ZoomGrants University

# How to Administer Funding Programs Using ZoomGrants™

## Tips and Tools for Creating, Setting up, and Managing Your Programs

Need a printer-friendly version?
https://zoomgrants.com/welcome/adminslideshowpf.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!).*

# 3 Quick Things to Know:

## ZOOMGRANTS UNIVERSITY

**Click the HELP link in your account** if you'd like to learn more about any feature of ZoomGrants or need some troubleshooting help. ZGU is open 24/7 and has the answers you need for *any* of your users!

## THE AUTO-SAVE FEATURE

**ZoomGrants™ automatically saves your progress**, so you can log out and log back in, leave your computer, get a cup of coffee and come back, or go on vacation without being worried about losing your data. When you make a change in a field then click outside of that field or change your selection in a radio button, checkbox, or dropdown menu, you'll see a flash of the 'saving' screen as your change is being saved.

*(Note: Auto-Save does not apply to creating/editing questions – you'll still need to click the Save This Question button when you are done working on it.)*

## THE TAB SYSTEM

**ZoomGrants™ predominantly uses a tab system** to set apart the different sections and features of the system. Keep that in mind as you are exploring and getting your Programs set up.

# About This Tutorial:

To provide instructions for setting up and administering Programs while also giving a tour of our system, this tutorial uses two different colors to denote the different types of information provided.

## ORANGE NUMBERS

These are **sequential instructions** that can be followed by users who just want to know how to get their ZoomGrants™ Programs set up.

## BLUE/GREEN LETTERS

These are **extra notes** regarding the ZoomGrants™ system and its features.

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# PART ONE:
# Program Setup

# MY ACCOUNT: A Quick Tour

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## 1. PROGRAM SETUP

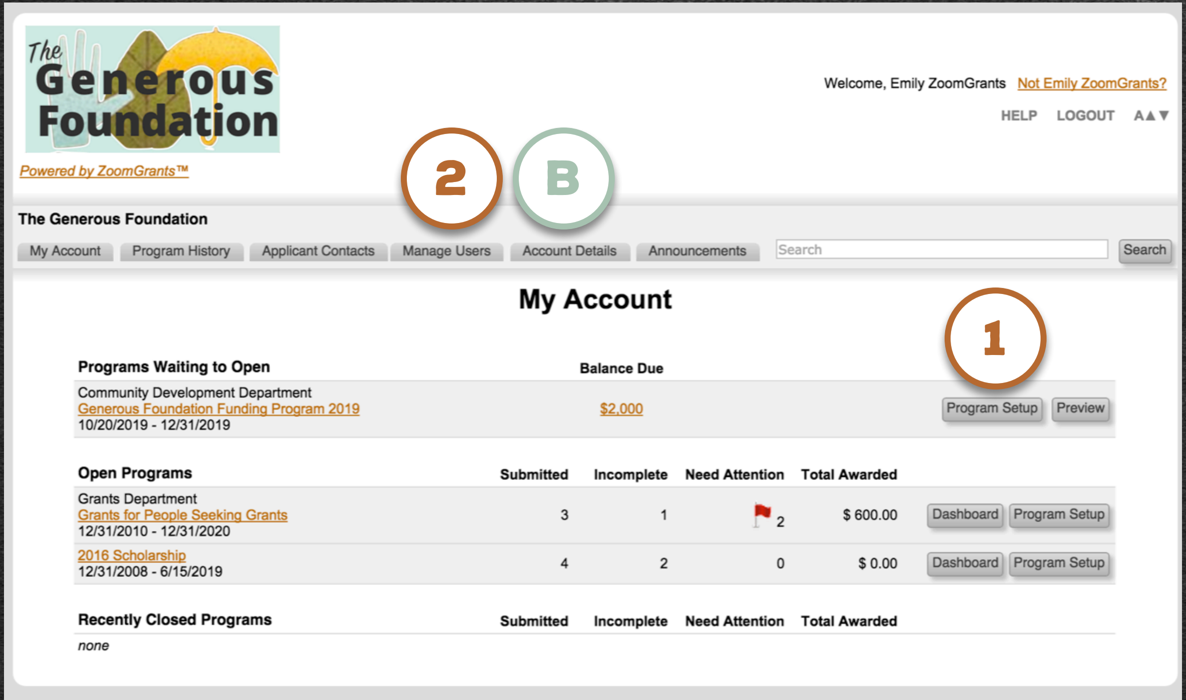
Click here to start setting up your new Program.

## 2. MANAGE USERS

Click here to create and manage accounts for your Committee Members and other Admins.

## B. ACCOUNT DETAILS

Click here to create new Programs and update your Organization info.



# PROGRAM SETUP: Program Summary - I

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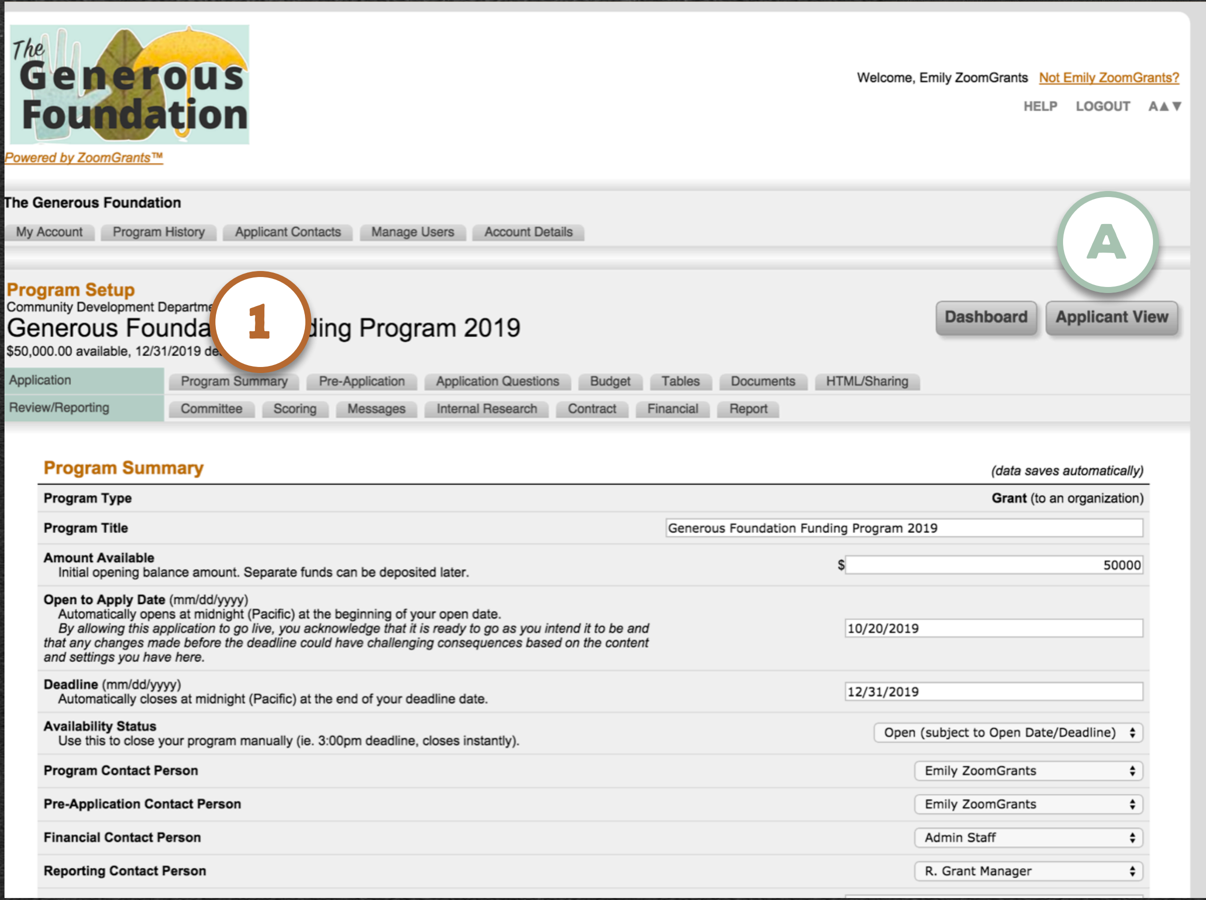


## 1. PROGRAM SUMMARY TAB

In this tab, enter the Program Information – Title, Amount Available, open and deadline dates, contact persons, etc.

## A. APPLICANT VIEW

Click here at any time to view the Application as it will appear to your Applicants.

# PROGRAM SETUP: Program Summary - II

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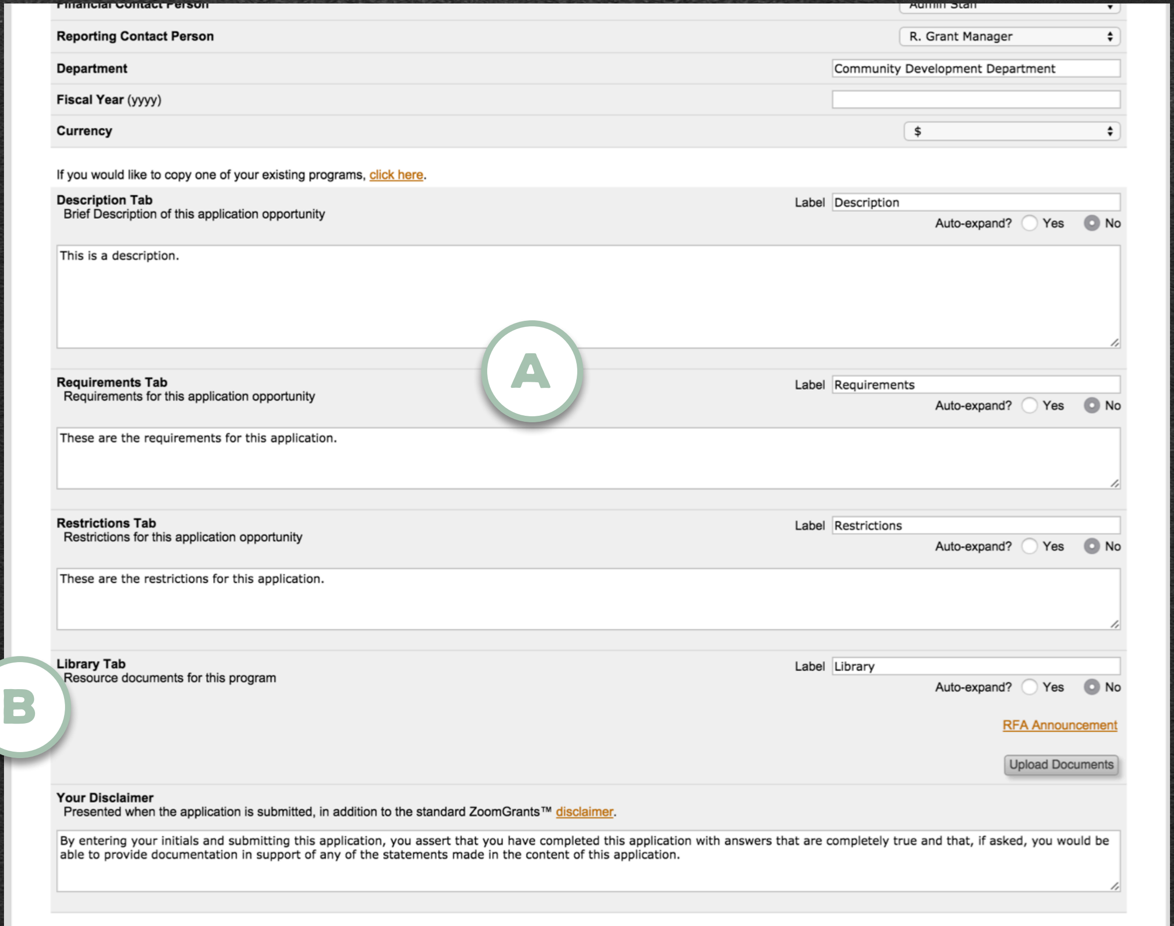
## A. INFORMATION TABS

**These tabs (Description, Requirements, Restrictions) can be available to Applicants during the Application process.** Enter your content and re-label the tabs as necessary. Applicants can expand the tabs when they need to access the information, or you can choose to make them automatically expand every time the Applicants log in to work on their Applications.

## B. LIBRARY TAB

**Click here to upload Documents to which your Applicants can refer as they work on their Applications.**



Financial Contact Person — Admin Staff

Reporting Contact Person — R. Grant Manager

Department — Community Development Department

Fiscal Year (yyyy)

Currency — $

If you would like to copy one of your existing programs, click here.

**Description Tab**
Brief Description of this application opportunity
Label: Description
Auto-expand? Yes No

This is a description.

**Requirements Tab**
Requirements for this application opportunity
Label: Requirements
Auto-expand? Yes No

These are the requirements for this application.

**Restrictions Tab**
Restrictions for this application opportunity
Label: Restrictions
Auto-expand? Yes No

These are the restrictions for this application.

**Library Tab**
Resource documents for this program
Label: Library
Auto-expand? Yes No

RFA Announcement

Upload Documents

**Your Disclaimer**
Presented when the application is submitted, in addition to the standard ZoomGrants™ disclaimer.

By entering your initials and submitting this application, you assert that you have completed this application with answers that are completely true and that, if asked, you would be able to provide documentation in support of any of the statements made in the content of this application.

# **PROGRAM SETUP:** Program Summary - III

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## 1. APPLICANT SETTINGS

In this section, select your desired settings for the actual Application, including creating field labels, hiding fields, allowing multiple applications, locking submitted applications, setting character limits, and more.

## 2. SUMMARY TAB LABEL

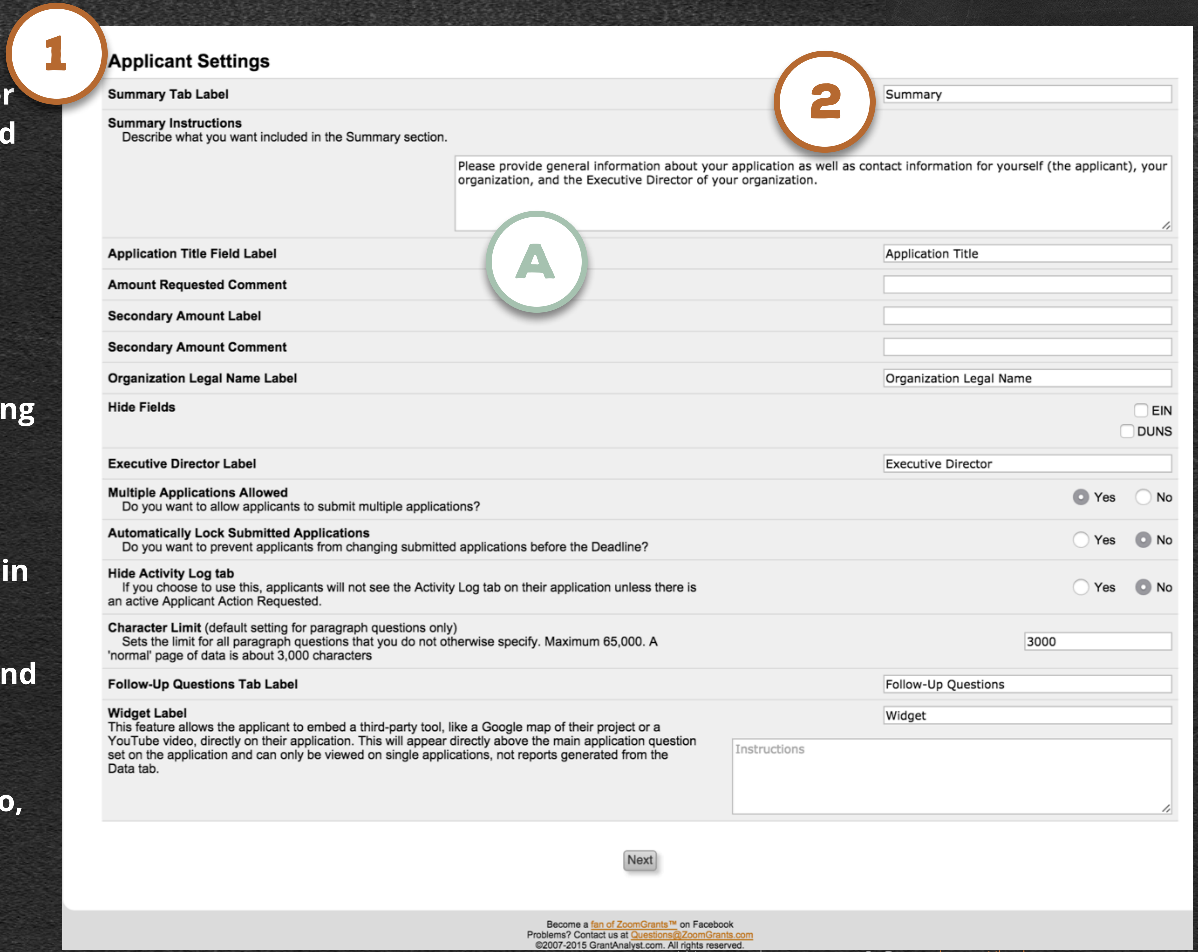
The Summary Tab is the first tab in the Application. Re-label the tab as necessary using this field.

