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## Flexi-Grant user guide

July 2021

This document describes how to register as a user of the Trust's online grant management system (Flexi-Grant).

### Registration and login

You must have a registered account with the Trust's Flexi-Grant system to apply for, and manage, your grants online.

#### For new users

You will need to create an account to apply. Head to: <https://ogdentrust.flexigrant.com/>

Figure 1 is a picture of the registration and login page for Flexi-Grant. Please click on the 'Register' button (circled).

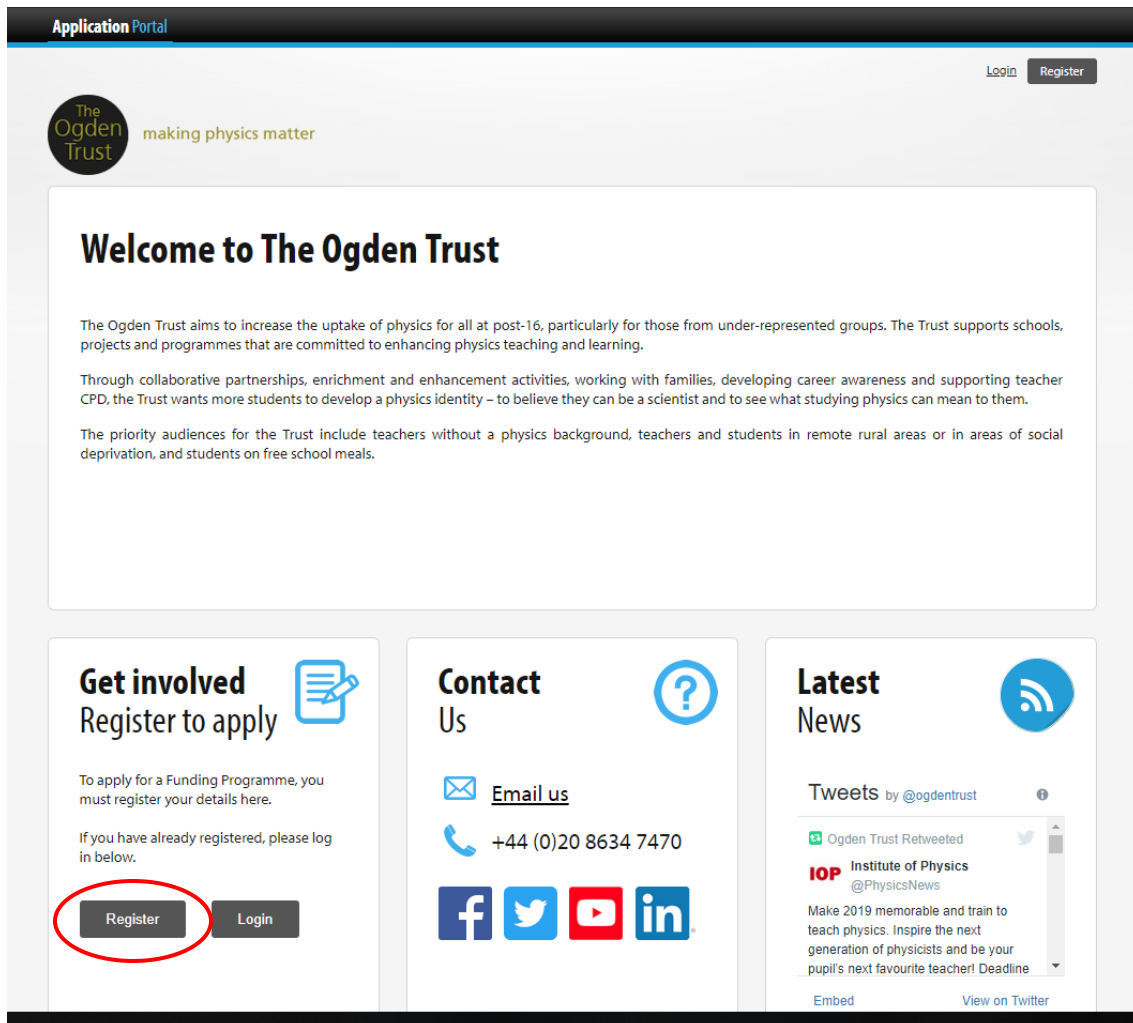
Once you have read (and accepted) the Trust's Terms and Conditions and our Data Policy, you will be asked to provide an email address and password so that you can log in to Flexi-Grant. Please provide a current email address and phone number (optional) when creating your profile. We will use these details to communicate with you about your application.

A confirmation email will be sent to the email address you have provided; please click the link to activate your user account. This will confirm your email address and complete your registration.

