



# Grant Management System

## Module 2 – Grant Application and Business Plan

National Lotteries Commission

# GMS Grant Application & Business Plan Manual

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## 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**.

The screenshot shows a login interface within a blue-bordered box. At the top is a dark blue user icon. Below it is a dropdown menu showing 'Sybrin' with a downward arrow. A green line with numbered circles 2, 3, and 4 highlights the login fields. Step 2 points to the 'User Name' input field. Step 3 points to the 'Password' input field, which includes a toggle icon (an eye) to the right. Step 4 points to the 'Log In' button, which is dark blue with white text. Below the 'Log In' button, the text 'New to NLC?' is followed by a link 'Create an account'. At the bottom, there is a horizontal line and a link 'Forgot Password?'.

## 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)

New OTP Request ➔ Inbox x

**NLC Account** <nlc@sybrin.com> 10:50 (2 minutes ago)  
to me ▾

Good day

Your OTP is 691965 and is valid for 5 minutes.

If you have any trouble accessing your account, please call 08600 123 123 or send an email to us at [nlccallcentre@nlc.org.za](mailto:nlccallcentre@nlc.org.za).

Our operating hours are from 07:00 to 18:00, Monday to Friday.

Regards,

NLC Call Centre.

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**.

Grant Management Portal | About Us | FAQs

System OTP Verification  
Regulatory verification check before attempting any NLC proceedings

One-Time Password

We have sent an OTP to your email address.

6 9 1 9 6

Validate OTP

Resend OTP

**Notes:**

- \* For successful verification, ensure that you used a valid email and it can still receive messages.
- \* If you have **exhausted all the retry attempts**, kindly **log out and try again later**, or **contact NLC Call Centre**

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System OTP Verification  
Regulatory verification check before attempting any NLC proceedings

One-Time Password

We have sent an OTP to your email address.

OTP Validation  
Successfully validated

OK

Resend OTP

**Notes:**

- \* For successful verification, ensure that you used a valid email and it can still receive messages.
- \* If you have **exhausted all the retry attempts**, kindly **log out and try again later**, or **contact NLC Call Centre**

