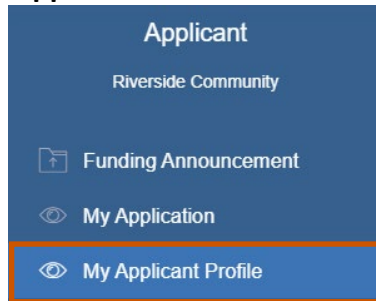



My Applicant Profile

Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user's applications. *My Applicant Profile* is a tool designed to enhance a user's application. Here applicants may add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications. All applicant users must upload their documents to their User Profile before they begin a funding announcement application. Applicant's will not be able to upload documents directly to the application. Instead, the system will look to the user's profile.

1. From the site map, click **My Applicant Profile** . The Applicant Profile page appears.



2. On the Organization Information tab, fill in the necessary fields.

 **Note:** The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.

My Applicant Profile : Clubhouse Community

| Organization Information | Address | Users | Contact | Documents | Projects | Reports |
|--|---------|-------|----------------------|-----------|----------|---------|
| Organization Name * | | | EIN | | | |
| <input type="text" value="Clubhouse Community"/> | | | <input type="text"/> | | | |
| Organization Type | | | DUNS Number | | | |
| <input type="text" value="Community Nonprofit"/> | | | <input type="text"/> | | | |
| Website URL | | | Main Phone | | | |
| <input type="text"/> | | | <input type="text"/> | | | |
| Fax Number | | | Vendor Number | | | |
| <input type="text"/> | | | <input type="text"/> | | | |

3. **Optional:** On the Address tab, fill in the necessary fields.

My Applicant Profile : Obi-wan Organization

< Organization Information **Address** Users Contact Documents >

Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Physical Address Same as Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code



Save

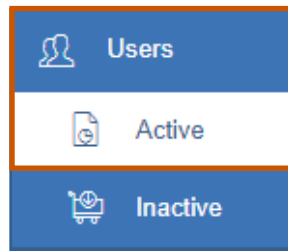
Users

View the users related to the application. You can view active or inactive user.

The screenshot shows the 'Users' management interface. At the top left, there is a '+ New' button with a callout box that says 'Create a user.'. Below this is a search bar with the placeholder text 'Search...' and a magnifying glass icon, with a callout box that says 'Use the search bar to look for users.'. The main area contains a table with the following columns: Name, Email, Organization Unit, and Active. The table lists two users: 'Test Contact' with email 'tcontact@applicant.com' and 'Mickey Mouse' with email 'mmouse@applicant.com', both associated with 'Riverside Community' and marked as 'Active' with a green checkmark. A callout box on the left says 'Choose a user from the grid.'. Below the table, there is a 'Total: 2' label with a callout box that says 'Total number of users'. To the right of the table is a pagination control with arrows and the number '1', with a callout box that says 'Use the arrows to see more users.'. Further right is a dropdown menu showing '10', with a callout box that says 'Use the drop-down list to choose how many users you see in the grid at a time.'.

Create a User



- From the site map, click **Users**  and choose **Active** . The Users for Applicant page appears.




- Click **New +**. The Create New User dialog box appears.

