Before you Begin

The intended audience for this document is a new user who is registering for the first time or a returning user who needs assistance with registration, log in and getting started with our funding portal.

The Funding Process

Requesting funding from Wellington City Council can be done in a few easy steps via the Wellington Funding Portal.

1. Register / login to the Wellington Funding Portal
   The first time you request funding via the Wellington Funding Portal you will need to register. You will select a username (your email address) and a password. Every time you log in you will use this user name and password.

2. Funding request
   You can submit a funding request to Wellington City Council by completing the form for the fund that you want to apply to. You may need to attach some additional documentation as supporting evidence for your funding request.

3. Assessment and Approval
   Your funding request will be acknowledged and you will be kept informed of its status within the portal. When a decision has been made, you will receive an email to advise whether or not your request has been successful. If your request is approved this will include details of the amount you have been granted and how the Wellington Funding Team expect you to use the funds.

4. Funding agreement
   If your funding request is successful a funding agreement will be created within the portal, you will be informed by email when this is ready for you. You will then need to accept it in the Funding Portal.

5. Payment
   Payment will be made into the bank account that you specified in the Funding Request. (Note: for some Funds e.g. Built Heritage Incentive Fund, payment will only be made after the accountability has been accepted – see step 6).

6. Accountability
   You will need to return to the portal to submit your accountability outlining how you’ve used the funds. You will be expected to report back on how you have achieved the intended outcomes of your project using the funds.
Registration

The first time you use the portal you will need to register.

1. Open a browser window
2. Navigate to the following address:
   https://wellingtonfunding.secure.force.com
   (Alternatively click on the link in the Wellington City Council Website)

   **NOTE:** It is generally a good idea to bookmark frequently visited pages and we recommend that you bookmark this page

   The following will be displayed:

3. Click the Join button

   The Registration Page will be displayed:
4. Enter your personal details

**NOTE:** The email address you enter will become your username for the Wellington Funding Portal.

**NOTE:** Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

5. Enter your address details

**NOTE:** If applying on behalf of an organisation or non-legal entity, enter the street address here – you will be asked to provide postal address details later

*If you are applying for funding as an individual*

Click the submit button and you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.

*If you are applying for funding on behalf of an organisation with legal status (e.g. Charity, Incorporated Society, Body Corporate etc) or on behalf of a group / non-legal entity*

a) Tick the checkbox in the Organisation Details section

The following will be displayed:

```
Organisation Details

Are you registering to request funding on behalf of an organisation or group? [ ]

What is your organisation or group’s name? 

What is your organisation’s legal status? Trust

Press the button at the right to validate if your organisation is already existing.
```

b) Enter your organisation or group’s name and select your legal status from the drop down

**NOTE:** Depending on your selection you will be asked to provide further details as follows:

<table>
<thead>
<tr>
<th>Legal Status</th>
<th>Details required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charity</td>
<td>You must enter your Charity Registration Number in the box provided – enter a Charities Commission registration number or a NZ Companies Office registration number.</td>
</tr>
</tbody>
</table>
Wellington City Council Funding Portal – Quick Reference Guide for Applicants

<table>
<thead>
<tr>
<th>Legal Status</th>
<th>Details required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporated Society</td>
<td>You must enter your Incorporated Society Registration Number in the box provided – enter a Charities Commission registration number or a NZ Companies Office registration number.</td>
</tr>
<tr>
<td>Limited Company</td>
<td>You must enter your organisation’s Company Number in the box provided.</td>
</tr>
<tr>
<td>Body Corporate</td>
<td>You must enter your organisation’s Body Corporate Number in the box provided.</td>
</tr>
<tr>
<td>Residents and Progressive</td>
<td>Make sure you tick the checkbox later in the form to confirm you are able to meet the Council’s requirements for a Residents and Progressive Association. Note: City Communities keep a current list of active residents and progressive associations in the City, contact <a href="mailto:funding@wcc.govt.nz">funding@wcc.govt.nz</a></td>
</tr>
<tr>
<td>Association</td>
<td></td>
</tr>
</tbody>
</table>

**c) Click the Search Existing Organisations button**

**NOTE:** The system will check to determine if your organisation has already been set up on the Wellington Funding Portal.

**NOTE:** The organisation must be entered exactly as it was registered under otherwise it will not be displayed. If you suspect that the organisation has been registered please contact a member of the Funding Team on 04 499 4444.

**If a user has already registered from your organisation to use the Wellington Funding portal**

The following will be displayed:

Your organisation was found in our database. Please submit to register yourself against this organisation.

Submit

Click the submit button and you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.
If a user has NOT already registered from your organisation, or if we have insufficient details to validate your organisation

The following will be displayed:

Your organisation was not found in our database. Please enter the details below to create a new organisation.

What is your organisation’s postal address, different from above?
- Postal Street
- Postal Suburb
- Postal City
- Postcode

Are you GST registered?
- If yes, please provide your GST number.

