
# Grant Management System Module 2 – Grant Application and Business Plan

**National Lotteries Commission**

# GMS Grant Application & Business Plan Manual

## Contents

# Objective

This user manual is a reference for daily usage guide for organisations that required to use the Grant Management System (GMS) for application funding purposes.

It contains a written guide and the associated images or screenshots to explain and simplify the workflow for the user. The screenshots have been taken from the latest version of a working case management solution. Please note that there may be slight discrepancies between the final version of the solution and the version shown in the screenshots of this manual.

Please consult with your support resource or supervisor for any queries not covered in this document or that fall outside the scope of the covered topic.

# 1. Log In

Pre-requisite(s):

Use a **Microsoft Edge** or **Google Chrome or Brave** browser to access the case management solution. No Firefox, No Internet Explorer, No Safari.

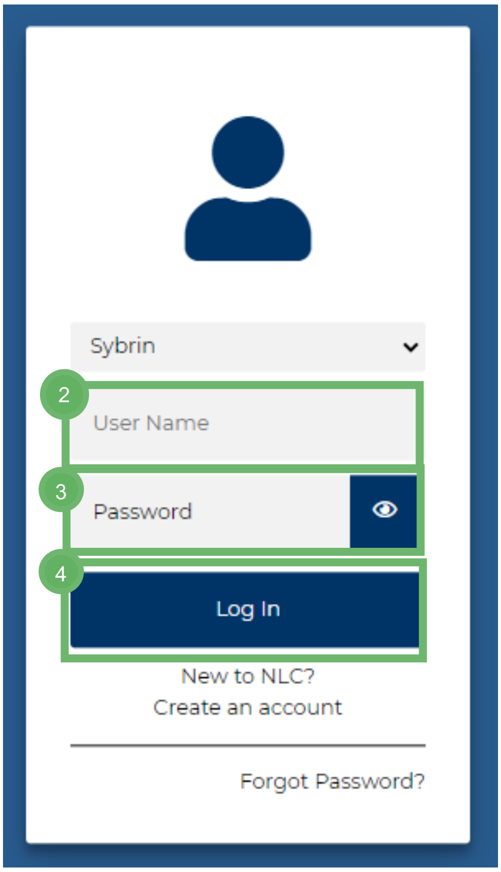
## 1.1. Log In

2. Go to the portal URL (*As per provided*).

3. Enter your username.

4. Enter your password.

5. Click **Log In**.



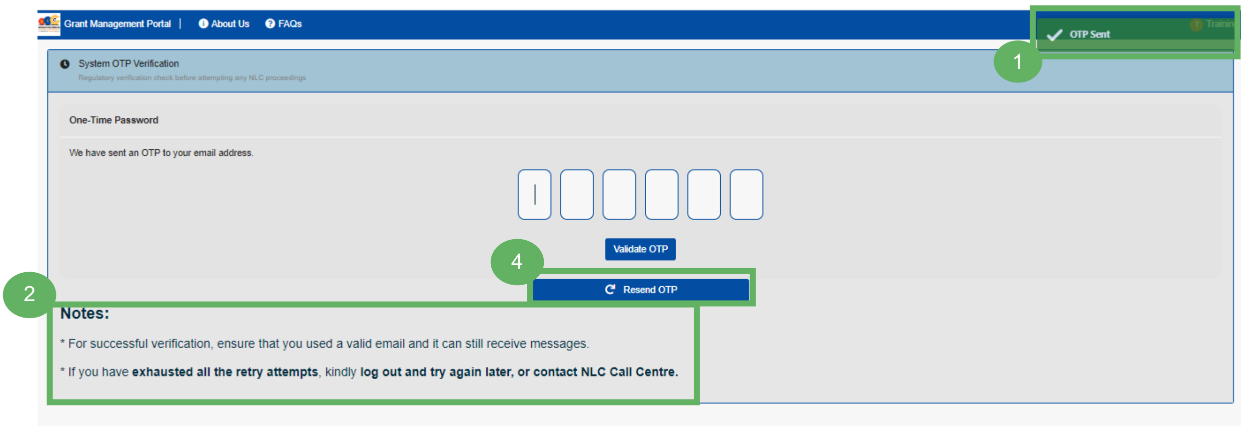
## 1.2 OTP Verification

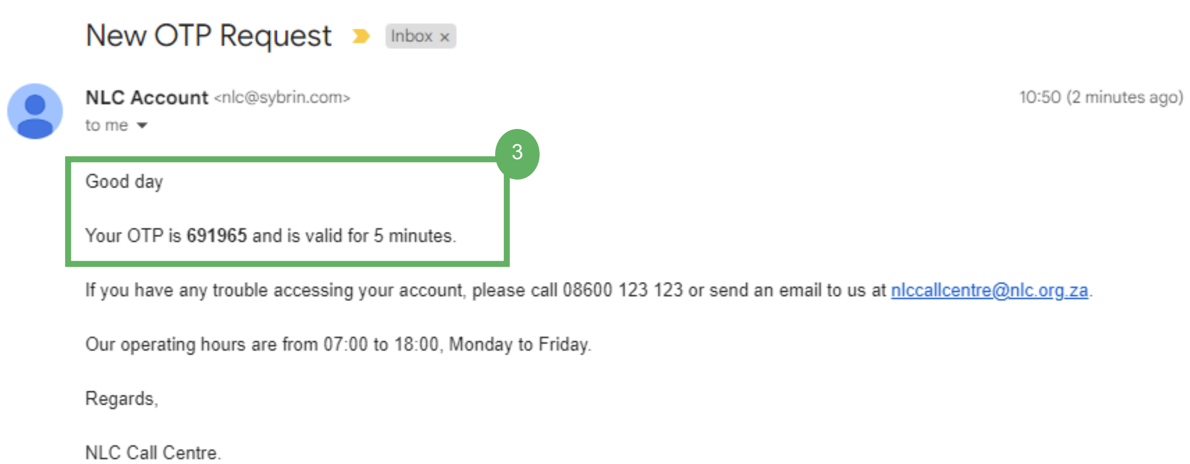
Pre-requisites:

System will authenticate User through a One Time Password (OTP) sent to the captured Email Address.

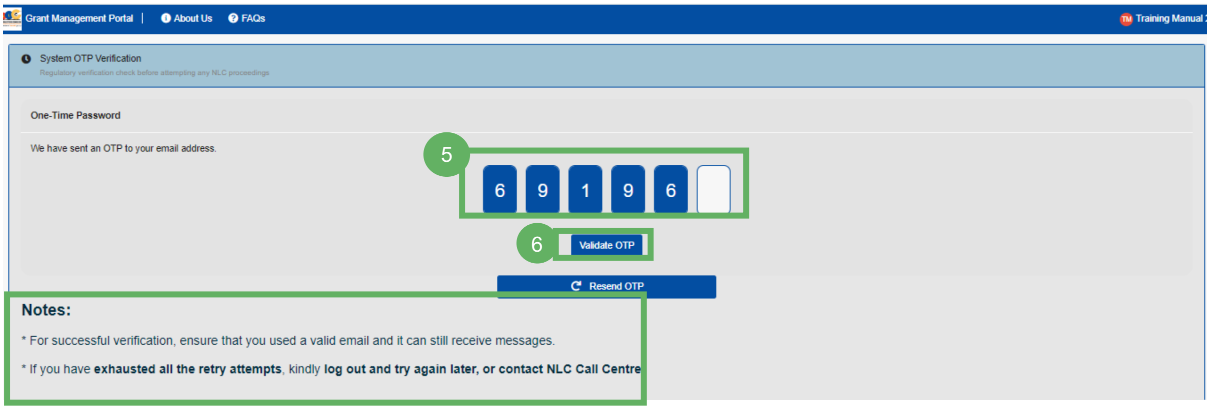
The OTP is only valid for 5 minutes.

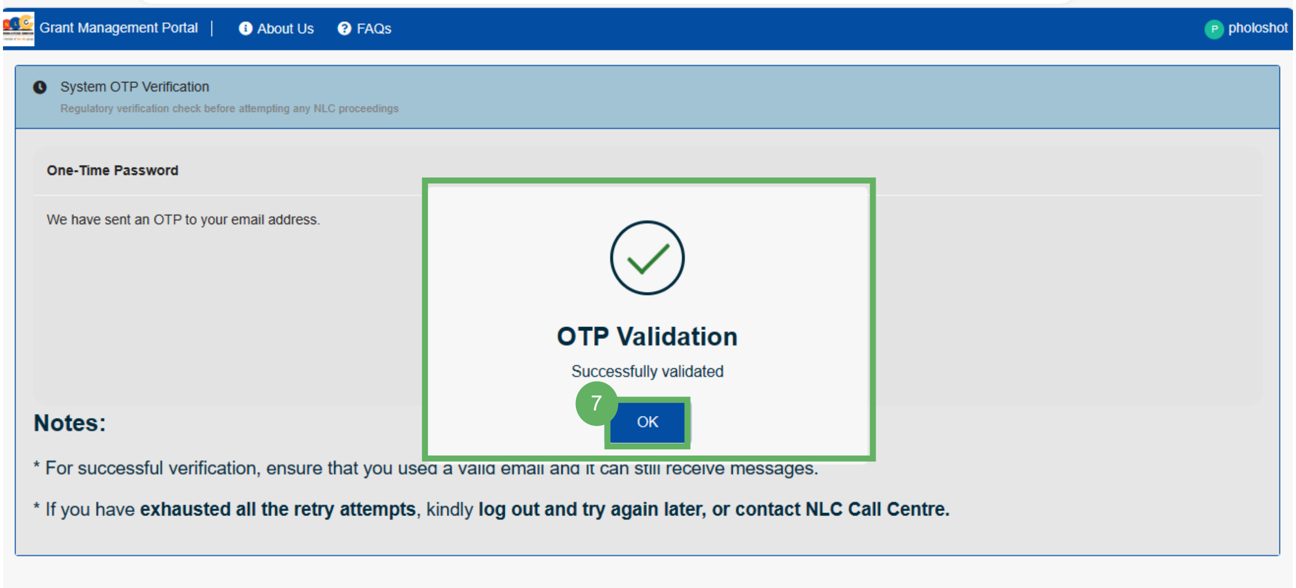
1. Upon logging in, **OTP** is automatically sent to the captured email address before further actions.
2. Important Notes.
3. **Email** sent with OTP.
4. Click **Resend OPT** (If you have not received the OTP, so it can be resent)




5. **Enter** the OTP sent into the System's portal screen.
6. Upon entering the OTP, User will see notification "OTP Validation" message OR Click **Validate OTP**.



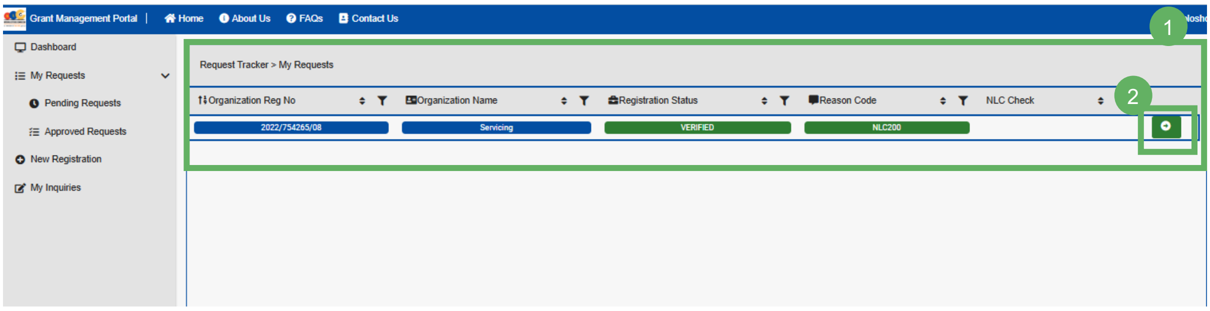




7. Click **OK**

## 1.3 Landing Page

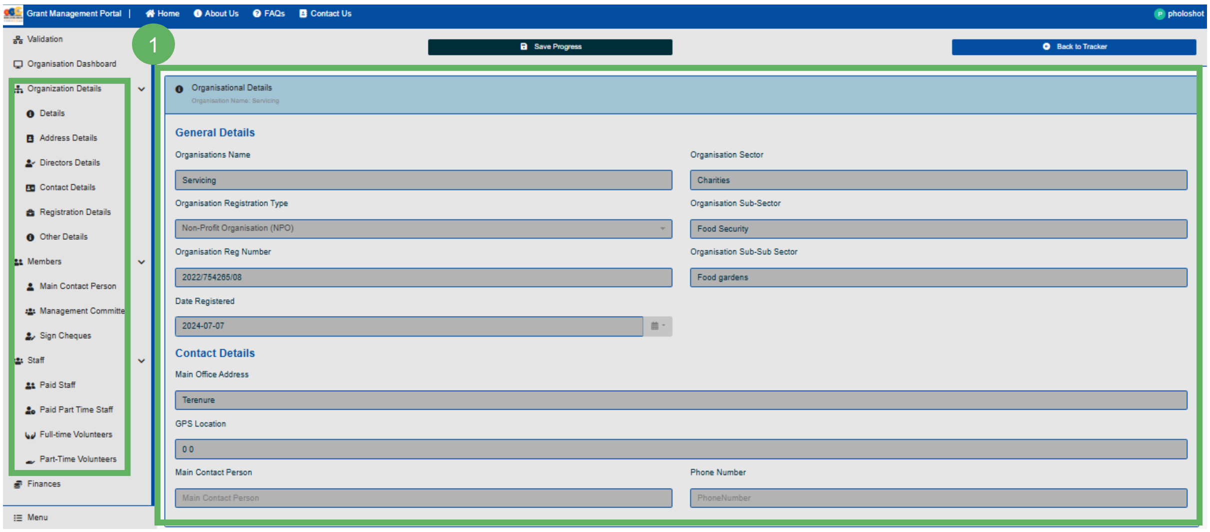
Pre-requisites:

Only an organisation director can perform the registration/profile request.

