



FLEXI-GRANT® **CORE TRAINING** **PROGRAMME**



Our dedicated training consultant will deliver a standardised training programme to give you and your team superior insights into software and best practice derived directly from the team behind Flexigrant.

The course consists of seven sessions to cover the core end-end processing and management of applications through the supporting workflow.

Training will be delivered online via Microsoft Teams, with sessions designed to be interactive so that clients can demonstrate they have firmly grasped and understood each of the topics to be covered before advancing to the next topic.

Supporting documentation and training guidance will also be provided along with recordings of each session for future reference.

What do we cover in the training?

Our core Flexi-Grant training is spread across 7 unique sessions that cover:

SESSION 1 45min

An Introduction to Flexi-Grant

- Admin Portal
- Application Portal
- Manage Contacts
- Manage Grants

SESSION 4 1hr

Processing the approval and offer stages

- Shortlisting applications
- Completing the approval stage
- Generating an offer letter
- Issuing and accepting an offer letter

SESSION 2 1.5hr

Creating a grant scheme and configuring an application form

- How to create a new grant scheme
- How to configure an application form
- How to publish a new application form

SESSION 3 1.5hr

Processing the checking and review stages

- Processing the checking stage
- Assigning Reviewers
- Completing Reviews
- Moving application to subsequent review rounds
- Creating and Managing a Panel



SESSION 5

1.5hr

Managing finances and progress reports

- Scheduling and processing payments
- Scheduling and processing progress reports
- Creating and managing conditions
- Utilising the query and export tool

SESSION 6

1.5hr

Configuring a scheme workflow and other admin settings

- Configuring the checking stage
- Configuring the review Stage
- Configuring the approval Stage
- Configuring the offer Stage
- Configuring reporting forms
- Configuring templates
- Other admin settings

SESSION 7

1hr

Configuring finance settings

- Configuring a budget table
- Configuring payment settings
- Configuring funding sources
- Configuring a claim form

Why do we need training?

- Ideal for getting new members of your team familiar with and confident in using the system in a short time frame.
- Enhancing and refreshing the knowledge of seasoned members of your team, to improve their capability to manage more complex changes to the system.
- Introducing you to some of our newer features which could improve the effectiveness of your grants management processes.

What is the price of training?

Training starts from £2,670 (Not including VAT) for up to 10 users.

How to find out more

For further information about the service contact your Account Manager, or send us an e-mail to:

professionalservices@fluenttechnology.com