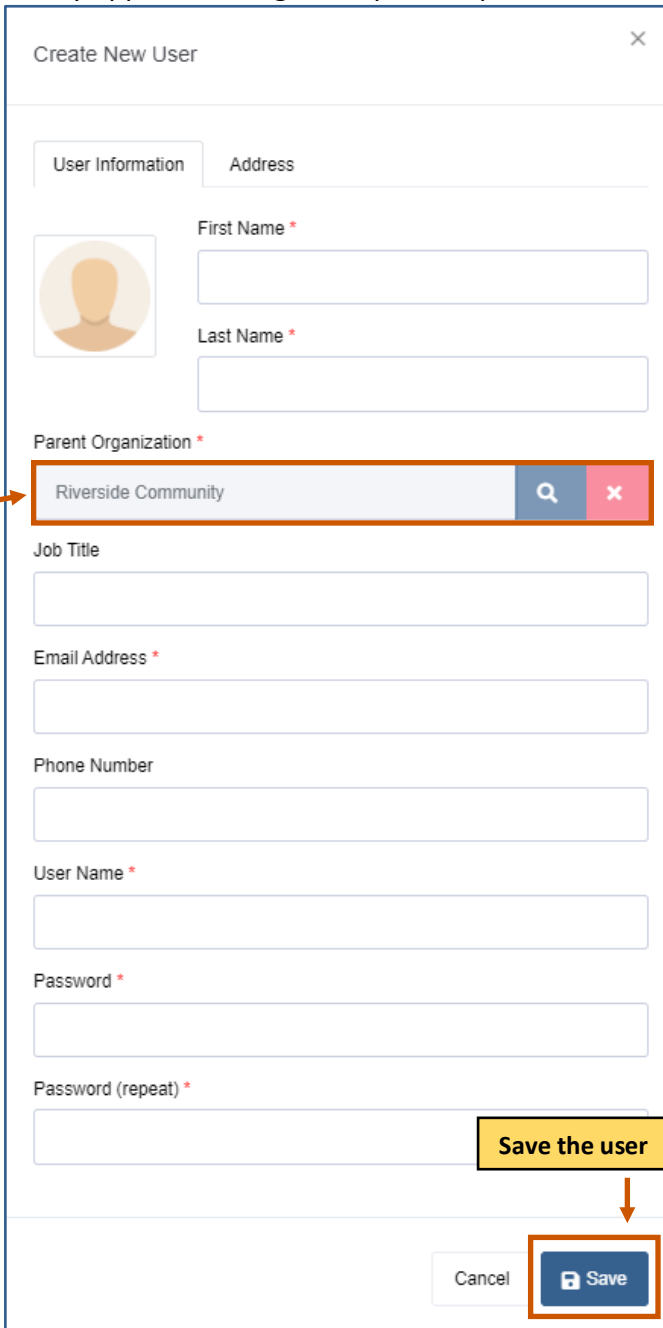


Under the Active column:

-  indicates the user is inactive.
-  indicates the user is active.

- Fill in the necessary fields.
Note: The red asterisks indicate required fields.
- Click **Save**  to save the user. They appear in the grid. Repeat steps 2-4 for each user.

Use the command to add or search for a parent organization. The default is the organization you are viewing.

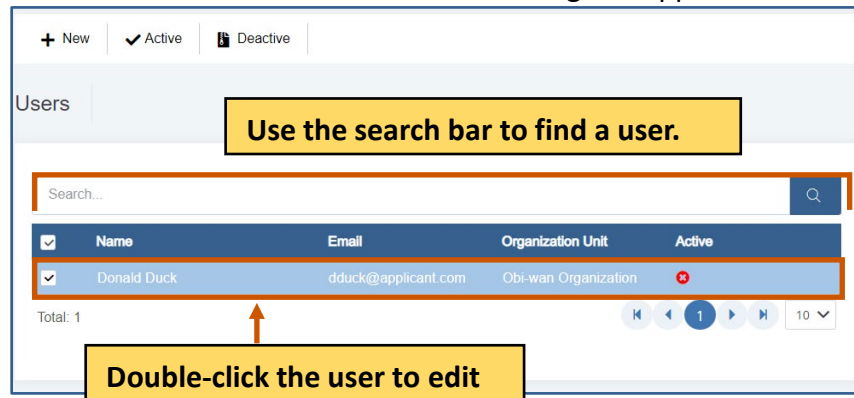



Save the user

Cancel Save

Edit a User

1. **Optional:** Use the search bar to find a user.
2. **Double-click** the user to edit it. The Edit User dialog box appears.



3. Edit the necessary fields for each tab.
i Note: The red asterisks indicate required fields.
4. Click **Save** . The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

 Saved Successfully.

Contacts

View the contacts related to the application.

The screenshot shows the 'Contacts' page interface. At the top left, there is a '+ New' button and a 'Create a contact.' label. Below this is a 'Contacts' tab and a table with the following columns: Full Name, Organization Name, Job Title, Phone Number, and Email. The table contains two rows: 'Test Contact' (Riverside Community, tcontact@applicant.com) and 'Mickey Mouse' (Riverside Community, mmouse@applicant.com). Below the table, there is a 'Total: 2' label. On the right side of the table, there are navigation arrows and a dropdown menu showing '10'. Instructional callouts are placed around the interface: 'Choose a contact from the grid.' points to the table rows; 'Total number of contacts' points to the 'Total: 2' label; 'Use the arrows to see more contacts.' points to the navigation arrows; and 'Use the drop-down list to choose how many contacts you see in the grid at a time.' points to the '10' dropdown menu.


