ZoomGrants:
A How-To Guide for
Applicants

Tips and Tools for Creating, Submitting, and Managing Your Applications

Need a printer-friendly version?
https://zoomgrants.com/welcome/applicantslideshowpf.pdf
Please consider sharing the link to this file instead of printing it.
Using the link will ensure you have the latest version of this guide
(and it'll save paper!).

Want to learn more? Go to http://help.zoomgrants.com/.

4 Quick Things to Know

ZOOMGRANTS UNIVERSITY (ZGU)

ZoomGrants users can access the knowledgebase online guide for self-training and troubleshooting at any time by clicking the **HELP** link at the top of any application. Click the **ZoomGrants University button** to go to ZGU.

THE AUTO-SAVE FEATURE

ZoomGrants automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your Application. Whenever you make a change in a field then click outside of that field, you'll see a flash of the 'Saving' screen as your change is being saved.

(Note: If you see the 'Saving' screen for more than a few seconds your Internet connection may have blinked during the saving process and the change may not have been saved. Read more on how to troubleshoot that issue on ZGU: http://help.zoomgrants.com.)

THE TAB SYSTEM

ZoomGrants uses a tab system to set apart the different sections and features of the system. You can click on each tab of the application to access the content housed there.

THE CHECK FOR COMPLETION

ZoomGrants will double-check your Application to ensure that it is complete before the Application is submitted. Every application question must be completed, and any Document Requests that are marked as 'Required' must be uploaded before the system will allow you to submit the application.

(Note: Click the 'Refresh Page' button on the ZoomGrants page (not in your Internet browser) if the system says that your Application is incomplete, but you believe you have completed it. The 'Refresh Page' button directs ZoomGrants to check the Application again.)

GETTING STARTED: Create Your Account

In order to submit an Application, you must have a ZoomGrants™ account. You can use the same account to submit Applications to any other funder that uses ZoomGrants™.

Recipient accounts can *only* be created on the Funder's ZoomGrants™ page (not the ZoomGrants™ homepage). The Funder will provide a link or directions on its website.
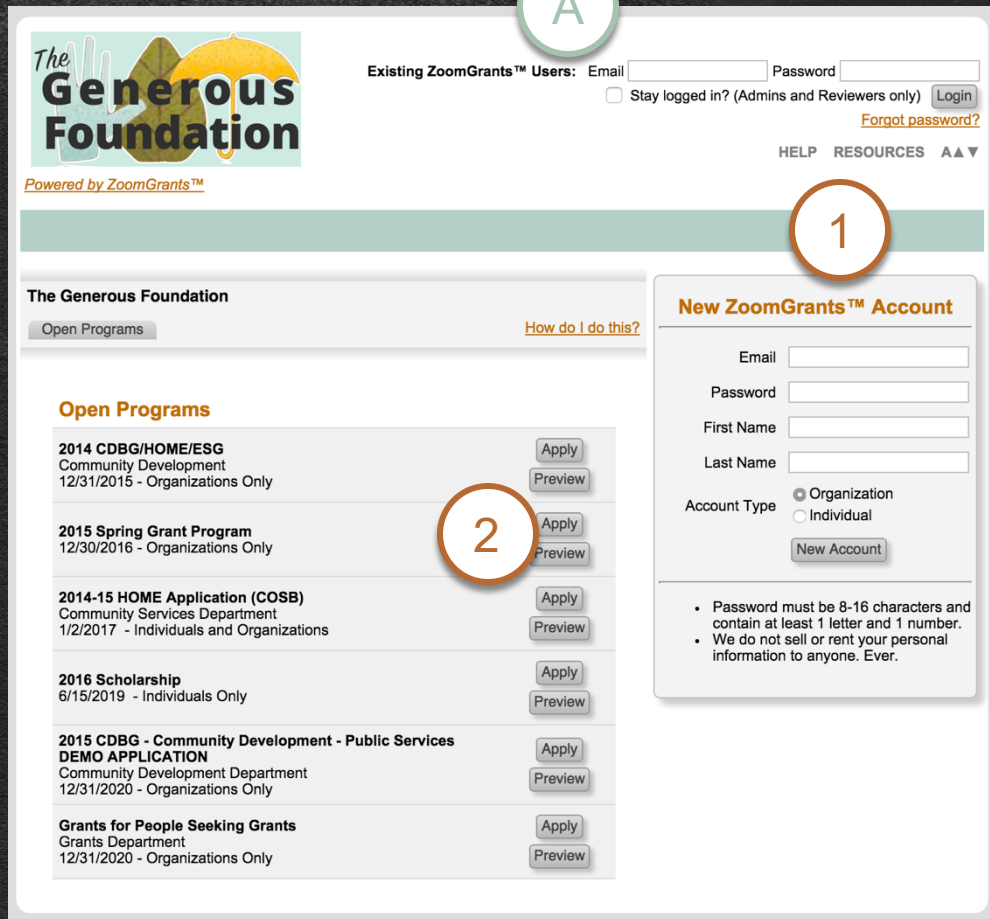
1. New ZoomGrants™ account

