

Instructions for setting up Organization User Profiles for CFGV Community Grants Application

Individuals will no longer be able to apply for CFGV Community Grants as they have in the past. ALL applicants will need to create an Organization User account in order to apply.

The SMapply system requires a designated Primary Organization Administrator and an associated email. If that email address already has an Individual User account associated with it, skip to the next section. **If this is your first time applying for a Community Grant or if the email address for the Primary Organization Administrator is not already associated with an Individual User account:**

- 1) Go to <https://cfgv.smapply.org> and click on Register.
- 2) Select "Register as an Organization" and complete the signup fields for the individual who will be the Primary Organization Administrator. This person will be able to add other Members to the Organization User account, so this does not necessarily have to be the person who will be writing the grant proposal.
- 3) Input the organization name; you may opt to skip inputting additional information at this stage if desired.
- 4) The system will send an email to the email address you input in step #2. You will not be able to begin any applications until the email address has been verified. The verification email will come from "CFGV".
- 5) Once you verify your email address, log in and click on "Manage organization" in the upper right hand side of your dashboard to add more information to your account, including a logo, organization information (if you opted to not complete those fields in step #3), etc. You may also add other Members (see last section for instructions).

If the email address for the Primary Organization Administrator is already associated with an Individual User account:

- 1) Go to <https://cfgv.smapply.org> and log in to your Individual User account.
- 2) In the upper right hand corner of the dashboard, click on your name to show a drop down menu, then click on "My Account".
- 3) Scroll down and locate the "Set up organization" button below Preferences.
- 4) Input the organization name; you may opt to skip inputting additional information at this stage if desired. Click "Continue" and then "Continue to site".
- 5) You will now be able to navigate between your Individual and Organization User accounts in the upper left hand corner of the dashboard; click on the down arrow to select accounts.
- 6) Click on "Manage organization" in the upper right hand side of your dashboard to add more information to your profile, including a logo, organization information (if you opted to not complete those fields in step #3), etc. You may also add Members (see next section for instructions)

You may add as many Members to your Organization User profile as necessary; they do not have to currently have an Individual User account to be added. To add Members:

- 1) Make sure you have selected the correct organization to manage in the upper left hand corner; the name of current account you're operating in will appear there. If you are in your Individual User account or another Organization User account, click on the down arrow to select the correct account.
- 2) Click on "Manage organization" in the upper right hand corner and click on "Members" in the upper middle area of the dashboard. Here you will be able to manage the Members who can apply on behalf of your organization.
- 3) Click on "Add member" and input the Member's name and email, and select their role (keep in mind that only members with the role of Organization Administrators can apply on behalf of the organization!).
 - a. The Community Grants application does not utilize the team function, so there is no need to set up and assign members to teams.
 - b. If the member you are adding does not currently have an Individual User account associated with their email address, this effectively creates an account for them and they will have to verify the account before they can apply.
 - c. If an Individual User account already exists, this will simply add your organization to their existing account.

If you have any questions or issues with setting up an Organization User account, adding Members, etc., please contact Alicia Corliss at alicia@cfqv.org.