Add a Contact

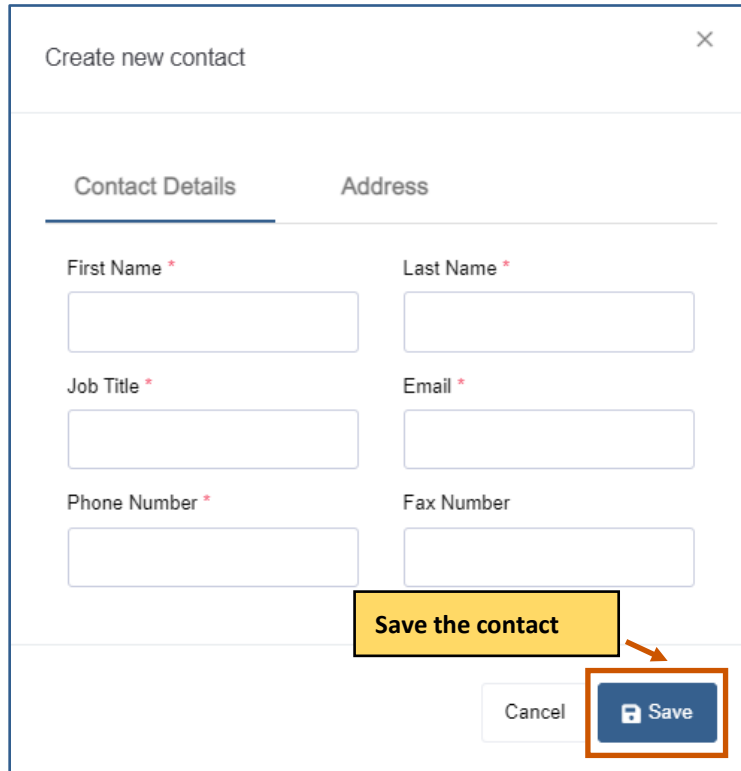
1. From the site map, click **Contacts** . The Contacts for Applicant page appears.

The screenshot shows the 'Applicant' site map for 'Riverside Community'. The menu items are: Funding Announcement, My Application, My Applicant Profile, Users, **Contacts** (highlighted with an orange box), and Documents.

2. Click **New** . The Create New Contact dialog box appears.

This screenshot is identical to the one above, showing the 'Contacts' page with the same table and callouts. The callouts are: 'Choose a contact from the grid.' pointing to the table; 'Total number of users' pointing to the 'Total: 2' label; 'Use the arrows to see more contacts.' pointing to the navigation arrows; and 'Use the drop-down list to choose how many contacts you see in the grid at a time.' pointing to the '10' dropdown menu.

- Fill in the necessary fields.
Note: The red asterisks indicate required fields.
- Click **Save**  to save the contact They appear in the grid. Repeat steps 2-4 for each contact.



Create new contact

Contact Details Address

First Name * Last Name *

Job Title * Email *

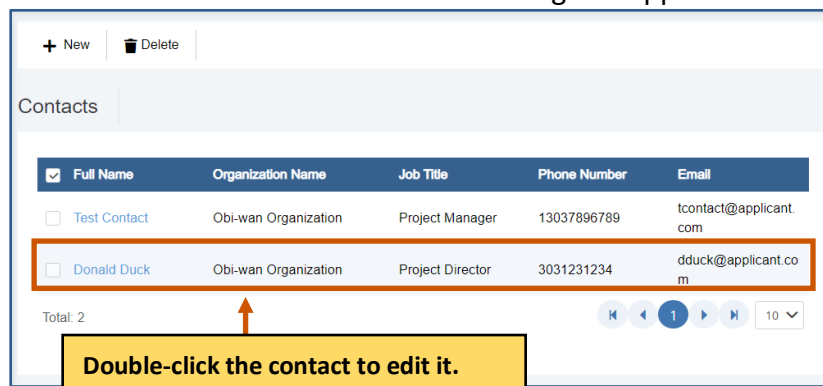
Phone Number * Fax Number

Save the contact

Cancel Save

Edit a Contact

- Double-click** the user to edit it. The Edit User dialog box appears.