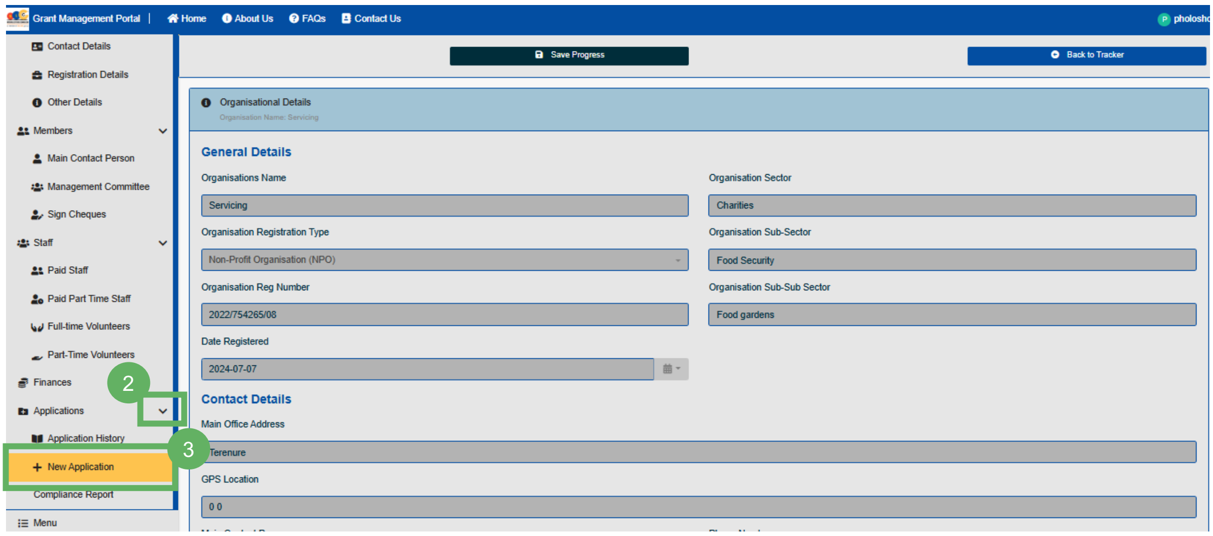



1. On the request tracker you will see your registration application with status Verified.
2. Click the forward arrow icon to start applying for funding.

### 1.3.1 Application




1. This will be your landing page; you will see the details previously captured when doing the registration.




2. From the menu item, scroll down & click the drop-down on **Applications**

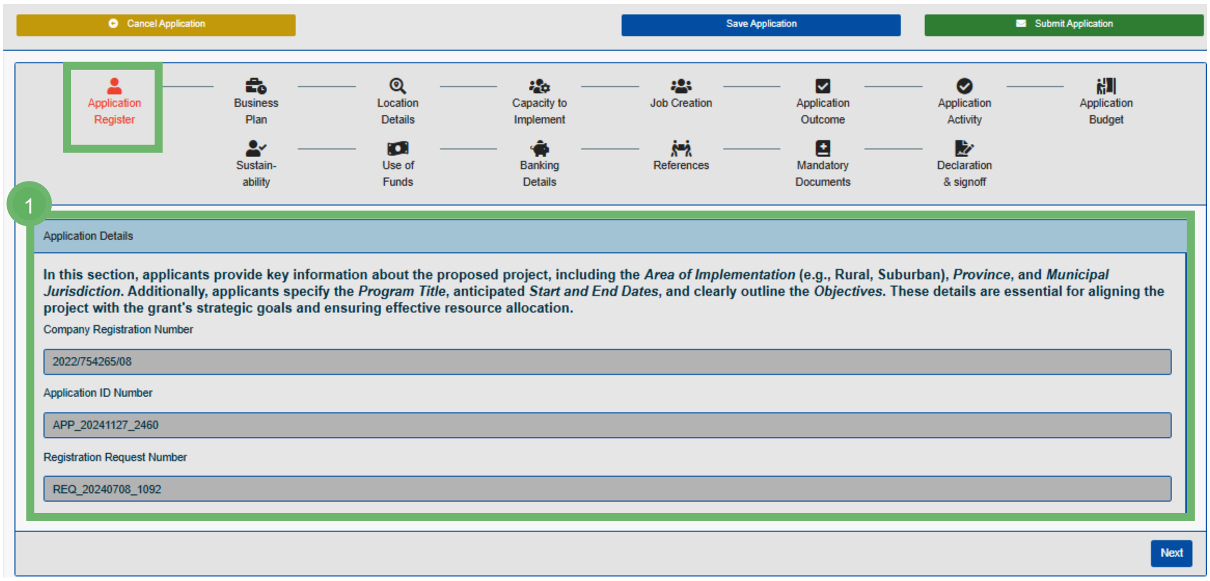
3. Click **New Application**

4. Read and **Accept** the Disclaimer  to continue.

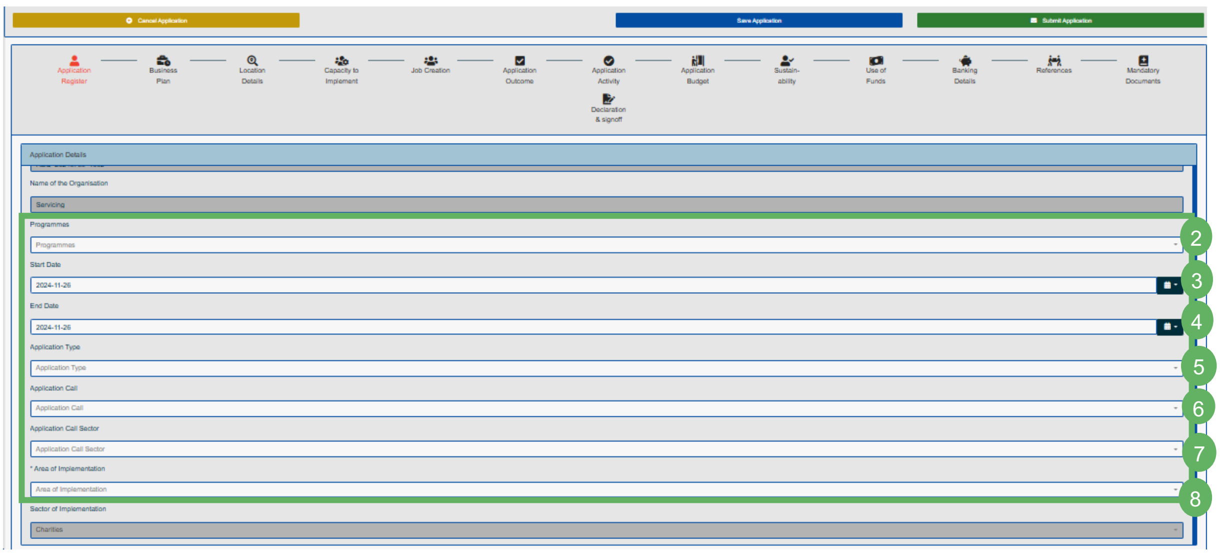
5. Click **Done**

# 2. Navigating the Application Process Sections

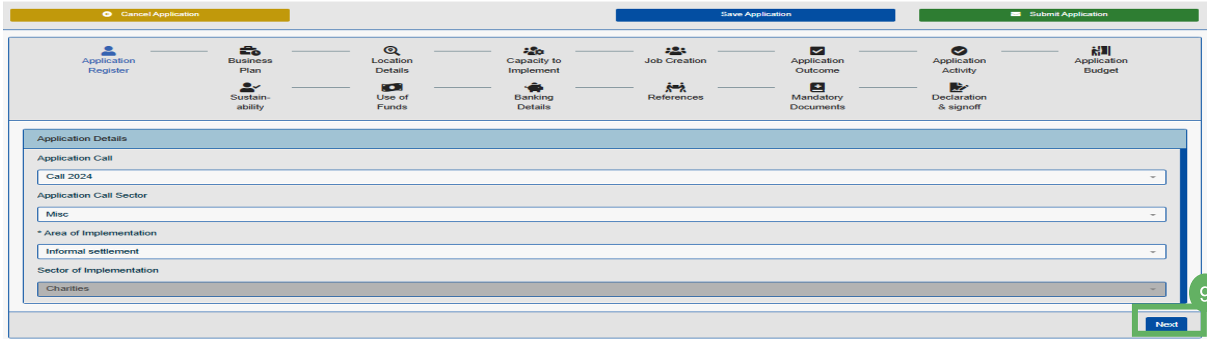
## 2.1 Application Register




1. You will view your application details, which include the Company Registration number, system-generated application ID, and registration request number.

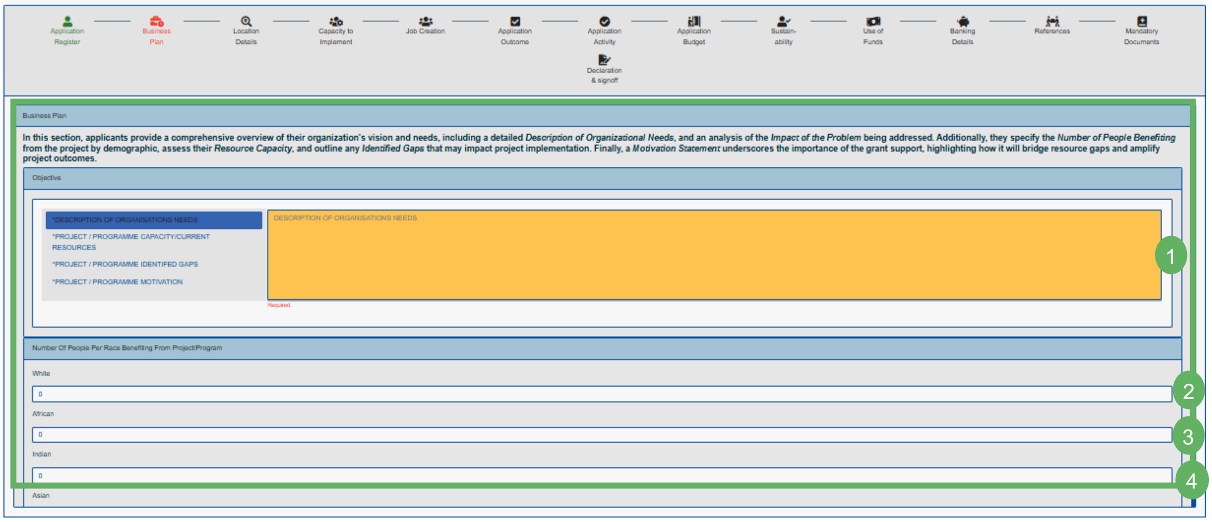


2. Click the drop-down & select the **Programme** (applicant can select multiple programmes)
3. **Select** the Start date
4. **Select** the End date
5. **Choose** the Application Type
6. **Select** the Application Call
7. **Select** the Application Call sector
8. **Choose** your Area of Implementation