City Communities keep a current list of active residents and progressive associations in the City, contact

What is the key purpose of your organisation?

What community groups do you work with?

How are your services normally funded?

Are your services accessible?

d) Complete the remaining fields in the Organisation Details section

e) Complete the Primary Contact Details section

Primary Contact Details

The primary contact should be someone representing the governance body of your organisation - for example the Chair of the board, a trustee or committee member.

If no, please specify your organisation’s primary contact.

Are you the primary contact? Yes

Please check all the information you have entered above before finally pressing the Submit button and register in behalf of your organisation.

Submit
f) Click the **Submit** button you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.

**Logging in**

Once you have setup your password and logged in initially, all future logins will follow a different login process.

1. Open a browser window

   Navigate to the following address:

   https://wellingtonfunding.secure.force.com

**NOTE:** It is generally a good idea to bookmark frequently visited pages

2. You will be presented with a login page

3. Click the **Login** button

4. Enter your username and password and click **Login**

**NOTE:** If you do not remember your password you can click on “Forgot your password?” to reset your password. If you do not know your username then you can refer to the e-mail which was sent by support@salesforce.com when your account was created or you can contact the system administrator or Funding Advisor on 04 499 4444.
### Navigation – Home Page

The following screen capture is of the Home page. The home page is the default page that is displayed when you log in to the Wellington Funding Portal and provides an overview of the Funding Pools that are open.

#### Welcome panel – enables a user to manage their profile by clicking on the My Profile link or log out of the portal by clicking Logout

#### Side Bar – area of the screen that is displayed on all portal pages. Houses the Welcome, Funding Help and Information and Our Funding components where specific information about the specific funds can be found.

#### Messages and Alerts – reminds users that their session will automatically log out after 4 hours plus up-to-the-minute important information.

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Welcome</strong> panel – enables a user to manage their profile by clicking on the <strong>My Profile</strong> link or log out of the portal by clicking <strong>Logout</strong></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Side Bar – area of the screen that is displayed on all portal pages. Houses the <strong>Welcome</strong>, <strong>Funding Help and Information</strong> and <strong>Our Funding</strong> components where specific information about the specific funds can be found.</td>
<td></td>
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</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>4.</td>
<td><strong>Funding Help and Information</strong> - Contains links to information and help about Wellington Funding.</td>
<td>Clicking on a link opens the information in a separate browser window</td>
</tr>
<tr>
<td>5.</td>
<td><strong>Our Funding</strong> – contains links to detailed information about each funding pool that is available for requests.</td>
<td>Clicking on a link opens the information in a separate browser window</td>
</tr>
<tr>
<td>6.</td>
<td><strong>Past Allocations</strong> – view previous successful applicants.</td>
<td></td>
</tr>
</tbody>
</table>
| 7. | Tabs – The tabs are a key navigational concept as they allow the user to navigate to the different areas within the portal. The following tabs are available:  
  
  **Funding Requests** – contains funding requests that have been created by you, or another user in your organisation, in the Wellington Funding Portal. This tab enables you to view, edit and attach documents to saved Funding Requests, and submit Funding Requests to the Wellington Funding Team for assessment and approval.  
  
  **Financial Documentation** – this tab enables you to upload financial accounts for review by the Wellington Funding Team. This is a necessary step for all organisations that are GST registered.  
  
  **Funding Agreements** – contains Funding Agreements that have been created by the Wellington Funding Team on approval of Funding Requests submitted by you or another user in your organisation. This tab enables you to view and accept Funding Agreements.  
  
  **Accountabilities** – contains Accountability Forms that have been created by the Wellington Funding Team on approval of Funding Requests submitted by you or another user in your organisation. This tab enables you to view, edit and attach documents to saved Accountability Forms, and submit Accountability Forms to the Wellington Funding Team for acceptance. | 1. Clicking on a tab navigates away from the Home screen  
  
  2. Clicking on the Home tab navigates back to the Home screen |
### Available Funding

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Available Funding – contains details of Funding Pools that are available for Funding Requests. Click on a Create Request link to create a Funding Request.</td>
<td>If you have registered as an individual you will not see the funds only available to groups or organisations.</td>
</tr>
</tbody>
</table>

### My Profile

**To view your profile:**

1. Click on the **My Profile** link in the Welcome panel

The My Profile page will be displayed:

To edit your profile:

1. Click on the **Edit** button
2. Edit the data

**NOTE:** Make sure you populate all the required fields. Required fields have a red indicator next to the field.
3. Click **Save**

**To change your password:**

1. Click on the **Change Password** button
2. Enter your old and new passwords in the boxes provided
3. Click Change Password

**Financial Documents**

If you are applying for funding on behalf of an organisation that is GST registered you need to provide a set of financial accounts. To do this:

1. Click on the Financial Documents tab

The Financial Documents page will be displayed:

2. Click the Browse button and select the file that you would like to attach
3. Click the Save Attachment button

The following will be displayed:

**NOTE:** Your documents will now be available to the Funding Team to review, you will not be able to view the documents once uploaded.

