| | Address 1 | | \$ Enter Amount |
| | Address 2 | | Request Name * |
| | M001005.2 | | |
| | City | | Request Summary * |
| | | | |
| | State | | |
| | - Select State/Province - * | | 0 of 512 characters and spaces |
| | Zip Code | | Description of the need to be addressed by this proposal |
| | | | |
| | Website | | |
| | Enter URL | | 0 of 2000 characters and spaces |
| | Please provide a brief description of your organization, including mission statement | | How will this need be addressed if these requested funds are granted? |
| | | | |
| | | | |
| | 0 of 2000 characters and spaces | | |
| | Please describe your organization's major accomplishments over the past year | | 0 of 2000 characters and spaces |
| | | | What is the total budget (beyond this grant request if applicable) for the proposed project or program? |
| | | | \$ Enter Amount |
| | 0 of 2000 characters and spaces | | Grant Evaluation |
| | Please describe your organization's goals for the next year | | Please list the objectives that you anticipate achieving if these funds were awarded |
| | r cene e contrac your organization o general o cre nov you | | |
| | | | |
| | | | |
| | 0 of 2000 characters and spaces | | 0 of 2000 characters and spaces |
| | Primary Contact Information | | Please describe how these objectives will be achieved |
| | First Name * | | |
| | Last Name * | | |
| | Last Name - | | 0 of 2000 characters and spaces |
| | | | Attachments |
| | | | If you have an existing project budget document , or any documents that would be helpful in assessing this application (e.g., annual report, media posts, rewards), please upload it here. |
| | | | assessing this application (e.g., annual report, media posts, rewards), please upload it here. Upload |
| | | | Drag and drop file here or use the file browser. (30 MB max file size). |
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Thank you.

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