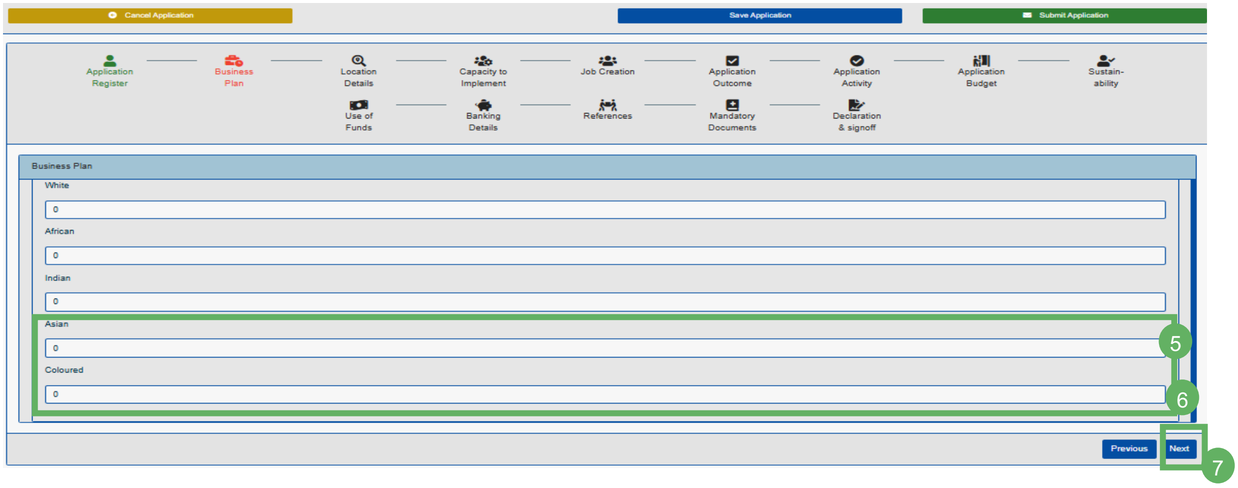

9. Click **Next**

## 2.2 Business Plan



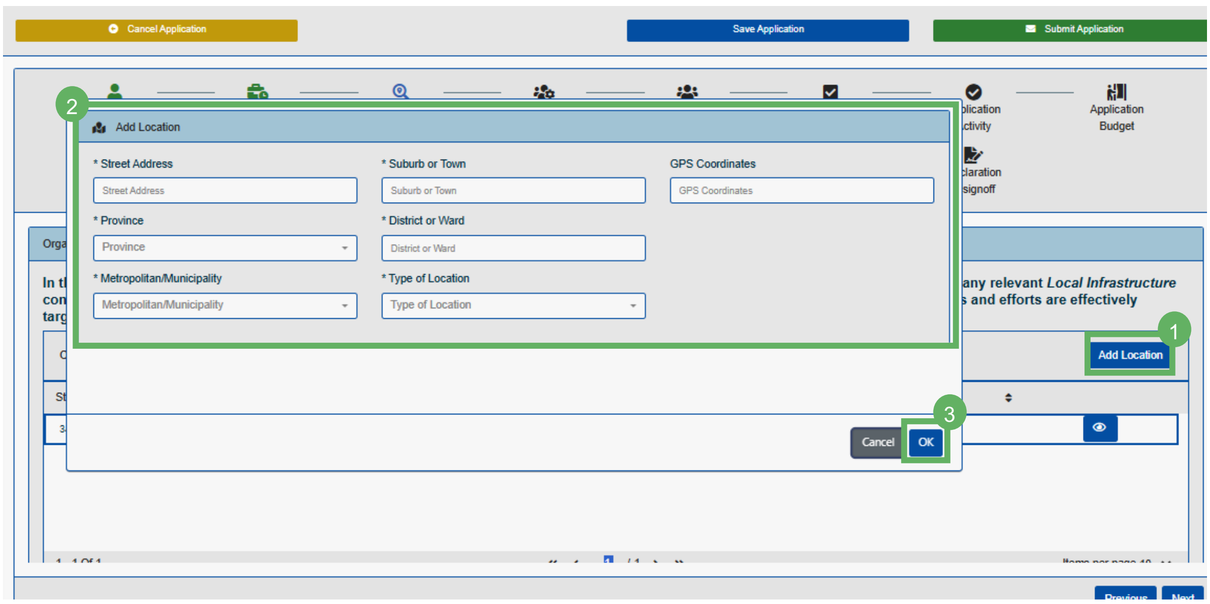

1. **Write** a description of the project’s organisation needs. (Required)
   - **Click** on ‘Project/Programme Capacity/Current resources & fill in those as per your project. (Required)
   - **Click** on ‘Project/Programme Identified Gaps & fill in those as per your project. (Required)
   - Click on ‘Project/Programme Motivation & fill in that as per your project. (Required)
2. **Enter** the total count of white people that will benefit from your project.

3. **Enter** the total count of African people that will benefit from your project.
4. **Enter** the total count of Indian people that will benefit from your project.




5. **Enter** the total count of Asian people that will benefit from your project.
6. **Enter** the total count of Coloured people that will benefit from your project.
7. Click **Next**

## 2.3 Location Details



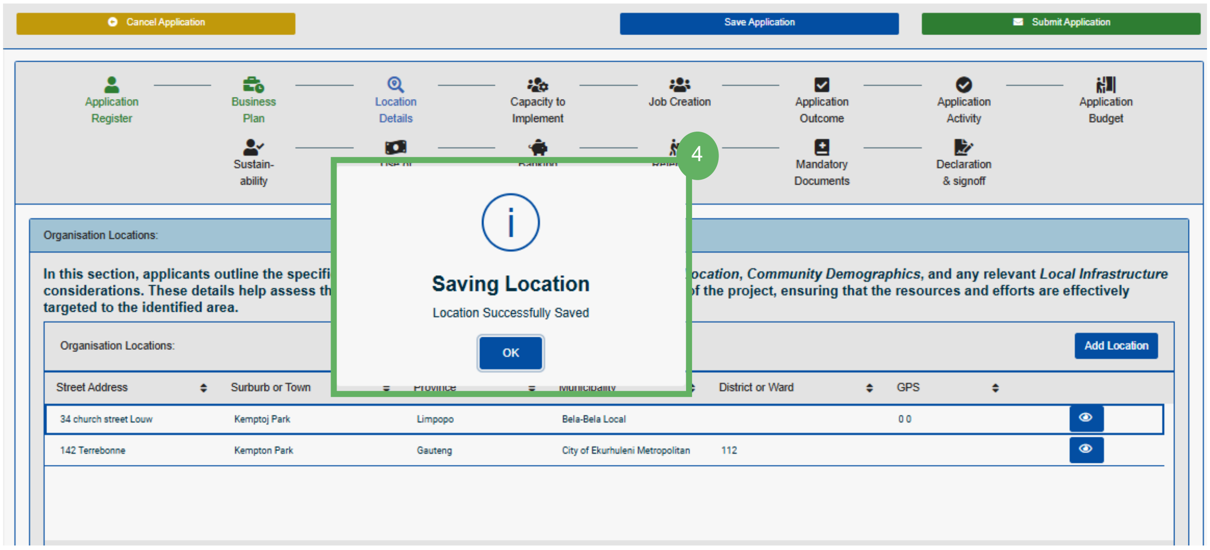

1. Click **Add Location.**

2.**View** Location form and **capture** all the compulsory fields;

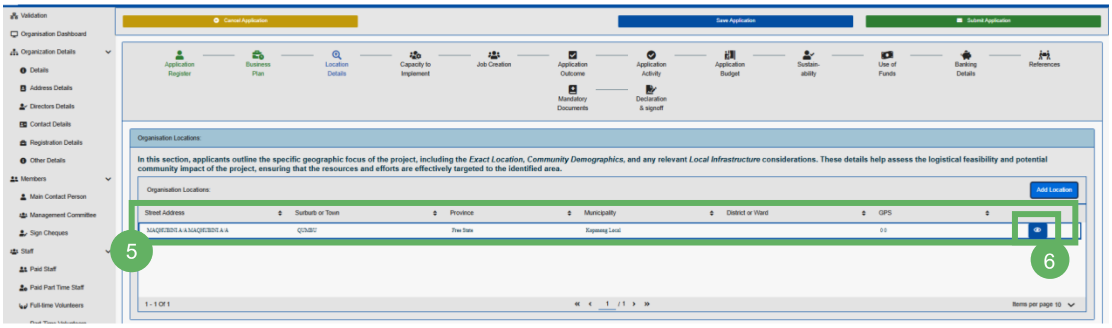
- **Enter** Street Address (Required)
- **Enter** Suburb (Required)

- **Click the drop-down & select** Province (Required)
- **Click the drop-down & select** Municipality (Required)
- **Enter** District (Required)
- **Click the drop-down & select** Type of Location (Required)
- **Enter** GPS Coordinates

3. Click **OK.**




4. Organisation Location added message**.**

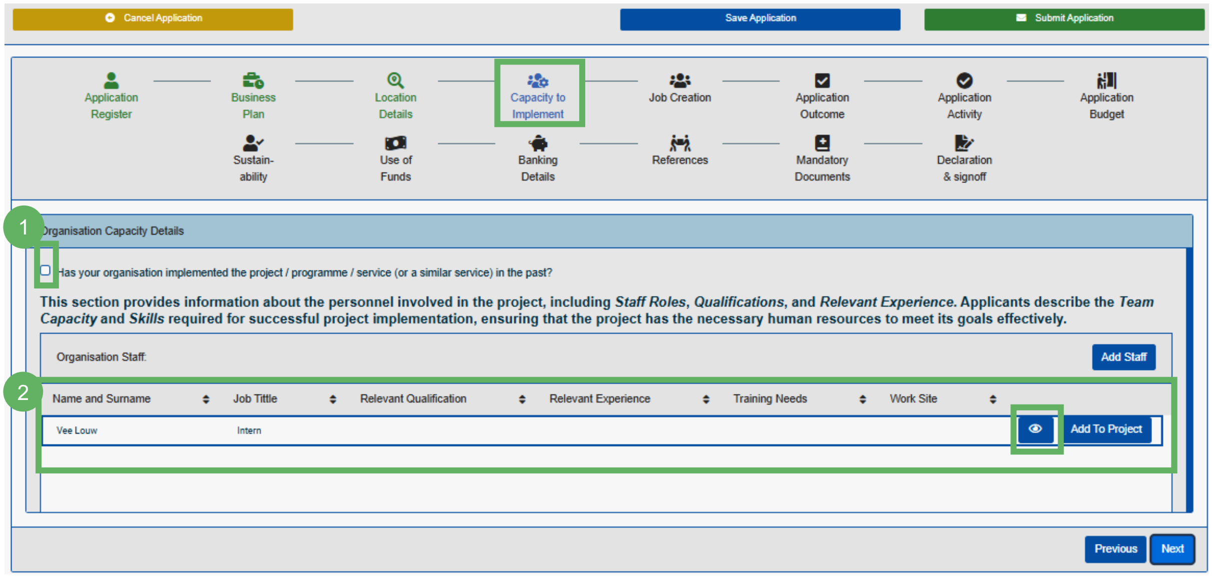



5. Organisation's location's added record.

6. Click the **User Edit icon** (to view the Location details and update, where applicable).

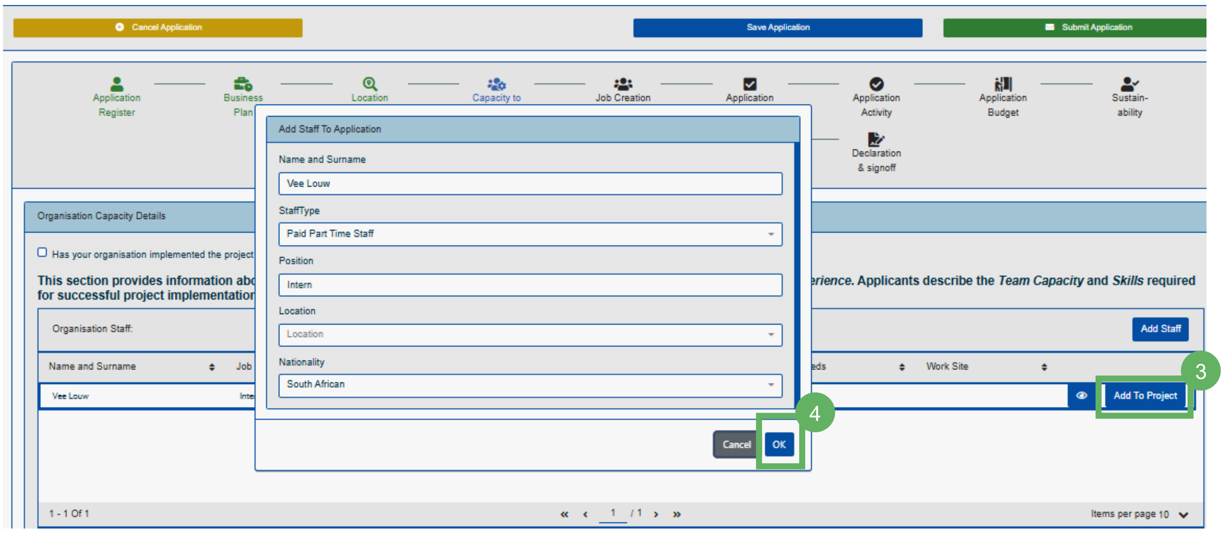
7. Click **Next**

## 2.4 Capacity to Implement




1. **Click** the checkbox if your organisation has implemented the project/programme/service in the past

2**. View** the organization's staff details that were added during the registration process, and **update** them if necessary.

