

# First Source FCU Online Application Tutorial



**First Source**  
Live Smarter.

# About

## Online Application Portal

For your convenience, you will now be able to login with your own user name and password to First Source's Community Giveback Portal and build a profile for your organization where all community requests will filter through. You will be able to check request status, place multiple requests and edit your profile as needed.

Link to start a new donation application can be found on the First Source webpage:

<https://www.fsource.org/Givesback>

### Helpful Tips:

Limit your use of bullets and other formatting

Copy and paste as needed

Add [mail@grantapplication.com](mailto:mail@grantapplication.com) to your safe senders list to ensure you receive all system communications.

*Please note, we do not give to political or religious affiliations or personal fundraisers. Your completed form request does not constitute an immediate approval. Our Community Donation Committee will review your request, ensuring alignment with our filters and allocated budget. Please allow 30 days for review, 60 days for fulfillment.*



# Application Log-In Page



This is the application login page. Here you will either need to create a new account (if new applicant) or use your existing login if you have created an account previously. It is imperative that you use your functional and monitored e-mail address as your login e-mail.

## Please Sign In

- If you have an account, please log in using your E-mail Address and Password.
- First time applicants, please use the "New Applicant" link found below.

E-mail

pway@fsource.org

New Applicant?

Password

••••••••

Forgot Password?

Login

If you are a first time applicant, select **New Applicant** to create an account.

If you are a returning applicant, enter your Email/User ID and Password and click **Login**.

If you forgot your password, use the **Forgot Password** function to have it sent to the email address on file.



# Eligibility Question



Please note, we do not give to political or religious affiliations or personal fundraisers. We strive to get involved with causes that offer an educational component or benefit. Your completed form request does not constitute an immediate approval. Our Community Donation Committee will review your request, ensuring alignment with our filters and allocated budget. Please allow 30 days for review, 60 days for fulfillment.

Does your organization serve Herkimer and/or Oneida County?

-Select One- ▼

Submit

Qualifying Question

Please Note: The question above is to ensure you meet the basic criteria to receive funding. If your organization does not serve Herkimer and/or Oneida County, First Source cannot entertain your request and you will not be able to proceed.



# Organization Information

1

Before You Begin

2

Organization Information

3

Contact Information

4

Request Information

## Organization Information

\* Required before final submission

### General Information

\* Organization Name

\* Address

\* City

\* State

- Select One -

\* Zip Code

\* Phone

Fax Number

This is the actual application page where you will enter in the information for your application.

Each required field is identified by a red X and must be completed before the application can be submitted.



**First Source**  
Federal Credit Union



# Application Navigation

To navigate to the different pages of the application, you can click on the page numbers/descriptions.

1 Before You Begin

2 Organization Information

3 Contact Information

4 Request Information

5 Attachments

6 Review My Application

Organization Information

\* Required before final submission

Printer Friendly Version | E-mail Draft

If you want to print your application, click here.

If you want to email a draft of your application, click here.

# Attachments

1 Before You Begin

2 Organization Information

3 Contact Information

Required before final submission

Attachments

Sponsorship Packet

File Name	Uploaded	Size
<a href="#">Organization2018.pdf</a>	12/12/2018	162 KB

Remove

Or any other relevant attachments

Upload

Browse...

When you successfully upload a document, it will appear as in the example to the left. To see what you have uploaded, click the blue link to the document. To remove it, click the **Remove** button.

Here you will attach your supporting documentation for your request.

To upload an attachment, click on the **Browse** button to open a search window that will allow you to navigate to the location of the document on your computer.

Once you locate the document, click the **Open** button in the search window. You will see that the file location will appear in the browse field.

Finally, click the **Upload** button to attach the file to your application.

# Saving and Review

**Attachments**

\* Required before final submission

---

Attachments

Sponsorship Packet

File Name	Uploaded	Size
<a href="#">Organization2018.pdf</a>	12/12/2018	162 KB

Or any other relevant attachments

At any time during your application submission, If you wish to save and continue at a later time, you can click the link **"Save & Finish Later"**

If you close the application without saving it, your work will be lost.

When you have filled in each field and added all required attachments, you can click on **"Review & Submit"** to review your application before submission. You will still be able to make any needed changes.




# Application Review

1 Before You Begin

2 Organization Information

3 Contact Information

4 Request Information

 **Please correct the problems indicated below.**

- Project Title/Event Name is a required field.
- What are you requesting? is a required field.
- How will our contribution help the overall cause? is a required field.
- Type of Support is a required field.
- Request Amount is a required field.
- Project/event start date is a required field.
- Do we have an existing partnership? is a required field.
- Does your organization have a Membership with First Source? is a required field.
- Age Group(s) is a required field.
- Program Area is a required field.

