



Platform Administrator Guide

Use this guide only if you create or support district and foundation areas across GrantsPost.

BEFORE YOU BEGIN

Have the organization name, type, code, public contact information, and first administrator ready.

HOW TO USE THIS GUIDE

Complete the tasks in order. Each task tells you where to begin, what to select, how to know you are finished, and what happens next.

Understand the two timelines

A Grant Cycle can close while its awarded projects and reports continue.

Grant Cycle	One application opportunity, including its application dates, review, and award decisions.
Project Period	The dates when an awarded project is expected to begin and end. It may continue after the Grant Cycle closes.
Reporting Schedule	The progress and final reports required for an awarded project, with their due dates.
Project closeout	The final checks that formally complete an awarded project after its required reports are accepted.

Tasks at a glance

1. Sign in 2. Check platform activity	3. Add an organization
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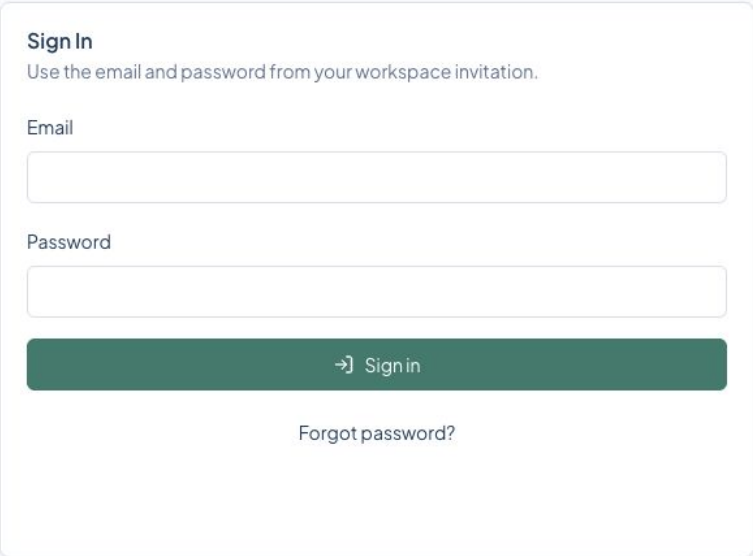
Screenshots use fictional training records. Names, dates, amounts, and district numbers will differ.

Sign in

WHERE TO BEGIN

Start on the GrantsPost sign-in page.

- 1 Enter the email address from your invitation.
- 2 Enter your password.
- 3 Select Sign in. If you cannot remember your password, select Forgot password?



Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

You arrive at the home page for your assigned role.

WHAT HAPPENS NEXT

GrantsPost opens the home page for your assigned role.

IF SOMETHING IS NOT WORKING

Check that you used the email address from the invitation. Use Forgot password? before asking an administrator to resend access.

Check platform activity

WHERE TO BEGIN

From the top menu, open Platform Admin.

- 1 Review the organization, user, application, and message totals.
- 2 Find the district or foundation that needs attention and open it.
- 3 Use the setup details only when you are preparing a new district or solving an access problem.

Platform administration

View district activity across GrantsPost while keeping each district's grant information separate.

Next step
Start with platform status. Open technical details only when publishing changes or troubleshooting a problem.

Districts
9
Districts available in GrantsPost.

Applications
18
Applications visible to platform admins.

Messages needing attention
0
Email previews or sends that failed.

Show technical details
Application mode, protected file storage, email mode, and recent activity.

Districts	STATUS	OPEN GRANT CYCLES	APPLICATIONS	REPORTS	MESSAGES	USERS	APPLICANT ORGANIZATIONS	AVERAGE SCORE
District 5150 Open setup details	Active	2	7	0	104	27	6	15 (3 cards)
District 9999 Open setup details	Active	0	1	0	0	3	1	Not scored
Rotary District 5030 Open setup details	Active	1	2	0	2	4	1	Not scored

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

You know which organization you are setting up or supporting.

WHAT HAPPENS NEXT

Return to your role's home page and follow the next action shown by GrantsPost.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.

Add an organization

WHERE TO BEGIN

From Platform Admin, select Add organization.

- 1 Choose the organization type and enter the public name and organization code.
- 2 Enter the first administrator's name and email address.
- 3 Review the details, then select Add organization.

GrantsPost
Parker Platform Admin | Platform Admin | All organizations | Platform Admin | Messages | Account | Ask for help

← Back to Platform Admin

Add an organization

Add an organization, choose its starting setup, and invite the first program administrator.

Organization details
These details appear throughout GrantsPost and in messages.

Organization name: Community Impact Foundation
GrantsPost language style: General grantmaker

Organization identifier: COMMUNITY-IMPACT
Web address name: community-impact

Optional internal number or code: Rotary districts may use the district number.
Use lowercase letters, numbers, and dashes. You can change this before launch.

Default timezone: America/Los Angeles
Primary contact name: Casey Grants

Primary contact email: grants@example.org
Website URL: https://example.org

Logo web address: https://example.org/logo.png
Optional. Leave blank if the organization will upload a logo later.

Logo placeholder text: Community Impact
Shown when no logo is uploaded yet.

Example screen. Training names, dates, amounts, and district numbers will differ.

YOU ARE FINISHED WHEN

The organization is available in GrantsPost and its administrator has an invitation.

WHAT HAPPENS NEXT

The district or foundation area is created and its first administrator can sign in.

IF SOMETHING IS NOT WORKING

Use Help or Ask for help. Include the page name and what you were trying to do. Never send your password.