Use the New ZoomGrants™ Account box to create your Account. Click the New Account button to create your account and log in automatically**.**

If you're already a ZoomGrants™ user, log in using the fields in the upper right-hand corner (A).

2. Apply

Click the Apply button next to the appropriate Program in the Open Programs section to create your Application. You can create additional Applications later.

THE APPLICATION: A Quick Tour

1. Contact admin

Click here to send an email to the Program Administrator.

ZoomGrants™ Technical Support staff can help with technical questions or general inquiries about the system, but all content-related questions should be directed toward the official contact for that Program.

2. Open programs

Click here to create additional Applications for this Program or to create new Applications for other Programs offered by this Funder.

A. Program information tabs

If the Funder chooses to use them, these tabs contain program information. They may be set to automatically open as soon as you log in. Click the orange [hide this] link to hide the text when the tab is open.

B. Print/preview

Click here to view a printer-friendly version of your Application. You can print the Application, save it as a PDF, or email it as an attachment from the Print/Preview window.

APPLICATION TABS: Summary*

ZOOMGRANTS UNIVERSITY

1. Summary* tab

Enter your contact information, the contact information for your organization (if applicable), and general Application information – title, amount requested, etc. – in this first tab of the Application.

Remember:

- **The system will save automatically** as you move between the fields.

- **You must fill out every required field** in order to be able to submit the full Application.

Thank you. Your application has been created. You may get started now.

| My Account Home | Refresh Page |

The Generous Foundation
Grants Department
Deadline 12/31/2020

Grants for People Seeking Grants

| Open Programs | Description | Requirements | Restrictions | Library | Contact Admin | Announcements |

(1) Nonprofit Agency

Application Status: Not Submitted

Find a Grant Writer   Archive this Application   **Print/Preview**

| Summary | Pre-Application | Application Questions | Budget | Tables | Documents | Activity Log |

Summary

(answers are saved automatically when you move to another field)

Application Title	
Amount Requested	$ 0
Additional Contacts for this Application *(ONLY Email addresses separated by comma. No names. No titles. No phone numbers.)*	

Applicant Information

First Name	Ineeda
Last Name	Grant
Telephone	1111111111
Email	recip@zoomgrants.com

Organization Information   *(changes to this data will be reflected on all other applications for this organization)*

Organization Legal Name   My Little Nonprofit Agency

APPLICATION TABS: Questions*

*This feature may have a different label, depending on the settings chosen by the Administrator.

ZoomGRANTS UNIVERSITY

1. Application questions* tab

Most funders put the bulk of their Application content here. Be sure to fill every field that appears in this tab in the live, online version of your Application.

A Note RE: Branching Questions

Some funders use one of the multiple-choice questions in the Application Questions* and/or Pre-Application* tabs as a Branching Question.

Based on your selection on the Branching Question, you'll see a specific set of pre-determined questions. Make your selection on the Branching Question, then give the page a moment to fully reload. Some questions may appear or disappear, based on your answer.