## A. SUMMARY FIELDS

The following data is automatically captured in the Summary tab:

Organization name, full address, telephone and fax numbers, website, EIN*, DUNS*, CEO/Executive Director* name and contact info, Program Contact* name and contact info, Application Title, and Amount Requested.

**These fields can be modified or removed, based on the settings in Program Setup*



# PROGRAM SETUP: Pre-Application

## 1. PRE-APPLICATION TAB

**If you choose to use it, you can set up the Pre-Application (Pre-App) in this tab. The Pre-App feature allows you to vet Applicants by asking them to submit a Pre-App that you can review and either Approve or Decline.** Only Applicants whose Pre-Apps are Approved are able to complete and submit the rest of the Application.

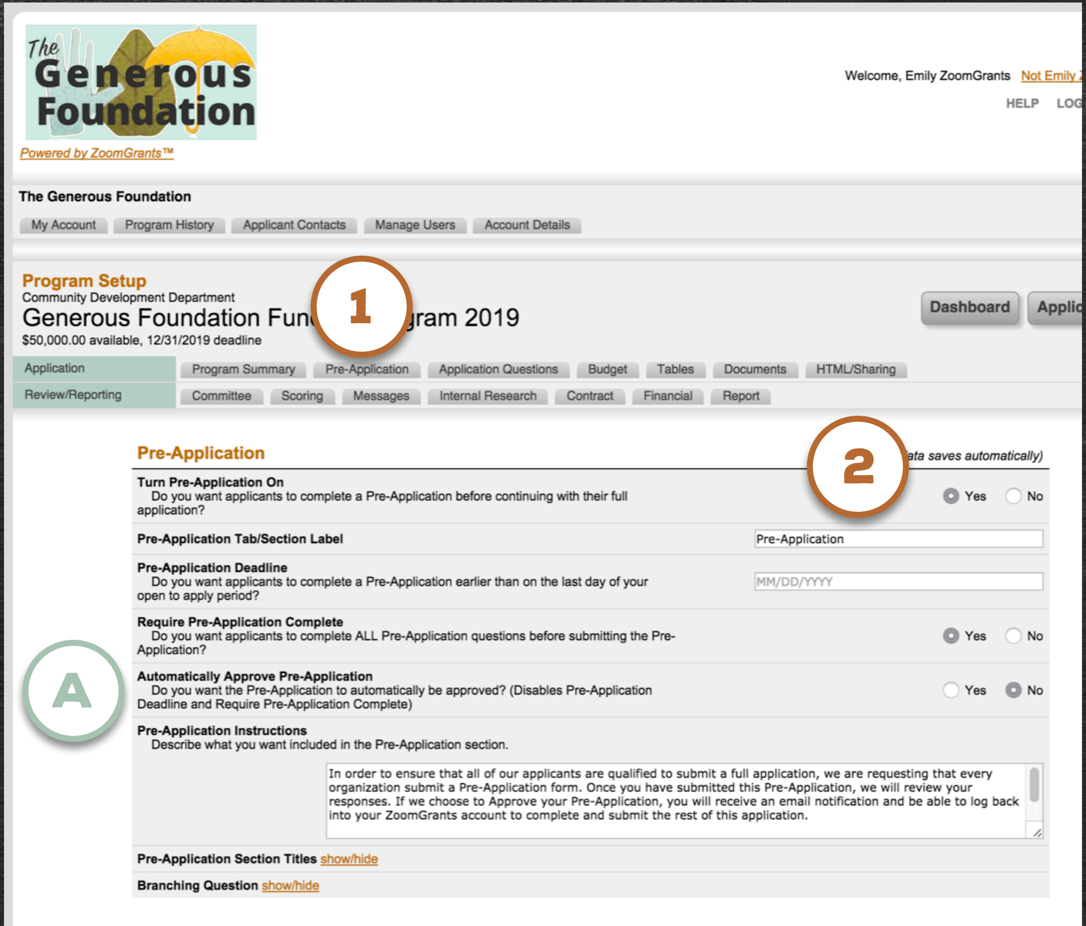
## 2. LABEL IT, TURN IT ON

**Every tab can be re-labeled. Give each tab a name that your Applicants will recognize.**

If you choose to use any tab other than the Application Questions tab, be sure to turn that tab 'on' to make it viewable to your Applicants.

## A. AUTO-APPROVE

If you want the Pre-App to not be *required* for every Applicant to complete but to be available to Applicants who *want* to fill it out, use the Auto-Approve feature.



# **PROGRAM SETUP:** Adding Questions



## 1. ADD A QUESTION

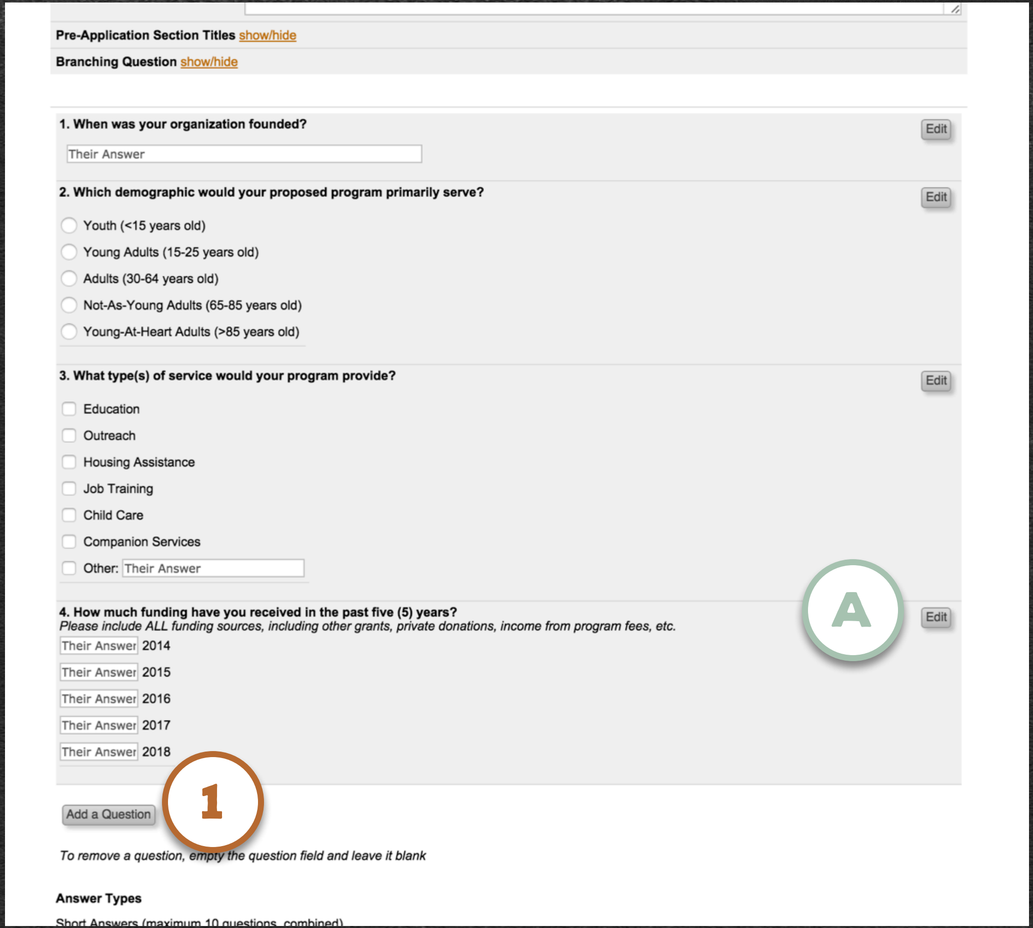
**Click here to Add a Question to this section** (in this case, the Pre-App)**.**

Enter your question text (255 characters displayed in **bold** as the main question) and additional information (255 characters displayed in *italics* below the question text) then select the question type. When you're done, click the Save This Question button to save the question.

**The process of adding questions is the same in every tab that can contains custom questions.**

## A. EDIT A QUESTION

**Click to Edit a question. To delete a question, empty the question field, then click the button to Save it.** When you refresh the page, that question will disappear.



# **PROGRAM SETUP:** Question Types

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## SHORT ANSWER QUESTIONS

### 1. SINGLE LINE (TEXT FIELD)

**Enter text answers**; 255 character limit

### 2. MULTIPLE CHOICE (RADIO BUTTON)

**Select ONE item from a list of options**

*Modifications (1 per question): To add a blank item, enter "Other:" as one of the line items OR to add a single line field after one of the options, enter "explain:" (as in "Yes, please explain:").*

### 3. CHECKBOX (CHECKBOXES)

**Select ONE OR MORE item(s) from a list of options**

*Modifications (1 per question): To add a blank item, enter "Other:" as one of the line items OR to add a single line field after one of the options, enter "explain:" (as in "Yes, please explain:").*

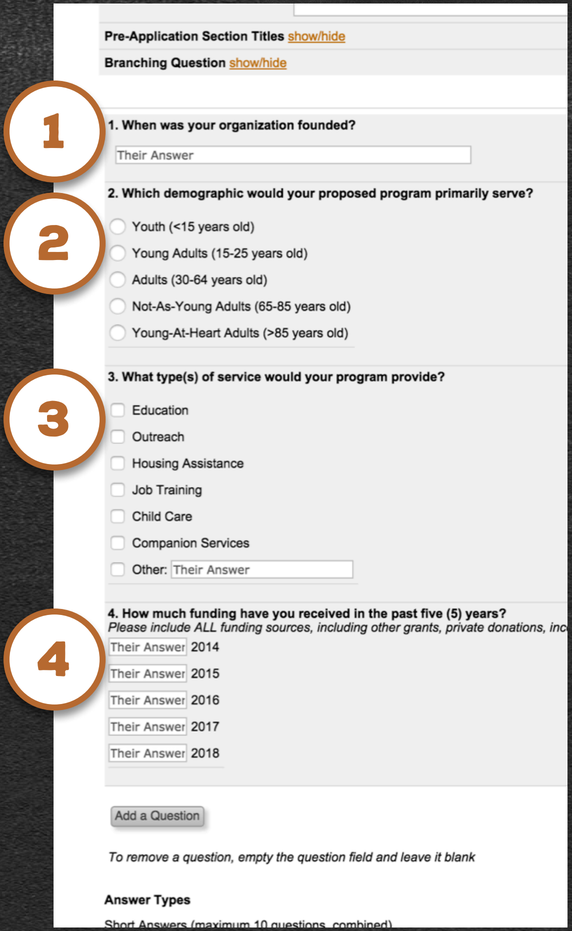
### 4. TABLE STYLE (STACKED FIELDS)

**Input numerical data**; 10 character limit per box; Automatically totaled after the last line item in the question

## LONG ANSWER QUESTIONS

### 5. PARAGRAPH (TEXT FIELD)

**Enter long text answers;** Customizable character limit (up to 65000 characters, including spaces)



# **PROGRAM SETUP:** Application Questions



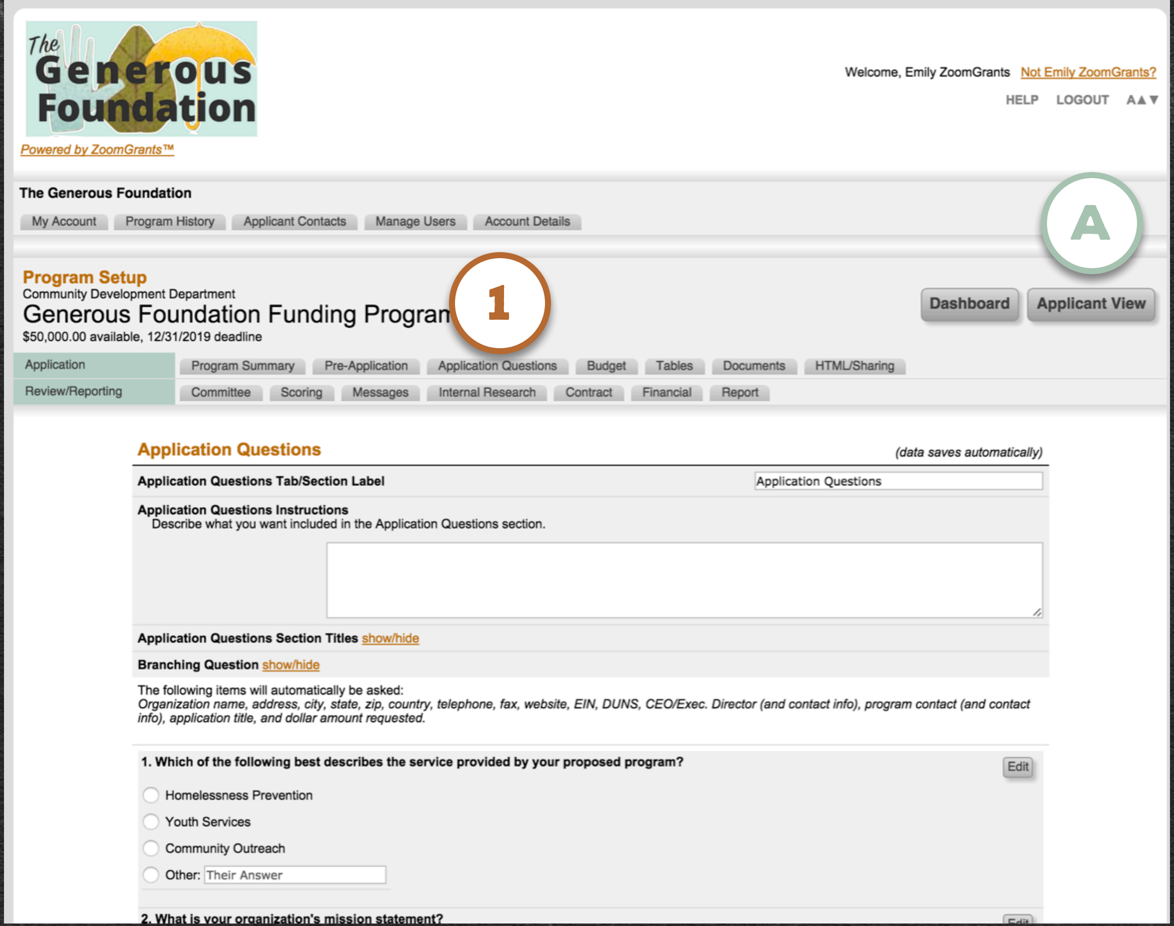
## 1. APPLICATION QUESTIONS TAB

**Here's where you'll put the bulk of your Application content.** Add questions using the Add a Question button at the bottom of the tab (refer to the previous two pages, if you need help). Applicants will be required to answer EVERY QUESTION that you put into this tab, unless you are using a Branching Question*.