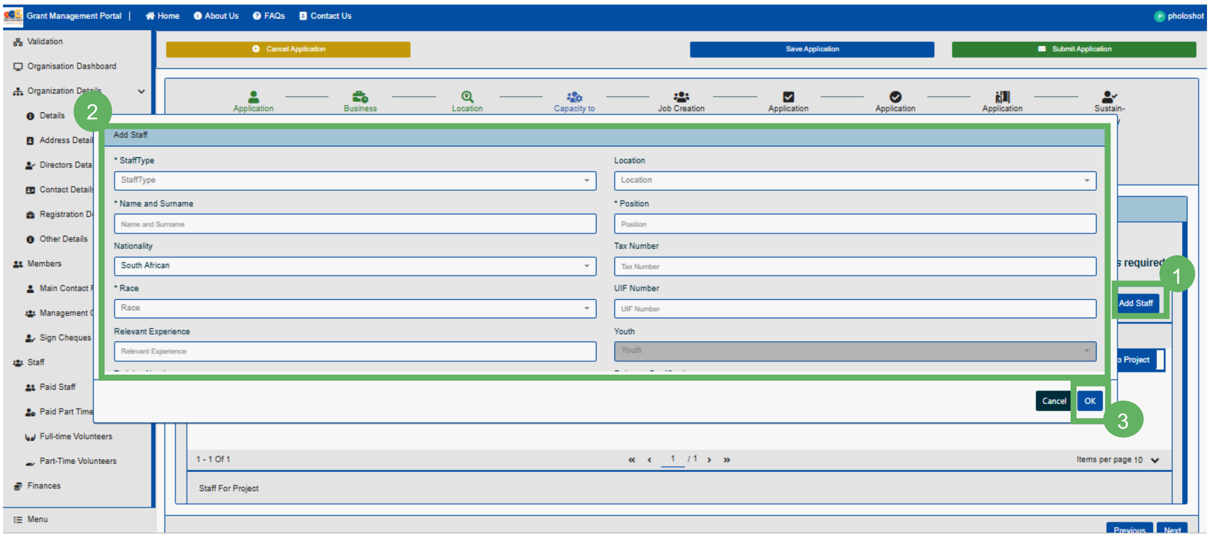



3. If you want to add the staff to your project, **Click** 'Add to Project'

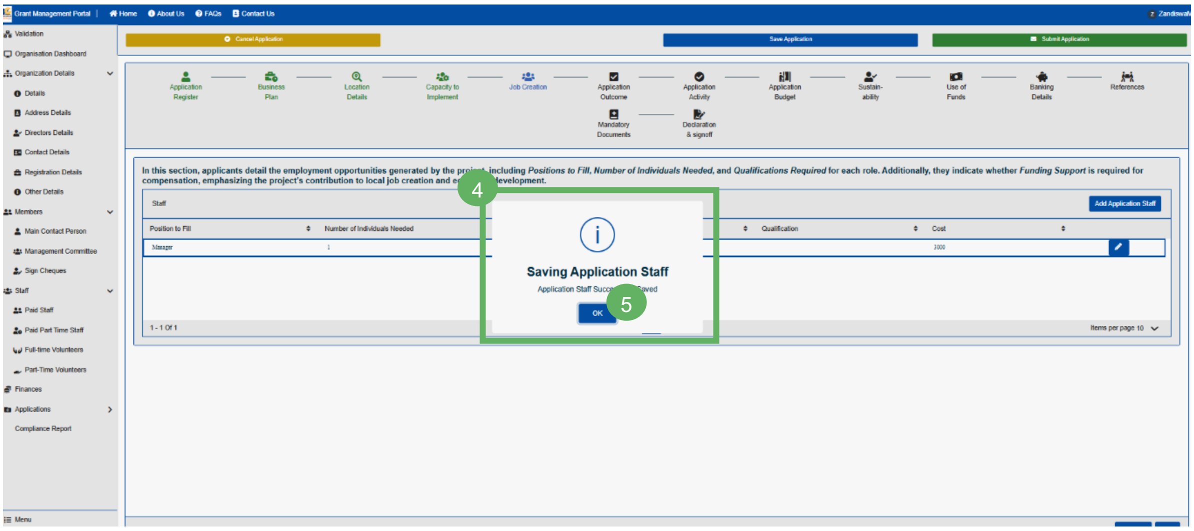
4. Upon clicking Add to project, an 'Add staff to Application' form will appear with the staff details. If you consent to adding them, then click **OK**.

**Note**: You can add more information on the **Add Staff to Application form**.

### 2.4.1 Add more Organisation Staff to the Application

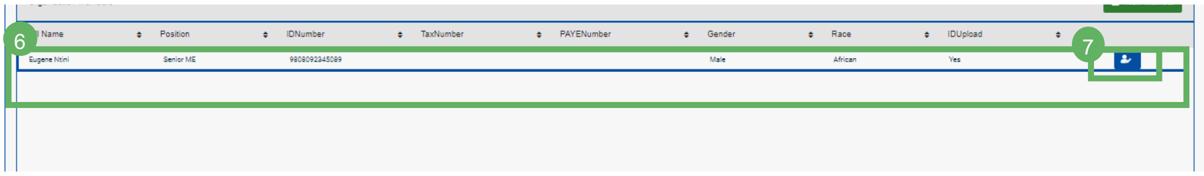



1. Click **Add Staff.**
2. **View** Staff application form and **capture** all the fields:
    - **Select** Staff Type (Required)
    - **Enter** Name and Surname (Required)
    - **Click drop-down and Select** Nationality (Required)
    - **Click drop-down and Select** Race (Required)
    - **Enter** Relevant Experience (Required)
    - **Enter** position (Required)
    - **Click drop-down and Select** Training needs (Required)
    - **Click drop-down and Select** Gender (Required)
    - **Enter** ID number (must be 13 digits)
    - **ID** captured will automatically prompt the system to select the **Youth** field**.**
    - **Click drop-down and Select** Location
    - **Enter** Tax Number
    - **Enter** UIF Number
3. Click **OK**




4. Application staff added message**.**

5. Click **Ok**

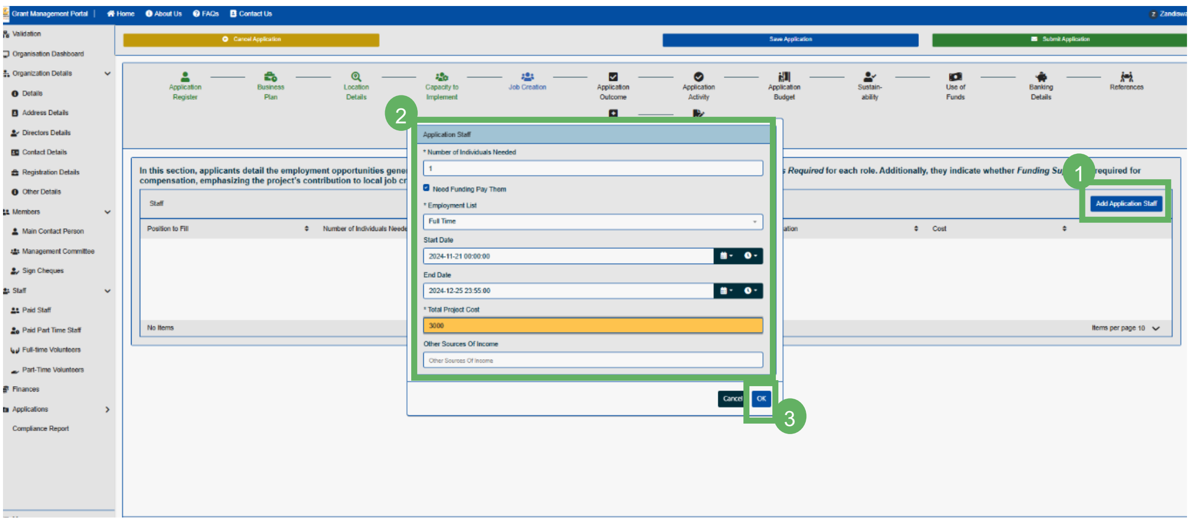



6. Organisation Staff's added record.

7. Click the **User Edit icon** (to view the organisation staff's details and edit, where applicable).

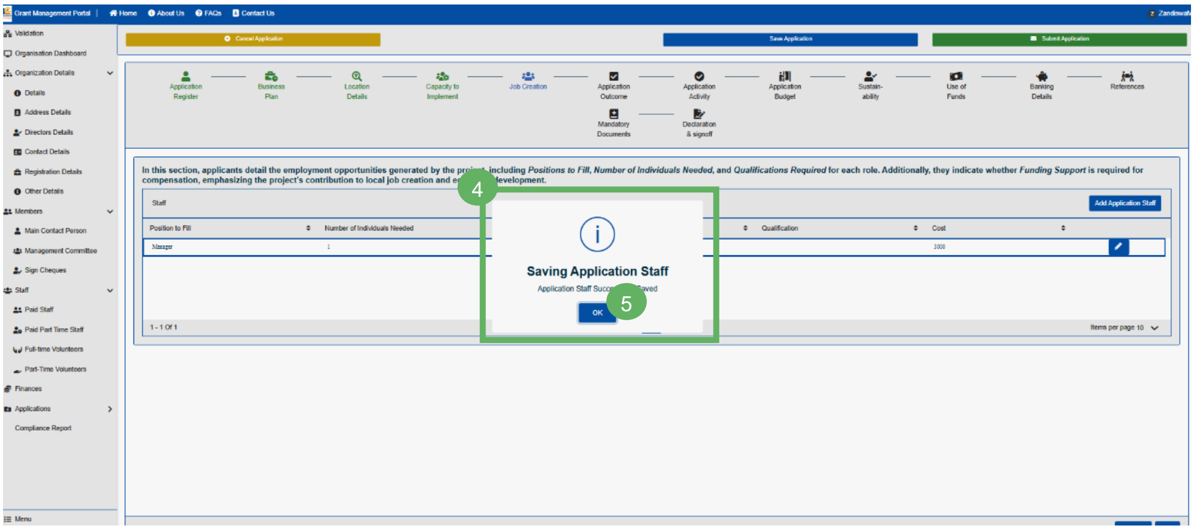
8. Click **Next**

## 2.5 Job Creation



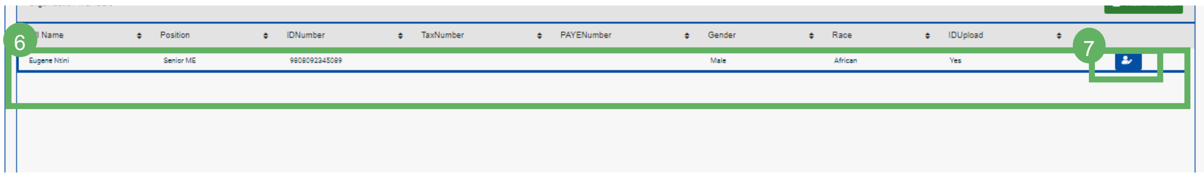
1. Click **Add Application Staff.**
2. **View** Staff application form and **capture** all the fields:
   - **Enter** Number of individuals needed (Required)
   - **Click drop-down and Select** Employment list (Required)
   - **Select** Start date
   - **Select** End date
   - **Enter** the Total Project cost (Required)
   - **Enter** other sources of income if applicable