+ New Delete

Contacts

| <input checked="" type="checkbox"/> Full Name | Organization Name | Job Title | Phone Number | Email |
|---|----------------------|------------------|--------------|------------------------|
| <input type="checkbox"/> Test Contact | Obi-wan Organization | Project Manager | 13037896789 | tcontact@applicant.com |
| <input type="checkbox"/> Donald Duck | Obi-wan Organization | Project Director | 3031231234 | dduck@applicant.com |

Total: 2

Double-click the contact to edit it.

- Edit the necessary fields for each tab.
Note: The red asterisks indicate required fields.

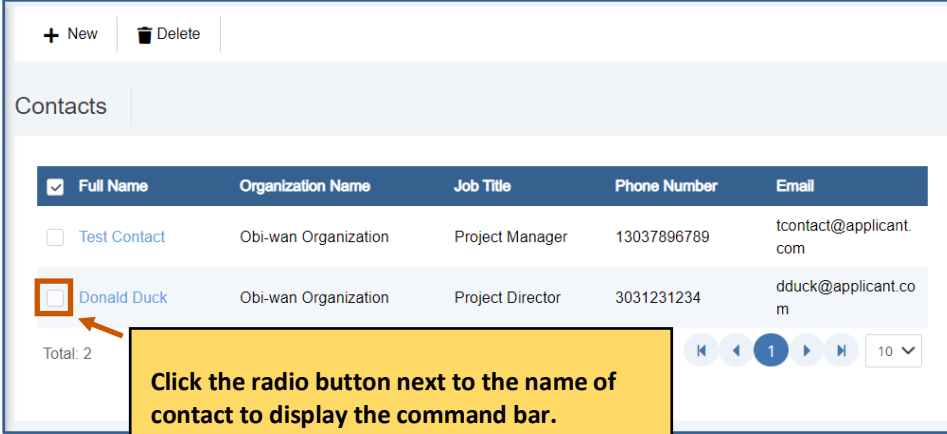
- Click **Save** . The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.



Saved Successfully.

Delete a Contact


- Click the radio button next to the name of contact to display the command bar.

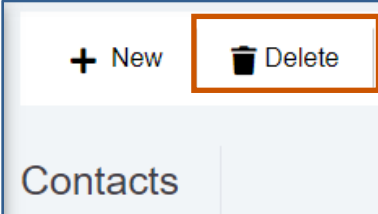


The screenshot shows a 'Contacts' interface with a table of contacts. The 'Donald Duck' contact is selected, and a yellow callout box points to its radio button. The callout text reads: 'Click the radio button next to the name of contact to display the command bar.'

| <input checked="" type="checkbox"/> | Full Name | Organization Name | Job Title | Phone Number | Email |
|-------------------------------------|--------------|----------------------|------------------|--------------|------------------------|
| <input type="checkbox"/> | Test Contact | Obi-wan Organization | Project Manager | 13037896789 | tcontact@applicant.com |
| <input checked="" type="checkbox"/> | Donald Duck | Obi-wan Organization | Project Director | 3031231234 | dduck@applicant.com |

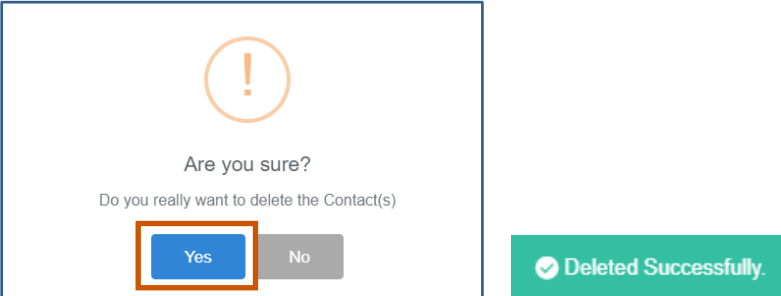
Total: 2

- Click **Delete** . A message popup asks if you are sure you want to delete the contact.



The screenshot shows the 'Contacts' interface with the 'Delete' button highlighted by a red box.

- Click **Yes**. The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.






The screenshot shows a confirmation dialog box with a red exclamation mark icon. The text reads: 'Are you sure? Do you really want to delete the Contact(s)'. The 'Yes' button is highlighted with a red box. To the right, a green 'Deleted Successfully' popup is visible.

Documents


View documents related to the application.