**If you are interested in using a Branching Question, check out this help article for more information: [http://help.zoomgrants.com/index.php/zgu/branching-question/](http://help.zoomgrants.com/index.php/zgu/branching-question/)*

## A. APPLICANT VIEW

**Remember, you can refer to the Applicant View to see how your Application will look for your Applicants.** The Applicant View will only display the tabs that are turned 'on'.



# PROGRAM SETUP: Budget – I

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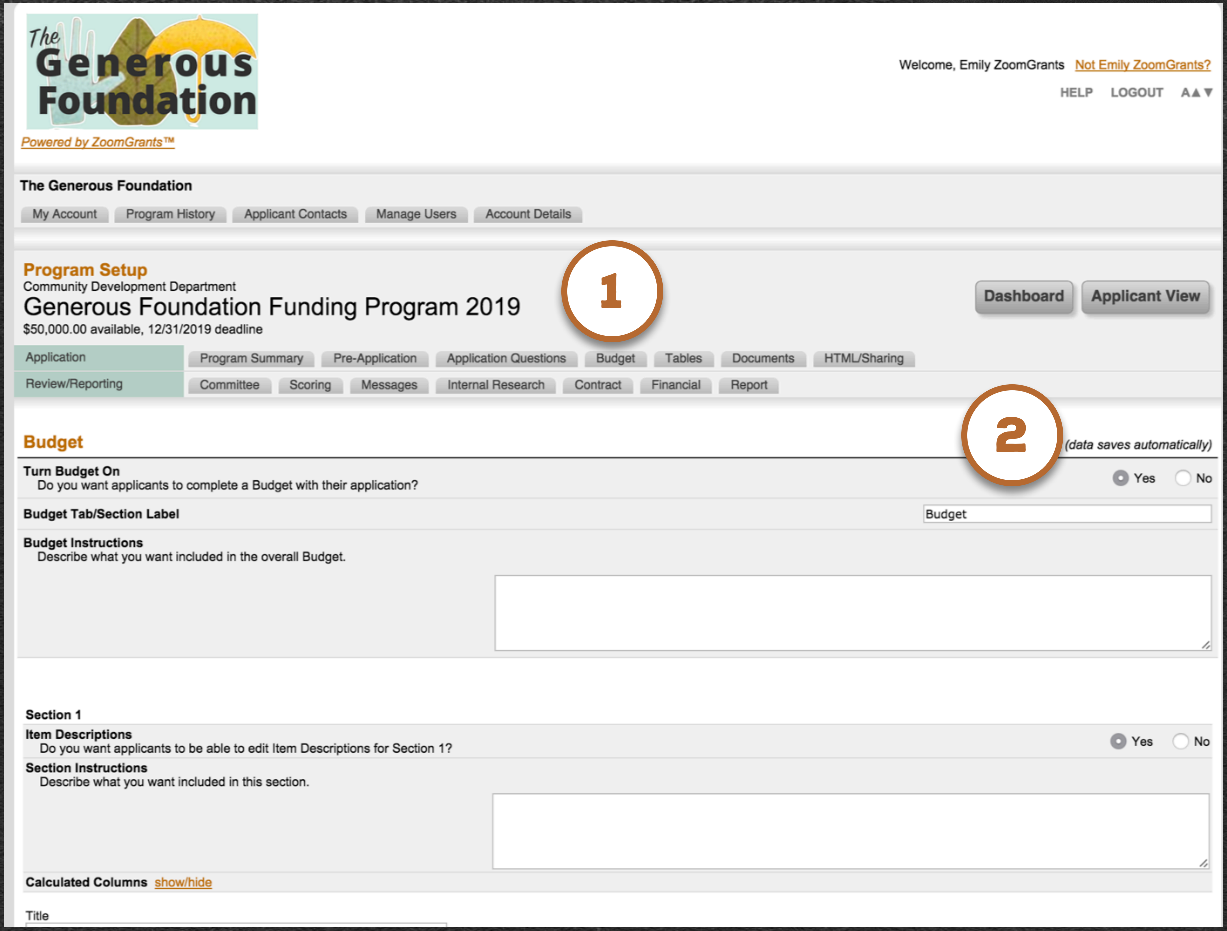
## 1. BUDGET TAB

**If you choose to use it, the Budget tab can capture budget data from your Applicants.** You can determine the line items or let your Applicants enter their own data, create Calculated Columns, and more.

## 2. LABEL IT, TURN IT ON

**Every tab can be re-labeled. Give each tab a name that your Applicants will recognize.**

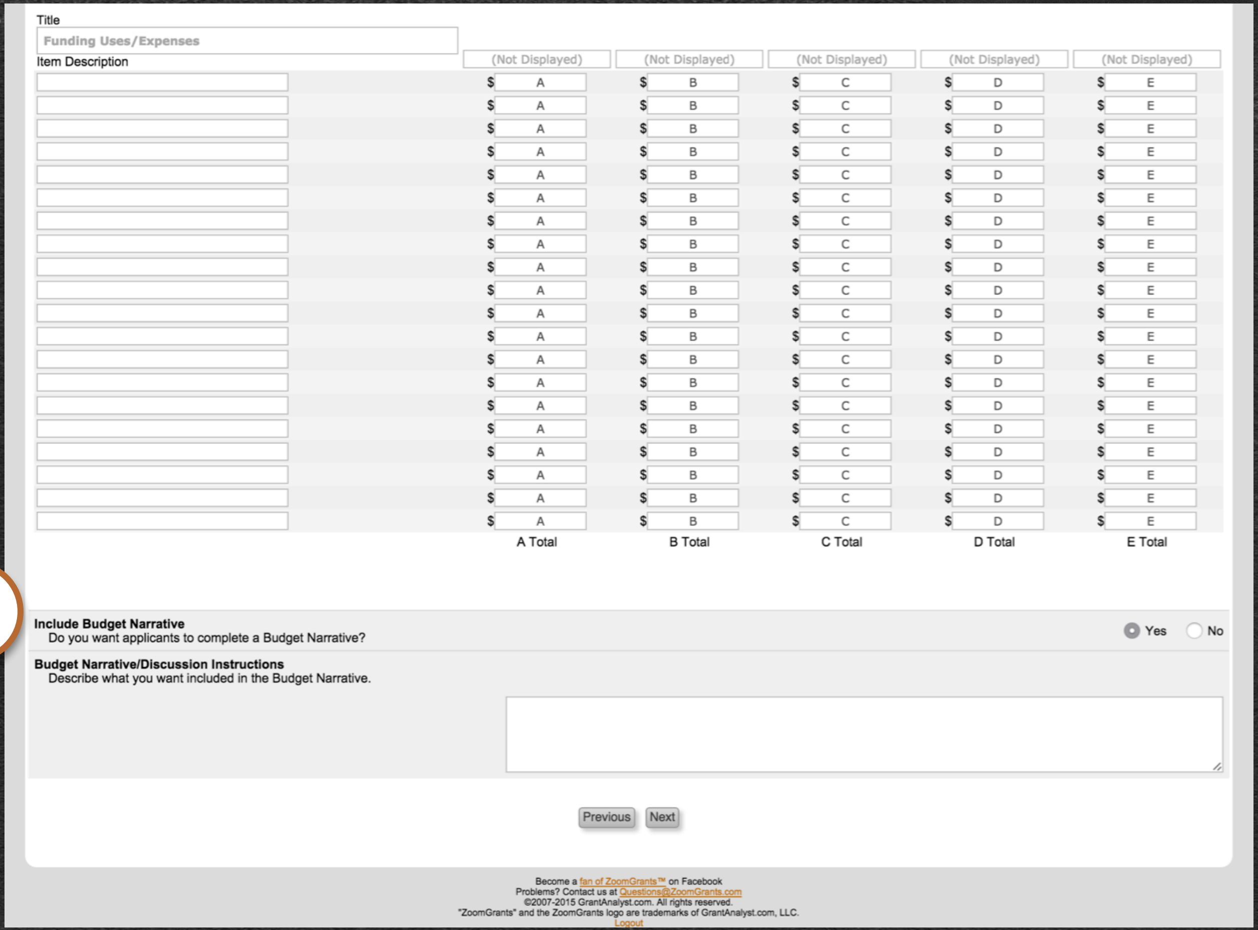
If you choose to use any tab other than the Application Questions tab, be sure to turn that tab 'on' to make it viewable to your Applicants.



## 1. BUDGET NARRATIVE

**If you choose to use it, the Budget Narrative can capture a budget narrative or discussion.** If you turn the feature on, Applicants will be able to type their narrative data into a paragraph-style text field at the bottom of the Budget tab.

1



# **PROGRAM SETUP:** Tables

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## 1. TABLES TAB

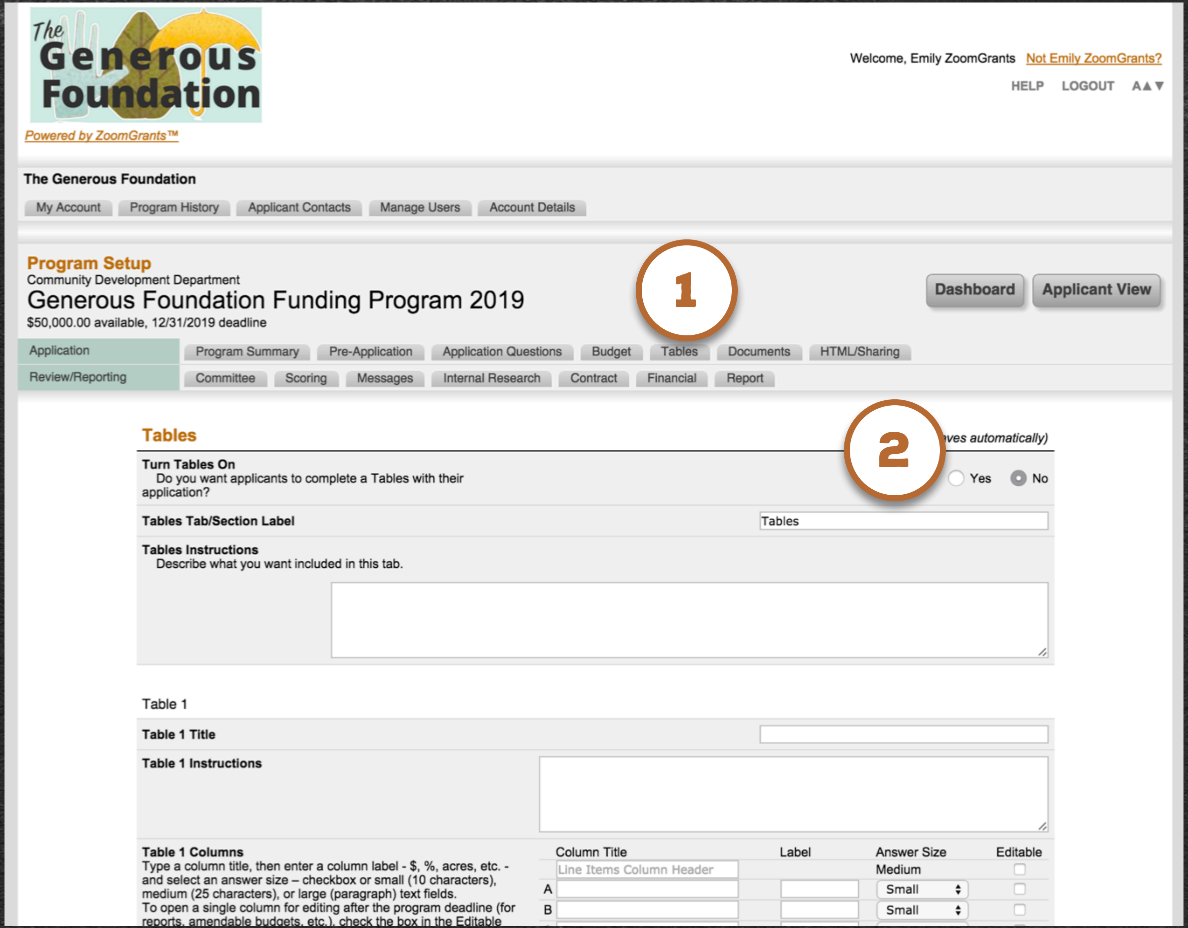
**If you choose to use it, the Tables tab is a great place to capture unique data that doesn't easily fit into single questions.**

**This is a complex, powerful feature, and we'd be happy to consult with you to help set up the Tables to meet your needs. Check out this help article on ZGU: http://help.zoomgrants.com/index.php/zgu/tables/*

## 2. LABEL IT, TURN IT ON

**Every tab can be re-labeled. Give each tab a name that your Applicants will recognize.**

If you choose to use any tab other than the Application Questions tab, be sure to turn that tab 'on' to make it viewable to your Applicants.



# PROGRAM SETUP: Documents



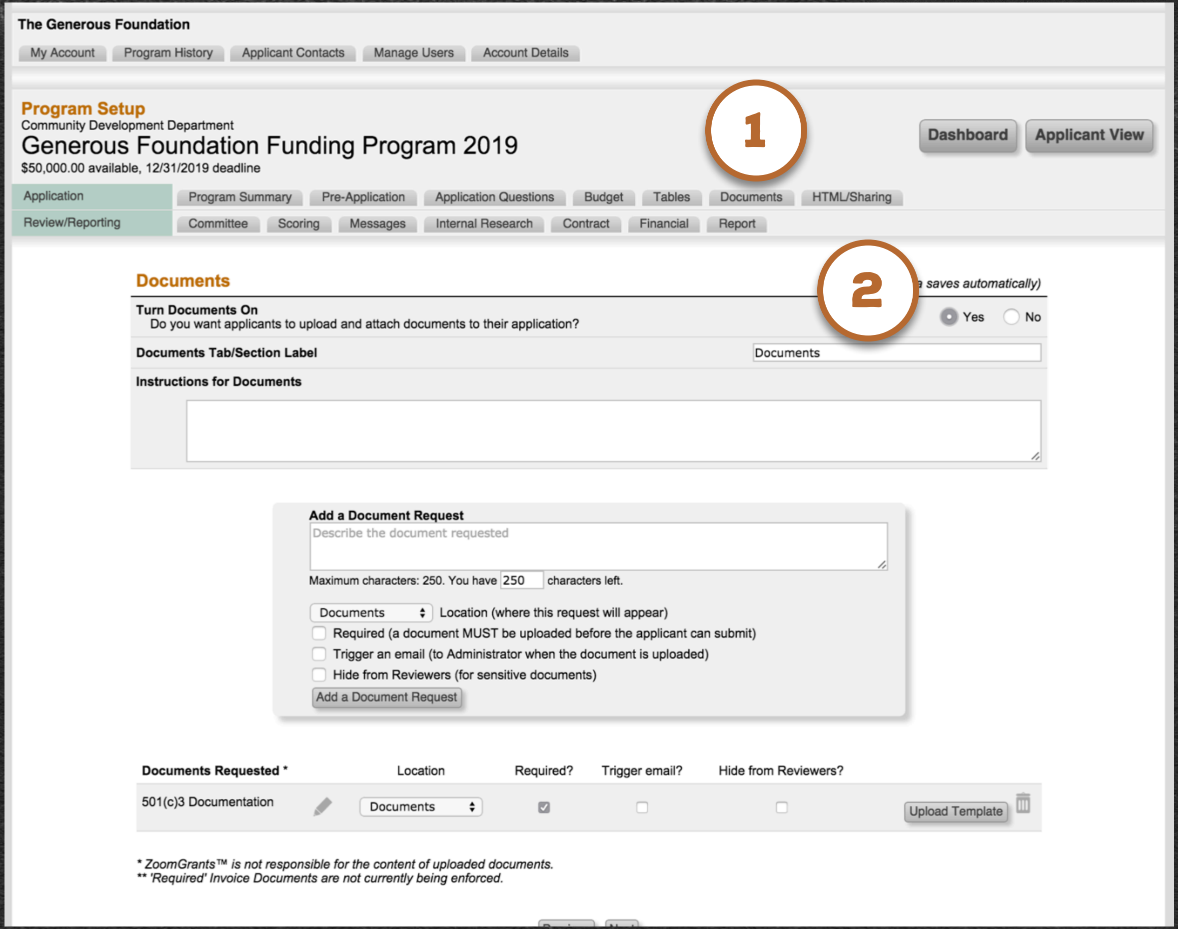
## 1. DOCUMENTS TAB

**Create your Document Requests in this tab. You can ask for an unlimited number of document uploads or links from your Applicants.**

## 2. LABEL IT, TURN IT ON

**Every tab can be re-labeled. Give each tab a name that your Applicants will recognize.**

If you choose to use any tab other than the Application Questions tab, be sure to turn that tab 'on' to make it viewable to your Applicants.