3. Click **OK**




4. Application staff added message**.**

5. Click **Ok**

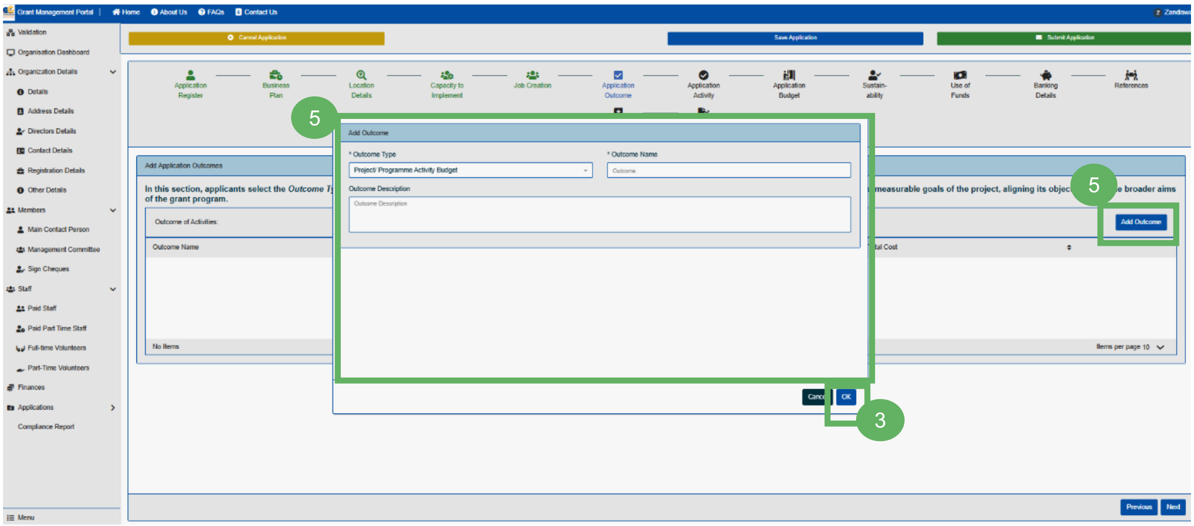



6. Organisation Staff's added record.

7. Click the **User Edit icon** (to view the organisation staff's details and edit, where applicable).

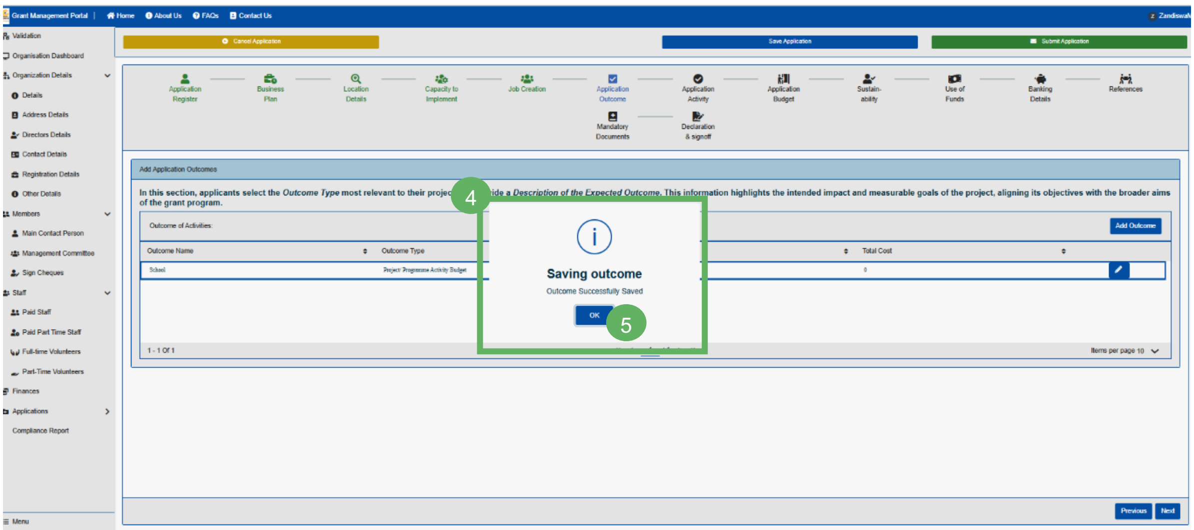
8. Click **Next**

## 2.6 Application Outcome



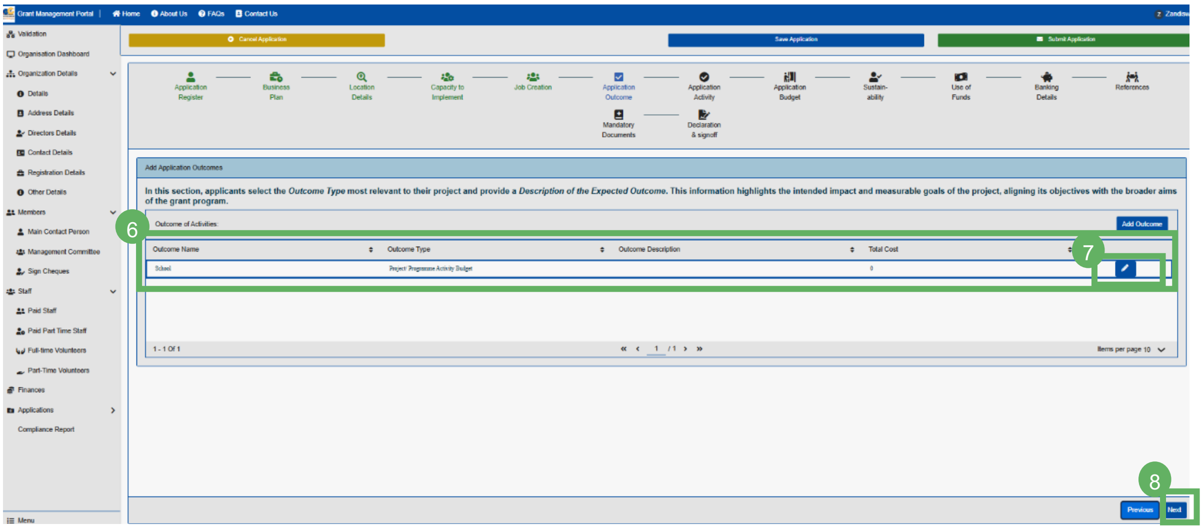

1. Click **Add Outcome.**
2. **View** Add Outcome form and **capture** all the fields:
   - **Click drop-down and Select** Outcome Type (Required)
   - **Enter** the Outcome Name (Required)
   - **Enter** an Outcome Description

3. Click **OK**




4. Application Outcome added message**.**

5. Click **Ok**

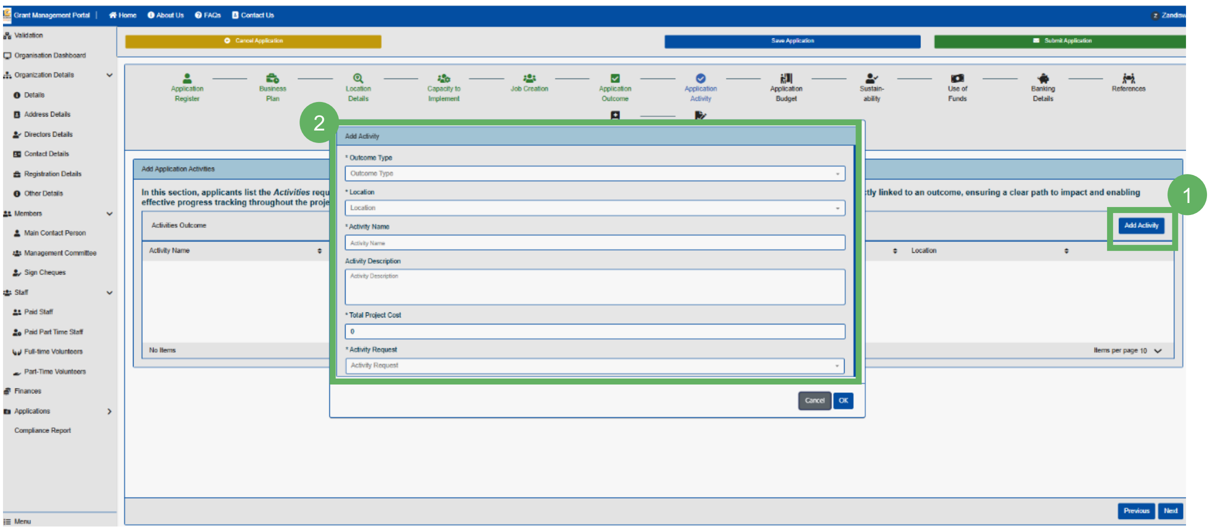



6. Application Outcome’s added record.

7. Click the **User Edit icon** (to view the Application outcome’s details and edit, where applicable).

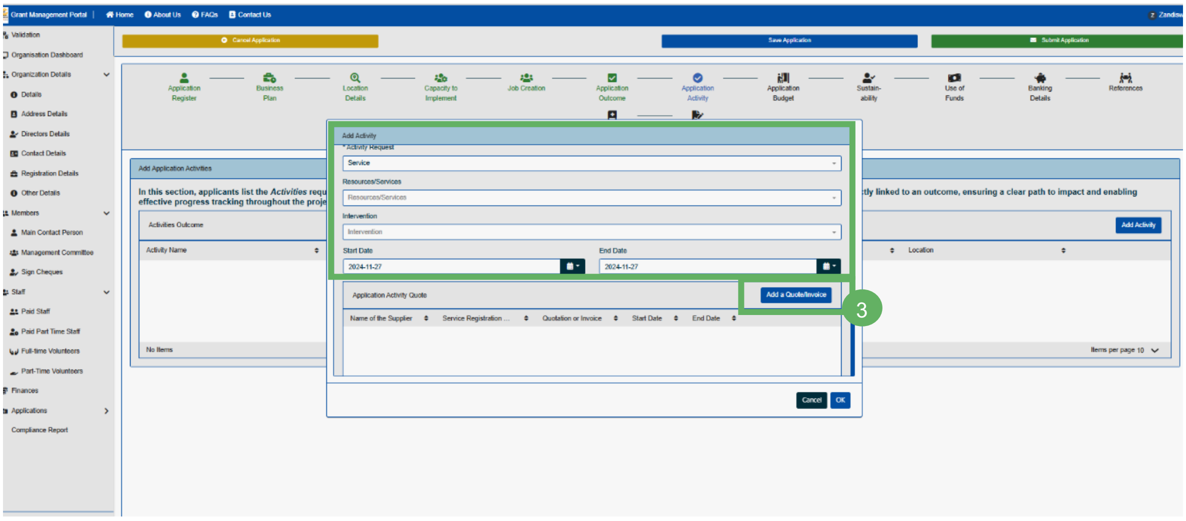
8. Click **Next**

## 2.7 Application Activity



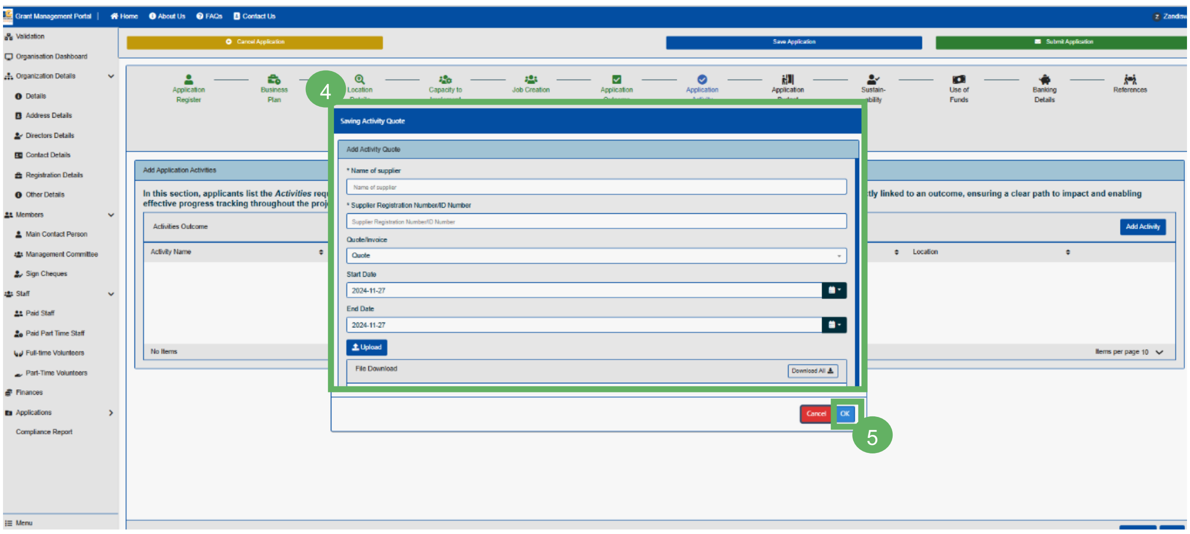

1. Click **Add Activity.**
2. **View** Add Activity application form and **capture** all the fields:
   - **Click drop-down and Select** Outcome Type (Required)
   - **Click drop-down and Select** Location (Required)
   - **Enter** Activity Name (Required)
   - **Enter** Activity description
   - **Enter** Total Project cost (Required)

- **Click drop-down and Select** Activity Request (Required)




- **Click drop-down and Select** Resources/Services
- **Click drop-down and Select** Intervention
- **Select** Start date
- **Select** End date
- **Enter** the Total Project cost (Required)

3. Click **Add a Quote/Invoice**

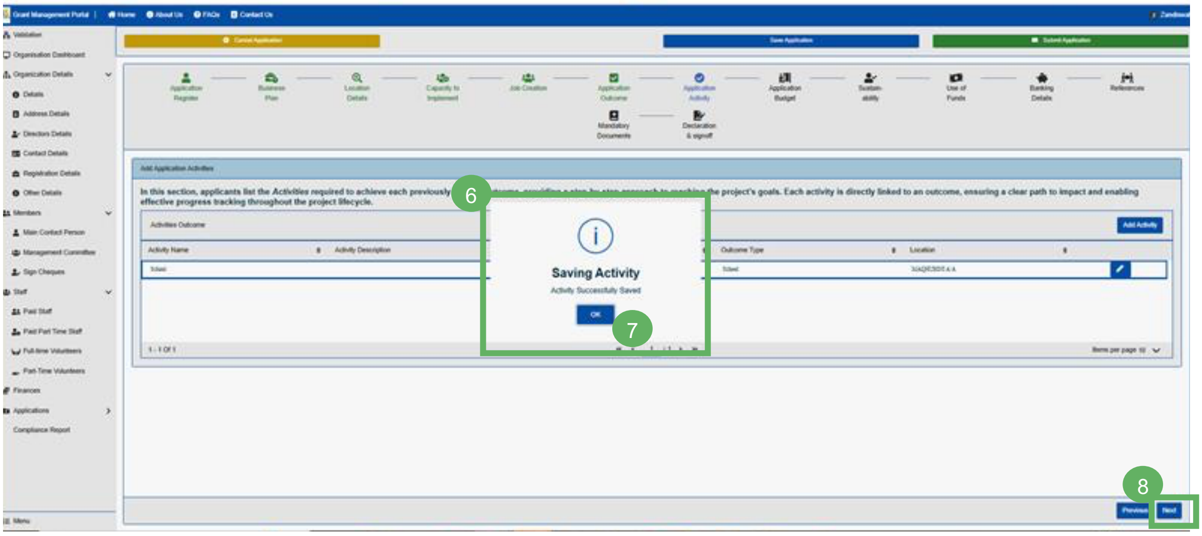



4. Upon clicking that button, **Saving Activity Quote form** will appear. Capture all the fields:

- **Enter** Name of Supplier (Required)
- **Enter** Supplier Registration number/ID (Required)
- **Click drop-down and Select** Quote/Invoice
- **Click drop-down and Select** Intervention
- **Select** Start date
- **Select** End date

- **Upload** a supporting document of the invoice/quote

5. Click **OK**



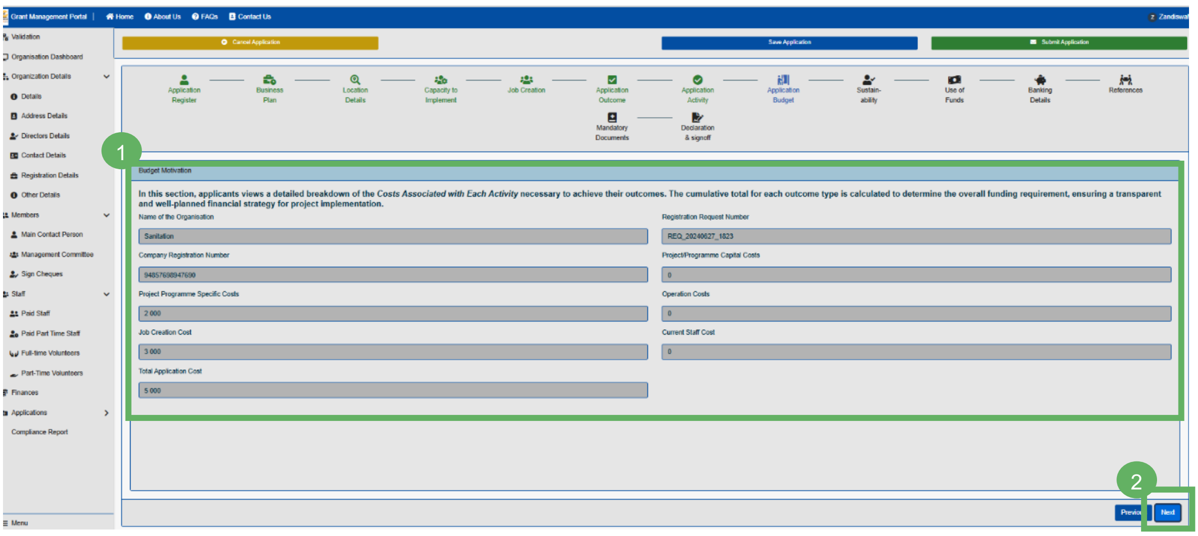

6. Application Activity added message**.**

7. Click **Ok**

**Note:** Upon clicking 'OK' an Application record will be added allowing the user to view the organisation staff's details and edit, where applicable).

