

# LLOYD A. FRY FOUNDATION

## SMARTSIMPLE REFERENCE GUIDE

### How to Complete an Online Application

#### Log in to SmartSimple System



1. Go to SmartSimple website at <https://fryfoundation.smartsimple.com/>.
2. For first-time users of the SmartSimple System, who have submitted an application to the Fry Foundation before, click **"Forgot Password?"** to check if an account has been enabled.
3. Enter the email address used for the prior application and click **"Submit"**.
4. **Wait 10 minutes to check for an email** with a Subject Line "Lloyd A. Fry Foundation Password Reset Request".
5. Set your password with the required **minimum of six characters, with at least one letter, one number and one special character**.
6. **If you have NOT received the Password Reset Email, return to website and click "Register" to create an account.**

#### Request Staff Member/Grant Writer Access



Multiple individuals may access the SmartSimple System with their own account to collaborate with you prior to submitting an application.

1. Open the Application record and click **"Invitations"**.
2. Click the **"Add"** button to start an invitation.
3. If a Grant Writer works for multiple nonprofits, please ensure the email account used is affiliated with your specific organization.
4. Complete all of the **mandatory fields for the contact** and click **"Save"**.
5. Click **"Invite"** and select **"Yes"** to confirm process.
6. An email will be sent requesting the contact accept or decline the invitation.

#### Submit a Letter of Inquiry



If you are seeking support for the first time or if you are a returning grantee for a new project, we recommend you to **complete a LOI before submitting a Full Proposal**.

1. On the Home page, click the **applicable program area** to request support.
2. Select **"Yes"** as response to "Would you like to complete a Letter of Inquiry?".
3. Click **"Proceed to Draft LOI"** to begin the application form.
4. On the Attachments section, **upload budget for the project** (if applicable).
5. Click **"Submit LOI"** to complete the application.
6. An email will be sent to you to confirm the application was received with a PDF copy for your reference.

#### Submit a Full Proposal



If you wish to submit a Full Proposal.

1. On the Home page, click on the **applicable program area** to request support.
2. Select **"No"** as response to "Would you like to complete a Letter of Inquiry?".
3. Click **"Proceed to Draft Proposal"** to begin the application form.
4. On the Attachments section, **upload the mandatory documents**.
5. Click **"Submit"** to complete the application.
6. An email will be sent to you to confirm the application was received with a PDF copy for your reference.

If staff changes within the organization have occurred, please email us with the new contact information to ensure online access is accurate in the new system.

Email: [applications@fryfoundation.org](mailto:applications@fryfoundation.org)

Phone: (312) 580-0310

# LLOYD A. FRY FOUNDATION

## SMARTSIMPLE REFERENCE GUIDE

### How to Complete Grant Agreement Requirements

#### Log in to the SmartSimple System



1. Go to SmartSimple website at <https://fryfoundation.smartsimple.com/>.
2. For first-time users of the SmartSimple System who have submitted an application to the Fry Foundation before, click **"Forgot Password?"** to check if an account has been enabled.
3. Enter the email address used for the prior application and click **"Submit"**.
4. **Wait 10 minutes to check for an email** with a Subject Line "Lloyd A. Fry Foundation Password Reset Request".
5. Set your password with the required **minimum of six characters, with at least one letter, one number and one special character**.
6. **If you have NOT received the Password Reset Email, return to website and click "Register" to create an account.**

#### Complete Grant Agreement Requirement



1. When a grant is approved an email with a Subject Line "Signature Needed for Lloyd A. Fry Foundation Grant Agreement" will be sent with a PDF of the Grant Agreement.
2. After review, an appropriate officer of your organization should countersign the document then upload the executed Grant Agreement in to the SmartSimple System.
3. On the Home page, scroll to "Requires Attention" section.
4. Click "Pending" to find the "Grant Agreement" Activity Type.
5. Click "Open" to review upload instructions.
6. Click "Upload" under "Upload the Fully Signed Grant Agreement" header.
7. Click "Complete Fully Signed Agreement" to finish the upload.

#### Complete the ACH Options



1. Upon completion of the signed Grant Agreement, payments will be processed within a few business days. **If we already have your bank information on file, no action is needed.**
2. If you have NOT provided your organization's ACH information, please refer to the Grant Agreement to complete the form instructions.
3. If you have previously provided ACH information to us, but the information needs to be updated since your last payment, please refer to the Grant Agreement to complete the form instructions.

#### Complete Interim or Final Grant Report



1. A reminder email with a Subject Line "Lloyd A. Fry Foundation: Report Submission Reminder" will be sent 30 days before the deadline.
2. Log in to the SmartSimple System to upload the narrative and/or financial reports.
3. On the Home page, scroll to "Requires Attention" section.
4. Click "Pending" to find the "Interim or Final Report" Activity Type.
5. Click "Open" to review upload instructions.
6. Click "Upload" under appropriate type of report.
7. Click "Submit" to finish the upload.
8. If you need an extension to complete this report, email [reports@fryfoundation.org](mailto:reports@fryfoundation.org).

If staff changes within the organization have occurred, please email us with the new contact information to ensure online access is accurate in the new system.