# **PROGRAM SETUP:** HTML/Sharing

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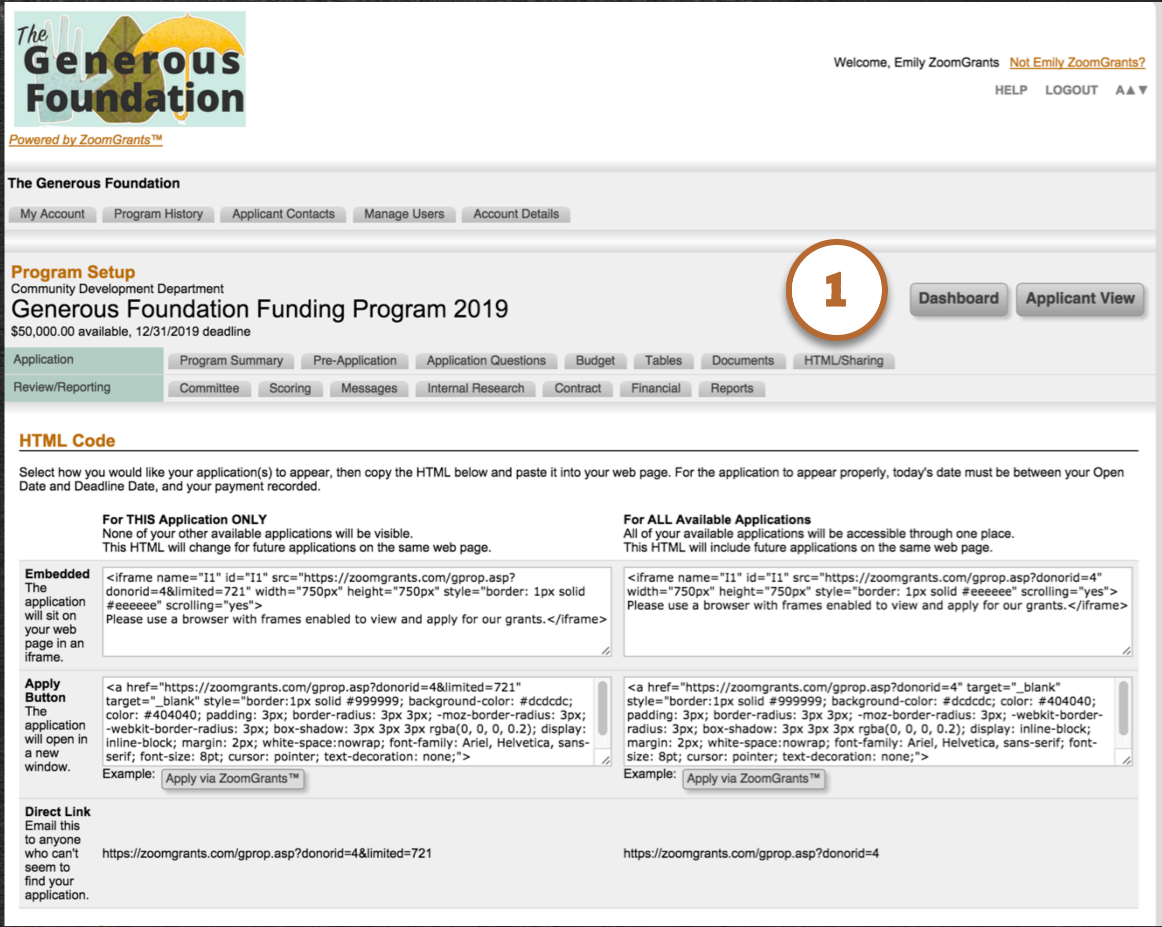
## 1. HTML/SHARING TAB

**When you've gone through this first row of tabs - customizing the Application settings and content – your Application is ready to go up on your website! Click into the HTML/Sharing tab to copy-and-paste the appropriate HTML Code into your web page.**

**Once we receive your payment, your Program will be ready to go live when your open date arrives!**

In the meantime, you can click through the second row of tabs to choose your Review and Reporting settings.



# PROGRAM SETUP: Committee

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## 1. COMMITTEE TAB

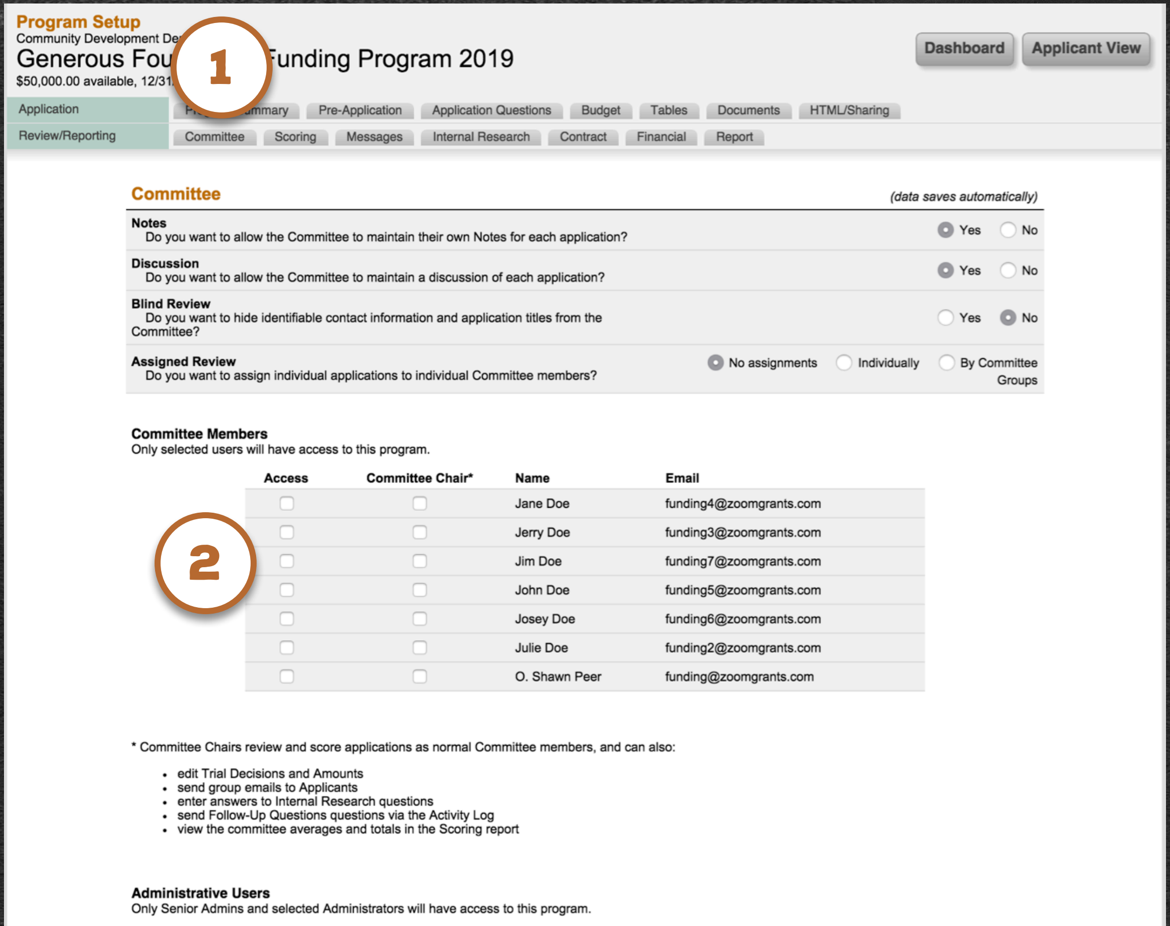
**The Committee tab is where you can set up your basic review settings and choose your Committee Members and Administrative Users.**

## 2. GRANT ACCESS

**Check the boxes next to the users whom you would like to be able to access the Applications for this Program. Users that aren't given access will not be able to see the Program or the Applications.** You can set up Committee Members as Committee Chairs, as well, which will give them limited administrative authority (see next slide).

## ADDING USERS

**Remember, you can add new users in the Manage Users section on your My Account page.**



# A Note About Committee Chairs:

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**Committee Chairs are a hybrid of**

**… NORMAL COMMITTEE MEMBER**

Committee Chairs review, score, and vote on Applications just as normal Committee Members do.

**… AND PROGRAM ADMINISTRATOR.**

In addition to reading Applications as Committee Members, Committee Chairs also have limited Administrative authority.

**COMMITTEE CHAIRS CAN:**

- Change Trial Decisions and Amounts
- Assign Custom Statuses
- Pose Follow-Up Questions via the Activity Log
- Email Applicants
- View Committee Totals and Averages in the Scoring Report

**COMMITTEE CHAIRS CANNOT:**

- Change Official Decisions and Amounts
- Change the Pre-Application status
- Assign Applications to Committee Members
- Enter Administrative Scores or Comments
- Open Applications for Editing
- View Specific Scores or Comments of other Committee Members
- Manage any Post-Funding Activities

# **PROGRAM SETUP:** Scoring - I

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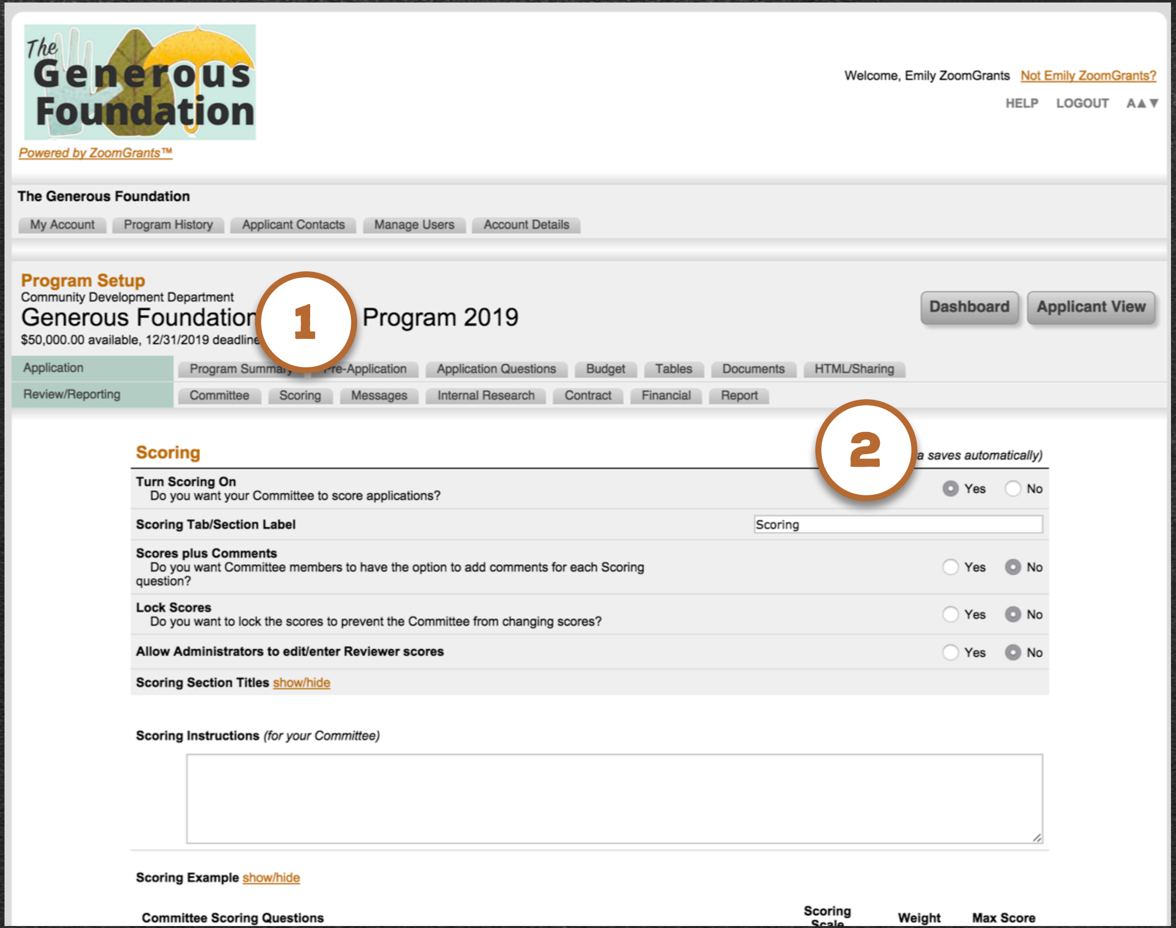
## 1. SCORING TAB

**You can create scoring criteria for your Committee Members and Administrators to refer to as they look over Applications.** Each question can be weighted individually and scored on a unique scale.

## 2. LABEL IT, TURN IT ON

This feature can be renamed, so give the tab a label that your Reviewers will recognize. Also, if you choose to use any Review feature, be sure to turn the tab 'on' to make it viewable to your Reviewers.



# **PROGRAM SETUP:** Scoring - II

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## 1. COMMITTEE SCORING QUESTIONS

**The Committee Scoring Questions, here and above, can be filled out individually by every Committee Member.** Each question can be weighted separately.