#### Forgotten passwords and locked accounts

If you have forgotten your password, follow the forgotten password option on the login page and a reset password link can be sent to you via email.

If you enter your password incorrectly three or more times, your account will be locked; this is to protect you from any attempts by a third party to access your data. To unlock your account, please contact the Trust via email ([office@ogdentrust.com](mailto:office@ogdentrust.com)).

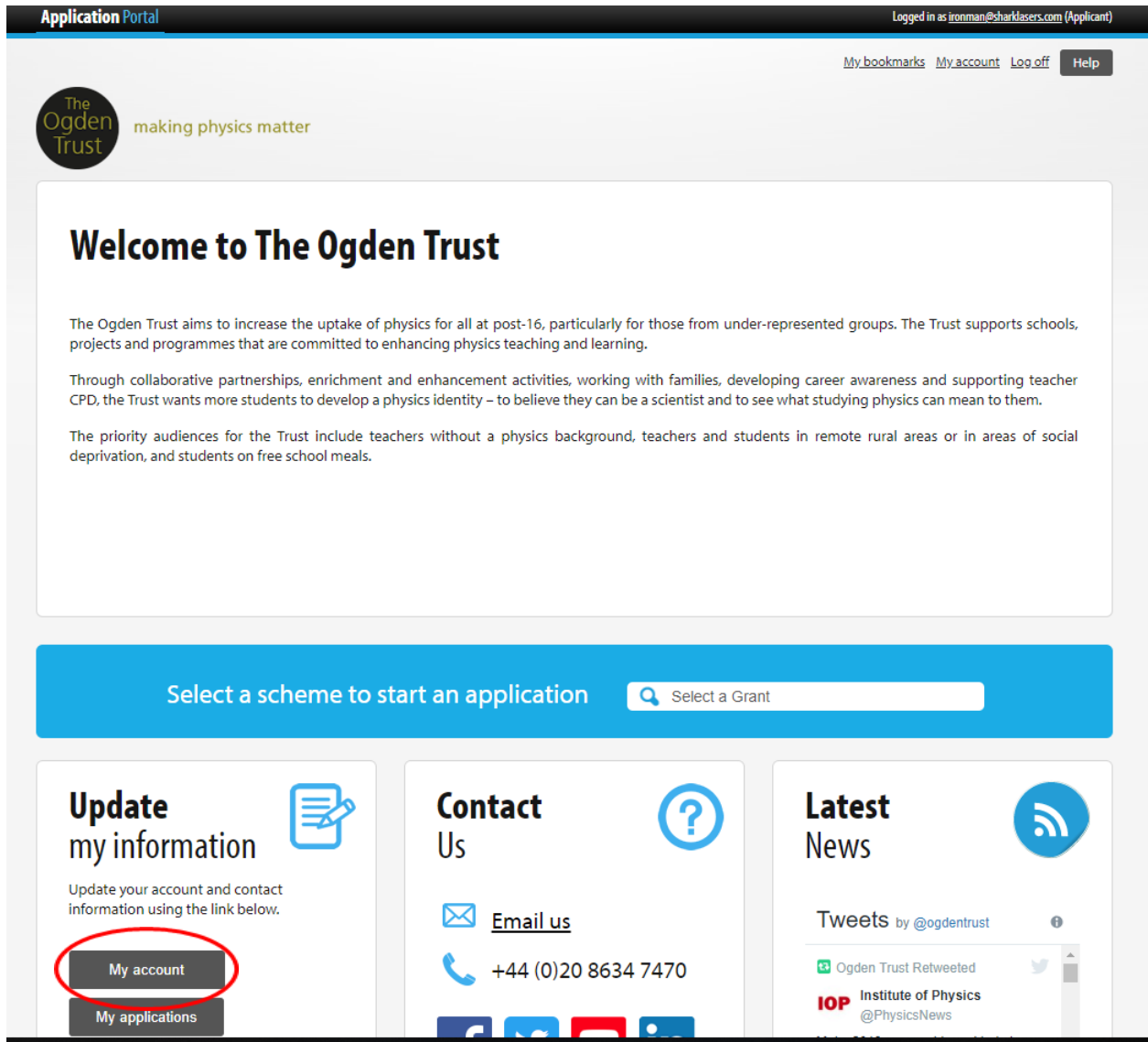


**Figure 1:** the Ogden Trust Flexi-Grant homepage

### Managing your account details

The Ogden Trust will use the details provided when first registering your account as your contact details. You can update your contact information at any time, by clicking the 'My account' button on the portal homepage (Figure 2).

The home page is the starting point for creating and accessing applications, managing your user account details and changing your password.