8. Click **Next**

## 2.8 Application Budget

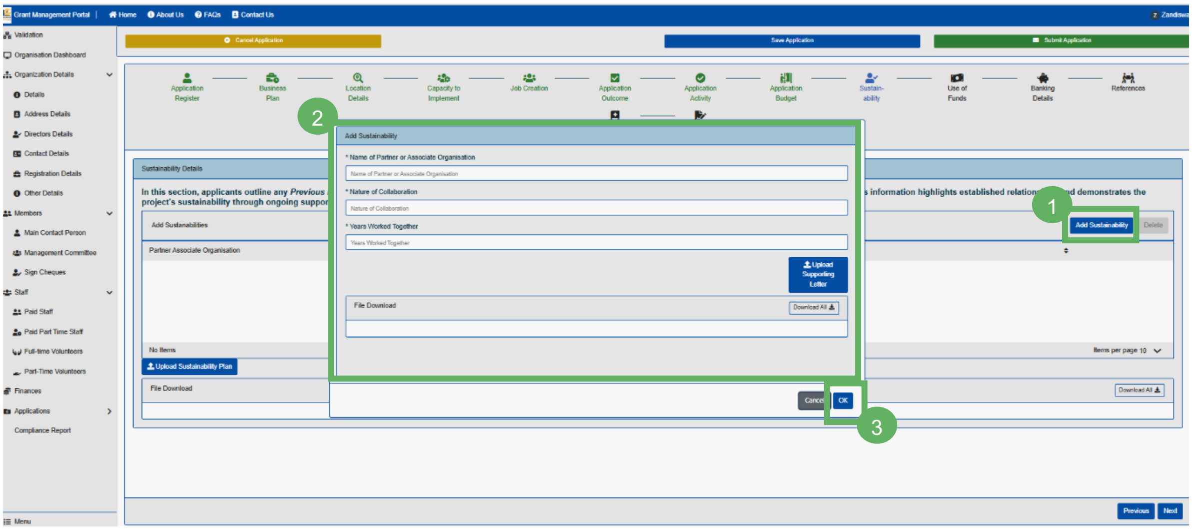


1. Applicants will have a view of the detailed breakdown of the costs that is associated with each activity in the project. (This will include all even the Organisation's details, namely the Company Registration number, Name, Registration request number etc.**)**

**Note:** In this stage of the application, applicant will not be able to make changes/edit.

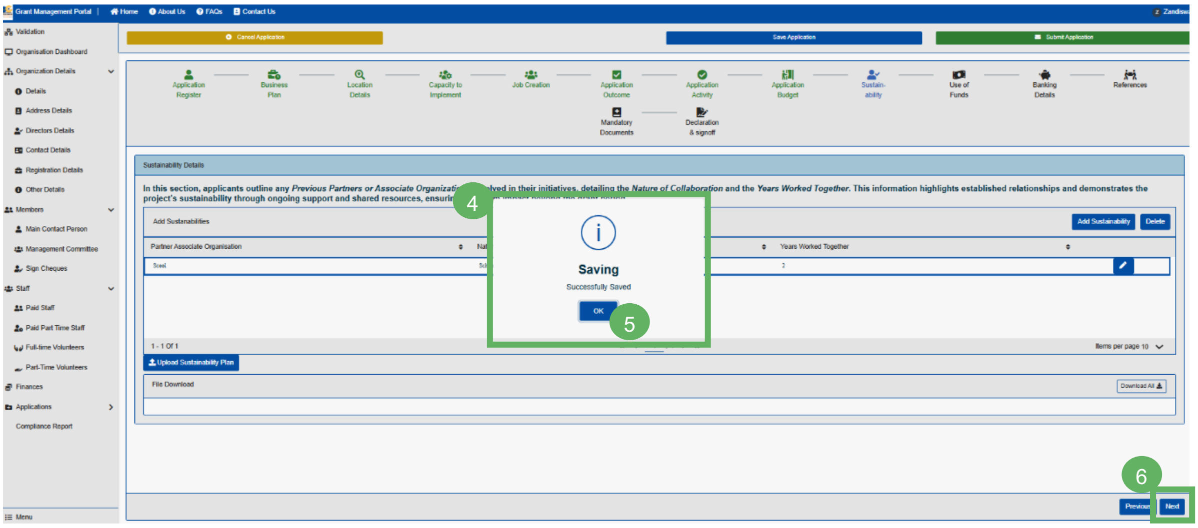
2. Click **Next**

## 2.9 Sustainability




1. Click **Add Sustainability**
2. **View** Sustainability application form and **capture** all the fields:
   - **Enter** Name of Partner/Associate organisation (Required)
   - **Enter** Nature of Collaboration (Required)
   - **Enter** the Years worked together (Required)
   - Upload a supporting letter

3. Click **OK**



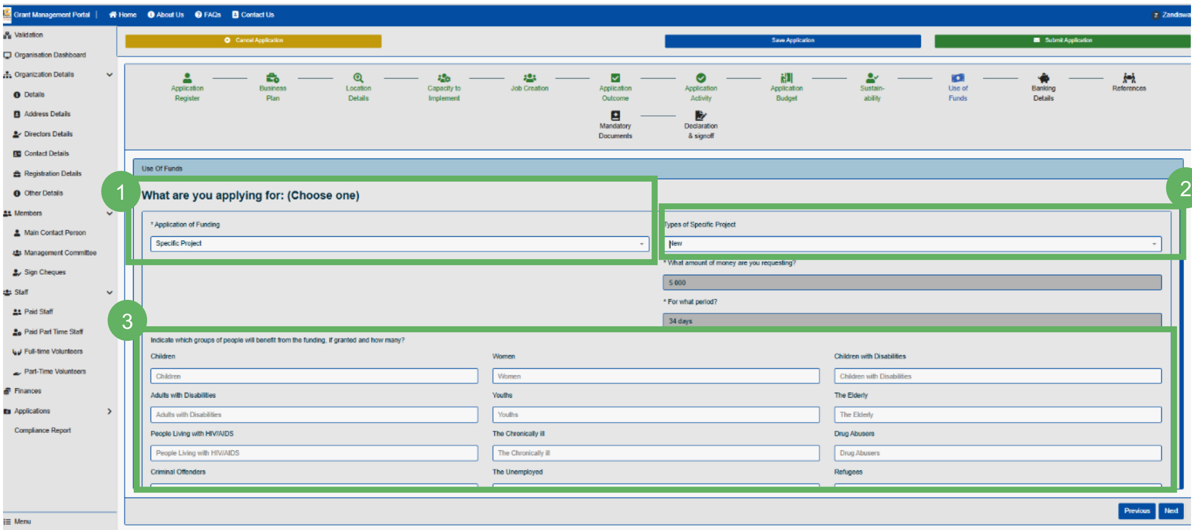

4. Partner Associate organisation added/saved message**.**

5. Click **Ok**

**Note:** Upon clicking ‘OK’ sustanbilities record will be added allowing the user to view the details saved and edit, where applicable).

6. Click **Next**

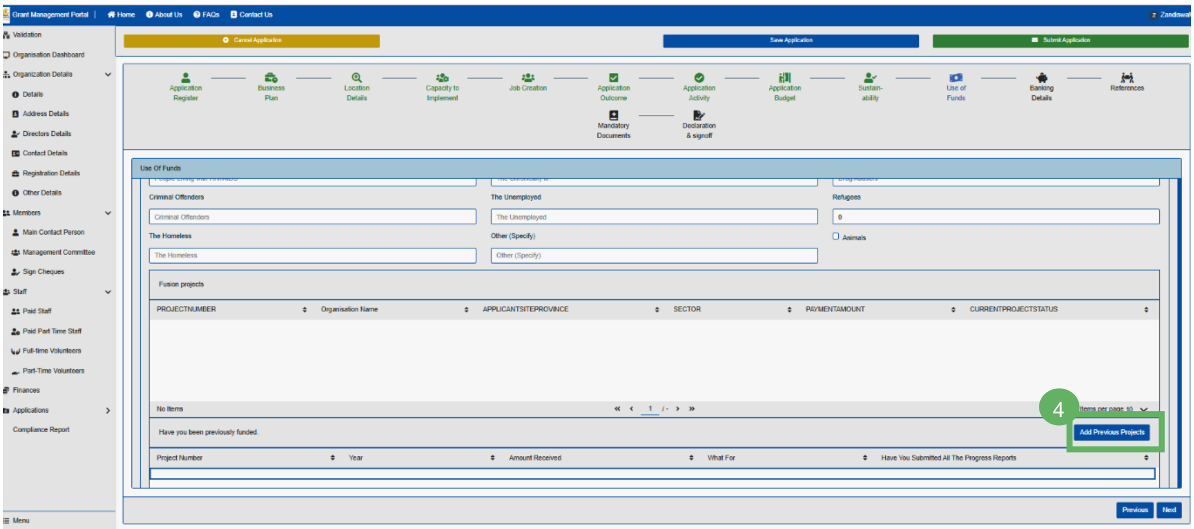
## 2.10 Use of Funds



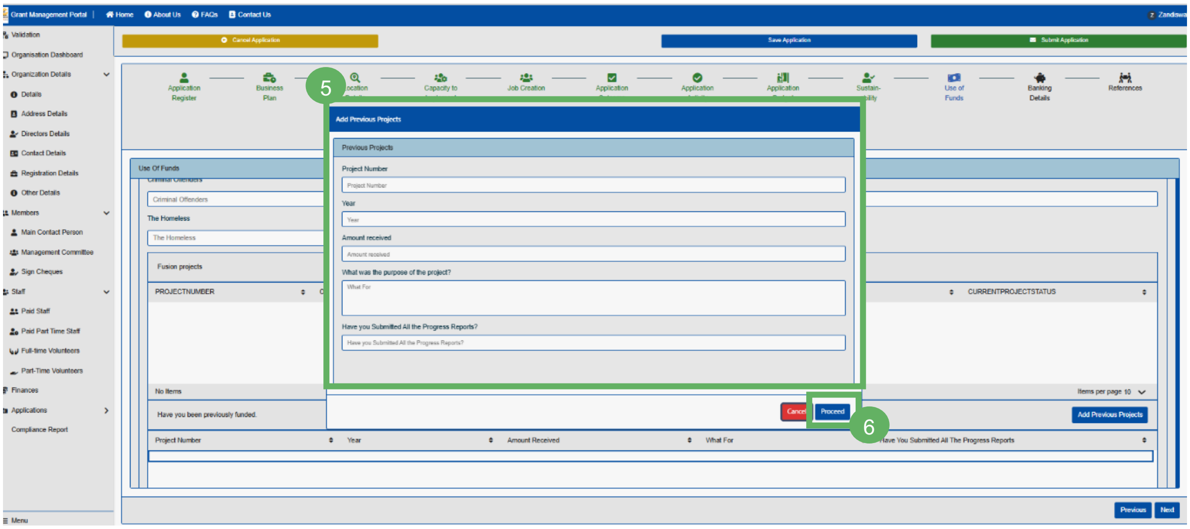

1. **Click** the drop-down and Select the Application of Funding (Required)

2. **Click** the drop-down and Select the type of Specific Project (Required)

3. **Enter** the total count of different of people who will benefit from the funding if granted, based on the list given.