## 2. ADMINISTRATIVE SCORING QUESTIONS

**Administrative Scoring Questions are a collaborative effort – any Administrator granted access to the Program can enter or amend Administrative Scoring Question and Administrative Scoring Comment data. There is only one set of Administrative Scores for each Application.**

1

| | | | | | |
|---|---|---|---|---|---|
| 11 | 0 | X | 1 | = | 0 |
| 12 | 0 | X | 1 | = | 0 |
| 13 | 0 | X | 1 | = | 0 |
| 14 | 0 | X | 1 | = | 0 |
| 15 | 0 | X | 1 | = | 0 |
| 16 | 0 | X | 1 | = | 0 |
| 17 | 0 | X | 1 | = | 0 |
| 18 | 0 | X | 1 | = | 0 |
| 19 | 0 | X | 1 | = | 0 |
| 20 | 0 | X | 1 | = | 0 |
| | | | Total Committee Score Possible | | 0 |

2

*Only one Administrative Score will be recorded for each application. Any Administrative User can edit these scores. Committee members will be able to view these scores.*

| Administrative Scoring Questions | Scoring Scale | | Weight | | Max Score |
|---|---|---|---|---|---|
| 1 | 0 | X | 1 | = | 0 |
| 2 | 0 | X | 1 | = | 0 |
| 3 | 0 | X | 1 | = | 0 |
| 4 | 0 | X | 1 | = | 0 |
| 5 | 0 | X | 1 | = | 0 |
| 6 | 0 | X | 1 | = | 0 |
| 7 | 0 | X | 1 | = | 0 |
| 8 | 0 | X | 1 | = | 0 |
| 9 | 0 | X | 1 | = | 0 |
| 10 | 0 | X | 1 | = | 0 |
| | | | Total Administrative Score Possible | | 0 |

# PROGRAM SETUP: Messages

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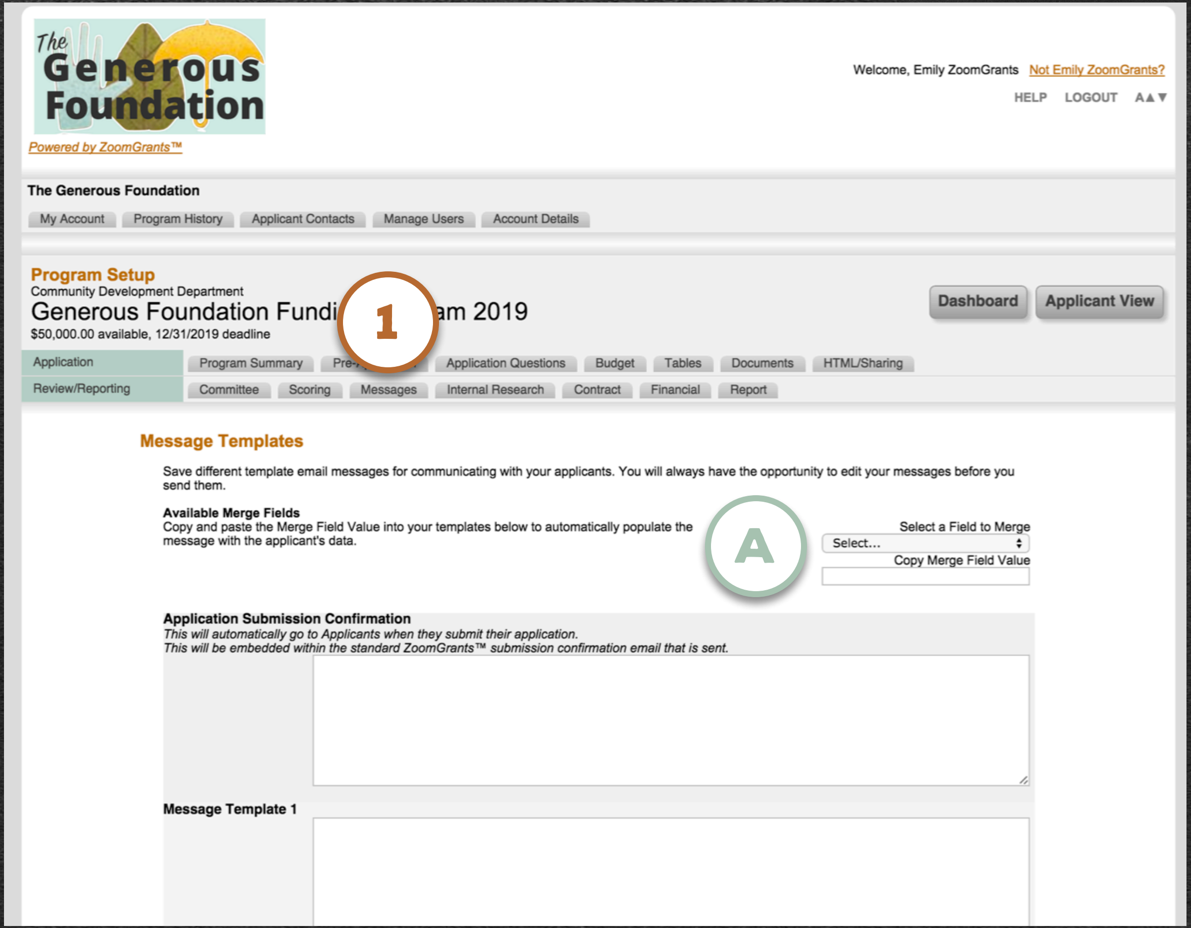
## 1. MESSAGES TAB

In the Messages tab, you can add your own content to the Application Submission Confirmation email that is automatically sent to Applicants when they submit their application as well as create your own Message Templates to use when you generate emails to send to Applicants via ZoomGrants™.

## A. MERGE FIELDS

Use Merge Fields to generate emails with pre-populated fields, such as Application Title, Applicant Name, etc.



# **PROGRAM SETUP:** Internal Research - I

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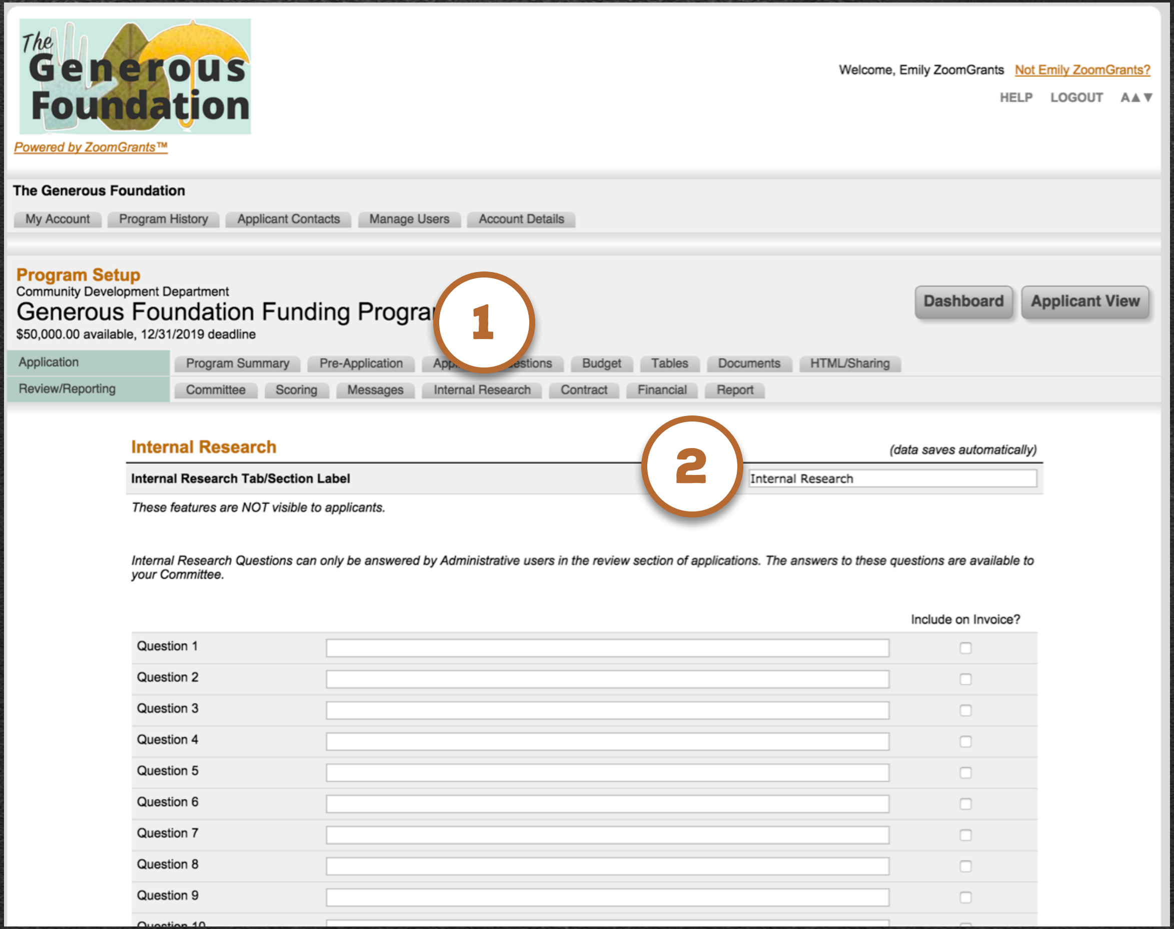
## 1. INTERNAL RESEARCH TAB

**The Internal Research feature is a great way to keep track of your organization's unique internal tracking fields for each Application, such as Accounting Numbers, custom Applicant ID Numbers, etc., or display answers to due-diligence inquiries**. Administrative users can input data or answers to Internal Research questions on each Application.

## 2. GIVE IT A LABEL

**Give this tab a name that your users will recognize.**

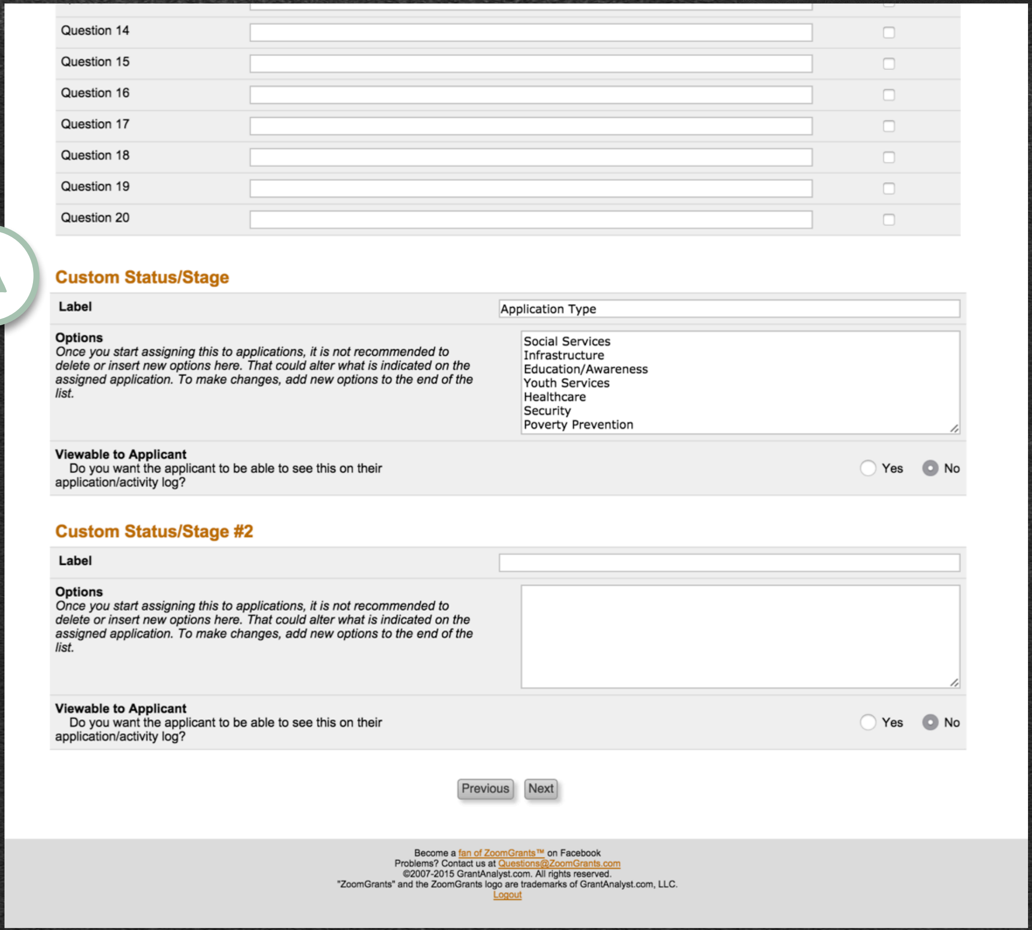


# **PROGRAM SETUP:** Internal Research - II

## A. CUSTOM STATUS

**You can use the Custom Status to separate your Applications into distinct groups. Each Application can be assigned two Custom Statuses**. The Custom Status feature puts a panel on the Program Dashboard that allows quick access to just the Applications with a select Custom Status and makes it easy to create Custom Reports that feature a specific subset of Applications.

A


Question 14
Question 15
Question 16
Question 17
Question 18
Question 19
Question 20

**Custom Status/Stage**

**Label** Application Type

**Options**
*Once you start assigning this to applications, it is not recommended to delete or insert new options here. That could alter what is indicated on the assigned application. To make changes, add new options to the end of the list.*

Social Services
Infrastructure
Education/Awareness
Youth Services
Healthcare
Security
Poverty Prevention

**Viewable to Applicant**
Do you want the applicant to be able to see this on their application/activity log? Yes No

**Custom Status/Stage #2**

**Label**

**Options**
*Once you start assigning this to applications, it is not recommended to delete or insert new options here. That could alter what is indicated on the assigned application. To make changes, add new options to the end of the list.*

**Viewable to Applicant**
Do you want the applicant to be able to see this on their application/activity log? Yes No

Previous Next

Become a fan of ZoomGrants™ on Facebook
Problems? Contact us at Questions@ZoomGrants.com

Logout

# PROGRAM SETUP: Contract

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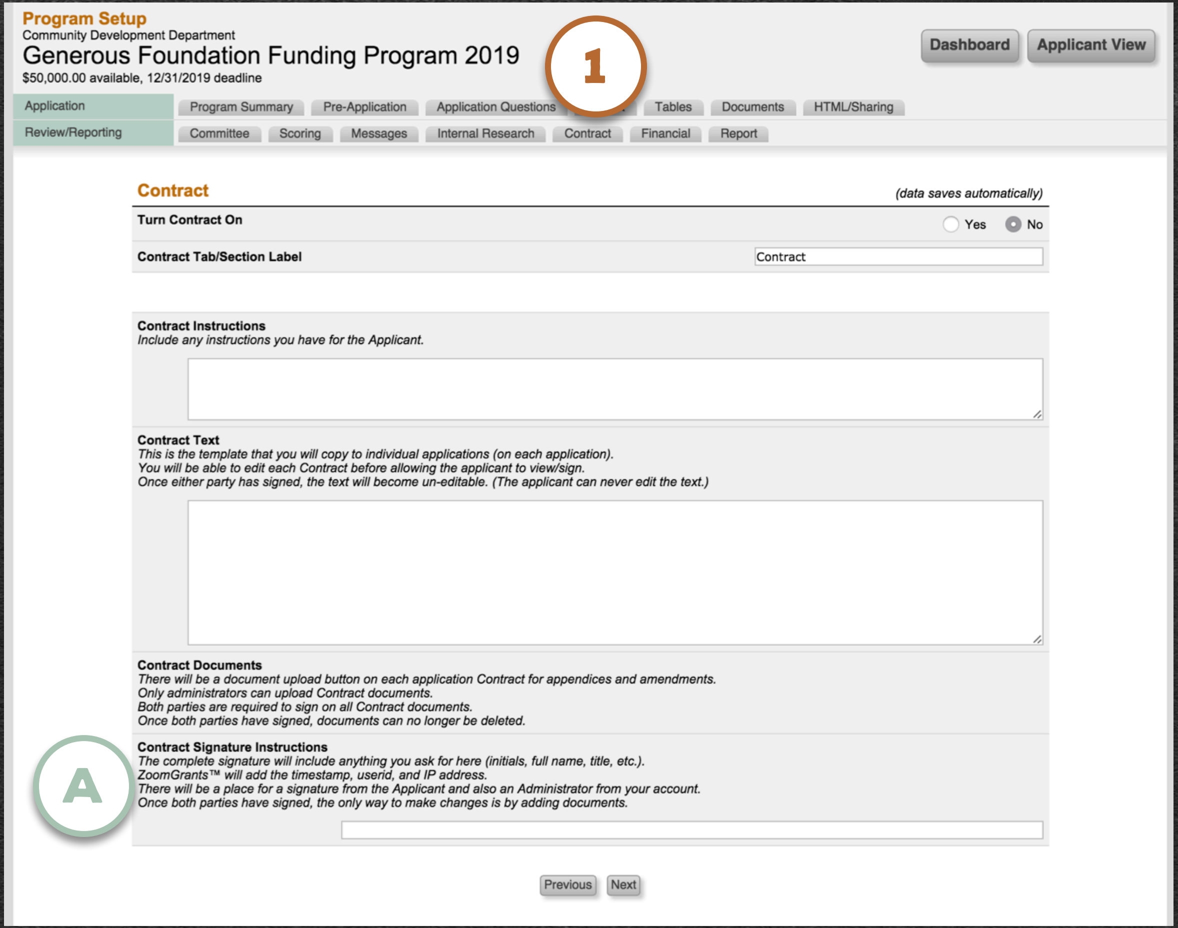
## 1. CONTRACT TAB

**If you have a Contract phase in your grant process, this feature can replace your paper-based contracts.** In this tab, you can create your template Contract Text, which you will copy into each Application as needed.