Email: [applications@fryfoundation.org](mailto:applications@fryfoundation.org)

Phone: (312) 580-0310

# LLOYD A. FRY FOUNDATION'S GRANTS SYSTEM

## HOW TO NAVIGATE

## SMARTSIMPLE REFERENCE GUIDE

Follow this glossary



LLOYD A. FRY  
FOUNDATION



My Profile



Organization Profile



Change Password

- **MY PROFILE:** Provides your contact information for the account which can be updated as needed.
- **ORGANIZATION PROFILE:** Provides general information about the organization applying for funding. This information should **ONLY** be updated by authorized staff (i.e. Chief Executive Officer or Development Director).
- **GRANTS:** A list of all applications submitted by the applicant organization will appear for reference purposes only.

### Applications

You will find all of your applications below.

### Requires Attention

You will find all activities such as grant agreements and/or grant reports below.

1

In Progress

0

Submitted

0

Approved/Decline

0

Pending

0

Completed

- **LETTER OF INQUIRY (LOI):** If you are seeking support for the first time or if you are a returning grantee seeking support for a new project, we highly recommend you to submit a short summary of your project in a letter of inquiry before submitting a Full Proposal.
- **FULL PROPOSAL:** Select if you are seeking to submit a comprehensive application (Full Proposal) for a new project or renewal request. All organizations are welcome to submit a full proposal. A Letter of Inquiry is not required, however, it is recommended for projects which have not been funded by the Fry Foundation before. Please visit our website at [www.fryfoundation.org/how-to-apply/application-procedures/](http://www.fryfoundation.org/how-to-apply/application-procedures/) for a list of mandatory requirements.
- **IN PROGRESS:** The application will remain in this status when an LOI or Full Proposal is started and saved to submit at a later date.
- **SUBMITTED:** The application will move to this status when an LOI or Full Proposal is completed and will be reviewed by Fry Foundation. The application cannot be edited. If changes are needed, email [applications@fryfoundation.org](mailto:applications@fryfoundation.org) with detailed updates.
- **APPROVED/DECLINED:** The application will move to this status upon a final decision by Fry Foundation and an email notification will be sent.
- **NOTES:** This option allows applicants to alert Fry Foundation of any additional comments. Select the menu option and click the "Add" button to complete the "Note for Foundation" window.
- **INVITATIONS:** This option allows applicants to collaborate with additional staff members or grant writers to work and submit future applications. Click "Invitations" to send an invite to a staff member(s) and/or grant writer(s). They will receive an invitation to create a SmartSimple account to begin work on the application.
- **PENDING:** This will list any Grant Agreements, Interim or Final Reports yet to be completed for the term of your grant. (If you are the primary contact for this grant, emails will be sent regarding these pending requirements.)
- **COMPLETED:** After submitting your requirements, Fry Foundation will review information provided. (The information cannot be edited after it has been submitted. If changes are needed, email [reports@fryfoundation.org](mailto:reports@fryfoundation.org).)

**IMPORTANT NOTE:** Before completing an application or grant activity, verify that the "Organization Profile" is accurate.

**GRANT EXTENSION:** If you are requesting an extension on your grant period or grant report due date email [reports@fryfoundation.org](mailto:reports@fryfoundation.org).

Main

Grants 1

Main

Notes

Invitations



**PRO TIP:**  
While working, **SAVE**  
often and do not use  
the browser's back  
button to ensure your  
data will not be lost.

# LLOYD A. FRY FOUNDATION'S GRANTS SYSTEM

## HOW TO REGISTER

## SMART SIMPLE REFERENCE GUIDE

### LLOYD A. FRY FOUNDATION

Login

Email

Password

Log In

Forgot Password?

New to Portal? Click below:

Register

If you are a first-time applicant or did not receive a "Password Reset" email when you tried to complete the "Forgot Password?" steps, please create a new user account, to begin the registration process.

1. Click **"Register"** to open form.
2. Enter **Federal EIN** (Exempt Identification Number)\* or your organization's Legal Name to search for its record in the IRS Masterfile Database.
3. Click **"Search"** to view a list of matching organizations.
4. **Select the organization** that is applying for a grant.
5. **Complete the remaining questions** to submit your registration.
6. After successfully submitting, an **email will be sent to set a password**.
7. Set your password with the required minimum of six characters, with **at least one letter, one number and one special character**.

**\*IMPORTANT NOTE:** We make grants only to tax-exempt organizations. If your organization is not a 501(c)(3), it will not be found in the IRS Masterfile Database. Please email [applications@fryfoundation.org](mailto:applications@fryfoundation.org) if you have questions.

Emails may take up to ten minutes upon registration completion. Also remember to check your spam folders if you cannot find the "Welcome" email with a password link.

Follow these steps to  
register for new users.



QUESTIONS?

[applications@fryfoundation.org](mailto:applications@fryfoundation.org)

THE SYSTEM WILL ONLY ALLOW ONE ACCOUNT PER EMAIL ADDRESS.

IF THE SYSTEM VERIFIES YOU HAVE AN ACCOUNT, RESET YOUR PASSWORD BY COMPLETING THE FOLLOWING:

1. Click on **"Forgot Password?"**.
2. Enter your email address.
3. Wait 10 minutes for a "Password Reset" email.



**PRO TIP:**  
For best results, use  
**Google Chrome** as  
your browser.