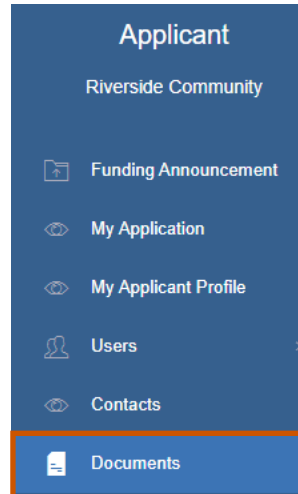
The screenshot shows a 'Documents' interface with the following callouts:



- Command bar:** A yellow box highlights the top bar containing 'Choose File', 'Save', and 'Cancel' buttons.
- Choose a contact from the grid:** A yellow box points to the 'Actions' column of the document grid.
- Total number of documents:** A yellow box highlights the 'Total: 2' text at the bottom left of the grid.
- Use the arrows to see more documents:** A yellow box highlights the pagination controls (back, forward, page 1, etc.).
- Use the drop-down list to choose how many users you see in the grid at a time:** A yellow box highlights the '10' dropdown menu in the pagination area.

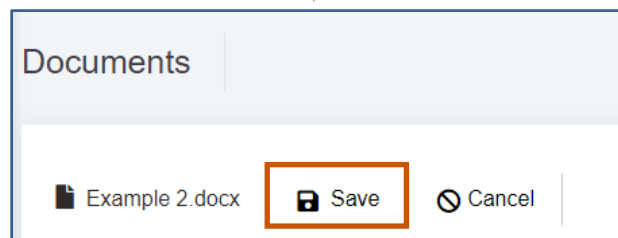
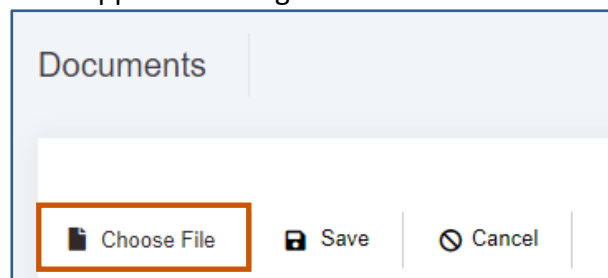
| Command Options | | Description |
|-----------------|---|--|
| Choose File |  | Choose the file you want to upload. |
| Save |  | Save the file you want to upload |
| Cancel |  | If you choose a file you do not want to upload, you can cancel uploading the file. |

Add a Document

1. From the site map, click **Documents** . The Attach Document for Applicant page appears.

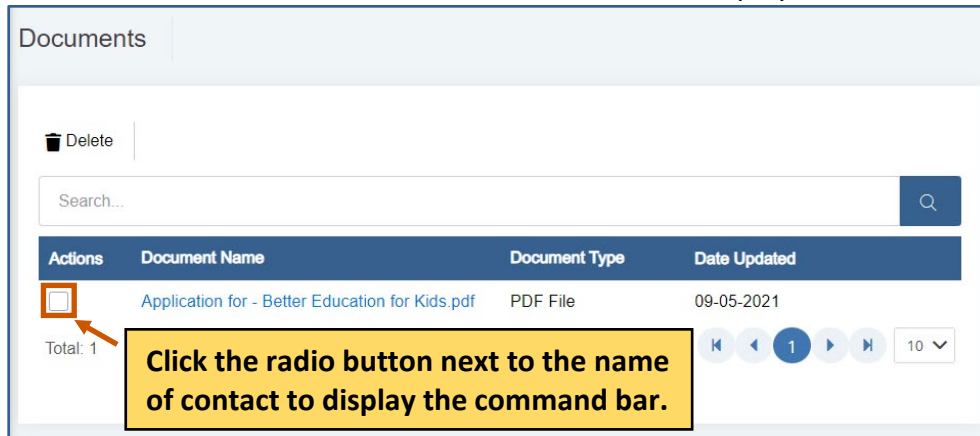



2. Click **Choose File** .
3. Upload the file.
4. Click **Save** . The file appears in the grid.

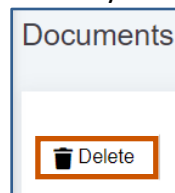


Delete a Document

1. Click the radio button next to the name of document to display the command bar.



2. Click **Delete** . A message popup asks if you are sure you want to delete the document.



3. Click **Yes**. The document is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each document you wish to delete.