*For more detailed information, check out this video:* [*http://youtu.be/d7w8RCEgbt4*](http://youtu.be/d7w8RCEgbt4)

## A. SIGNATURES

**When the Applicant or Administrator affixes a signature, ZoomGrants™ will automatically add a date and timestamp as well as the IP address of the user.**



# PROGRAM SETUP: Financial - I

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## 1. FINANCIAL TAB

**ZoomGrants™ can be used to track Invoices and Payments for your Program. Applicants can create and submit Invoices to you, and you can accept or decline them as necessary.** You can add Payments to individual Invoices or on an Application itself. ZoomGrants™ calculates the drawdown automatically.

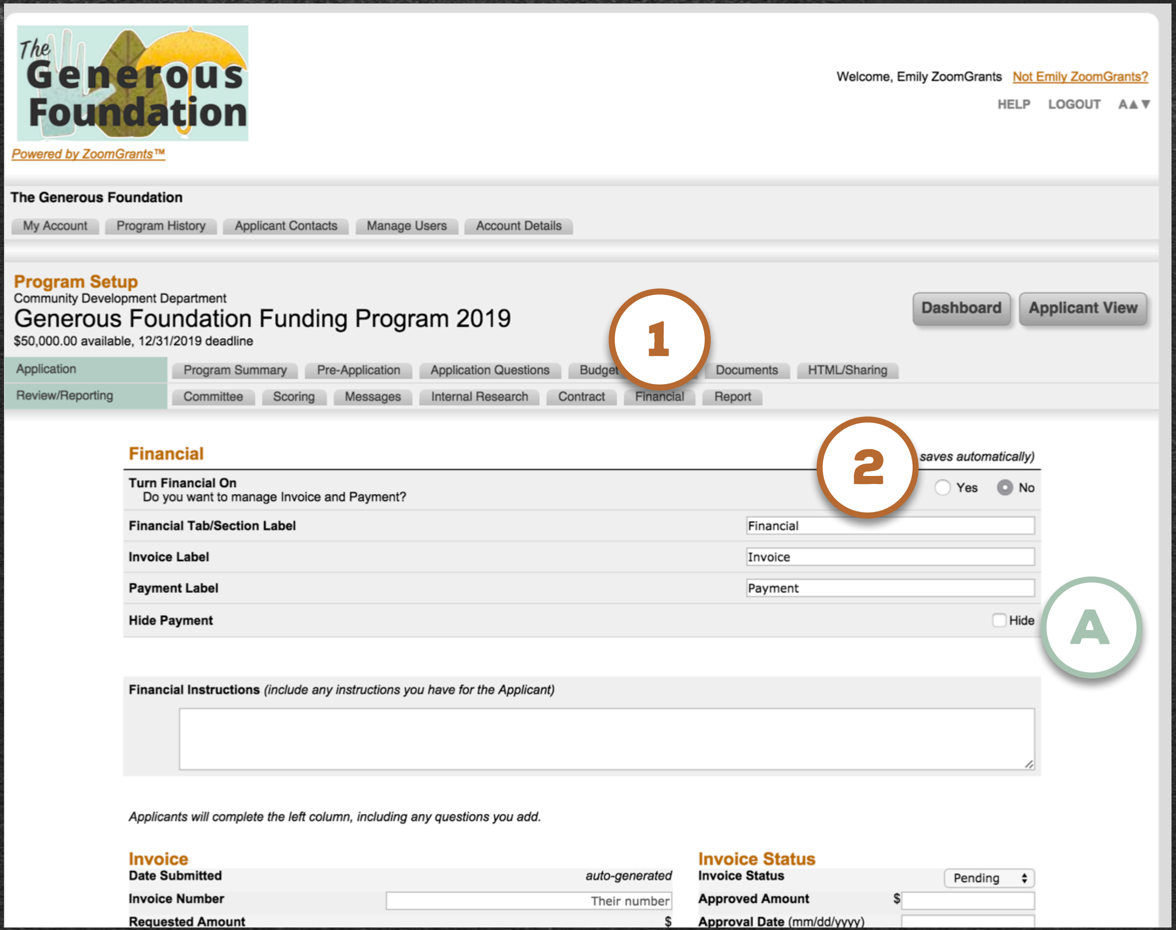
*For more detailed information, check out this video:* *http://youtu.be/K0VHWfNs8YM*

## 2. LABEL IT, TURN IT ON

**Give this tab a name that your users will recognize and don't forget to turn it 'on' – your Applicants will only be able to create Invoices if this feature is active.**

## A. HIDE PAYMENTS

**If you want to receive Invoices but don't want to track Payments, you can hide the Payments feature.**



# **PROGRAM SETUP:** Financial - II

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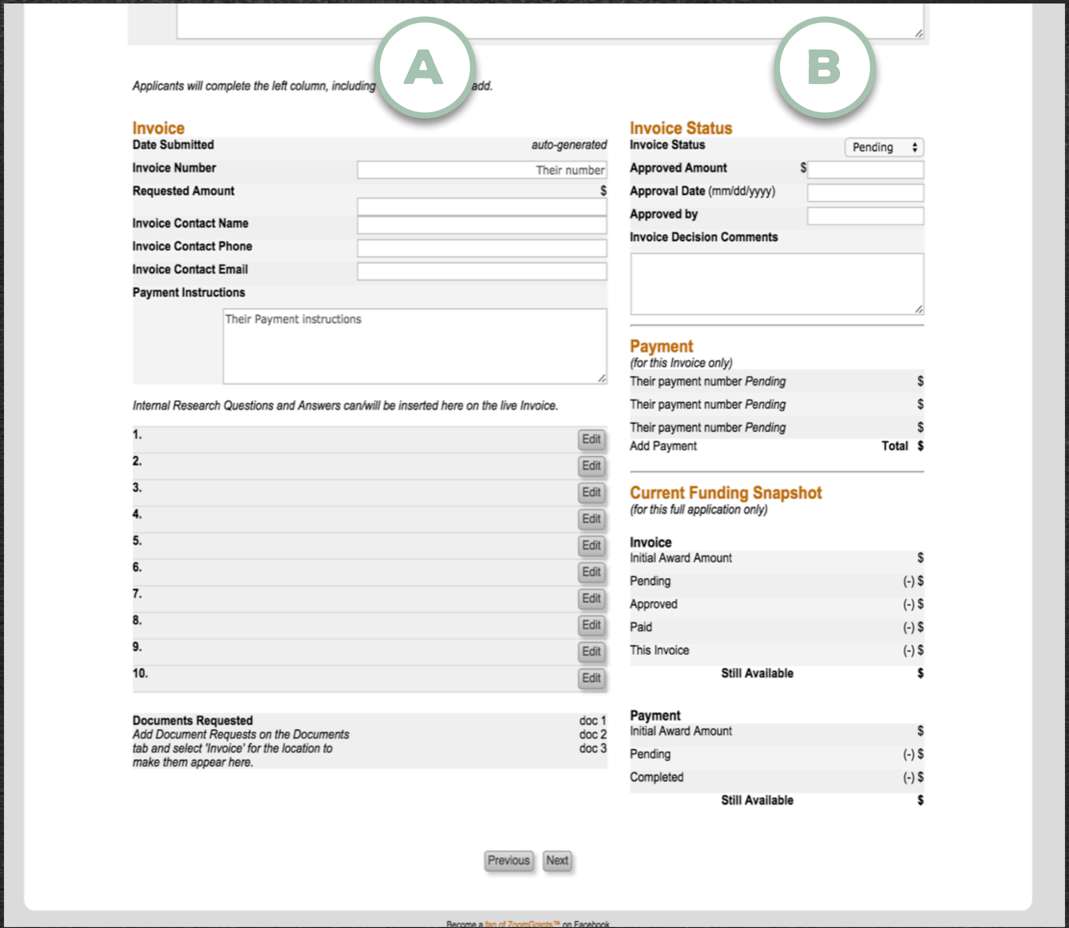
**This view shows how the Invoice will generally appear for both you and the Applicant.**

## A. APPLICANT COMPLETES THE LEFT SIDE

**The Applicant fills out the left side, including answering your questions and uploading documents, then submits the Invoice to you.**

## B. ADMINISTRATOR COMPLETES THE RIGHT SIDE

**After you receive it, you, the Administrator, will fill out the right side of the Invoice, changing the Status, Approved Amount, adding Payments, etc.**



# PROGRAM SETUP: Reports

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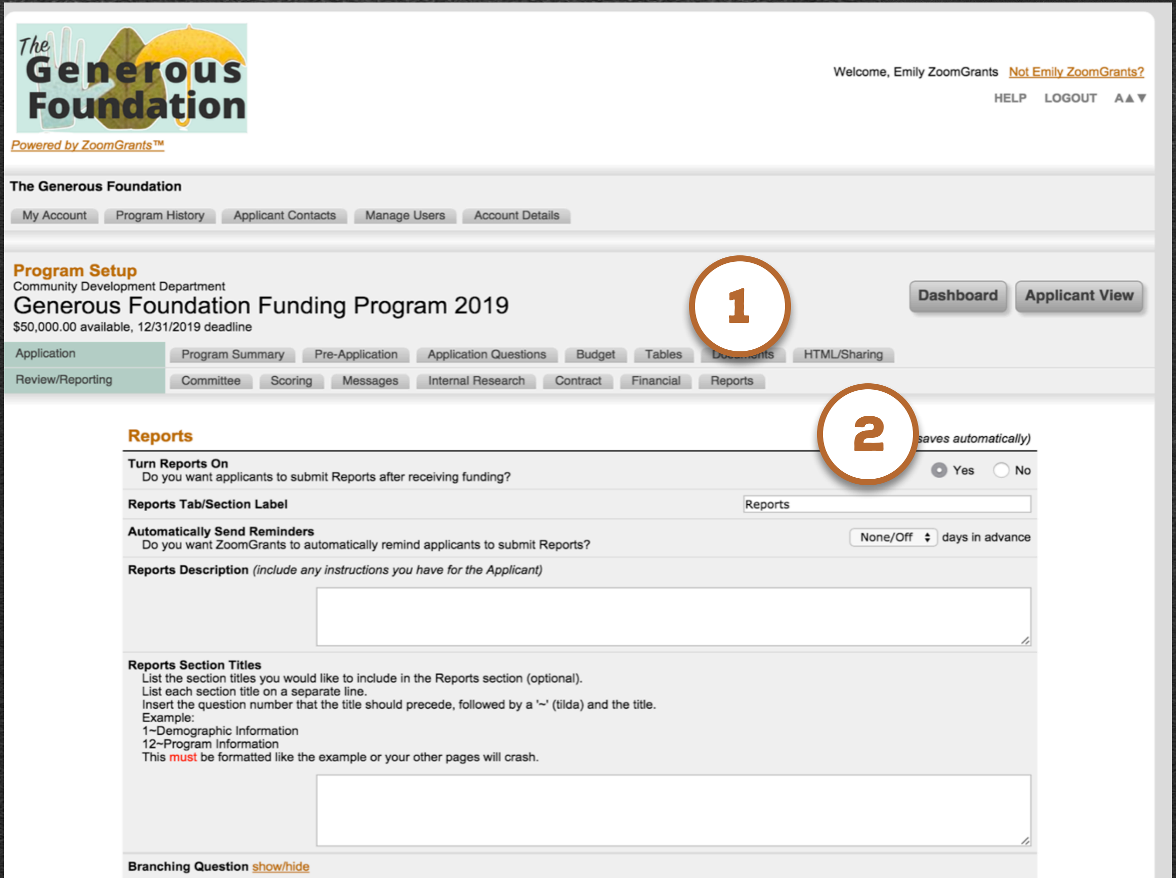
## 1. REPORTS TAB

Set up your Post-Funding Reports in this tab. You can choose up to 24 deadline dates, set up Automatic Reminders, and gather all the data you need by creating questions and Document Requests.

## 2. LABEL IT, TURN IT ON

Give this tab a name that your users will recognize and don't forget to turn it 'on' – your Applicants will only be able to create Reports if this feature is active.




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

# PROGRAM SETUP QUESTIONS?

We're always happy to help.

Check out ZGU: http://help.zoomgrants.com

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# PART TWO:
# Application Review & Review Tools

# APPLICATION REIVEW: My Account

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## 1. ACCESS A PROGRAM

**Click an orange Program title to access the Dashboard for a Program.**

## A. WAITING TO OPEN

This is the Program that we just set up in Part One of this tutorial. Once the Balance Due is received by ZoomGrants™, the Program will be ready to go live on the open date!

## B. SUBMITTED & INCOMPLETE

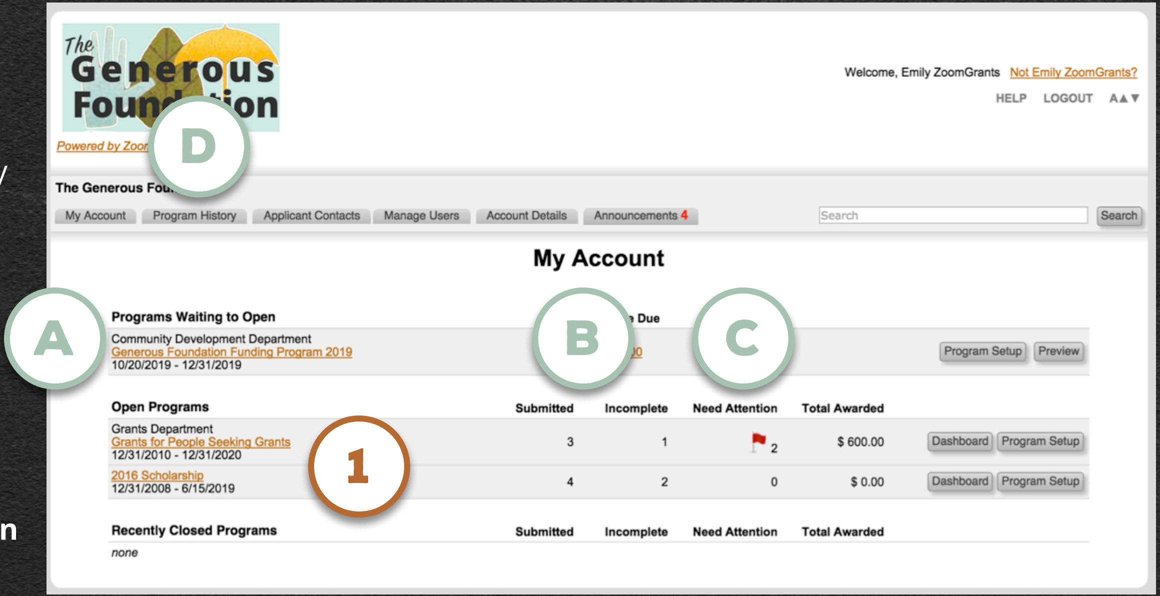
Here, you can see how many Applications have been Submitted or are Incomplete.