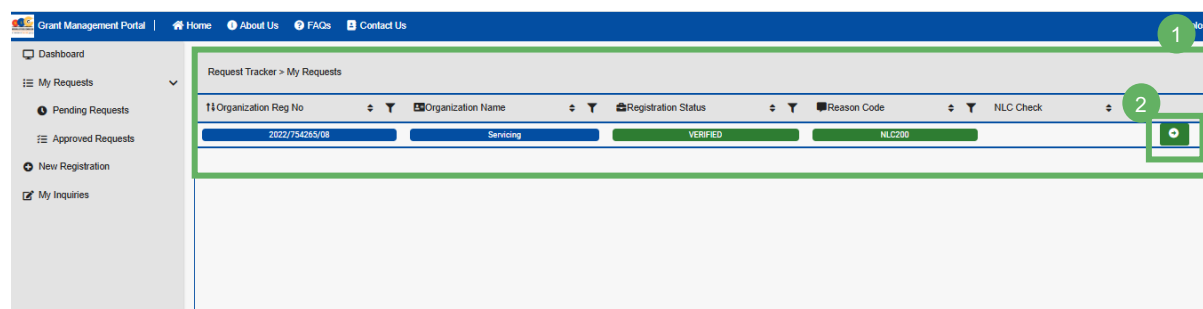
7. Click **OK**

## 1.3 Landing Page



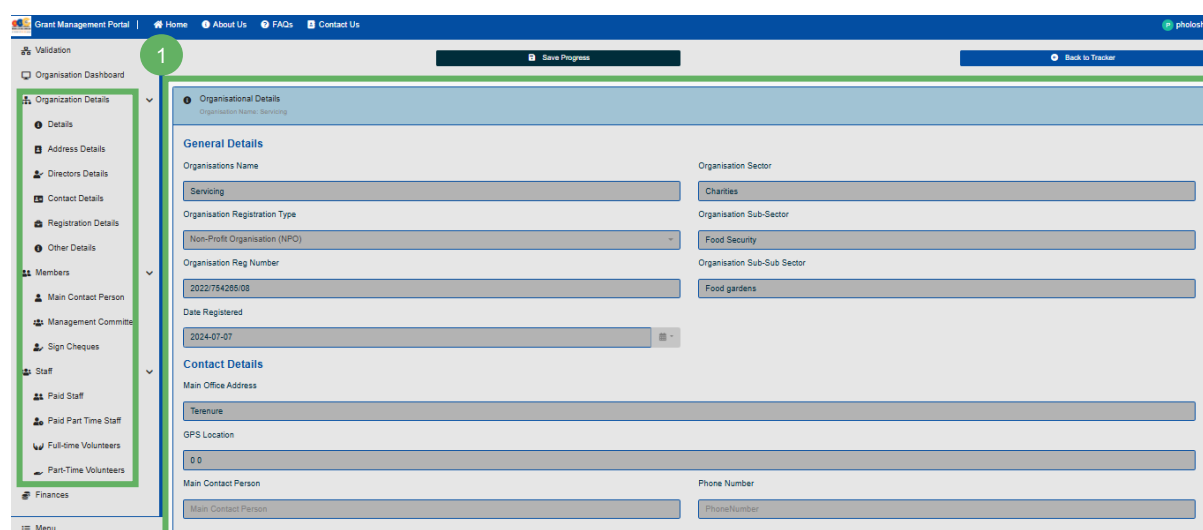
Pre-requisites:

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

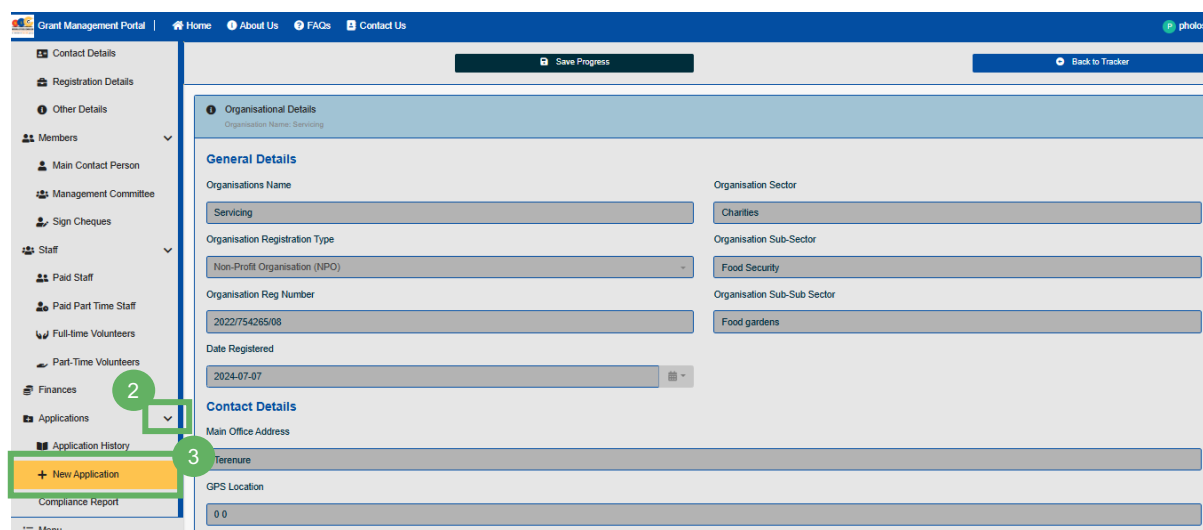


1. On the request tracker you will see your registration application with status Verified.
2. Click the forward arrow icon to start applying for funding.

### 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

The screenshot shows the 'Application Details' section of the GMS Grant Application (NLC) form. It includes a navigation bar at the top with buttons for 'Cancel Application', 'Save Application', and 'Submit Application'. Below the navigation bar is a horizontal menu with icons for various sections: Application Register, Business Plan, Location Details, Capacity to Implement, Job Creation, Application Outcome, Application Activity, and Application Budget. The main form area contains the following fields:

- Application Call: Call 2024
- Application Call Sector: Misc
- Area of Implementation: Informal settlement
- Sector of Implementation: Charities

A green circle with the number 9 is positioned next to the 'Next' button at the bottom right of the form.