The Print/Preview view shows *all* of the Application content, though you may not be responsible for every field. **So long as you have filled out everything that appears in the <u>live</u> version of your Application in your ZoomGrants™ account (<u>not</u> the Print/Preview), you will be able to submit**. Remember that the system automatically checks to make sure you completed every required component. If you accidentally miss anything, it will tell you.

My Account Home — Refresh Page

The Generous Foundation
Grants Department
Deadline 12/31/2020
Grants for People Seeking Grants

Open Programs | Description | Requirements | Restrictions | Library | Contact Admin | Announcements

My Little Nonprofit Agency
Application Status: Not Submitted
Grant Application
$ 750.00 requested

1

Submit Now | Print/Preview

Find a Grant Writer | Archive this Application

Summary | Pre-Application | Application Questions | Budget | Tables | Documents | Activity Log

Application Questions (answers are saved automatically when you move to another field)

Instructions Show/Hide

Demographic Information

1. If you were talking to a six-year-old, how would you describe your program?
Please limit the use of references to ice cream cones and trips to the pool, regardless of how well they relate to your program or the excitement induced by your program - children can be very excitable and we don't want anyone to be disappointed.

Maximum characters: 3000. You have 3000 characters left.

2. How many people of each age group will be able to participate in your program?
Young People
Young-at-Heart People

APPLICATION TABS: Budget*

ZOOMGRANTS UNIVERSITY

1. Budget* tab

Funders may request budget information in this tab.

A. Totals

In this tab, totals are calculated automatically. There may also be extra calculated columns set up by the Administrator.

You do not need to fill every field in this tab.

APPLICATION TABS: Documents*

*This feature may have a different label, depending on the settings chosen by the Administrator.

ZoomGRANTS UNIVERSITY

1. Documents* tab

Provide a link to or directly upload the requested Documents in this tab.

2. upload

Click this button to open the File Upload Window, where you can provide a link to your files or upload the files to attach to your Application.

Check out this video for more specific instructions: How to Upload Files

A. Required documents

For Document Requests that are marked 'required', you must upload or link something in that slot in order to satisfy the system and submit the Application.

SUBMITTING YOUR APPLICATION

1. Submit now

When you're ready to submit your Application, click the Submit Now button.

If there are any fields that are incomplete, the system will display those fields in red. Fill in those fields, then click the Refresh Page button (A) and try the Submit Now button again.

If your Application is complete, an Initials box will appear. Enter your initials, then click the lower Submit Now button.

2. Submitted

To verify that your Application was submitted successfully, check for the Submitted timestamp. You can use the Refresh Page button (A) to triple-check the presence of the timestamp.

You can also verify that your Application was submitted by clicking the My Account Home button (b) then clicking into the Submitted section. If your Application is there, it was submitted successfully. Additionally, you will receive a confirmation email.

Not seeing a Submit Now button?
Only the application owner can submit the application. If you are a *collaborator,* you will not be able to submit it. Learn more here: http://help.zoomgrants.com/

WORKING ON YOUR APPLICATIONS

After you've started your Application using the direct link to apply, you can log in directly on the ZoomGrants™ homepage at https://ZoomGrants.com/login whenever you need to work on your Application.

1. My Account home

When you log in from ZoomGrants.com, you'll start at your My Account Home page. From here, you can access all of your Applications by clicking on the tabs.

2. Incomplete ApplicationS

To continue working on an Application, click the orange Application title.