## C. NEED ATTENTION

**Applications can be flagged as needing attention if the Applicant has submitted a Pre-App to be reviewed, requested Administrator Action, etc.**

## D. PROGRAM HISTORY

**Click into this tab to view your organization's Programs from previous years.**



# APPLICATION REVIEW: Program Dashboard

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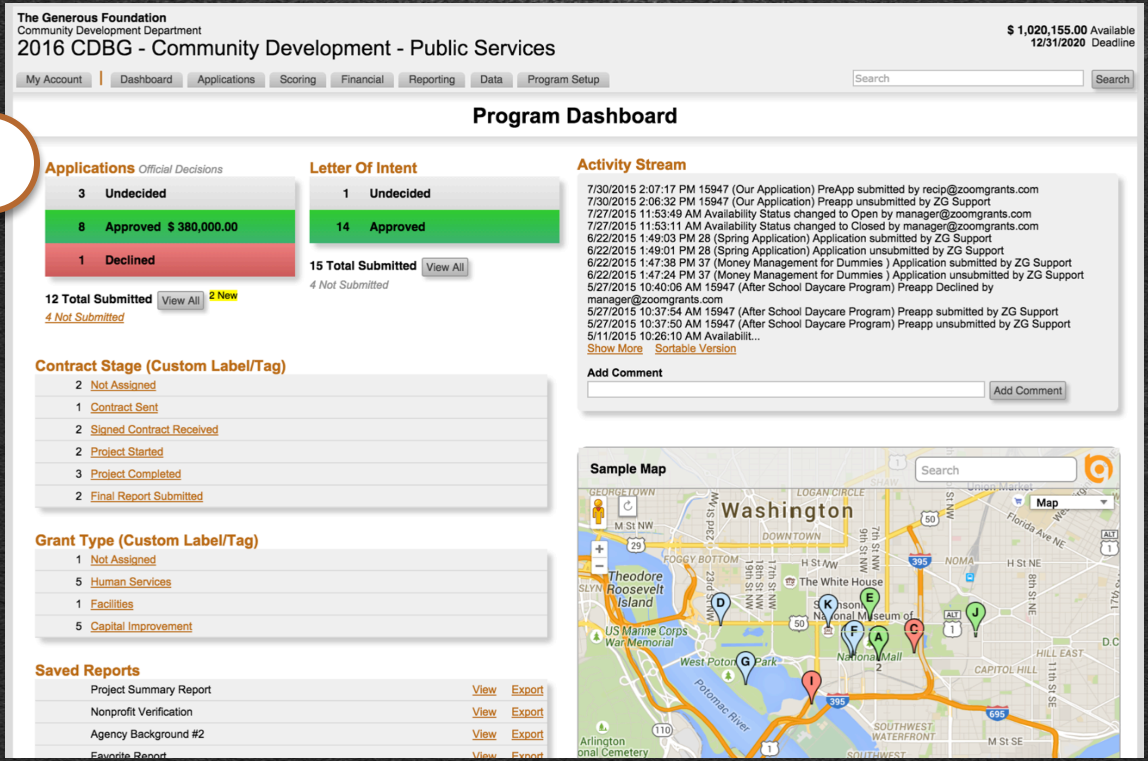
1




## 1. APPLICATIONS LISTS

**Click an color-coded Application or Pre-Application status or an orange Custom Status link to access a list of the Applications with that status.**

# **APPLICATION REVIEW:** Applications List

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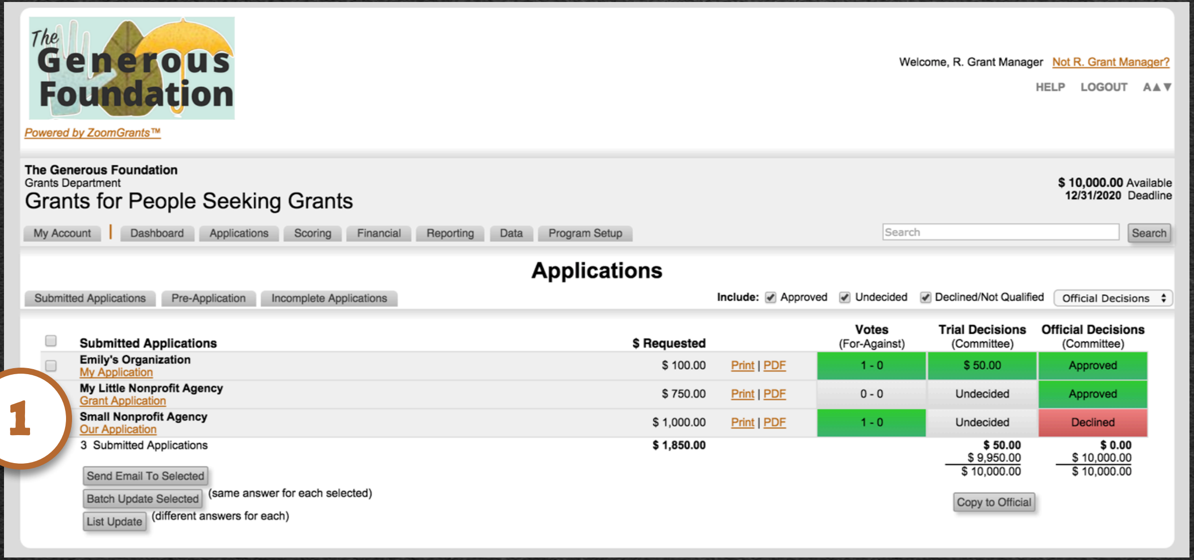


## 1. INDIVIDUAL APPLICATION

**Click an orange Application Title to open up that Application.**

# APPLICATION REVIEW: Application Summary

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## 1. APPLICATION SUMMARY

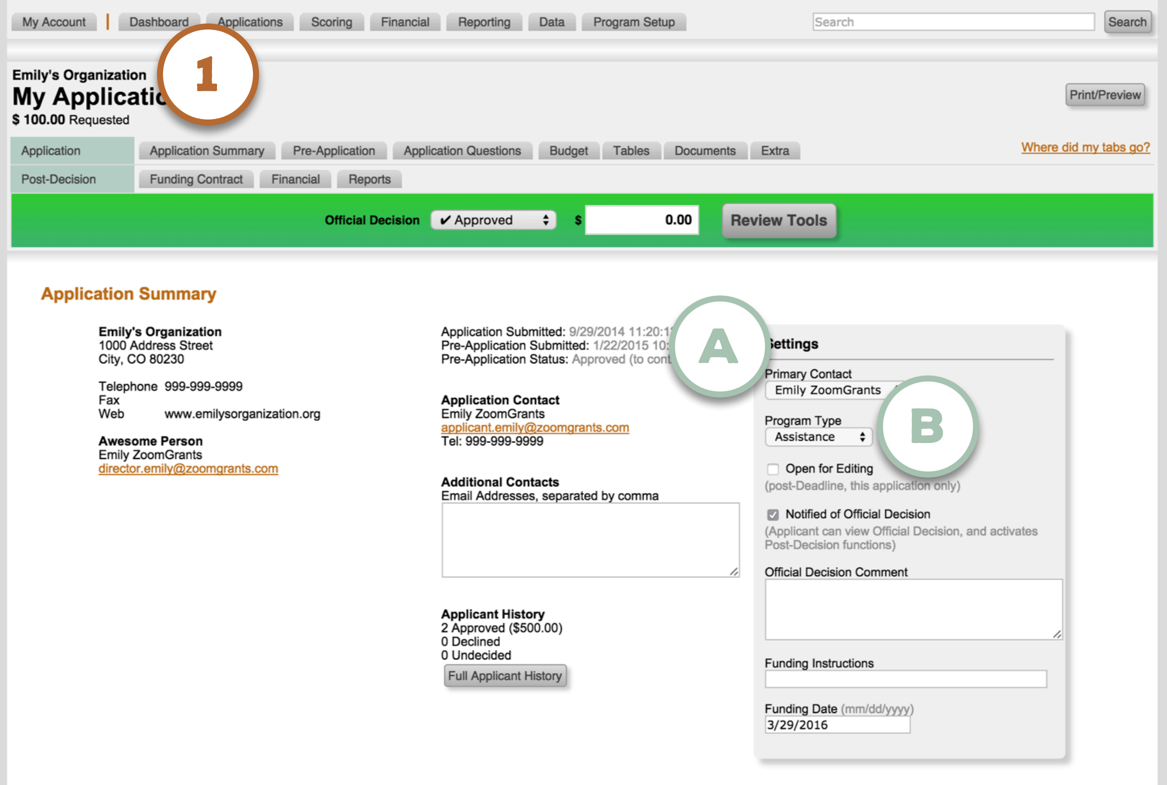
**Click into this tab to view general information for this Application, and to access the Internal Research fields and Activity and Audit Logs.**

## A. PRIMARY CONTACT

Each Application can have a specific Administrative Contact assigned to it. Select a Primary Contact for this Application from this dropdown.

## B. CUSTOM STATUS

If applicable, select a Custom Status for this Application from the dropdown(s) here.



# APPLICATION REVIEW: Pre-Application*

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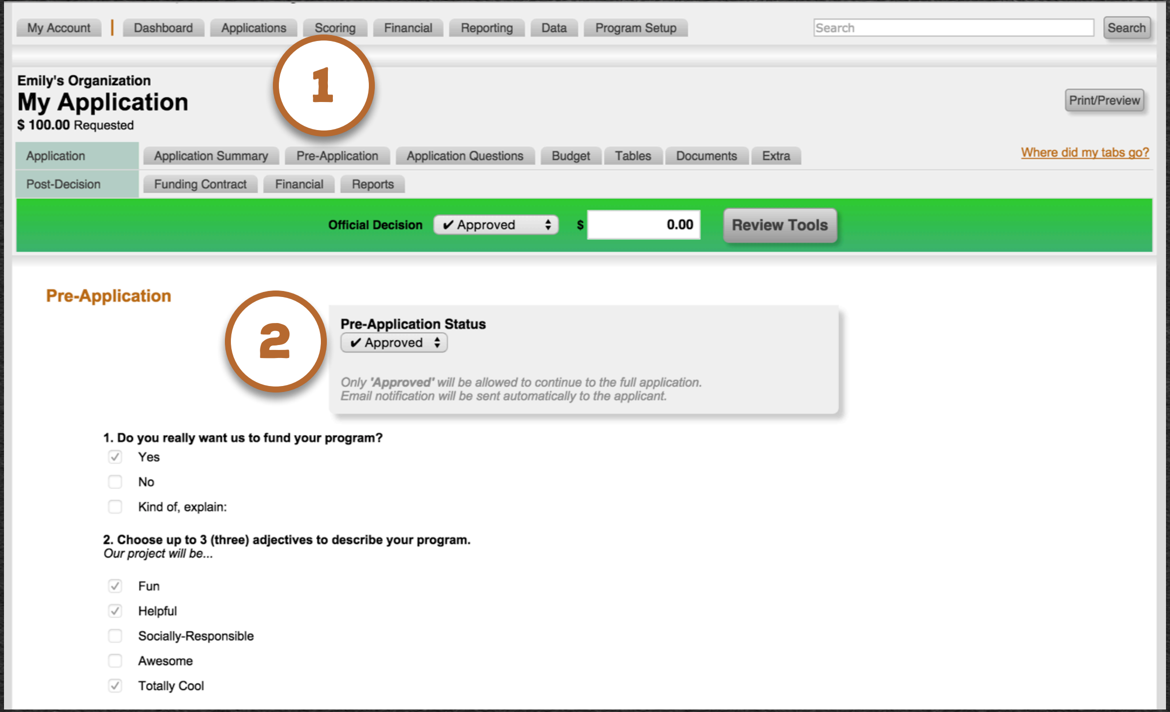
## 1. PRE-APPLICATION*

**Click into this tab within an Application to review and make a decision on this Applicant's Pre-Application*.**

## 2. PRE-APPLICATION* STATUS

**Review the Pre-Application*, then select the appropriate status.** The Applicant will automatically receive an email alerting them to the change in Pre-Application* status.

*Approving a Pre-Application* allows the Applicant to continue with the rest of the Application.*




*This tab may have a different label or may not appear at all, depending on the settings in Program Setup.

# **APPLICATION REVIEW:** Application Questions* & Budget*

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## 1. APPLICATION QUESTIONS*

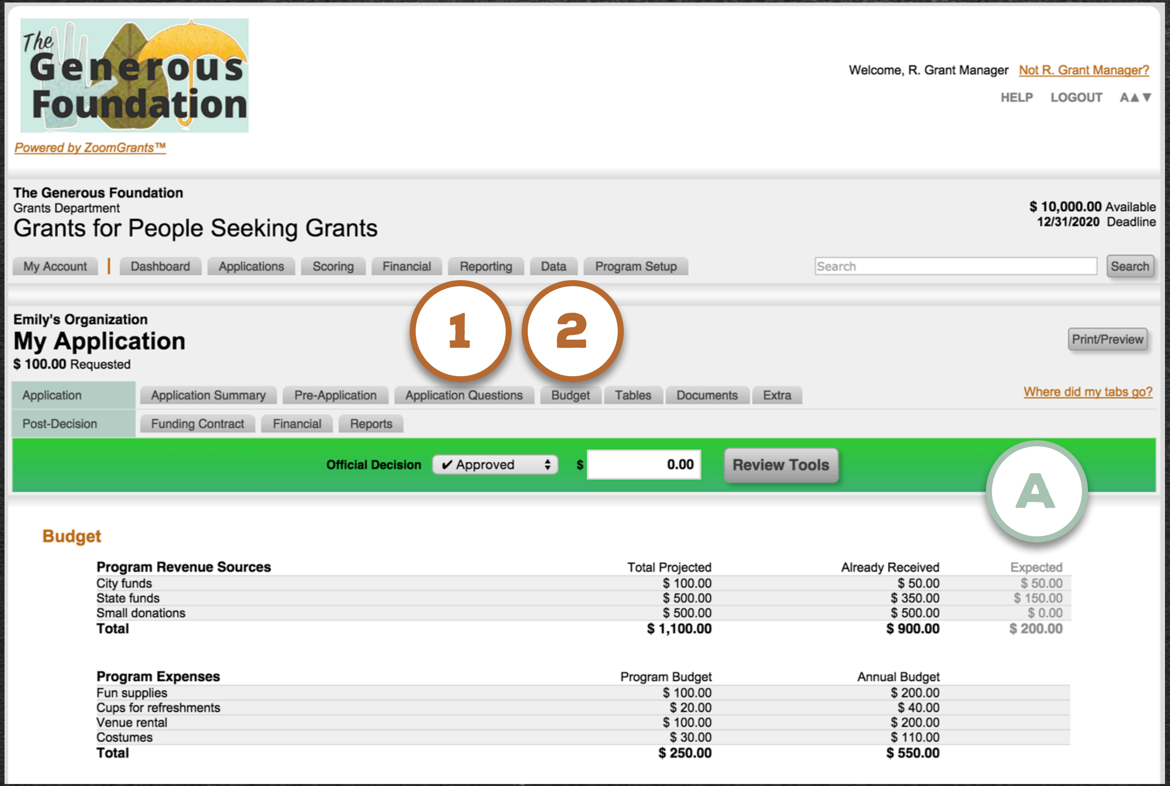
**Click into this tab within an Application to review the Applicant's answers to the main Application questions.**

## 2. BUDGET*

**Click into this tab within an Application to review the Budget information provided by the Applicant.**

## A. CALCULATED COLUMNS

Calculated Columns, which feature data that was not entered by the Applicant, are displayed in gray.




*This tab may have a different label or may not appear at all, depending on the settings in Program Setup.