9. Click **Next**

## 2.2 Business Plan

The screenshot shows the 'Business Plan' section of the GMS Grant Application (NLC) form. It includes a navigation bar at the top with buttons for 'Cancel Application', 'Save Application', and 'Submit Application'. Below the navigation bar is a horizontal menu with icons for various sections: Application Register, Business Plan, Location Details, Capacity to Implement, Job Creation, Application Outcome, Application Activity, Application Budget, Sustainability, Use of Funds, Banking Details, References, and Mandatory Documents. The main form area contains the following sections:

- Description of Organizations Needs:** This section includes sub-sections for 'Project / Programme Capacity/Current Resources', 'Project / Programme Identified Gaps', and 'Project / Programme Motivation'. A green circle with the number 1 is next to this section.
- Number of People Per Race Benefiting From Project/Program:** This section includes input fields for 'White', 'African', 'Indian', and 'Asian'. Green circles with numbers 2, 3, and 4 are next to the input fields for 'White', 'African', and 'Indian' respectively.

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**.

Cancel Application Save Application Submit Application

Application Register Business Plan Location Details Capacity to Implement Job Creation Application Outcome Application Activity Application Budget

Sustainability Mandatory Documents Declaration & signoff

Organisation Locations:

In this section, applicants outline the specific geographic focus of the project, including the *Exact Location*, *Community Demographics*, and any relevant *Local Infrastructure* considerations. These details help assess the logistical feasibility and potential community impact of the project, ensuring that the resources and efforts are effectively targeted to the identified area.

Organisation Locations:

Street Address	Suburb or Town	Province	Municipality	District or Ward	GPS
34 church street Louw	Kempton Park	Limpopo	Bela-Bela Local		0 0
142 Terrebonne	Kempton Park	Gauteng	City of Ekurhuleni Metropolitan	112	

Add Location

4. Organisation Location added message.

Validation Organisation Dashboard

Organisation Details

- Details
- Address Details
- Directors Details
- Contact Details
- Registration Details
- Other Details

Members

- Main Contact Person
- Management Committee
- Sign Cheques

Staff

- Paid Staff
- Part Time Staff
- Full-time Volunteers

Cancel Application Save Application Submit Application

Application Register Business Plan Location Details Capacity to Implement Job Creation Application Outcome Application Activity Application Budget

Sustainability Mandatory Documents Declaration & signoff

Organisation Locations:

In this section, applicants outline the specific geographic focus of the project, including the *Exact Location*, *Community Demographics*, and any relevant *Local Infrastructure* considerations. These details help assess the logistical feasibility and potential community impact of the project, ensuring that the resources and efforts are effectively targeted to the identified area.

Organisation Locations:

Street Address	Suburb or Town	Province	Municipality	District or Ward	GPS
34 church street Louw	Kempton Park	Limpopo	Bela-Bela Local		0 0

Add Location

1 - 1 OF 1

Items per page 10

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

The screenshot shows the 'Add Staff' form in the Grant Management Portal. The form is highlighted with a green border. The fields are as follows:

- StaffType**: A dropdown menu.
- Name and Surname**: A text input field.
- Nationality**: A dropdown menu with 'South African' selected.
- Race**: A dropdown menu.
- Relevant Experience**: A text input field.
- Location**: A dropdown menu.
- Position**: A text input field.
- Tax Number**: A text input field.
- UIF Number**: A text input field.
- Youth**: A dropdown menu.

At the bottom right of the form, there are 'Cancel' and 'OK' buttons. A green circle with the number 1 is next to the 'Add Staff' button on the right. A green circle with the number 2 is next to the 'Add Staff' button in the left sidebar. A green circle with the number 3 is next to the 'OK' button at the bottom right of the form.

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**

In this section, applicants detail the employment opportunities generated by the project, including Positions to Fill, Number of Individuals Needed, and Qualifications Required for each role. Additionally, they indicate whether Funding Support is required for compensation, emphasizing the project's contribution to local job creation and development.

