# The Colorado Trust Grants Portal Manual

*Updated 2025 – for external purposes*

## Purpose

This manual provides instructions on accessing and navigating The Colorado Trust's application and grants system managed by Fluxx. Please contact us with any questions you may have.

## Table of Contents

## Registering for the Portal

Individuals must use this link to register for the portal to access their organization's content. Upon registration submission, you will receive a verification email to activate your profile and set up a password login. Registrations can take 5-7 business days to get approved. Once approved, you will receive a final confirmation email. Please check your spam folder for this email.

## Logging In

Our grants portal website can be accessed at this link. When logging in for the first time, you must reset your password using the "Forgot Password" link on the landing page. The email may take a few minutes to arrive.


## Navigating the Portal

The left sidebar, categorized into the various stages of the grant process, allows navigation through the grants portal.

You can reset your password by selecting the settings wheel at the bottom left of the landing page. The left navigation bar (described below) explains each stage of the application process.

**REQUESTS**

- Draft: The application is saved but not submitted.
- In Review: Once you apply, view a read-only version here. The Colorado Trust is reviewing the application.
- Sent Back: Colorado Trust staff will contact you with any questions about your application or to request a revision. Once you re-submit your application, it will return to "submitted" status.
- Agreement Pending: The grant has been approved for grant agreement. The agreement will be created and routed for signatures.
- Declined: The application has been declined.

- Withdrawn: The applicant withdrew the application.

**GRANTS**
- Active: After executing a grant agreement, you can find a read-only version of the application and supporting documents here.
- Closed: All closed grants are available here. A closed grant requires that all reports have been approved and payments made.
- Terminated: The application has been terminated early.

**GRANTEE REPORTS**
- Scheduled: Reports (to be submitted) for all active grants appear here until submitted.
- Submitted Reports: Once you have submitted a report, you can view a read-only version here.
- Sent Back: Colorado Trust staff will contact you with any questions about your report or to request a revision. Once you re-submit your report, it will return to submitted reports.
- Approved: Reports reviewed and approved are available here.

**PAYMENTS**
- Scheduled: Scheduled payments for all your active grants appear here until they are paid.
- Paid: The payment record appears here once a payment has been made.

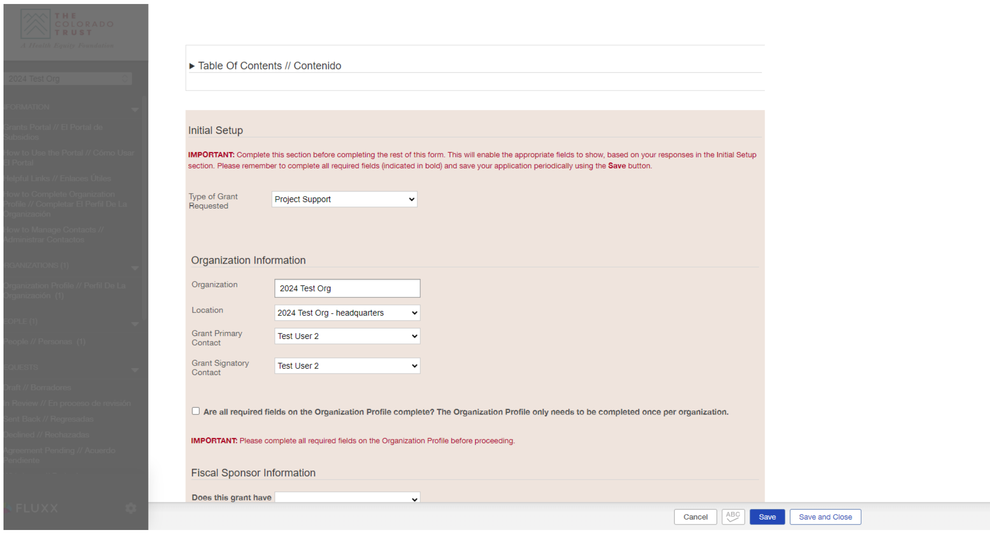
NOTE: When done editing, always “Save” your application by clicking the green button at the top right before returning to the main page. This ensures you can return to continue editing. Only click the “Submit” button when the page is complete.

