ClubGRANTS

Club User Manual

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1.0 Getting Started

1.1 How to create a new account

- Visit https://www.clubgrants.com.au/
- Click on Login/Sign Up https://www.clubgrants.com.au/user/login
- Click on Create New Account https://www.clubgrants.com.au/user/register
- Complete the Club and LGA User Registration section on the right-hand side
- Click on the ‘Create new account’ button
- Your submission has been sent; somebody from ClubsNSW will be in contact with you shortly to provide login details
- Login
- Accept/Reject the ClubGRANTS Online Terms & Conditions

1.2 How to log in to an existing account

- Visit https://www.clubgrants.com.au/
- Click on Login/Sign Up https://www.clubgrants.com.au/user/login
- Fill in your email, password and math question and click on the ‘Log in’ button

1.3 How to reset your password

- Visit https://www.clubgrants.com.au/
- Click on Login/Sign Up https://www.clubgrants.com.au/user/login
- Click on Reset your password
- Fill in your email and math question and click on the ‘Submit’ button
- Further instructions have been sent to your email address
- Click on the link and follow the prompts to setup a new password

1.4 How to update your account/club details

- Login to ClubGRANTS Online https://www.clubgrants.com.au/user/login
- Click on the Your Account tab
- Click on Settings from the drop-down list
- Update the Address & Website, Primary Contact and/or Secondary Contact sections
- Click on the ‘Update Contact Details’ button
- Contact details have been updated

1.5 How to change your username(email) or password

- Login to ClubGRANTS Online https://www.clubgrants.com.au/user/login
- Click on the Your Profile tab
- Click on Edit User Account from the drop-down list
- Update the required sections
- Click on the ‘Save’ button
- The changes have been saved

1.6 How to view existing users

- All users associated with your club’s account will be listed here

- To have a user removed, please contact ClubsNSW

1.7 Manage invited users

- To invite another user to have access to your club's account, click on the Your Profile tab
- Click on Settings from the drop-down list
- Scroll to the bottom of the page and click on the 'Add a user' button
- Fill in the required details
    - Role types:
        - Admin – All access levels, including inviting other users (most common)
        - User – Unable to invite other users
    - If the user's email address is already associated with another ClubGRANTS Online account, an error message will display and adding a user was not successful
- The user has been invited and further instructions have been sent to their email address
- Once the user accepts, you will see their details under the View Existing Users section
- If the user does not receive an email, please contact ClubsNSW to manually add the user

1.8 Your venues

- If you are the parent club of a group of clubs, then your child club(s) will be listed here
- To add a child club to your parent club's account, please contact ClubsNSW
- Click on the 'Switch to club' button next to each venue to swap between venues

1.9 How to get help via the *Contact Us* tab

https://www.clubgrants.com.au/form/clubgrants-contact

- Click the Contact Us tab
- Complete the form to contact the ClubsNSW' Member Enquiries Centre (MEC) with any enquiries you may have related to your ClubGRANTS Online account
    - This page should be used to contact ClubsNSW about any technical issues you may have with the ClubGRANTS Online system
- Click on the 'Send message' button and a member of the team will get back to you with 24 hours, Monday to Friday
    - A copy of the email will also be sent to you for reference

1.10 How to get help via the *Help* tab

https://www.clubgrants.com.au/faqs

- Click the Help tab
- Navigate this page to find most frequently asked questions and useful resources
- If you are unable to find your answer, click the 'Email' or 'Call MEC on 1300 730 001' button to get in touch the MEC

1.11 How to logout

- Click on the Your Profile tab
- Click on Logout from the drop-down list
- You are now logged out of ClubGRANTS Online

2.0 Grant Rounds Tab

2.1 How to create a new grant round

- Login
- Click on the Grant Rounds tab
- Click on the 'Create Grant Round' button
- Step 1 Grant details
    - Update the required sections
        - Sections with an * are mandatory
        - Name – Name of the grant round which will display to organisations
        - Description – This section will display to organisations when searching for and applying to the grant round. Consider including any relevant information for the organisation to consider
        - Grant Category – Category 1 & 2, in – kind and out of scope categories available
        - Local Area Priorities – For category 1 grant rounds: if your local area priorities are available, select them from the list to display to organisations when searching for the grant round. If your local area priorities are not listed or you do not wish for these to display, this section does not need to be filled out
        - Special Instructions – Considering including any additional information, like contact details
        - Use Custom Identifier – Tick this box if you would like to use your own naming convention
            - Example: Fairfield council may want prefix FC and suffix 20, so all applications will be in order FC120, FC220, FC320…
        - Organisations will not be able to apply to the grant round during this time
- Click on the 'Next' button
- Step 2 Review questions
    - Mandatory questions marked with * cannot be removed or amended
    - Click and drag custom project questions to rearrange the order they appear in
        - Click on the '+ Add custom project questions' button on the Project Details and Funding Details Sections to add additional questions to the application form
            - Your question: add your question here
            - Question type: choose from various question formats and click on the 'save' button
                - Example – if you would like organisations to have the ability to attach documents to the application form, add the 'file' question type – Add Financial Reports or additional documents here:
            - Add help text: tick the box to add help text to the question
            - Mandatory question: tick the box to make the question mandatory
    - To view how your application form will appear to applicants, save the grant round, and use the preview button