Staff	Position to Fill	Number of Individuals Needed	Qualification	Cost	Funding Support
1	Nasip	1		300	

1-1 OF 1

Items per page: 10

4. Application staff added message.

5. Click **Ok**

6	Name	Position	IDNumber	TaxNumber	PAYENumber	Gender	Race	IDUpload	7
	Eugene Ntini	Senior MG	9808092345089			Male	African	Yes	

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

In this section, applicants detail the employment opportunities generated by the project, including Positions to Fill, Number of Individuals Needed, and Qualifications Required for each role. Additionally, they indicate whether Funding Support is required for compensation, emphasizing the project's contribution to local job creation and development.

Staff	Position to Fill	Number of Individuals Needed	Qualification	Cost	Funding Support
No Items					

1-1 OF 1

Items per page: 10

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**

Name	Position	IDNumber	TaxNumber	PAYENumber	Gender	Race	IDUpload
Eugene Ntini	Senior ME	9808092845089			Male	African	Yes

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**

**Add Application Outcomes**

In this section, applicants select the Outcome Type most relevant to their project and provide a Description of the Expected Outcome. This information highlights the intended impact and measurable goals of the project, aligning its objectives with the broader aims of the grant program.

Outcome Name	Outcome Type	Outcome Description	Total Cost
School	Project Progress Activity Budget		0

1 - 1 of 1

Items per page 10

Previous Next

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

**Add Application Activities**

In this section, applicants list the Activities required for effective progress tracking throughout the project.

Activities Outcome

Activity Name

Activity Description

Total Project Cost

Activity Request

Cancel OK

Previous Next

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)**

The screenshot shows the 'Add Activity' form in the GMS Grant Application (NLC) Manual. The form is titled 'Add Activity' and has a green border. It contains fields for 'Service', 'Resource/Services', 'Intervention', 'Start Date', and 'End Date'. A green circle with the number '3' is next to the 'Add a Quote/Invoice' button.

- **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**

The screenshot shows the 'Saving Activity Quote' form in the GMS Grant Application (NLC) Manual. The form is titled 'Saving Activity Quote' and has a green border. It contains fields for 'Name of supplier', 'Supplier Registration Number/ID Number', 'Quote/Invoice', 'Start Date', and 'End Date'. A green circle with the number '4' is next to the 'Add Activity' button, and a green circle with the number '5' is next to the 'Upload' button.

### 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**

The screenshot shows the 'Add Application Activity' form in the Grant Management Portal. A green box highlights the 'Saving Activity' message and the 'OK' button. A green circle with the number 6 points to the 'Add Activity' button. A green circle with the number 7 points to the 'OK' button. A green circle with the number 8 points to the 'Next' button at the bottom right.

## 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

The screenshot shows the 'Application Budget' form in the Grant Management Portal. A green box highlights the form content. A green circle with the number 1 points to the 'Budget Motivation' section. A green circle with the number 2 points to the 'Next' button at the bottom right.

Budget Motivation	
In this section, applicants view a detailed breakdown of the Costs Associated with Each Activity necessary to achieve their outcomes. The cumulative total for each outcome type is calculated to determine the overall funding requirement, ensuring a transparent and well-planned financial strategy for project implementation.	
Name of the Organisation	Sanitation
Company Registration Number	9483703847599
Project Programme Specific Costs	2 000
Job Creation Cost	3 000
Total Application Cost	5 000
Registration Request Number	REQ_20240627_1823
Project/Programme Capital Costs	0
Operation Costs	0
Current Staff Cost	0

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

The screenshot shows the 'Add Sustainability' form within the GMS Grant Application (NLC) interface. The form is titled 'Add Sustainability' and contains the following fields:

- Name of Partner or Associate Organisation** (Required)
- Nature of Collaboration** (Required)
- Years Worked Together** (Required)
- Upload Supporting Letter** (File upload button)
- Download All** (Link)

The form is part of a larger application process, with a 'Next' button at the bottom right. Numbered callouts 1, 2, and 3 highlight the 'Add Sustainability' button, the 'Add Sustainability' button in the sidebar, and the 'OK' button respectively.