Please review your information carefully before submitting it, as you cannot edit it once it is submitted. Your application(s) and reports will remain in “Draft” status until you click the “Submit” button.

Submitted applications and reports will be reviewed, and if we have questions, a Colorado Trust staff member will contact you. Return to this portal anytime to check your submission’s status.

## Submitting a Request

Please select the correct request link on the grants portal landing page to submit a request. The application will open directly in the same window. When completing an application, you can save and return to your application later, which can be accessed as a draft under the “Requests” tab.

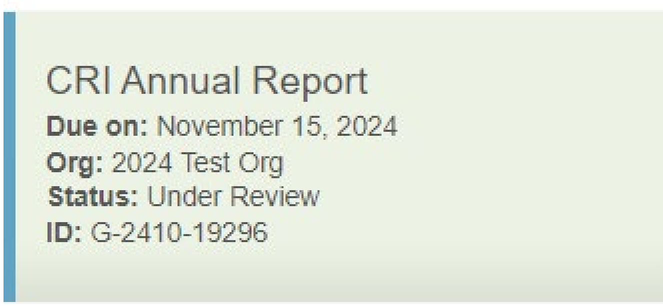



## Submitting a Report

Scheduled reports are available on the left-hand navigation panel under “Request Reports.” The report will directly open in the same window. When completing a report, please note that you must fill out the required questions before you can save and come back. Once submitted, your report will appear in the “Submitted” subsection and will display the status.

The following auto-emails will be sent to the primary contact:

1. Report is due in 28 days;
2. Report is due in 14 days;
3. Report was sent back to grantee;
4. Report was received; and
5. Report was approved.



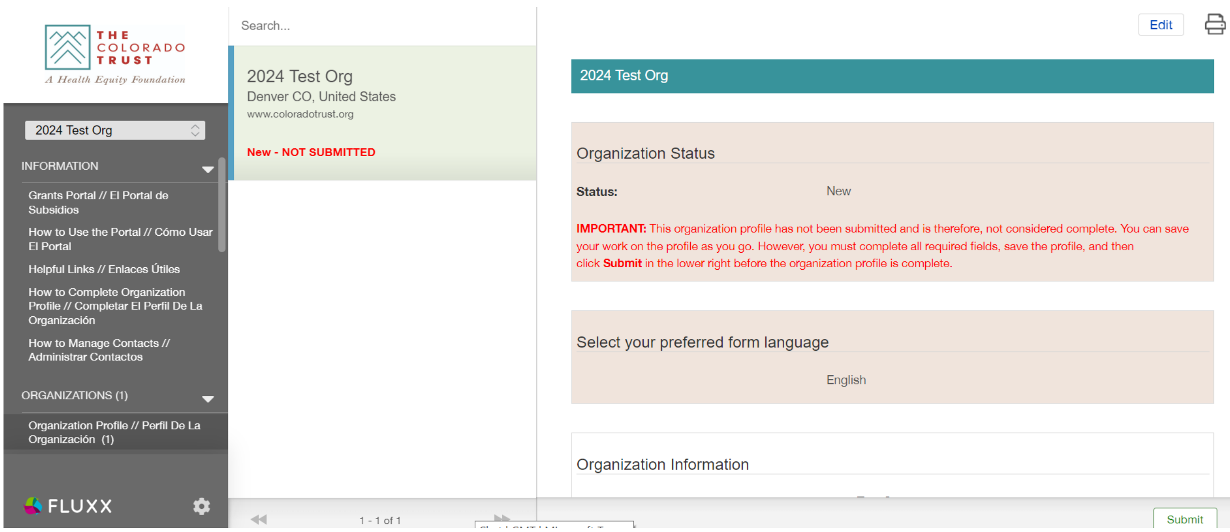

## Organization Profile

The organization profile requests general information about the applying organization, so applicants do not need to provide this information in every application. We ask that all organizations keep this information up-to-date annually and will specify when this profile is required for our application review.