**NOTE:** For organisations that request funding regularly from Wellington City Council - you will need to attach financial accounts for each financial year.
Funding Requests

To create and save a funding request:

Funding requests are created from the Home page. You can save a Funding Request for completion at a later date.

1. Click on the Home tab

   The Home page will be displayed:

   ![Home page](image)

2. Click on the Create Request Link for the funding pool that you would like to apply to

   **NOTE:** Details for each funding pool can be found in the Our Funding panel in the side bar
3. A funding request form will be presented

![Funding Request Form](image)

4. Complete the form

**NOTE:** Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

**NOTE:** Roll the mouse over the question mark next to a field to learn more about the information to be provided.

5. Read the declaration statement on the **Declaration** Section of the form and tick the box to confirm.

6. Read the information in the **Attachments** Section of the form. It explains how to attach documents to the form and what documents have to be attached.

7. Click the **Save** button

8. Attach documents to the funding request as follows:

   a. Scroll to Notes & Attachments section
   
   b. Click **Attach File** button
   
   c. Follow the instructions to select and attach the file
   
   d. Click the **Done** button
To submit a funding request:

When you are satisfied that the form is complete and all necessary documentation has been attached you need to submit the funding request to WCC for assessment and approval.

When viewing a saved Funding Request:

1. Click the Submit button

The following will be displayed:

2. Tick the Ready for Submission? Checkbox

3. Click the Save button

**NOTE:** An email will be sent to the address you provided at registration to confirm submission of the funding request

What happens next?

After you have submitted a funding request the following will occur:

1. You will receive an email confirming that your Funding Request has been submitted. If you are applying on behalf of an organisation the Primary Contact for that organisation will also be notified.

2. Your Funding Request will be reviewed and the WCC Funding Team will contact you if your request is incomplete or ineligible.

3. If your request is successful you will receive an email advising you of this and you will be asked to accept a funding agreement in the Funding Portal.

4. You will be required to submit an Accountabilities Form. You will receive an email to advise you of this.

To view saved Funding Requests:

The funding requests tab contains details of all funding requests that have created by you, or by other users in your organisation, in the Funding Portal.

1. Click on the Funding Requests tab

2. Select a view
Applicable views are as follows:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Funding Requests</td>
<td>This view shows all funding requests that have been created by you, or by other users in your organisation.</td>
</tr>
<tr>
<td>My Inactive Funding Requests</td>
<td>This view shows funding requests that have been created by you, or by other users in your organisation that have an inactive status (this includes Withdrawn, Ineligible, Declined and Complete funding requests).</td>
</tr>
</tbody>
</table>

**NOTE:** Please ignore the Assessor and Panel Funding Request views – these are for internal use only and do not contain any information.

A list of funding requests will be displayed:

![Funding Request Table]

To view an individual Funding Request:

1. Select the Funding Request you would like to view by clicking on the Funding Request Number (e.g. 201207-000150)

The Funding Request will be displayed:

![Funding Request Form]

**NOTE:** Saved Funding Requests that have not yet been submitted can be edited by clicking the **Edit** button.

**Funding Agreements**

A Funding Agreement will be created when a funding request is successful. You will be notified via email that a Funding Agreement is ready for acceptance in the Funding Portal. To confirm acceptance of a Funding Agreement complete the following steps:

1. Click on the **Funding Agreements** tab

![Funding Agreement Table]
2. Select the Funding Agreement you would like to view by clicking on the Funding Agreement Number (e.g. FA000085)

3. Tick the **I accept** checkbox beneath the declaration

4. Review the funding agreement

5. Click on the **Edit** button

6. Click the **Save** button.

**NOTE:** Once you have accepted the funding agreement payment can be made (providing you have supplied an appropriate tax invoice if required). You will not be able to retract your acceptance of the Funding Agreement via the Customer Portal.

**Accountabilities**

Accountabilities forms will be created in draft form and you will need to complete the Accountability form and submit it prior to the due date. You will receive an email 5 days prior to the accountability due date to remind you to submit the form.

**To view an Accountabilities form:**

1. Click on the **Accountabilities** tab
Wellington City Council Funding Portal – Quick Reference Guide for Applicants

To complete an Accountabilities form:

1. Click on the Edit button

2. Complete the Accountability form

**NOTE:** Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

**NOTE:** Roll the mouse over the question mark next to a field to learn more about the information to be provided.

3. Read the declaration statement on the Declaration Section of the form and tick the box to confirm.

4. Click the Save button
To submit an Accountabilities form:

When viewing a saved Accountabilities Form:

1. Click the **Submit for Approval** button

The following will be displayed:

Once you submit this record for approval, you might not be able to edit it or recall it from the approval process depending on your settings. Continue?

2. Click **OK**

**NOTE:** You will be notified if for any reason further information is required.