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**

The screenshot shows the 'Sustainability Details' section of the GMS Grant Application (NLC) interface. A green box highlights the 'Add Sustainability' button (4) and the 'OK' button (5) in a 'Saving Successfully Saved' dialog. A 'Next' button is highlighted with a green circle (6) at the bottom right.

4. Partner Associate organisation added/saved message.

5. Click **Ok**

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

6. Click **Next**

## 2.10 Use of Funds

The screenshot shows the 'Use of Funds' section of the GMS Grant Application (NLC) interface. A green box highlights the 'What are you applying for: (Choose one)' dropdown (1), the 'Types of Specific Project' dropdown (2), and the 'Indicate which groups of people will benefit from the funding' section (3).

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.

The screenshot shows the 'Grant Management Portal' interface. The left sidebar contains navigation links for Validation, Organisation Dashboard, Organisation Details, Details, Address Details, Directors Details, Contact Details, Registration Details, Other Details, Members, Main Contact Person, Management Committee, Sign Cheques, Staff, Paid Staff, Paid Part Time Staff, Full-time Volunteers, Part-time Volunteers, Finances, Applications, and Compliance Report. The main content area has a top navigation bar with 'Cancel Application', 'Save Application', and 'Submit Application' buttons. Below this is a 'Use Of Funds' section with various input fields for 'Project Number', 'Organisation Name', 'APPLICANTS/TERMS/PROVIDE', 'SECTOR', 'PROJECT/AMOUNT', and 'CURRENT/PROJECT/STATUS'. A table below this section shows 'No Items' and a 'Have you been previously funded?' section. The 'Add Previous Projects' button is highlighted with a green circle and the number 4.

#### 4. Click on **Add Previous projects**

The screenshot shows the 'Add Previous Projects' form. The form has a title 'Add Previous Projects' and a 'Previous Projects' section. The fields are: 'Project Number', 'Year', 'Amount received', 'What was the purpose of the project?', and 'Have you Submitted All the Progress Reports?'. The 'Proceed' button is highlighted with a green circle and the number 6. The 'Cancel' button is also visible.

#### 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**

The screenshot shows the 'Grant Management Portal' interface. A modal window titled 'Saving Previous Projects' is displayed, indicating that previous projects have been successfully saved. The modal has an 'OK' button. In the background, the 'Use Of Funds' section is visible, showing a table for 'Previous Projects' with columns: PROJECTNUMBER, Organisation Name, Year, Amount Received, Virtual For, and Have You Submitted All The Progress Reports. The table currently has one row with the project number 1194889482 for the year 2020. A green circle with the number 7 points to the 'Add Previous Projects' button in the top right corner of the table. Another green circle with the number 8 points to the 'OK' button in the modal. A green circle with the number 9 points to the 'Next' button at the bottom right of the page.

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

The screenshot shows the 'Banking Details' section of the 'Grant Management Portal'. The section is titled 'Organization Banking Details' and includes a note: 'In this section, applicants provide essential Banking Information, including the Bank Name, Account Number, Account Type, and any additional relevant details required for fund disbursement. Accurate banking details are crucial for ensuring timely and secure transactions, facilitating efficient financial management throughout the grant period.' The form has several fields: 'Account Holder' (1), 'Account Type' (2), 'Bank' (3), and 'Account Number' (4). The 'Account Number' field is highlighted in orange. Below these fields is a 'Branch' section with a 'Branch Code' field. At the bottom, there is a table for 'List 3 people who are authorised to sign cheques on your account' with columns for 'Name and Surname' and 'Position in an Organisation'. The table has three rows, each with a 'Name and Surname' field and a 'Position in an Organisation' field. A green circle with the number 5 points to the 'Add' button at the bottom right of the table. A green circle with the number 6 points to the 'Next' button at the bottom right of the page.