After logging in, use the menu on the left-hand side of the screen to navigate through the portal.

- Instructions on how to complete the organization profile can be found under the "Information" tab.
- The Organization Profile page can be found under the "Organizations" tab.
- To edit your organization profile information, click the "Edit" button in the top right-hand corner of the screen.
- After clicking the "Edit" button, enter the requested information in each section.
- Select your preferred form language (English or Spanish). If selecting Spanish, please save the form after selecting "Español."

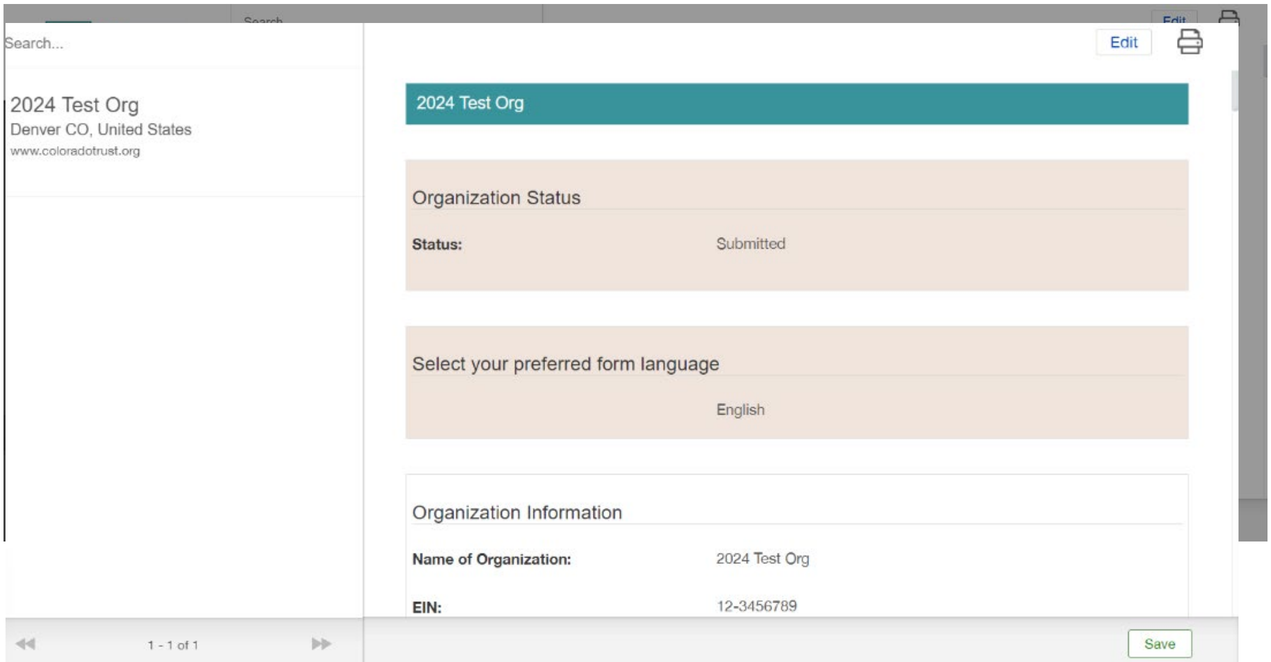
TIP: Periodically hit the "Save" button to ensure no information is lost. When you are finished entering information, click on the "Save and Close" button. Both buttons are found in the bottom right-hand corner of the screen.




After entering all organization profile information, follow these steps to submit your profile to indicate it is complete.

- On the Organization Profile page, click the "Submit" button in the right-hand corner of the screen.
- A pop-up window will indicate that you are about to submit your profile. Click the "OK" button.
- After hitting "Submit," you should no longer see the "New – Not Submitted" text in red below your organization name. The status will instead now read "Submitted."