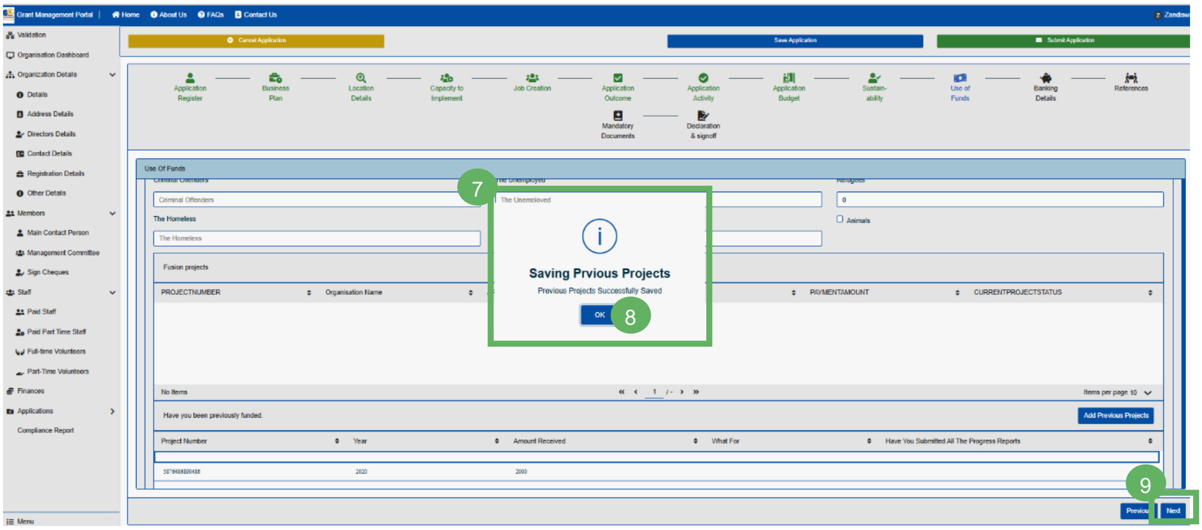
4. Click on **Add Previous projects**



5. Upon clicking that button, **Add Previous Projects form** will appear. Capture all the fields:

- **Enter** Project Number
- **Enter** the Year
- **Enter** the Amount received
- **Enter** a Description for the Purpose of the Project
- **Enter** an answer to ‘if you have submitted all the Progress Reports’

6. Click **Proceed**



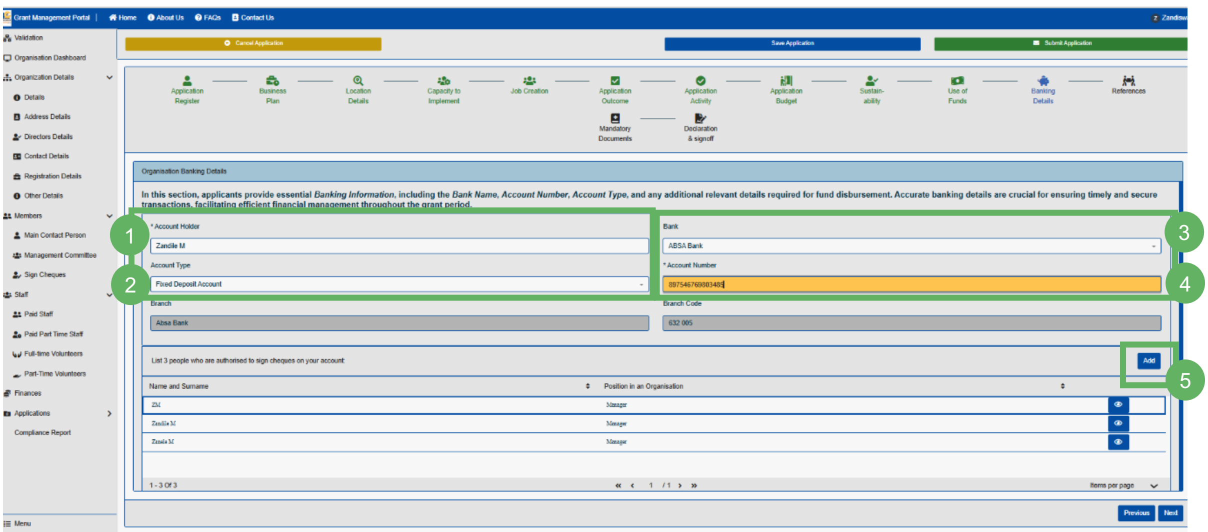

7. Previous Projects details added message**.**

8. Click **Ok**

**Note:** Upon clicking 'OK' a Previous Projects record will be added allowing the user to view previous projects details and edit, where applicable).

9. Click **Next**

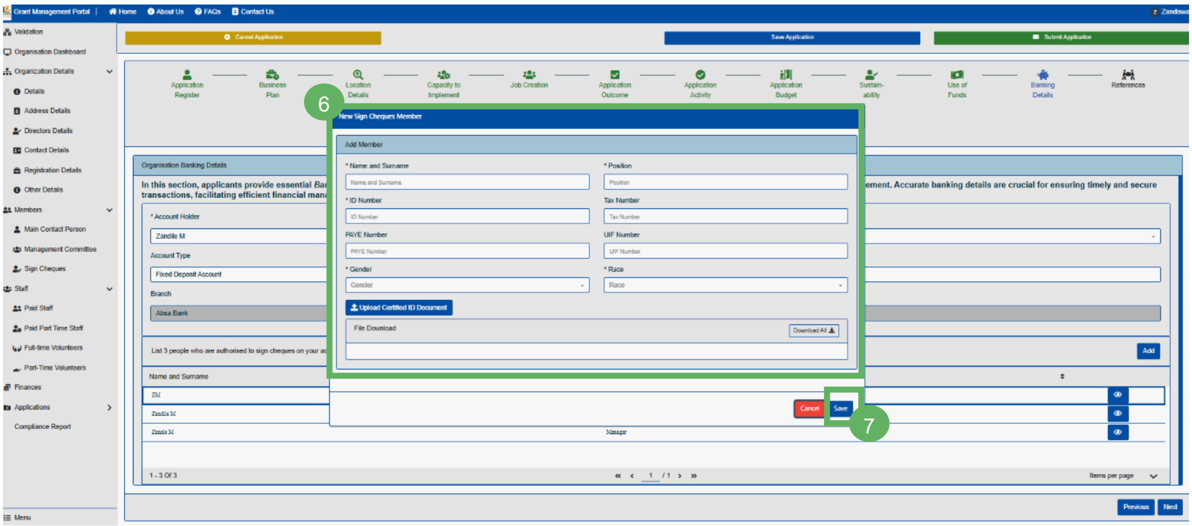
## 2.11 Banking Details




1. **Enter** the Account holder's full names that will be used for fund disbursement (Required)
2. **Click** the drop-down and Select Account Type
3. **Click** the drop-down and Select a Bank
4. **Enter** the Account Number (Required)

**Note**: The Branch & branch code will auto-populate based on the details supplied by the applicant.

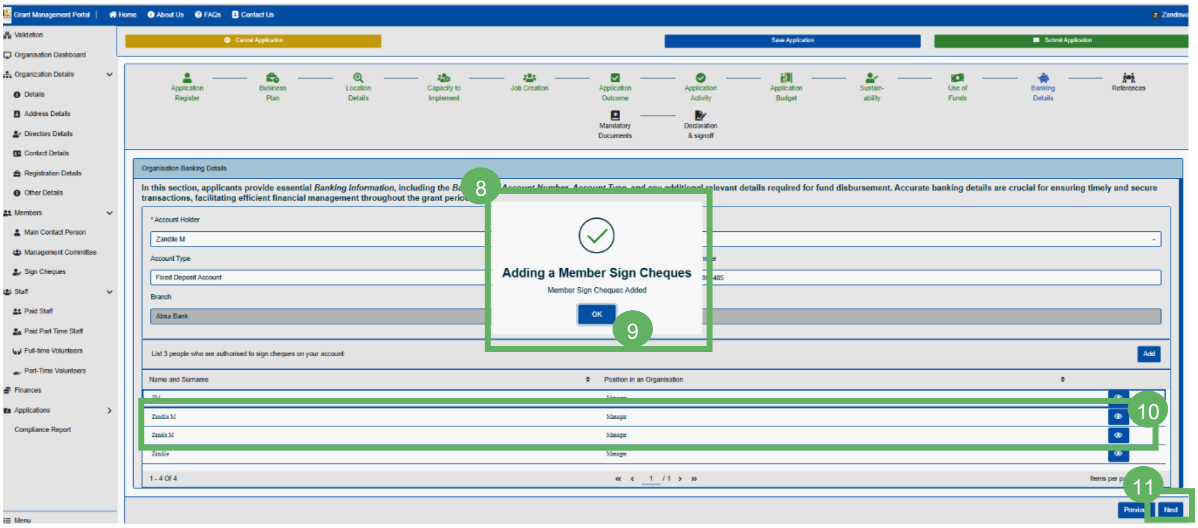
5. **Click** Add button (to add only 3 people who are authorised to sign cheques on your account)



6. Upon clicking that button, **New Sign Cheques Member form** will appear. Capture all the fields:

- **Enter** Name and Surname (Required)
- **Enter** ID Number(must be 13 digits) (Required)
- **Enter** Position (Required)
- **Click drop-down and Select** Gender (Required)
- **Click drop-down and Select** Race (Required)
- **Enter** Tax Number
- **Enter** PAYE Number
- **Enter** UIF Number
- **Upload** a Certified ID document of this member

7. Click **Save**



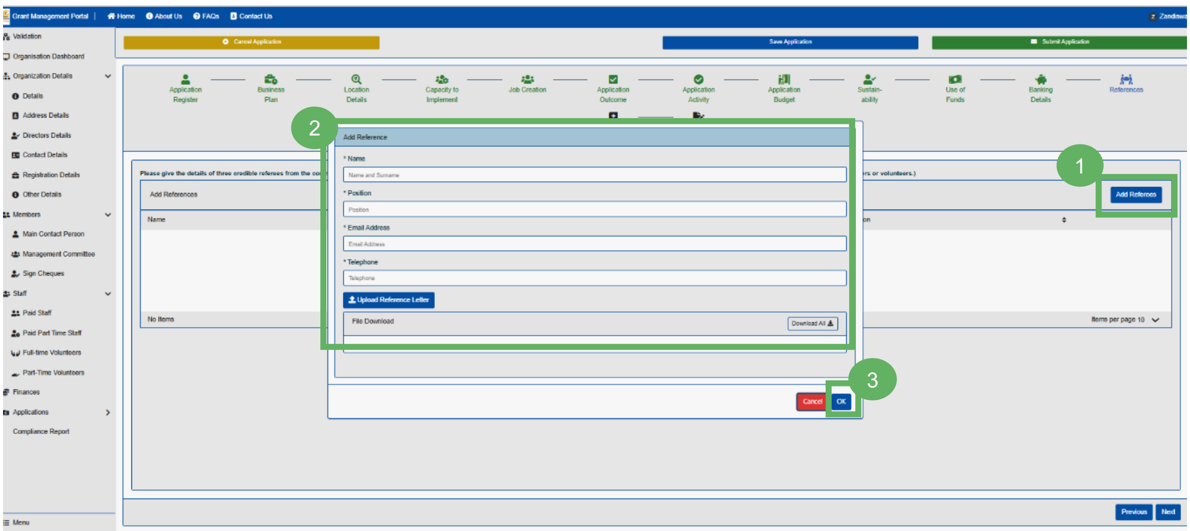

8. Member Sign Cheques added message**.**

9. Click **Ok**

10**.** Member Sign Cheques record (Click the **User Edit icon** to view the Member Sign Cheques details and edit, where applicable)

11. Click **Next**

## 2.12 References



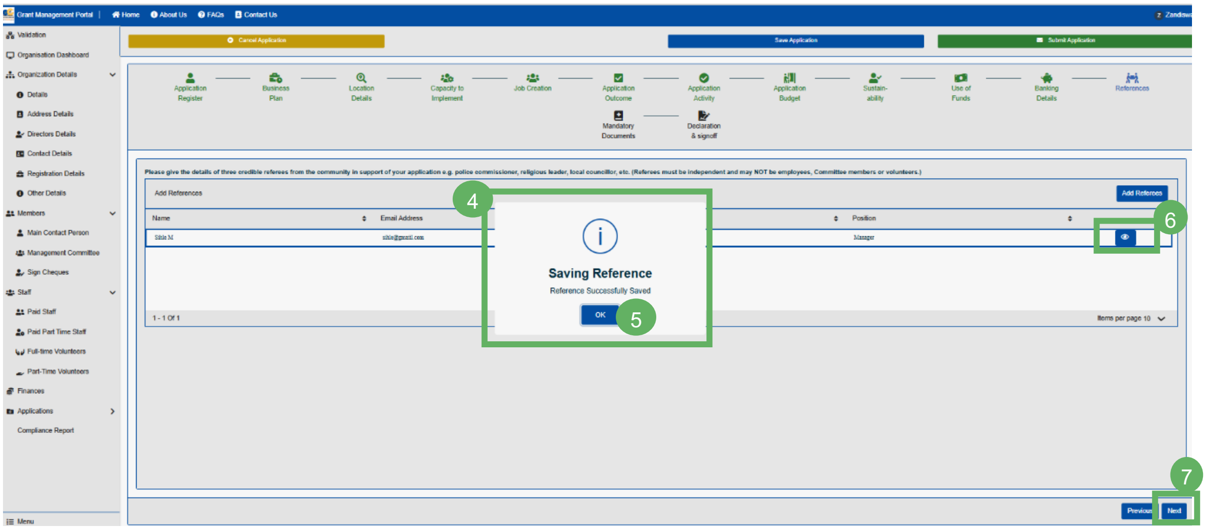

1. Click on **Add Referees.**

2. **View** Add Reference form and **capture** all the fields:

- **Enter** Name (Required)
- **Enter** Position (Required)
- **Enter** Email Address (Required)
- **Enter** Telephone (Required)

- **Upload** a Reference letter as a supporting document

3. Click **OK**



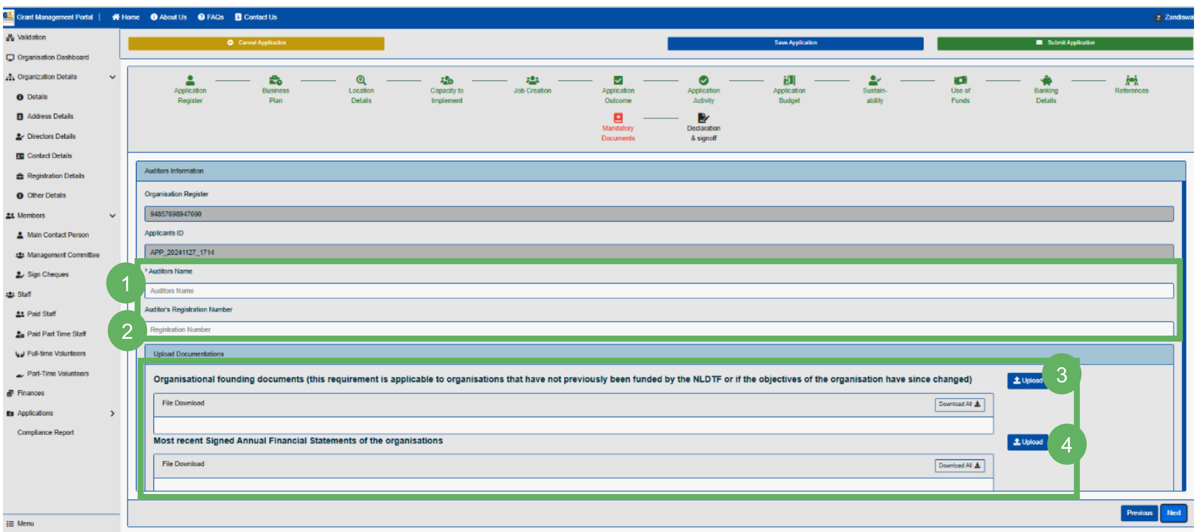
4. Reference added message**.**

5. Click **Ok**

6. Upon clicking ‘OK’ a Reference record will be added allowing the user to view refernce projects and edit, where applicable).