ACCESSING APPLICATIONS

(Remember that once you've started your Application you can log in directly on the ZoomGrants™ homepage – https://ZoomGrants.com.)
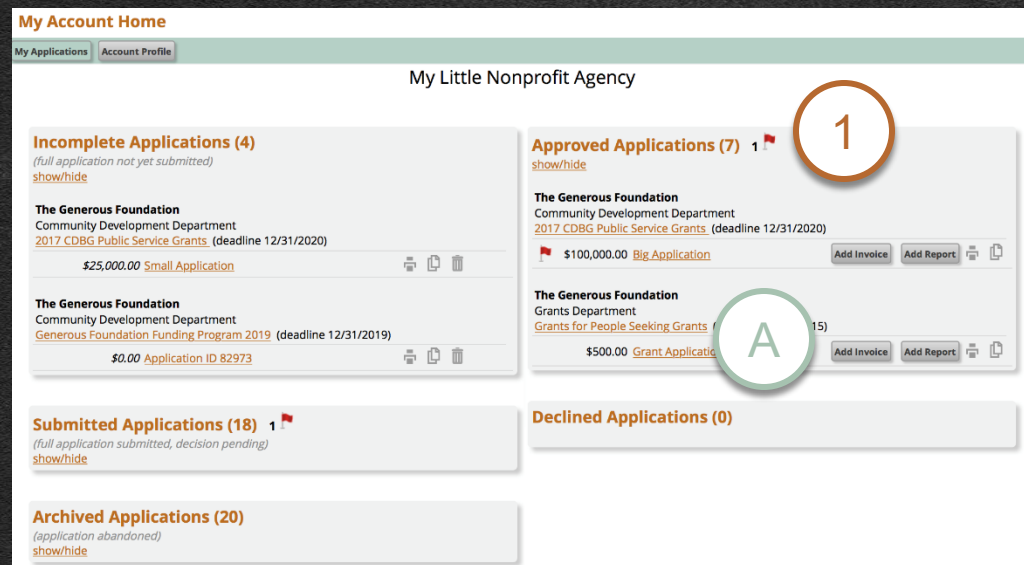
1. Approved section

Click into the Approved section to view all of your Approved Applications. Depending on the Funder's settings, you can submit Invoices* or Post-Funding Reports*, sign Contracts*, and more.

A. Easy access buttons

You can click either of these buttons to quickly create a new Invoice* or navigate to the Reporting* section of an Application.

To view the entire Application and the Post-Funding* tabs, click the orange Application title (2).

My Account Home

My Applications | Account Profile

My Little Nonprofit Agency

Incomplete Applications (4)
(full application not yet submitted)
show/hide

The Generous Foundation
Community Development Department
2017 CDBG Public Service Grants (deadline 12/31/2020)

$25,000.00 Small Application

The Generous Foundation
Community Development Department
Generous Foundation Funding Program 2019 (deadline 12/31/2019)

$0.00 Application ID 82973

Approved Applications (7) 1 🚩   1

show/hide

The Generous Foundation
Community Development Department
2017 CDBG Public Service Grants (deadline 12/31/2020)

🚩 $100,000.00 Big Application   Add Invoice | Add Report

The Generous Foundation
Grants Department
Grants for People Seeking Grants (15)   A

$500.00 Grant Applicatio   Add Invoice | Add Report

Submitted Applications (18) 1 🚩
(full application submitted, decision pending)
show/hide

Declined Applications (0)

Archived Applications (20)
(application abandoned)
show/hide

*These features may have a different label, depending on the settings chosen by the Administrator.

HOW TO ARCHIVE & DELETE APPLICATIONS

In order to keep Applications from being accidentally deleted, the removal process requires several steps.

FROM MY ACCOUNT HOME:

1. Archive application

In the Incomplete Applications folder, click the trashcan icon next to an Application to send that Application to the Archived section.

Note: Submitted applications may not be archived nor deleted by applicants. Archived applications must be moved to the Incomplete folder before they can be revived and submitted.

2. ARCHIVED TAB

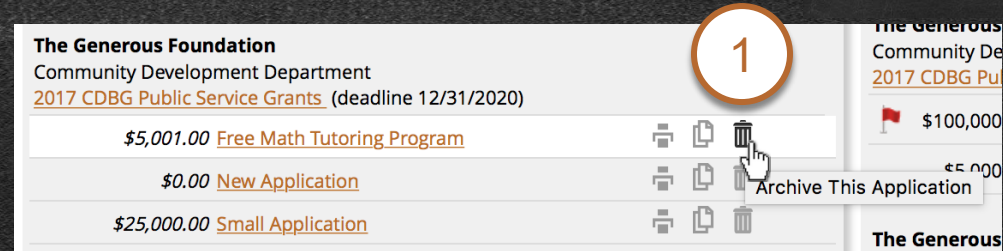Click into the Archived section to delete the Application.