TIP: You can still edit this page if necessary. To make any updates, follow the steps above to edit the organization profile.




## Managing Contacts

You can update and edit your organization's contacts. New contacts can access the grants portal. A contact will receive email communications on behalf of your organization if they are designated as one of the following contact types:

- **Organization Primary Contact:** This is the contact person for Corpay, our payment processing system. This person and their information may be updated within the organization profile section of the portal. This person receives auto-email communications about grant payments.
- **Grant Primary Contact:** This is the contact person for the designated grant application. This person and their information may be updated within the grant application itself. This person receives auto-email communications about the designated grant.
- **Grant Signatory:** This person signs the agreements for the designated grant application. This person and their information may be updated within the grant application itself.

After logging in, use the menu on the left-hand side of the screen to navigate through the grants portal. Instructions on how to manage contacts are under the "Information" tab, and the Contacts page is under the "People" tab.

**Enable Moderator Permissions**

You must designate yourself as a moderator for an organization before you can manage, update and edit the organization's contacts. Follow the instructions below to enable your moderator permissions for yourself or another person.

1. Click the "People" tab from the menu to the left.
2. If more than one contact is listed, select the contact who needs moderator permissions.
3. In the organization section for that person, check the Moderator box next to the organization's name.

These steps can also be completed from the “All Contacts” section of the Organization Profile.

**Add a New Contact**
Before creating a new contact for your organization, follow the above instructions to enable moderator permissions for yourself. Once you are a moderator for an organization, follow the instructions below to add a new contact:

1. Click the “People” tab from the left-hand menu.
2. Click “Create New” in the lower right corner.
    - NOTE: If you do not see this button, this means you have access to multiple organizations and have not selected which organization you want to create a contact for. Use the dropdown at the top of the left-hand menu to select the organization for which you need to create a new contact. Then, refresh the page.
3. Fill in all required fields.
4. Click “Save.”

The newly created contact will automatically receive an email invitation to the portal.

**Archive a Contact**
While you cannot delete contacts, you can archive a contact’s relationship with your organization to prevent them from accessing the grants portal. Follow the instructions below to archive a contact:

1. Click the “People” tab from the left-hand menu.
2. If more than one contact is listed, select the contact you want to archive.
3. In the organization section for that person, click “Archive” next to the organization’s name. If an alert pops up, read it carefully and then click “OK.”

The archived contact will lose access to your organization in the grants portal unless you un-archive them. These steps can also be completed from the “All Contacts” section of the Organization Profile.

**Edit a Contact**
You can edit any contact information within your organization. Note that only moderators may edit all users, not just their own.

1. Click the “People” tab from the left-hand menu.
2. Select the contact you want to edit if more than one contact is listed.
3. Click “Edit” in the upper right corner.
4. After updating the person’s contact information, click “Save” in the lower right corner.

## FAQs

**What types of organizations are approved for the grants portal?**
As a private foundation, The Colorado Trust will approve organizations eligible for funding, including (but not limited to) public 501(c)(3) charities, other private foundations, educational institutions, social enterprise or for-profit companies with a charitable purpose, and government entities. If your organization is not approved for the grants portal, please contact us for more information.

**How do I check if I’m already in the grants portal?**
Individuals may reset their password using the email they may have registered with. Please check your spam folder for the reset link. If uncertain, contact us for assistance.

**How many contacts can be linked to an organization?**
There is no limit to the number of contacts added to an organization, but we recommend limiting who has access to ensure your contact list is kept up to date.

**I should be receiving email communications from the portal, but I am not.**
Please check your spam folder for communications from our system. Emails will come from a do-not-reply email address. If you have further issues, please contact us.

**How do I track pending payments in the grants portal or change my payment information?**
All payment communications will come to your organization's primary contact, so please ensure your contact and mailing address is current. You will be able to see any scheduled or paid payments in the "Payments" tab. For details on your payments and to update your preferred method of payment, please visit Corpay, our payment processing system, for details.