**Figure 2:** the portal homepage

The 'My account' page, shown in Figure 3, shows your current contact information. You can use the 'My contact details' tab to the left of the page to update your contact and organisation details, and change your password using the link at the bottom of the page.

**Please always remember to save all your changes and updates.**

The screenshot shows the 'Application Portal' interface. At the top right, it says 'Logged in as ironman@sharklasers.com (Applicant)'. The left navigation menu includes 'Available grants', 'My account', 'My contact details' (circled in red), and 'My applications'. The main content area is titled 'My account' and displays the name 'Tony Stark'. Below the name, there is a brief description: 'This form shows your current contact information. You can use the menu on the left to update your contact and organisation details, or look through the available grants. To change your password, please click on the 'Change password' link below.' The user details are listed as follows: Username: ironman@sharklasers.com; Type of user: Applicant; Organisation: (blank); T: 678-136-7092 - (Work); S: (no record); E: ironman@sharklasers.com; AE: (no record); Primary address: 13 Bramley Road, London, W10 6SP. At the bottom of the main content area, there is a section titled 'Update my user account details' with the text 'You can use the link below to update your password.' and a circled link 'Change password'. The footer contains the text '© 2019 Fluent Technology. All rights reserved.' and 'Powered by Flexi-Grant'.

**Figure 3:** managing your account details

Scrolling to the bottom of the 'My contact details' page will give you the option of adding yourself to an organisation (see Figure 4). Please select your organisation from our drop-down menu. If your organisation does not show automatically in the dropdown list that appears when you start to type, please enter the full name of your organisation and click on the save button. It will be added to the system and you can update its details using the 'My organisation' tab to the left of the page (see Figure 5).

Once you have updated your information, use the left-hand navigation bar to view available grants and your applications.

**Update your personal details**

**Contact details**

Title: Please Select...  
First name: Tony  
Last name: Stark  
Position: Enter position within organis:  
Date of Birth:

Phone number: 678-136-7092 Work Primary  
[Add another phone number](#)

Email: ironman@sharklasers.com Work Primary  
[Add another email](#)

Alternative email: Please enter an alternative e Work Primary  
[Add another alternative email](#)

Social media: Please enter a social network! Twitter Primary  
[Add another social network](#)

Address: 13 Bramley Road Work  
Street address line 2  
London  
Please enter a county  
W10 6SP  
United Kingdom Primary  
[Add another address](#)

**Organisation details**

Please identify the organisation you work for. Please do this by entering the name of your organisation in the field below.

N.B If your organisation does not appear automatically in the dropdown list that appears when you start to type, please enter the full name of your organisation and click on the save button and it will be added to the system.


Organisation: The Avengers

Cancel Save

**Figure 4:** adding your organisation

Application Portal Logged in as ironman@charities.com (Applicant)

[My bookmarks](#) [My account](#) [Log off](#) [Help](#)




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- [Available grants](#)
- [My account](#)
- [My contact details](#)
- [My organisation](#)
- [My applications](#)

## The Avengers

You can use the form below to update your organisation's contact information. Please note that any users who are associated with this organisation will also see the updated contact information.

### Organisation details

Name	<input type="text" value="The Avengers"/>	 <p><small>Drag or add a photo. Photos should be at least 250px x 250px. Remember to save changes.</small></p>
Type	<input type="text" value="Community interest comp."/>	
Company Number	<input type="text"/>	
Charity Number	<input type="text"/>	

### Organisation contact details

Phone number	<input type="text" value="Please enter a phone number"/>	<input type="text" value="Work"/>	<input type="text" value="Primary"/>
	<a href="#">Add another phone number</a>		
Email	<input type="text" value="Please enter an email address"/>	<input type="text" value="Work"/>	<input type="text" value="Primary"/>
	<a href="#">Add another email</a>		
Website	<input type="text" value="Please enter an alternative email"/>	<input type="text" value="Work"/>	<input type="text" value="Primary"/>
	<a href="#">Add another alternative email</a>		
Social media	<input type="text" value="Please enter a social network"/>	<input type="text" value="Twitter"/>	<input type="text" value="Primary"/>
	<a href="#">Add another social network</a>		
Address	<input type="text" value="Avengers Tower"/>	<input type="text" value="Work"/>	
	<input type="text" value="Manhattan"/>		
	<input type="text" value="Please enter a city"/>		
	<input type="text" value="Please enter a county"/>		
	<input type="text" value="Please enter a postcode"/>		
	<input type="text" value="United States"/>	<input type="text" value="Primary"/>	
	<a href="#">Add another address</a>		

**Save**

  
[Cancel](#)

Figure 5: updating your organisation's details