

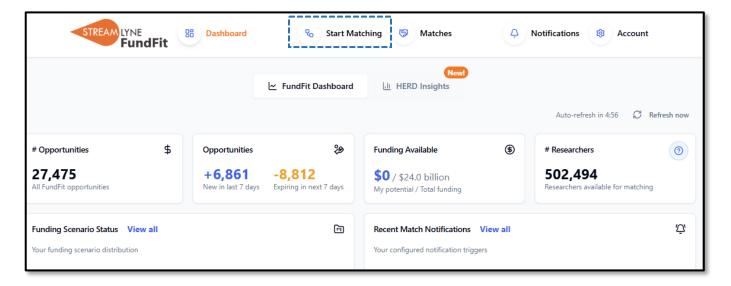


FINDING OPPORTUNITIES ON FUNDFIT - BROAD MATCH & PERSONALIZED MATCH

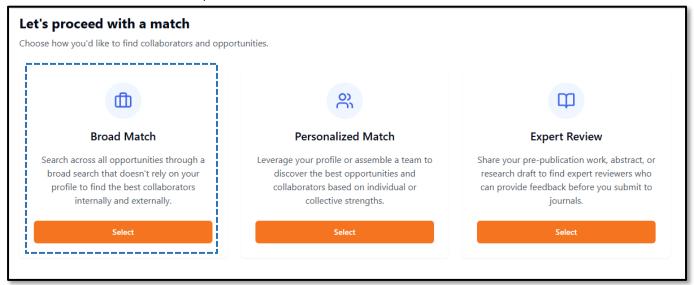
BROAD MATCH

FundFit offers two methods to find funding opportunities relevant to you, Broad Match and Personalized Match. We will start with the Broad Match option which uses a search engine without leveraging your researcher profile. This is useful if you are looking for opportunities of a particular type or from a certain sponsor or if you would like to find something new and different that doesn't necessarily line up with your previous work.

To begin, click on the **Start Matching** button at the top of the screen.



Click on the Broad Match option.







Your search controls will appear at the top of the page like the image below.

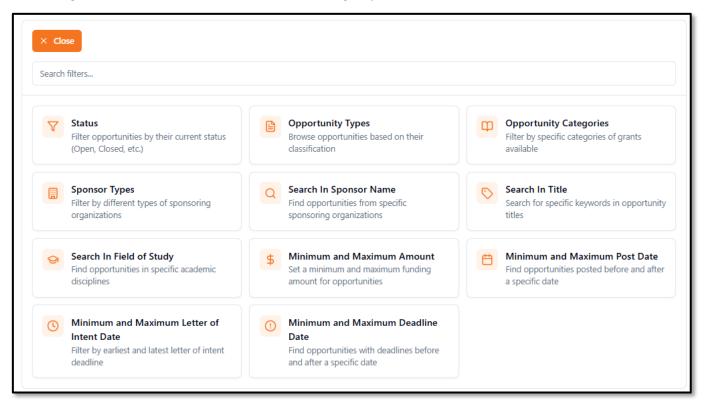


- A. **Search Box** Here's where you type in your keywords or phrases to find what you're looking for. Press the Enter key after typing something in to search using your query.
- B. Add New Saved Search Click this button to same your search configuration as a saved search to use again later. You'll mainly use this to save your advanced filter configurations.
- C. **Saved Searches** Any searches that you have saves will appear in this drop down. Select a search from the dropdown to load that searches configuration.
- D. **Research Mode** Research Mode uses advanced AI to understand complex research queries and find highly relevant opportunities. Toggle this feature on for nuanced searches that require deeper understanding of your research context.
- E. **Advanced Filters** These functions allow you to filter your search results. We'll cover this section in more depth on the next page.
- F. Sort Functions These allow you to sort your results based on the following options
 - a. Amount (largest to smallest)
 - b. Post Date (newest to oldest)
 - c. Deadline (furthest to soonest)
 - d. Letter of Intent Date (furthest to soonest)
 - e. Sponsor (A-Z)
- **G.** Manual Opportunity Entry If you know of an opportunity but cannot find it using the search, you can click here to upload a link to the opportunity to import it into FundFit. This will allow you to then match to potential collaborators for this opportunity.