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)

The screenshot shows the 'New Sign Cheques Member' form in the GMS Grant Application (NLC) Manual. The form is titled 'Add Member' and contains the following fields:

- Name and Surname (Required)
- ID Number (Required, must be 13 digits)
- Position (Required)
- Tax Number
- PAYE Number
- UIF Number
- Gender (Required, drop-down menu)
- Race (Required, drop-down menu)

Below the form, there is a section for 'List 3 people who are authorised to sign cheques on your account'. This section contains a table with columns for Name and Surname, Position, and a checkbox for 'Authorised to sign cheques'. The table has three rows, each with a 'Zandile M.' entry. The 'Save' button is highlighted with a red box and a green circle with the number 7.

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**

The screenshot shows the 'Grant Management Portal' interface. A modal message 'Adding a Member Sign Cheques' is displayed, indicating that 'Member Sign Cheques Added'. Below the message, a table lists the members authorized to sign cheques on the account. The table has columns for 'Name and Surname' and 'Position in an Organisation'. The table contains three entries: 'Zandile M', 'Zandile M', and 'Zandile M', all with the position 'Manager'. The table is paginated, showing '1 - 4 OF 4' items. The interface also includes a sidebar with navigation options like 'Validation', 'Organisation Dashboard', 'Details', 'Address Details', 'Directors Details', 'Contact Details', 'Registration Details', 'Other Details', 'Members', 'Main Contact Person', 'Management Committee', 'Sign Cheques', 'Staff', 'Paid Staff', 'Paid Part Time Staff', 'Full-time Volunteers', 'Part-time Volunteers', 'Finances', 'Applications', and 'Compliance Report'.

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

The screenshot shows the 'Grant Management Portal' interface with the 'Add Reference' form open. The form has fields for 'Name', 'Position', 'Email Address', and 'Telephone'. There is a 'Download All' button and a 'Cancel' button. The interface also includes a sidebar with navigation options like 'Validation', 'Organisation Dashboard', 'Details', 'Address Details', 'Directors Details', 'Contact Details', 'Registration Details', 'Other Details', 'Members', 'Main Contact Person', 'Management Committee', 'Sign Cheques', 'Staff', 'Paid Staff', 'Paid Part Time Staff', 'Full-time Volunteers', 'Part-time Volunteers', 'Finances', 'Applications', and 'Compliance Report'.

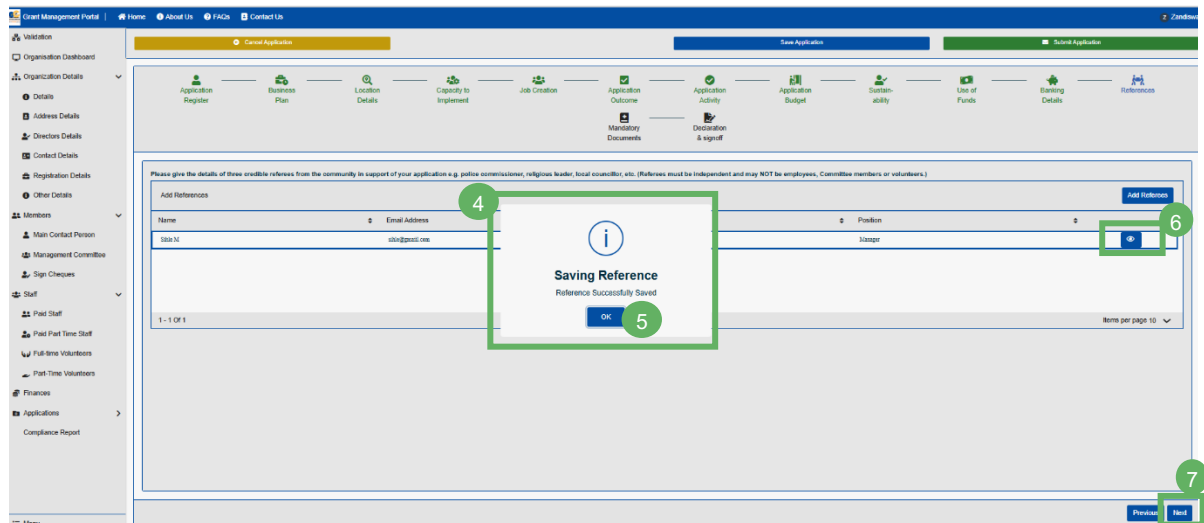
1. Click on **Add Referees**.