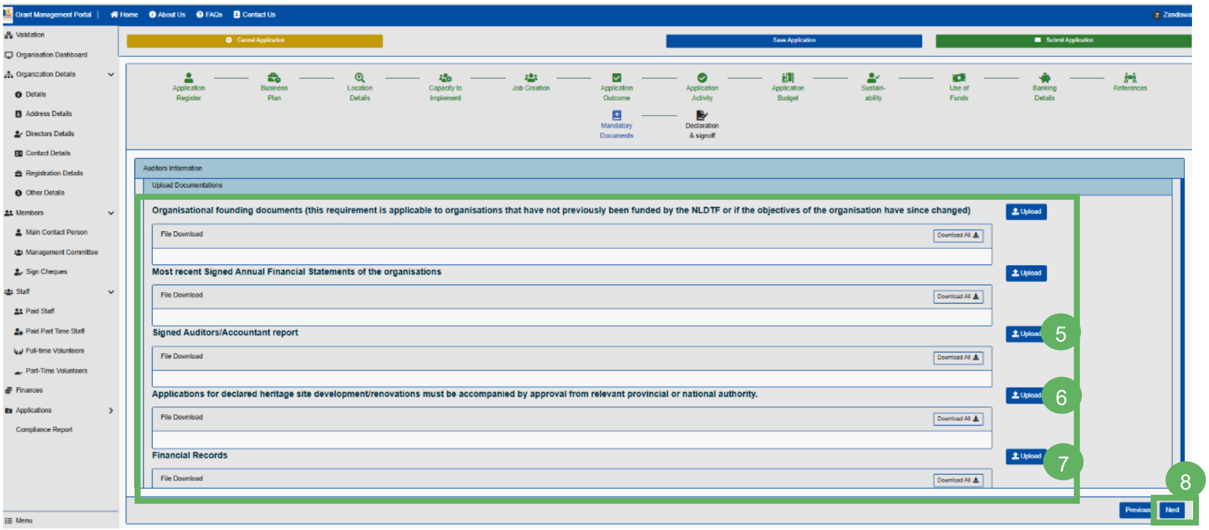
7. Click **Next**

## 2.13 Mandatory Documents



1. **Enter** the Auditor’s Name (Required)
2. **Enter** Auditor’s Registration Number

3. **Upload** the Organisational founding documents (This only applies to organisations that have not been previously funded by the NLDTF).
4. **Upload** the Organisation's most recent signed Annual Financial statement



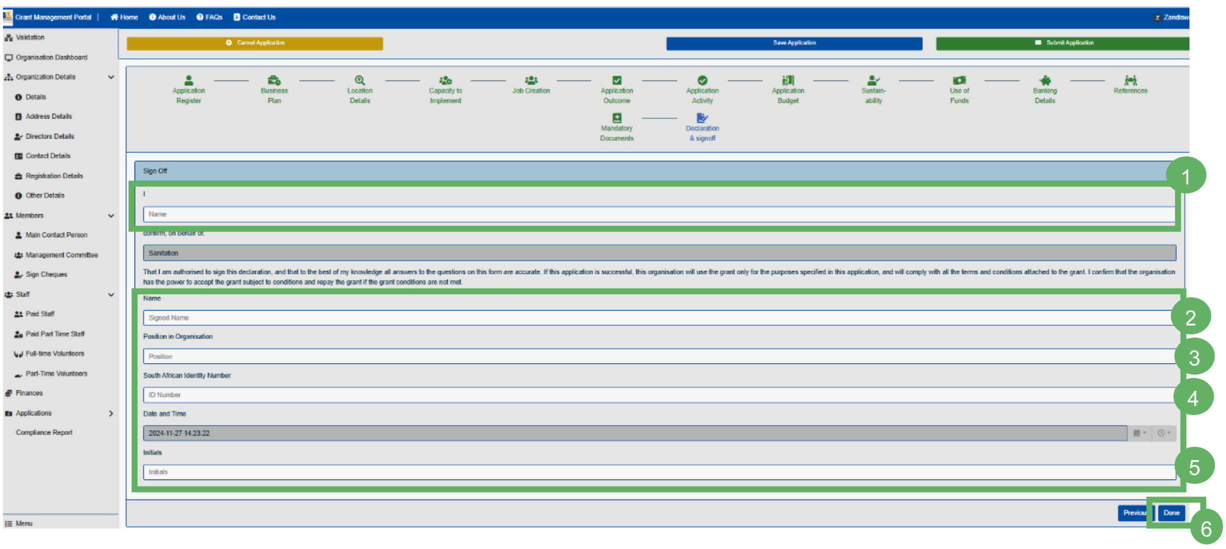

5. **Upload** a signed Auditors/Accountant report of the organisation.

6. In the case of Applications for declared heritage site development/renovations, **Upload** an approval from the relevant Provincial/National authority.

7. **Upload** Financial Records

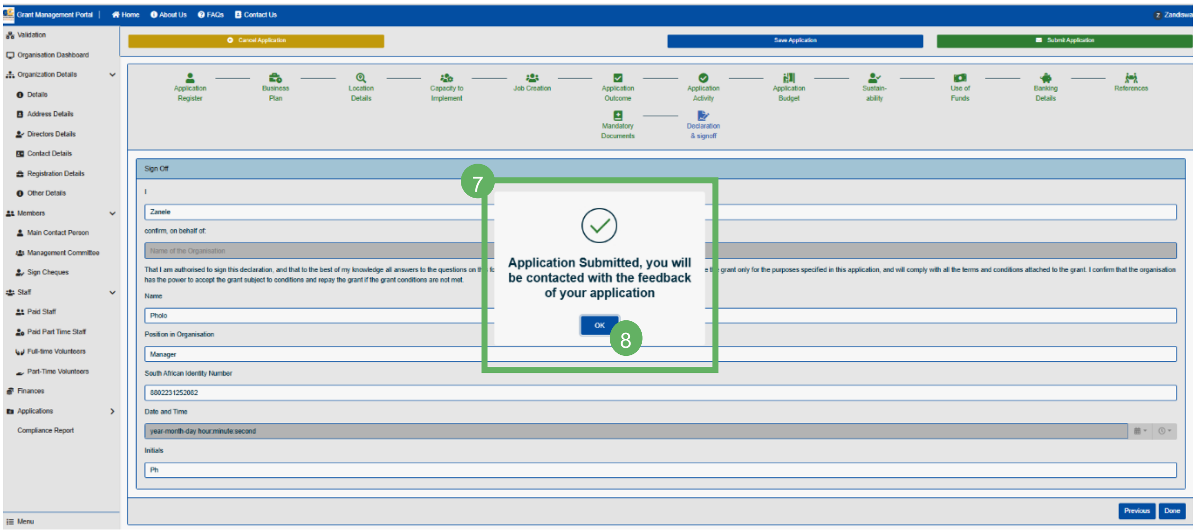
8. Click **Next**

## 2.14 Declaration & Signoff



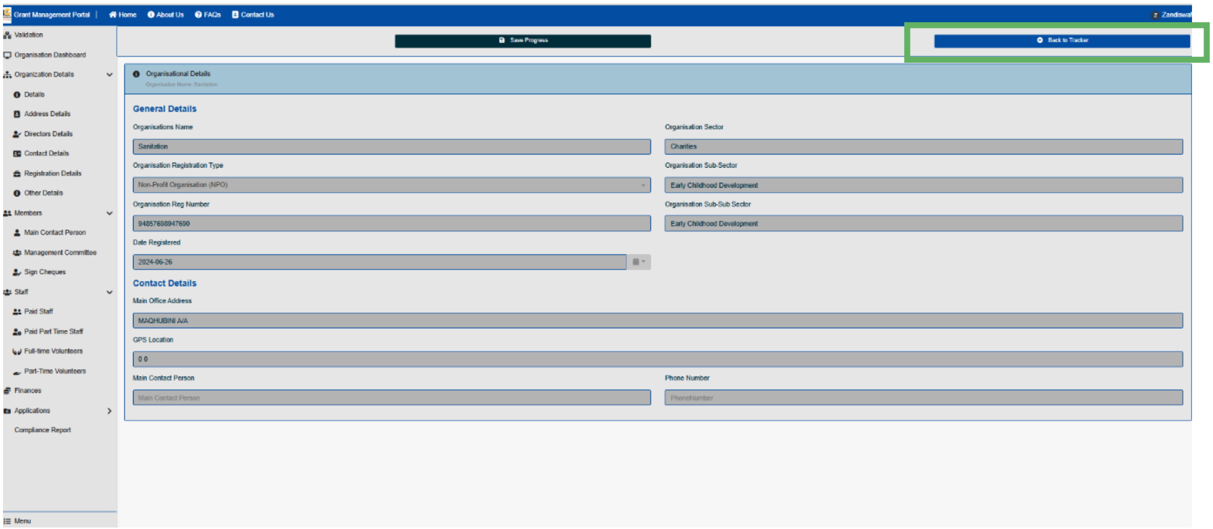

1. **Enter** your Name.

2. **Enter** your Signed Name (Input your full name to indicate formal agreement or authorization).
3. **Enter** your Position in the Organisation
4. **Enter** your ID Number (must be 13 digits)
5. **Enter** your Initials
6. Click **Done**




7. Application Submitted message. (An email will be sent to the applicant as confimation)

8. Click **OK**

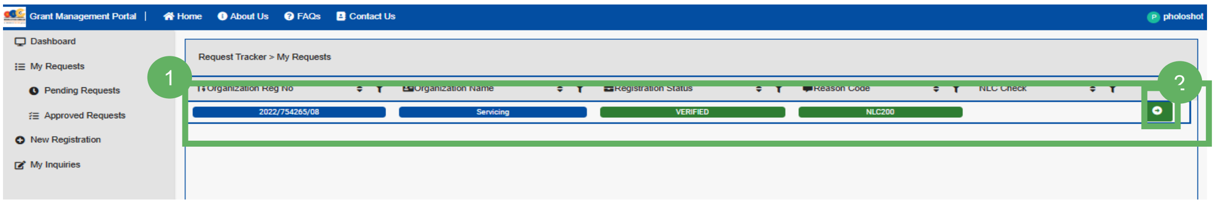



You can click '**Back to Tracker'** to go back to the Applications dashboard.

# 3. Troubleshooting (potential Issues)

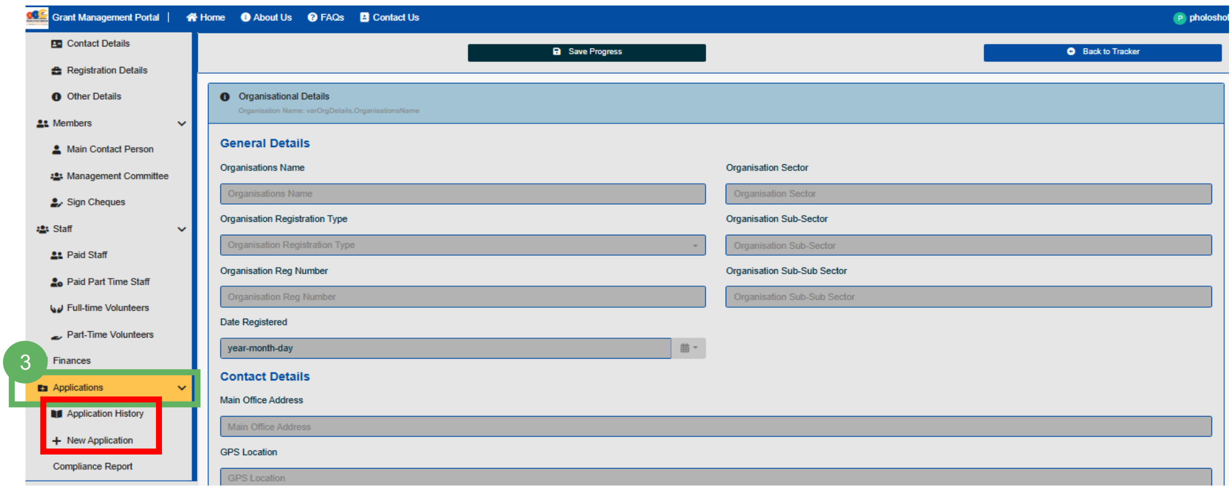
If your internet connection is lost or you are interrupted while completing your application, you can log back into the portal to continue.

- Upon logging in again, the screen below will be your landing page in the dashboard




1. A **Verified** registration status will be displayed**.**

2. Click the **forward arrow icon** to continue with the application.




3.This will be your landing page. From the menu item**, click the drop-down on Applications.**

Where you will have two options:

- **Application history:** This enables the applicant to continue with their application from where they left off.

- **New Application:** Applicant can start off with a new application/new submission.

User can always email or call the NLC Call Centre for further assistance.

Alternatively, user can walk into any NLC Centre for assistance.