



SOVEREIGN EQUITY FUND

Foundant Application Tutorial

The Sovereign Equity Fund (SEF) uses Foundant as its software provider. This tutorial goes through the essential steps to take in the Foundant system to apply for a grant with SEF, including how to make an account, navigate your Foundant dashboard, print the application, and copy answers from previous applications.

What internet browser should applicants use while using Foundant (SEF's Grant Portal)?

- [Google Chrome](#) - most recent version is recommended for all users (especially if using a Mac)
- [Safari](#) 16 or higher.
- Internet Explorer and Internet Edge are not supported, so we highly recommend using a different browser.

Tutorial Guide:

1. How to Create an Account
2. How to Apply
3. Your Dashboard
4. How to Print Your Application

Note: If you need to move back and forth through forms, please use the **Next** and **Previous** buttons at the bottom of the screen. Do **not** use the back/forward buttons in the browser.

1. CREATE NEW ACCOUNT:

Video Tutorial 1: Site Access & Account Creation

<https://drive.google.com/file/d/1O2-rkkxy9iQ1WLx2LKaBYr9LgFoXfaqt/view>

- Creating a new account is a multi-step process ...
 - Collect **Organization Information**
 - Collect **User Information**
 - Collect **Signing Authority Information**
 - Create a **Password**

- Organization Information
 - Enter information relevant to the **applying** organization, such as address, phone number, and organization email. These items can be edited later if needed.
 - Click the **Next** button to move to **User Information**

- User Information
 - User information is information relevant to YOU, the applicant. Note that the email address entered will become your **username** in the Foundant system.
 - If your address is the same as the applicant organization, use the “**Copy Address from Organization**” button to automatically pull the address information from the organization address fields into the address fields in this section.
 - Once the fields on the “**User Information**” section are completed, click on the “**Next**” button to move to **Signing Authority**.

- Signing Authority
 - The Signing Authority is the member of the applicant organization that is able to sign official documents and agreements.
 - If you are the Signing Authority, select “**Yes** to update optional fields that include mobile phone number, a second address (if applicable), and country. Note that SEF only funds organizations based in the U.S.
 - If you are not the Signing Authority, select “**No**” to add information for the Signing Authority such as name title, email, phone number, and address.
 - Once the Signing Authority information is entered, click on the “**Next**” button to create a password.

- Password
 - Finally, enter the password for the applicant.
 - Password requirements are listed at the top of the section, so the applicant can create their password accordingly.

Once the password is created, click the “**Create Account**” button.

EMAIL CONFIRMATION:

Upon clicking “**Create Account**” button, you will be taken to the Email Confirmation page to confirm that you are receiving emails from the system. Follow the onscreen instructions and click the “Continue” button to finish the registration process. Now you have an account in this system. Remember, this is an account that you will use for present and future applications.

2. Applying for Funding:

VIDEO Tutorial 2: Applying for Funding

<https://drive.google.com/file/d/1cmTa7Hmacg4pqJpn5Xo92vp3RzRxfoeS/view>

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them. To start an application, click on the blue “**Apply**” button under the opportunity you’d like to apply to. Clicking this will immediately begin the application.

Helpful Notes:

- You can preview the application without having to save any work by clicking on the “Preview” button. You can also access a PDF copy of the full application on SEF’s website.
- You may collapse question groups as you go by clicking on the grey headers within the application. This is useful as both an indicator to yourself that you’ve completed that section and to reduce scrolling.
- Once an application has been submitted you can no longer edit it.

Work your way through the form responding to the fields.

- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application. The form will not allow you to submit until all questions with asterisks have been answered.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- Some fields have character limits.
 - Responses that are longer than the set limit will be saved, **but** an error message will appear informing the applicant the limit has been exceeded.
 - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file per question.
 - Upload areas have size limits listed within the question.
 - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
 - Upload fields may also have File Type restrictions.
 - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable, and you will not be able to upload the file.
 - Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.

- The application does have an auto-save feature, but you may manually save by clicking the “**Save**” button at the bottom of the form.
 - When you click “Save” you are taken to a confirmation page, so you know the save was successful.
 - If you click “**Continue**” you will be taken back into the form so you can continue working.
 - If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
 - Pick back up where you left off by clicking “**Edit**” link to the right of the request.
- If necessary, you may formally abandon the application by emailing grants@SovereignEquityFund.org

When all of the fields are complete, submit the application.

- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
 - An error message appears listing the fields that need to be completed or edited.
 - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
 - When you click “**Continue**” you are taken to your dashboard where you can press the “View” button to look at your submitted application.

Required Uploads:

To assist you in preparing your application please be prepared to provide the following documents in your application prior to submission.

- € Eligibility Information
- € Resumes
- € Budget Template (Excel)
- € Budget Template (PDF)
- € Budget Narrative
- € Governing Body
- € Cover Letter
- € Support Letter #1 (optional)
- € Support Letter #2 (optional)

3. Your Applicant Dashboard

Video Tutorial 3: Your Applicant Dashboard

<https://vimeo.com/user38479606/review/218825690/21ea160857>

The Dashboard is the landing page for any user logging into the site. Underneath their contact information applicants will see *Active Requests*. The Active Request displays projects that are being applied for, as well as previous projects that have been funded (if applicable).

Applicant Dashboard

Public Profile

Applicant:
Mrs. Elder Good Saver
[Redacted]
555-555-5555
1234 Seed Saver Ave
[Redacted]

Organization:
Tribal Seed Saver
44-4444444
555-555-5555
1234 Seed Saver Ave
Spokane, WA 99205 USA

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

Active Requests **1** | Historical Requests **0**

Save Tribal Seeds

Process: Example Process

LOI	Submitted	05/07/2019	View LOI
Decision	Undecided		

- You may continue working on saved forms by clicking the “Edit” option next to the form.
- You can also see the request’s decision status.
 - The status will be “Undecided” until the site administrator posts a decision.
 - Timing on decision status updates vary.

If your request is approved, you will be assigned Follow Up Forms such as quarterly updates and final reports to be completed and submitted through the system.

4. Printing Your Application

Foundant allows users to download and print their application any time. This is great for record keeping or sharing with others as you work on the application. When in the application, press the

 button in the top right and a PDF copy of the application will automatically download.