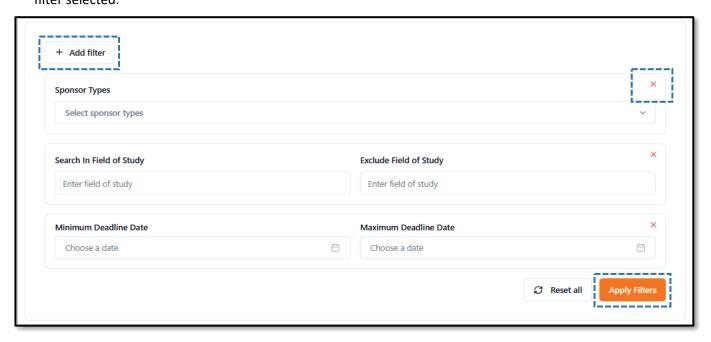




Clicking on the link to show advanced filters (E), will give you a collection of filters to select from.



Clicking on any of the listed options will add the filter to your search and allow you to make selections for that filter using the dropdown, date selector, or text box controls that populate depending on the filter selected.





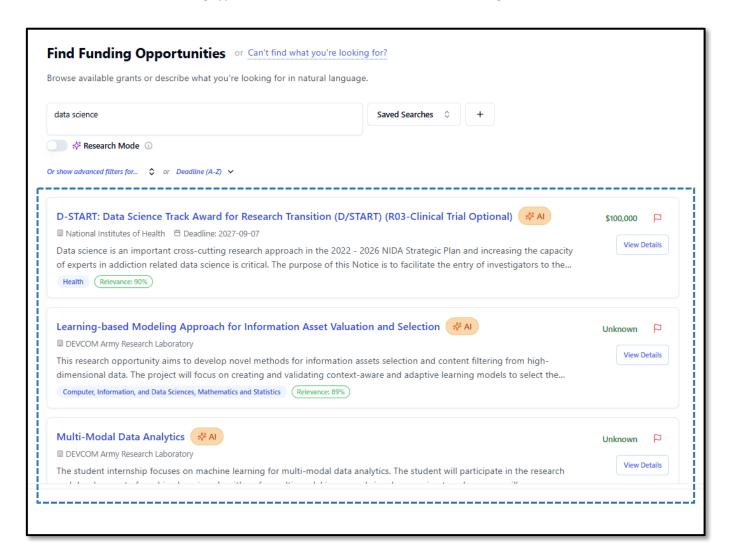


You can click the + Add filter button to add an additional filter to your filter list.

The red **X** in the top right corner of each filter will remove that filter from the search.

Clicking the **Apply Filters** button will apply your filter selections to the search results below. Don't forget to click this if you make any changes to your filters. Also, if you like your filters, remember to add your search as a saved search (**B** from page 2) so that you can come back to it later.

Your search results will appear in a list you can scroll through. As the elements of this list are the same for the alternative matching type, we'll cover that in the final section of this guide.



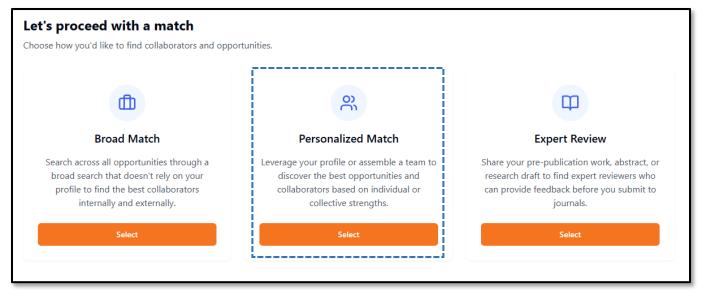




Personalized Match

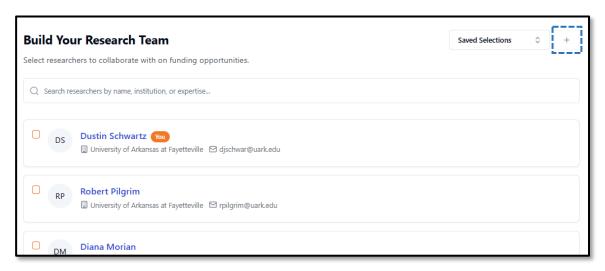
Personalized Match attempts to pull in funding opportunities that align with your (or another person's) researcher profile on FundFit. You can use this option if you want FundFit to do the work in delivering a list of funding opportunities relevant to your area(s) of research, or if you want to see if there's anything out there for someone else in your department or team.

To start a Personalized Match, click the **Start Matching** button at the top of the screen just as with starting a Broad Match, but click on the **Personalized Match** option on the next page.