        - The green preview icon is located in the dashboard on the Grant Rounds tab and can be used to preview a grant round before it goes live
    - Application forms cannot be amended once a grant round is live
- Click on the ‘Next’ button
- Step 3 Grant administration details
    - Review/ update the required sections
    - Hide payment method required for this grant: tick the box if you wish to remove the payment section from the grant round
        - Example – remove payment section for in – kind applications
    - Enabled: Enable this grant round so that it appears in grant search results and accepts applications between the start and close dates
    - Display Before Open: If checked, the grant round will be displayed in search for 3 months before it is due to go live but will not accept applications outside the open and close date range. Note that this field requires the round to be enabled.
    - Save: click on this button to save the application
    - Save & close: click on this button to save your progress and exit the application form

2.2 How to edit application forms

- The green edit icon is located in the dashboard on the Grant Rounds tab and can be used to edit grant rounds before they go live
- The icon can be used to amend opening and closing dates at anytime
- Application forms cannot be edited once an application have been received to that round
- The icon will not display for rounds which you are not the grant round owner of i.e. council run rounds

2.3 How to preview grant rounds

- The green preview icon is located in the dashboard on the Grant Round tab and can be used to preview a grant round before it goes live

2.4 How to archive grant rounds

- The yellow archive icon is located in the dashboard on the Grant Round tab and can be used to archive grant rounds
- Archiving grant rounds removes the grant round from view and does not permanently delete the grant round
- Click on the ‘View archived grant rounds’ button to view and restore grant rounds

2.5 How to review/approve applications

- Click on the grant round name in the Grant Round column to display applications within that round
- ‘Total requested amount this grant year’, ‘Total funded amount this grant year’ and ‘Total number of applications this grant year’ boxes will populate as applications are received and funded
- Grant round link: Copy this link to share on social media/website, in newsletters, advertising, etc.
    - This link will not display until the grant round is live, except in the instance that the ‘Display before open’ box has been ticked

- Click on the ‘Request export’ button to download an excel export of applications received
- Your export has been queued and will be available shortly
    - The download will occur in the background of the system, continue to review applications, or refresh the page after a few minutes for the export to appear
    - Grant rounds with a large amount of applications (100+) may take longer to load
- Click on the ID or Title of the application to review the application
    - Review the application form
        - Contact details for the organisation are listed on the left-hand side, at the top of the application form
        - Scroll down for the body of the application form
    - Application status:
        - New – default status
        - Under review – change the status to under review to let organisations know the application is being reviewed, no email notifications will be sent to the organisation
        - Approved – change the status to approved for approved applications
            - Approving an application will not trigger an email to the organisation for category 1 & 2 grant rounds, an email will trigger when funding is added
            - For category 1 & 2 in – kind rounds, approving an application will trigger an email to the organisation, a second email will not trigger when funding is added
                - Refer to the Your Emails tab for email templates and more information on when emails will trigger
            - Approving an application will allow an organisation to upload a progress report and/or acquittal
                - Organisations will not be able to upload a progress report and/or acquittal if an application is not approved on the system
        - Add Funding – when the status is approved, an ‘Add funding’ button will appear.
                - Click on the ‘Add funding’ button
                - Add the amount of funding being provided
                - Click on the ‘fund’ button, an email will trigger when funding is added
                - More than 1 club can fund the same application, an email will trigger when funding is added from each club
                - The funding amount can be more, less or equal to, the amount requested by the organisation
                - When funding is added, the application will also add funding details to the Expenditure tab
            - Withdrawn – change the status to withdrawn if an applicant requests for their application to be withdrawn
                - Applicants can also withdraw their own applications
            - Finalised – change the status to finalised once an acquittal has been provided and the reporting process is completed

            - Unsuccessful – change the status to unsuccessful for rejected/ unsuccessful applications, an email notification will be sent to the organisation
    - Purpose of funds:
        - Should the applicant select the incorrect purpose of funds option, you can modify it here
    - Add a new file/ Attached files:
        - Clubs and committees can upload and attach documents to application forms by clicking on the 'Choose files' button
            - Example: Attach a customised 'Letter of Offer' to the application form for successful applications. Advise the organisation of the documents by adding in a line to your Approved email template i.e. Refer to the Attached Files section of your application form for additional information
            - Example 2: Attach a 'Helpful Tips' document to unsuccessful emails to help organisations achieve success next time. Advise the organisation of the documents by adding in a line to your Unsuccessful email template i.e. Refer to the Attached Files section of your application form for helpful times for next time
            - All documents uploaded to this section are visible to both the club and the organisation
            - Committee feedback, assessment forms, etc. should not be uploaded here
        - LGA Recommendation: Refer to 'Assessment Process' below
        - Comments: Refer to 'Assessment Process' below
        - Click on the 'Save' button
        - If an organisation attaches documents to their application form, the documents will appear here
        - When an organisation submits a progress report or acquittal form, the documents will appear here
    - Email Log
        - An email log is included at the bottom of each application form
- Click the Organisation name to view previous activity on ClubGRANTS Online from this organisation

