

## GETTING STARTED

charity: water's Fluxx partner portal is the hub for managing all your charity: water grant proposals and reports.

In the portal, you can:

- View details and documents for all concept notes/proposals and grants
- View report due dates for open grants and submit upcoming reports
- Exchange documents with your Water Programs Officer or Grant Officer

### LOG-IN INFORMATION

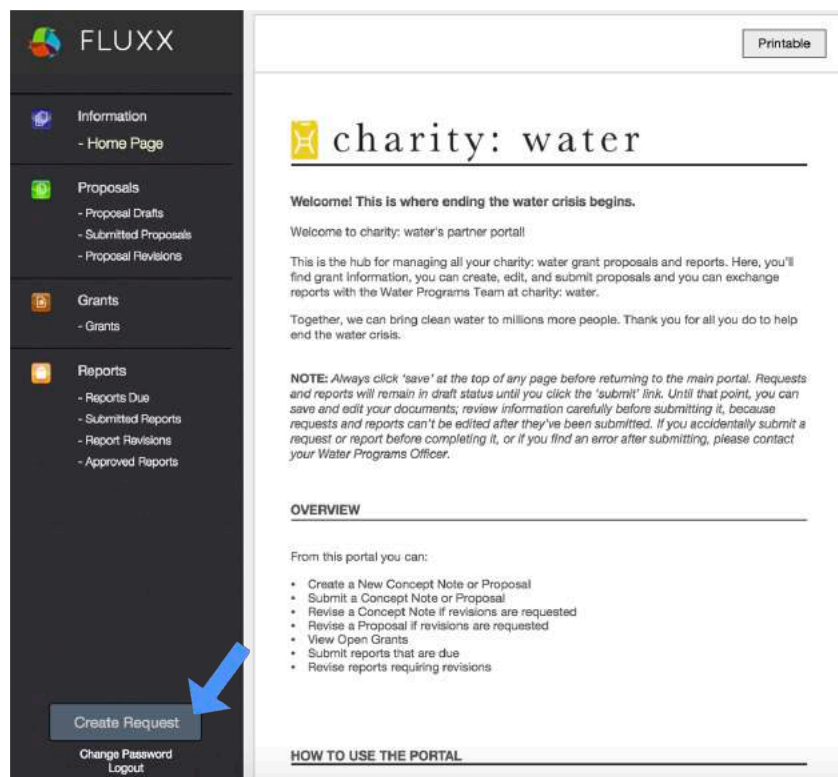
You can access Fluxx using the following link: <http://charitywater.fluxx.io>.

You will receive a username and password instructions from your Water Programs Officer or Grant Officer via email.

Your password can be changed by clicking on the 'Reset or create password' link on the home screen.

## SUBMITTING A CONCEPT NOTE OR PROPOSAL

To submit a new Concept Note or Proposal to charity: water, click on the 'Create Request' button on the home page of the partner portal.



The screenshot shows the Fluxx partner portal interface. On the left is a dark sidebar with a 'FLUXX' header and navigation menu items: Information (Home Page), Proposals (Proposal Drafts, Submitted Proposals, Proposal Revisions), Grants (Grants), and Reports (Reports Due, Submitted Reports, Report Revisions, Approved Reports). At the bottom of the sidebar is a 'Create Request' button, which is pointed to by a blue arrow, along with 'Change Password' and 'Logout' links. The main content area is white and features the charity: water logo, a 'Printable' button, a welcome message, a note about saving drafts, an overview of portal functions, and a 'HOW TO USE THE PORTAL' section.

**FLUXX**

Information  
- Home Page

Proposals  
- Proposal Drafts  
- Submitted Proposals  
- Proposal Revisions

Grants  
- Grants

Reports  
- Reports Due  
- Submitted Reports  
- Report Revisions  
- Approved Reports

Create Request

Change Password  
Logout

Printable

**charity: water**

Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you'll find grant information, you can create, edit, and submit proposals and you can exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

**NOTE:** Always click 'save' at the top of any page before returning to the main portal. Requests and reports will remain in draft status until you click the 'submit' link. Until that point, you can save and edit your documents; review information carefully before submitting it, because requests and reports can't be edited after they've been submitted. If you accidentally submit a request or report before completing it, or if you find an error after submitting, please contact your Water Programs Officer.