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 reference 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**

The screenshot shows the 'Grant Management Portal' interface. On the left is a sidebar menu with categories like Validation, Organisation Dashboard, Organisation Details, Members, Staff, Finances, and Applications. The main content area has a top navigation bar with 'Cancel Application', 'Save Application', and 'Retired Application' buttons. Below this is a row of icons for various application stages. The 'Sign Off' section is active, showing a form with fields for Name, Position, ID Number, and Initials. A green box highlights a message that says 'Application Submitted, you will be contacted with the feedback of your application'. A green circle '7' points to the message, and a green circle '8' points to the 'OK' button.

7. Application Submitted message. (An email will be sent to the applicant as confirmation)
8. Click **OK**

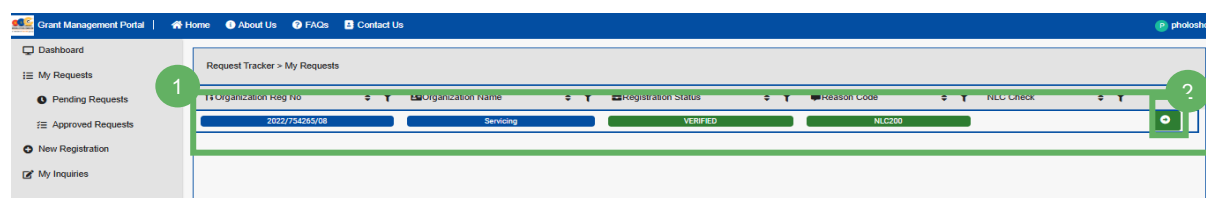
The screenshot shows the 'Grant Management Portal' interface with the 'Organisational Details' section selected. The top navigation bar includes 'Home', 'About Us', 'FAQs', 'Contact Us', and a 'Back to Tracker' button highlighted with a green box. The main content area displays various fields for organisational information, including Organisation Name, Organisation Registration Type, Organisation Reg Number, Date Registered, Main Office Address, GPS Location, Main Contact Person, and Phone Number.

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

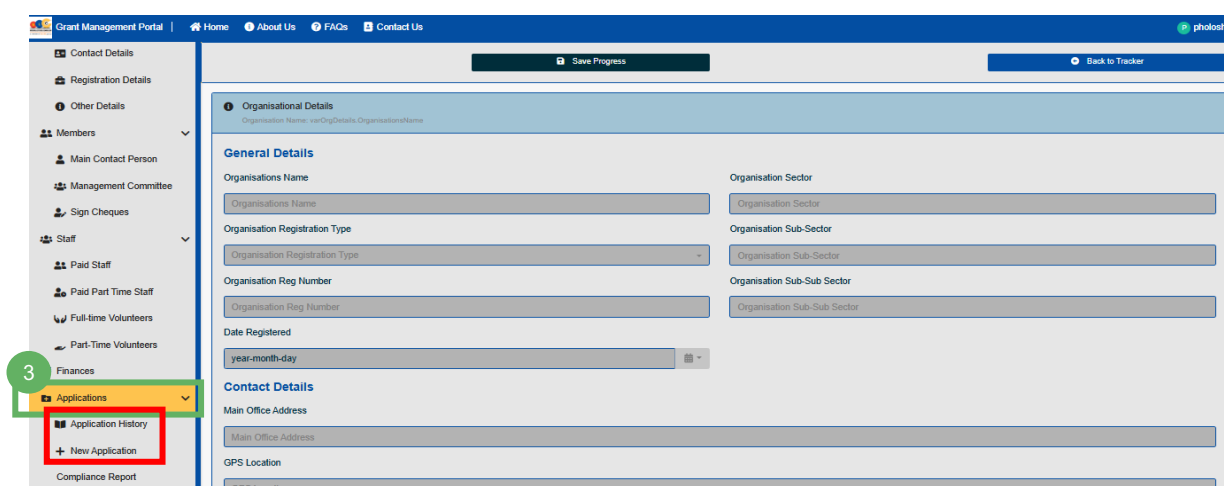
### 3. Troubleshooting (potential Issues)

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.