2.6 Assessment Process

- To commence the assessment process, the club should change the status of all eligible applications to 'under review' while the assessment process is being worked through. For grant rounds run by the LGA, the convenor should change the status on behalf of the committee
    - Club Assessment
        - Click on the ID or Title of the application to view the application
        - Review the application form
        - Rank the application by selecting high, medium or low from the 'LGA Recommendation' drop down list, this will not be visible to the applicant
        - The 'Comments' section is available to leave feedback on the application, this will not be visible to the applicant

    - Committee Assessment
        - Click on the ID or Title of the application to view the application
        - Review the application form
        - Right click on the ID or Title of the application to view the application in a new window – this will allow you to view both the application form and assessment form at the same time in two windows as you are completing the assessment form
        - Click on the 'Add Assessment +' button in one window
        - Complete the required sections on the assessment form
        - The 'Special Conditions/Feedback for Committee' and 'Feedback for Applicant' sections will not be visible to the applicant
        - Click on the 'Save' button
        - Click on the ID or Title of the application to view or edit the assessment
        - Assessments from other members of the committee will appear under the Assessments section once completed by the committee member(s)
        - LGA Recommendation: column will populate an average based off the group average ranking

2.7 How to download PDF (PDF format, individual application)

- Click on the ID or Title of the application to view the application
- Click on the 'PDF' button to download a PDF copy of the application

2.8 How to export grant rounds (Excel format, all applications)

- From the Grant Round tab:
    - Click on a grant round title to open the round
    - Click on the 'Request export' button to download an excel export of applications received
    - Your export has been queued and will be available shortly
        - The download will occur in the background of the system, continue to review applications, or refresh the page after a few minutes for the export to appear
        - Grant rounds with a large amount of applications (100+) may take longer to load

2.9 How to view a progress report/acquittal

- From the Grant Round tab:
    - Click on a grant round title to open the round
    - Click on the ID or Title of the application to view the application
    - The progress report or acquittal display in the Attached Files section
    - Section on the progress report and/or acquittal
- Applications with a Progress Report submitted will display a yellow tick in the Acquittal column on the dashboard
- Applications with an Acquittal submitted will display a green tick in the Acquittal column on the dashboard, the grant round owner will also be notified via email when an acquittal is submitted

- Applications without a Progress Report or Acquittal submitted will display a red flag in the Acquittal column on the dashboard

2.10 How to send acquittal reminder email

- From the Grant Round tab:
    - Click on a grant round title to open the round
    - Find the application and click on the red flag icon
    - A pop up will display, click on the 'Send acquittal reminder email' button
    - Follow the prompts and click on the 'Confirm' button
    - Email reminder sent

3.0 My Applications Tab

3.1 How to filter applications

- From the My Applications tab:
    - Use various filters to sort applications

4.0 Expenditure Tab

4.1 How to add a manual expense/create new entry

- If your club or committee agreed to fund an application which wasn't received via the online system, a manual expense can be added here
- Click on the 'Create New Entry' button
- Enter the expense details
- Click on the 'Create expenditure' button to add the expense

4.2 Yearly expenditure

- Here you can access a list of your club's approved and manually entered allocations
- Click on the year to access that gaming year's information
    - Grant Category: filter allocations by grant round
- Click on the 'Request export' button to download an excel export of allocations

Your export has been queued and will be available shortly

4.3 MAXsy End of Year Reporting (coming soon…)

5.0 Your Emails Tab

5.1 How to select email template type

- Select an email template type from the drop-down list
- Each email template can be customised with content, email replacement tokens and logos.
- After you customise and save your template, the system will automatically issue the relevant email once it has been triggered.
- If you do not wish to customise templates, the default templates will be sent.

5.2 How to use email replacement tokens

- Select an email template type from the drop-down list
- Click on ‘View email replacement tokens’ to view available tokens
- Replacement tokens can be used in the 'Template subject' and 'Template email body' fields
- Copy and paste the email token into your custom email template to use the token
    - Example: use [club:name] and [expenditure:amount_funded] to include the club name and the amount the club has funded an application
    - [club:name] would like to congratulate you on your successful application for [expenditure:amount_funded]

5.3 Automatic Email Triggers

- Trigger List
    - From the Your Emails tab, scroll to the table below the ‘Select email template type’ filter to view a chart of automatic email triggers
    - A description on when each automatic email will trigger can be found for each available email template
    - Automatic emails cannot be turned off