**OVERVIEW**


From this portal you can:

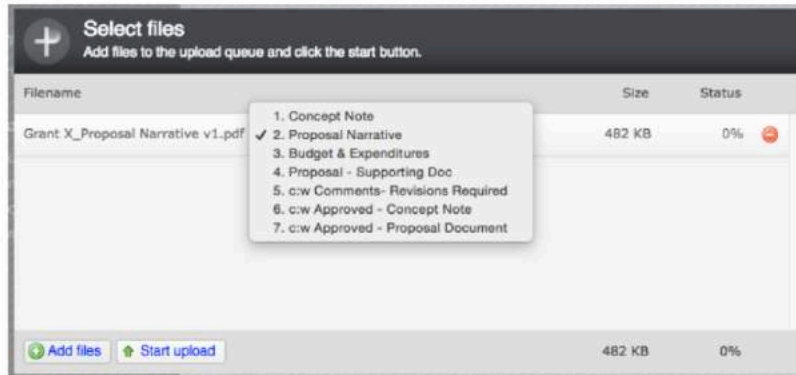
- Create a New Concept Note or Proposal
- Submit a Concept Note or Proposal
- Revise a Concept Note if revisions are requested
- Revise a Proposal if revisions are requested
- View Open Grants
- Submit reports that are due
- Revise reports requiring revisions

**HOW TO USE THE PORTAL**

This will open a new request page where you will enter the necessary information about the concept note or proposal in the **Organization** and **Program Information** sections.


**UPLOADING PROPOSAL DOCUMENTS**

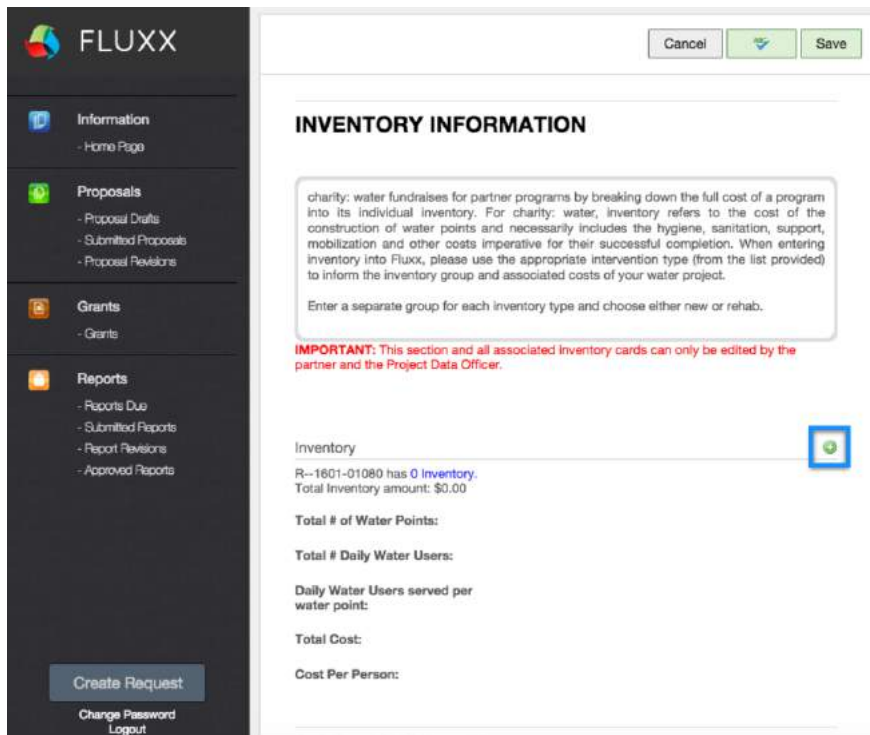
1. On the request page, click the green  button next to the **Concept Note/Proposal Documents** section.
2. Click **'Add Files'** to browse for the corresponding documents.
3. Assign the appropriate **document type label** (i.e. Proposal Narrative, Budget & Expenditures) to every document using the drop-down menu.



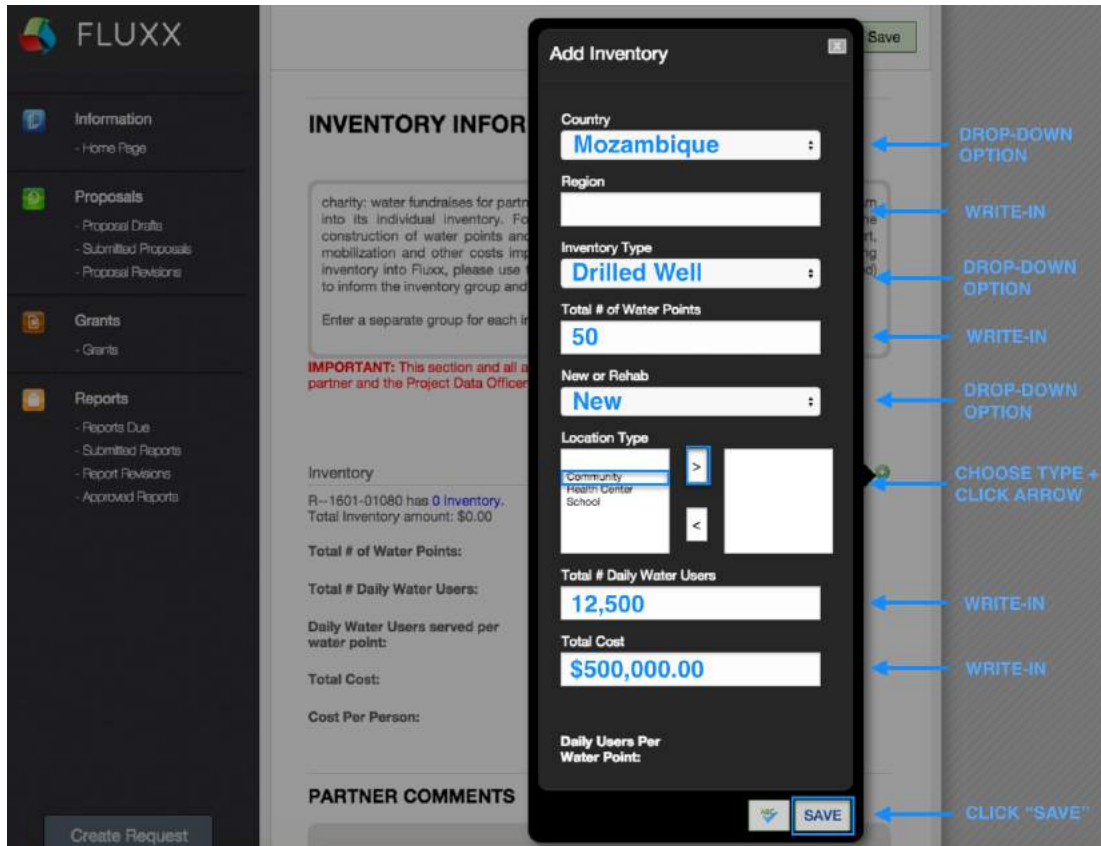
4. Click **'Start Upload'**.
5. This document will now appear under the corresponding proposal.