The next page will prompt you to select the researcher(s) you would like to find funding opportunities for. You will always appear at the top of the list. Click on a researcher's name to select them. You can select any number of researchers to collaborate on a project and can use the search bar at the top of the list to find who you are looking for.

If you have a specific team that frequently works together, you can save your list of selected researchers to use again on future searches using the + button in the top right.

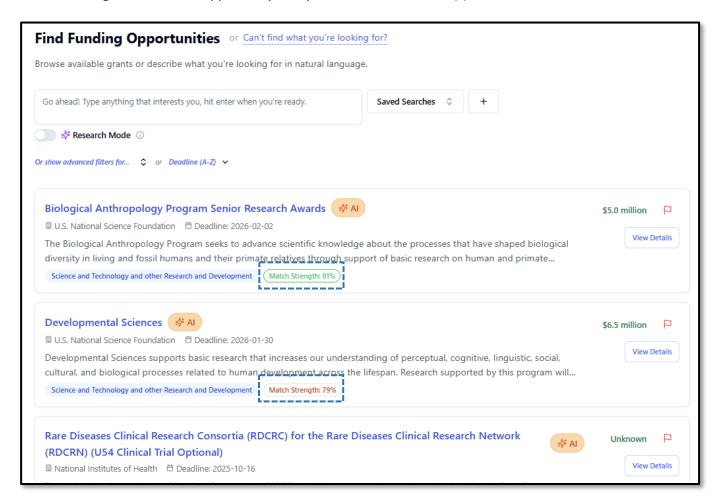






Once you are happy with your selections, click the blue **Continue** button in the bottom right corner of the page to load the opportunity search.

This page will be similar to the search from the Broad Match process, and it functions much the same way. You can use the same filters and saved searches from that section here to narrow down the list of funding opportunities, but each of the opportunities here will also have an added match score to show how strong of a match the opportunity is to your selected researcher(s).

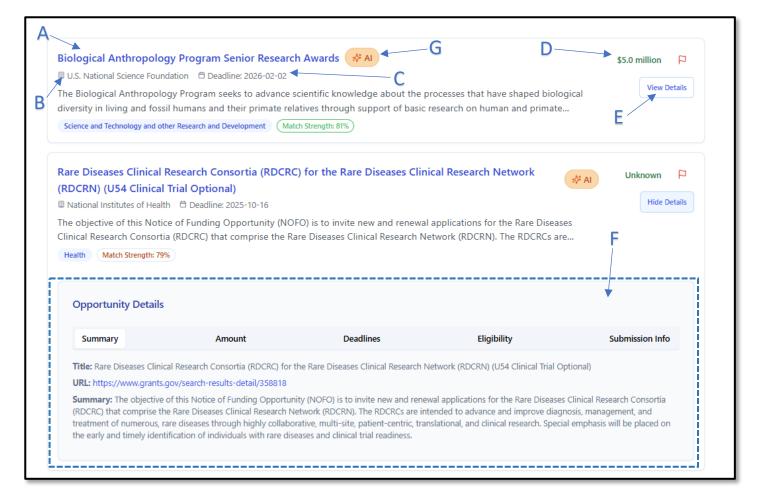






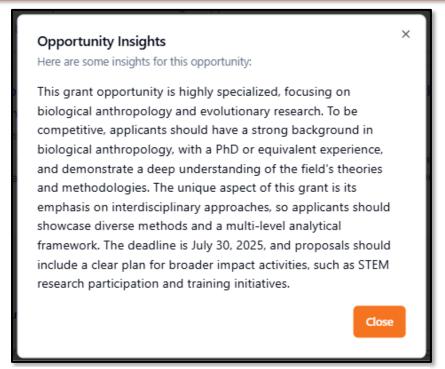
REVIEWING YOUR MATCH RESULTS AND FINDING COLLABORATORS

Whether you started with a Broad Match or a Personalized Match, your opportunity list will have the same format, so let's look at the elements of this list.



- A. Opportunity Title
- B. Sponsor
- C. Deadline Date
- D. Funding Amount
- E. View Details Click this button to show the details of the opportunity (F)
- F. **Opportunity Details** Additional details from the opportunity.
- G. **Al Summary** Click here to get a brief Al-generated summary of insights from the opportunity. Example on the next page.





Example 1: Al Insight Sample

Once you have identified an opportunity you would like to pursue, you are ready to begin the search for potential collaborators. This process will be covered in the next QRG. You can find it here.