FROM A FUNDER'S OPEN PROGRAMS LIST:

1. Archive application

Click the orange Archive link next to an Application to send that Application to the Archived tab.
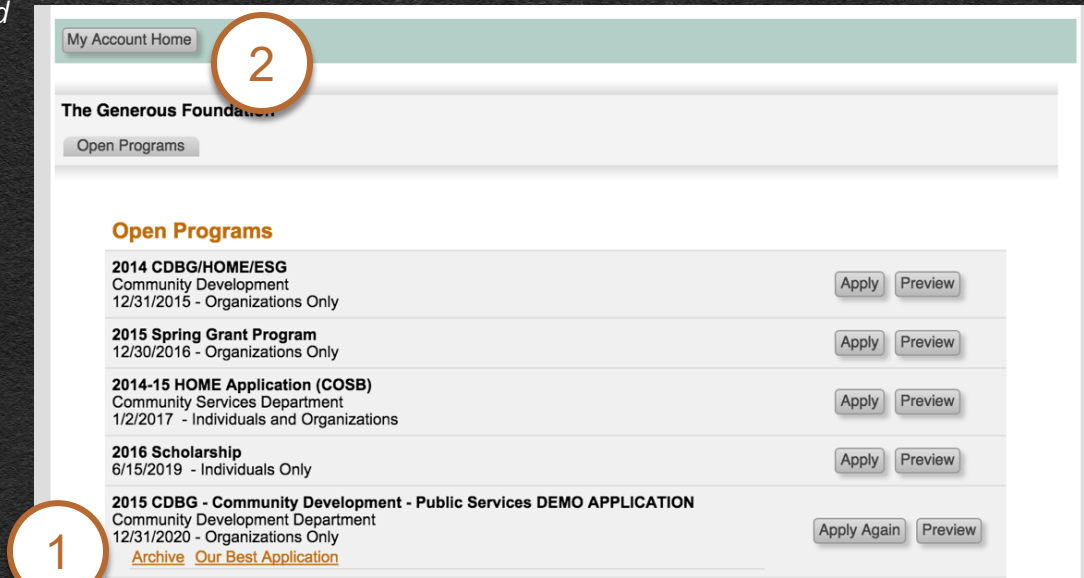
2. MY ACCOUNT HOME

Click the My Account Home button to access the Archived section.

The Generous Foundation
Community Development Department
2017 CDBG Public Service Grants (deadline 12/31/2020)

$5,001.00	Free Math Tutoring Program	
$0.00	New Application	
$25,000.00	Small Application	

Archive This Application

The Generous
Community De
2017 CDBG Pu
$100,000
$5,000

The Generous

My Account Home

The Generous Foundation

Open Programs

Open Programs

2014 CDBG/HOME/ESG
Community Development
12/31/2015 - Organizations Only   Apply Preview

2015 Spring Grant Program
12/30/2016 - Organizations Only   Apply Preview

2014-15 HOME Application (COSB)
Community Services Department
1/2/2017 - Individuals and Organizations   Apply Preview

2016 Scholarship
6/15/2019 - Individuals Only   Apply Preview

2015 CDBG - Community Development - Public Services DEMO APPLICATION
Community Development Department
12/31/2020 - Organizations Only   Apply Again Preview
Archive Our Best Application

Tips from the ZoomGrants™ Team:

Save yourself the stress! Try to start early, finish early, and submit early.

Start your Application as soon as the Program opens so you can get familiar with the requirements and gather your materials. Save a copy of the application in Print/Preview to look over when you're not online and share with other. Work on the Application throughout the submittal period, giving each section the attention it deserves. And **submit early to make sure that you have time to correct any deficiencies noted in the auto-check process.**

Reach out any time you need help.

Use the Help link in the Application in your ZoomGrants™ account to contact the Program Administrator if you have questions about Program requirements or content. You can also look over ZGU if you have technical questions or contact the ZoomGrants™ Tech Support Team for additional assistance.

TECHNICAL QUESTIONS?

We're always happy to help.

Visit ZGU: http://help.zoomgrants.com/

Contact tech support: questions@zoomgrants.com

Give us a call: (866) 323-5404 x2