**ENTERING INVENTORY**

1. On the request page, click the green  button under the **Inventory Information** section.



2. Create an inventory group and fill in the necessary fields for each separate inventory type included in the Proposal Budget Detail and Water Points List tabs.
  - Note that “New” and “Rehab” of each technology should be entered as separate inventory types.



3. Click **'Save'** and repeat for each inventory type.

Please note that partners are responsible for entering inventory directly into Fluxx with the first submission of a proposal. In subsequent rounds of revisions, charity: water will make any updates to inventory as needed.

**SUBMITTING THE PROPOSAL**

When you've finished entering your proposal details and have uploaded the necessary documents, click the green **'Save'** button at the top of the page and Fluxx will take you to a saved version of the request. Click the green **'Submit'** button in the top right corner to fully submit the request to your charity: water Water Programs Officer.

## FLUXX GUIDELINES

You can navigate through the sections of the portal using the menu on the left side of the home page.

### PROPOSALS

Proposals or concept notes that have been saved but not yet submitted are listed under **Proposal Drafts**. Proposals or concept notes that have been submitted to charity: water are listed under **Submitted Proposals**. Proposals or concept notes that have been submitted, reviewed by charity: water, and require revisions from your team are listed under **Proposal Revisions**.




For each proposal listed, you will see the charity: water Grant ID, country of implementation, amount requested, cost per daily water user, and granting time period. You can click into each proposal listed to view program information, inventory, and proposal documents.

### GRANTS

All open and closed charity: water grants can be found under the **Grants** section in the left-side menu. You can click into each grant to view the details for that grant. For each grant listed, you will find the charity: water Grant ID, country where the grant was implemented, the grant amount, cost per daily water user, and granting time period. You can find a read-only version of the grant's proposal documents by clicking into each grant.

### REPORTS


All associated reports for each of your organization's grants can be found in the **Reports** section in the left-side menu. For each report listed, you will find the charity: water Grant ID, type of report, and report due date. There are five types of reports, which are associated with different color icons when viewed in list form:

1. Grant Agreements 
2. Progress Reports 
3. Completion Reports 
4. Amendments 
5. Supplemental Reports 

All upcoming reports associated with an open grant are listed under **Reports Due** and will remain in the **'Due'** state until fully submitted. Reports are listed in descending order with the next report due at the bottom of the list.

Reports that have been submitted to charity: water are listed under **Submitted Reports**. Reports that have been submitted, reviewed by charity: water, and require revisions from your team will be listed under **Report Revisions**. Reports that have been submitted, reviewed, and approved by charity: water will be listed under **Approved Reports**.

### UPLOADING REPORT DOCUMENTS

1. On the report card, click the green  button next to the Report Documents section.
2. Click **'Add Files'** to browse for the corresponding documents.
3. Assign an appropriate **document type label** (i.e. Progress Report Narrative, Progress Report Budget & Expenditures) to every attachment using the drop-down menu.
4. Click **'Start Upload'**.
5. This document will now appear under the corresponding report.

### SUBMITTING REPORTS

When you're ready to submit your report, click the green **'Save'** button at the top of the page and Fluxx will take you to a saved version of the report. You must click the green **'Submit'** button in the top right corner to fully submit the report to your charity: water Water Programs Officer.

## **QUESTIONS?**

If you come across any technical issues or questions while navigating through Fluxx, be sure to contact your Water Programs Officer or Grant Officer for assistance.