You can review the information you've provided so far and make necessary modifications here. If you're satisfied with the contents of the application, click Submit to forward you Save & Finish Later.

Printer Friendly Version | E-mail Draft

\* Required before final submission

Welcome to our online donation and community request portal!

For your convenience you will build a profile for your organization and

**Before You Begin**

When you click on the “Review & Submit” button, if any of the required fields/documents are missing, you will receive the message above.

Helpful Tips

- Limit your use of bullets and other formatting.

# Save Application

Thank you. Your application has been submitted. You should receive an email confirmation shortly.

## Applications

Welcome to your "My Application Page". This is the area where you will manage your work.

1. Select in progress or submitted in the drop down.
2. If you select submitted, you can only view the applications that you have submitted.
3. If you select in progress, you will be able to continue working on your application.
4. To delete an application, simply select the garbage can next to it.

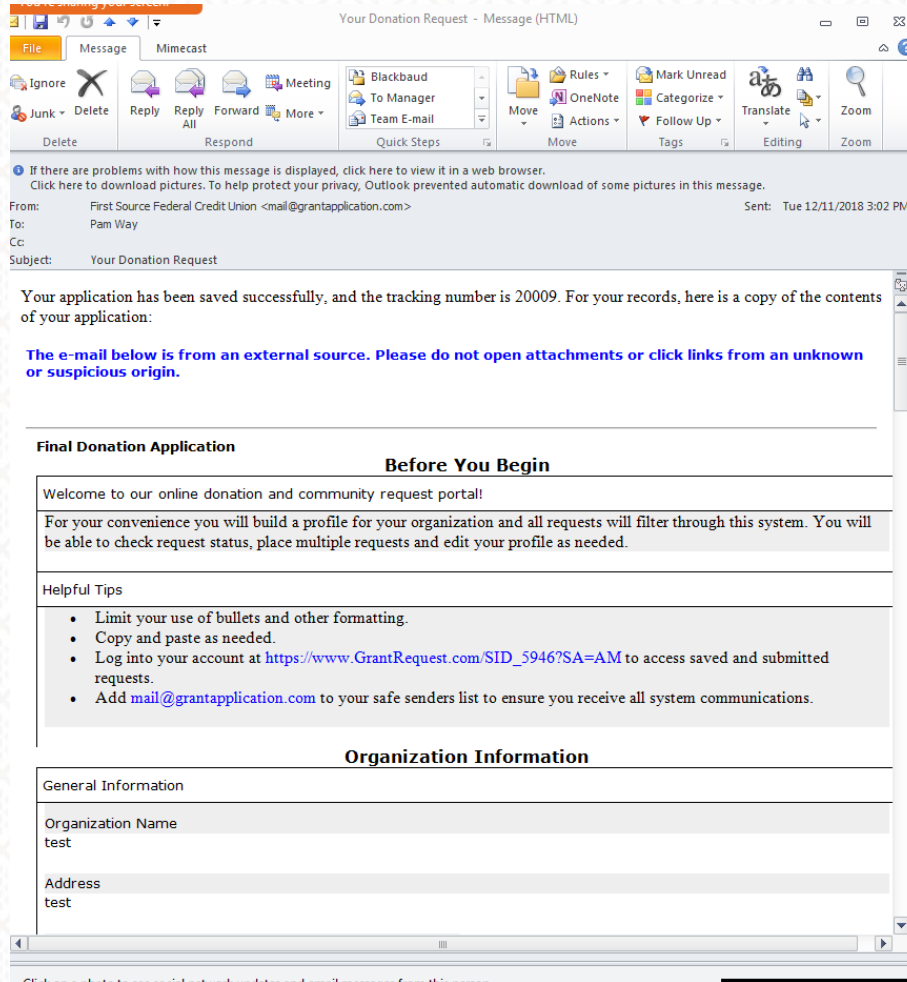
Show Submitted Applications ▾

Application Name	Project Title	Requested	ID	Submitted	Action
Final Donation Application	ghhm	500	20010	12/12/2018	
Final Donation Application	fhjy	100	20009	12/11/2018	
Donation Application	test	100	20007	8/13/2018	

When you click **"Save & Finish Later"** you will be taken to your grants management account.

You will have the ability to log back into your account and continue working on your application.

# Confirmation Email



You will receive an email with the following:

- A message stating your application has been saved successfully
- A copy of the contents of your application
- Helpful tips
- A link to log into your account



# Questions & Inquiries

If you have any questions about filling out the online application or the process, you may contact an employee in the Community department at:

[Community@fsource.org](mailto:Community@fsource.org)