# APPLICATION REVIEW: Documents*

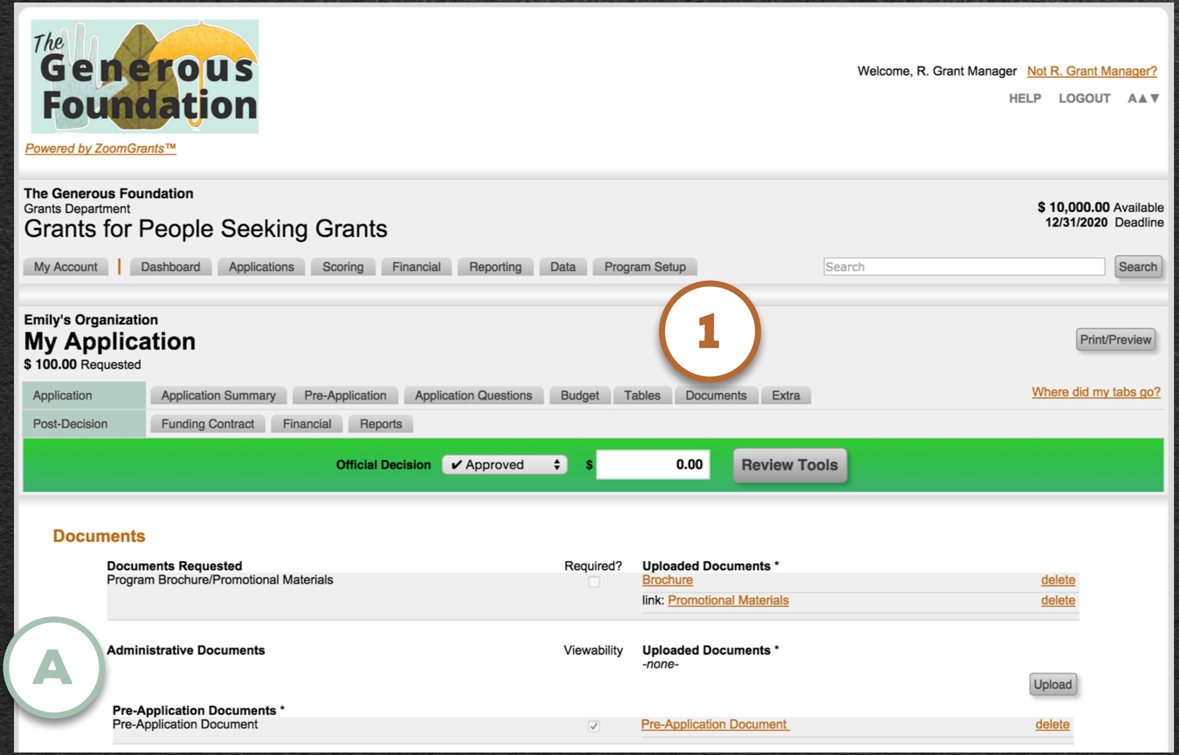


## 1. DOCUMENTS*

**Click into this tab within an Application to view or download the documents attached by the Applicant to the Application.**

## A. ADMINISTRATIVE DOCUMENTS

Administrators can upload their own documents on each Application. Documents can be made viewable to Admins and Reviewers only; to Admins, Reviewers, and the Applicant; or to all Applicants.

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# APPLICATION REVIEW: Extra*

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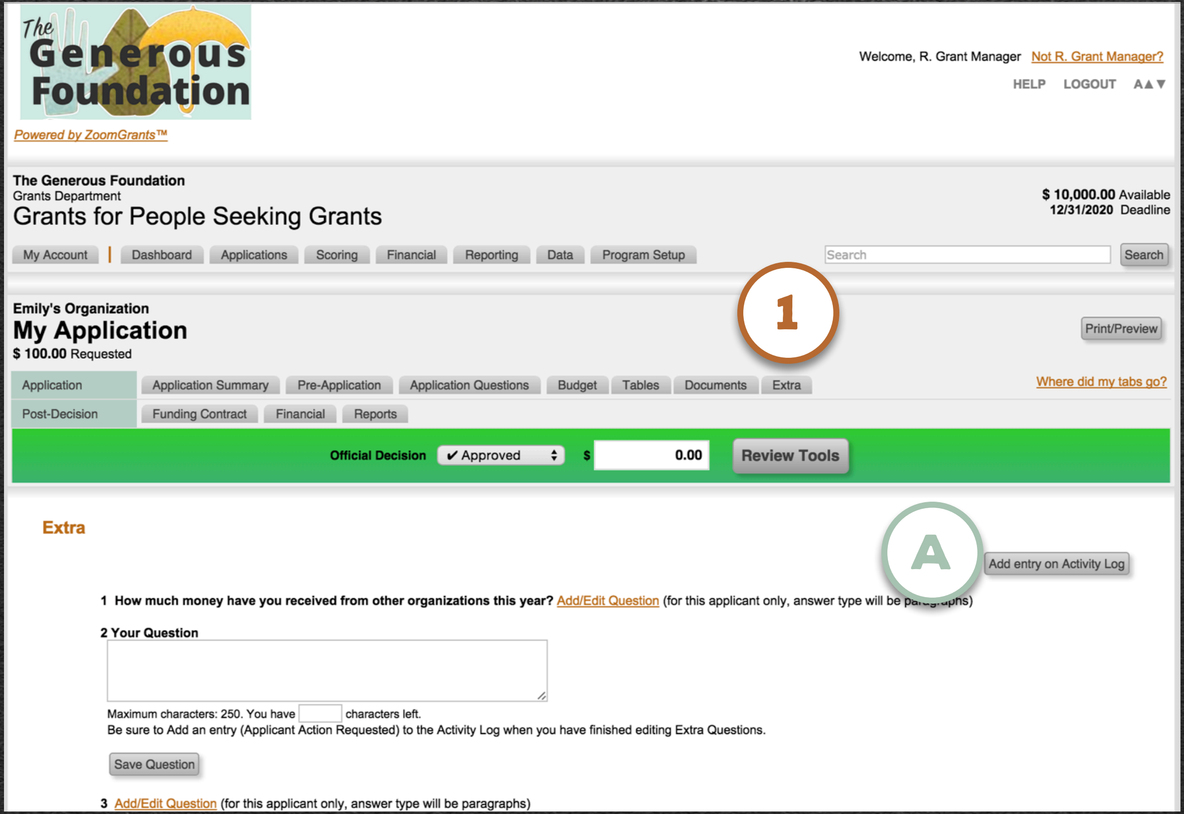
## 1. EXTRA*

**Use this tab to pose extra follow-up questions to a *single* Applicant on a *specific* Application.**

## A. ADD AN ENTRY ON ACTIVITY LOG

Once you're done creating your question, be sure to add an entry in the Activity Log.

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# **APPLICATION REVIEW:** Activity Log

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## 1. ACTIVITY LOG

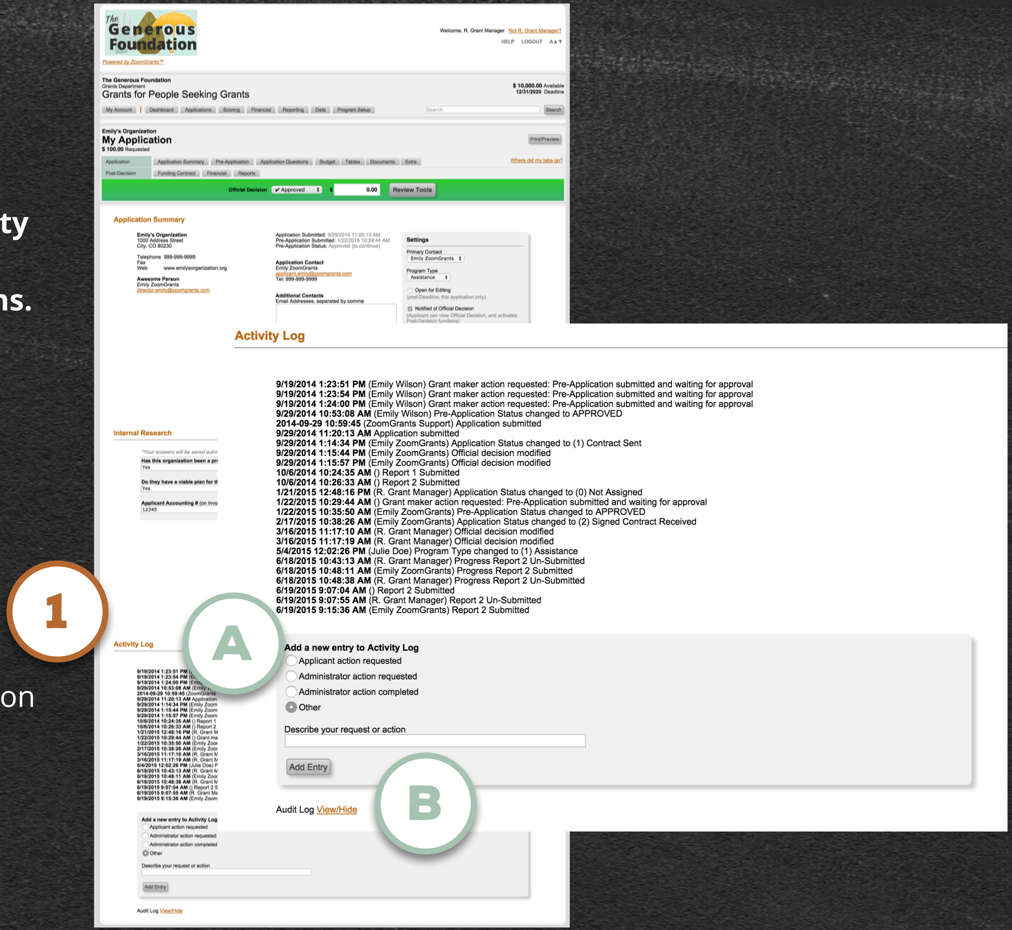
**Click into the Application Summary tab to view the Activity log, which keeps track of the major activities on this Application, including Applicant and Administrator actions.**

## A. ADD ENTRY

Administrators and Applicants can request actions or make specific notes of their actions using this section of the Activity Log.

## B. AUDIT LOG

**Click the orange View/Hide link to open up the Audit Log,** where ZoomGrants™ keeps a more detailed log of *all* of the activities on this Application, including the User ID of the person doing the action, their IP address, the field that they changed, and the time that it was changed.



# APPLICATION REVIEW: Scoring

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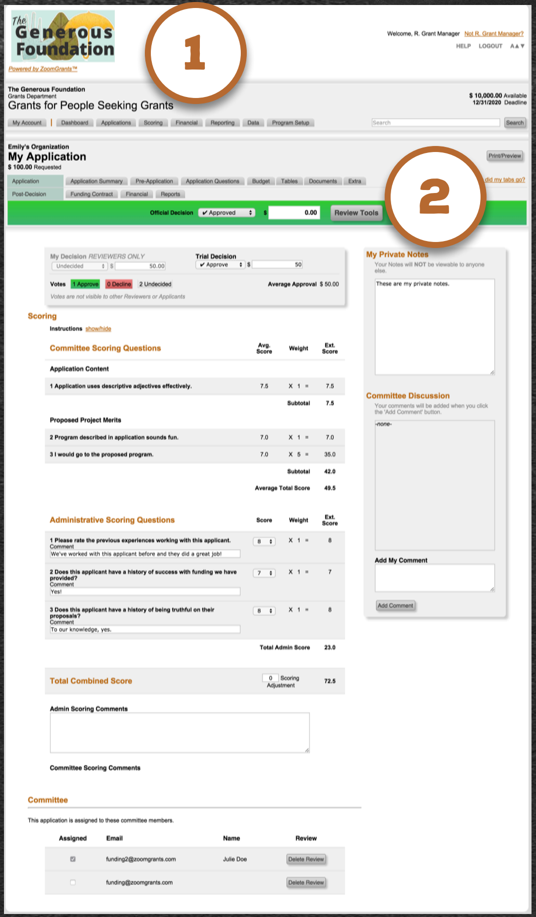


## 1. SCORING – PROGRAM LEVEL

**Click into this tab to view the Scoring Report for this Program, which includes multiple views such as Reviewer Totals, Committee Averages, and more.** You can also send emails to your Committee Members from that page.

## 2. REVIEW TOOLS – APPLICATION-LEVEL SCORING

**Click this button to view the Committee votes and averages on the Committee Scoring Questions* and to enter your scores on the Administrative Scoring Questions* on *this* Application.**

*This section may have a different label or may not appear at all, depending on the settings in Program Setup.

# APPLICATION REVIEW: Decisions

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## 1. TRIAL DECISION

**Click the Review Tools button to change the Trial Decision on each application.**

## 2. OFFICIAL DECISION

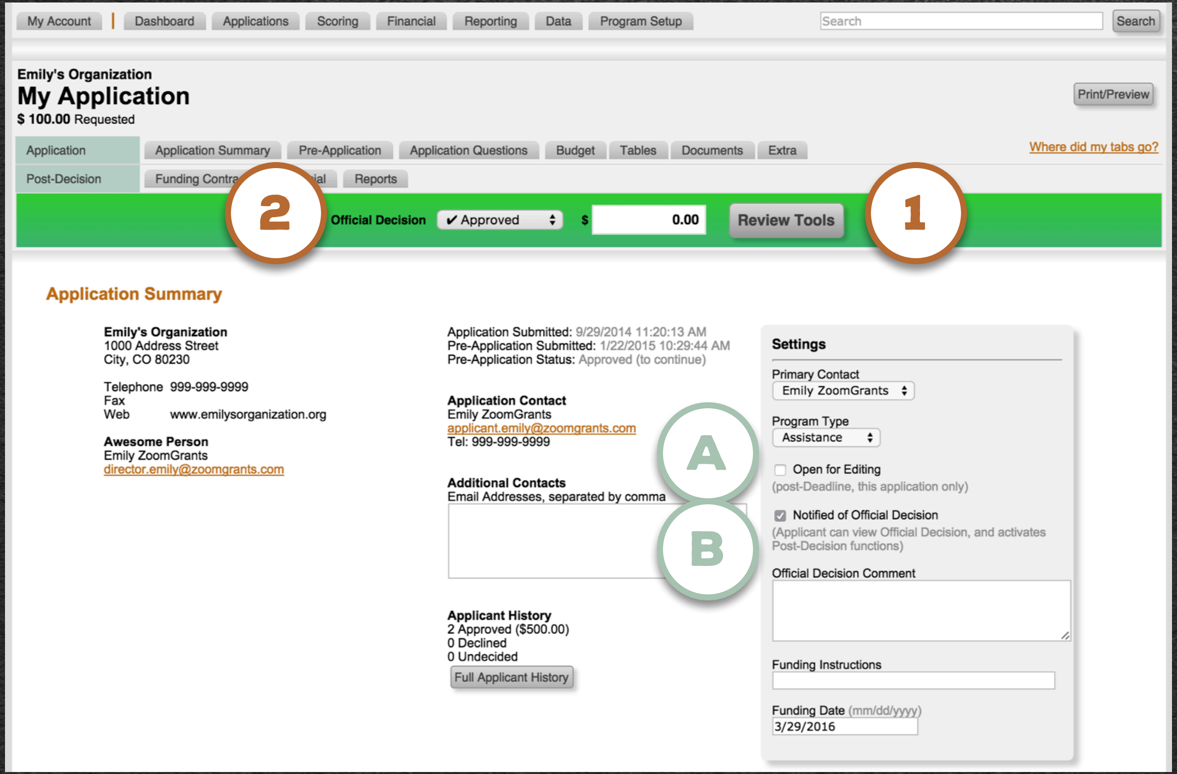
**Use the Official Decision bar to change the Official Decision.**

## A. OPEN THIS APPLICATION FOR EDITING

If an Applicant needs to make changes to their Application after the deadline, you can open the entire Application to allow that Applicant to amend their answers on that Application by checking this box in the Application Summary tab.

## B. NOTIFIED

**Once you've made your Decision and you're ready for the Applicant to see the Official Decision, check this box in the Application Summary tab to allow them to view the Decision when they log into their ZoomGrants™ account.**



# APPLICATION TOOLS: Data

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## 1. DATA TAB

**Click into this tab to create and view or download ad hoc Reports that pull specific fields from specific subsets of Applications or to complete a Standard Export of Contact Fields, Full Applications, etc.**

## A. CUSTOM DATA REPORT

**1. Set a Filter** – Choose which Applications you'd like to include in the Report.

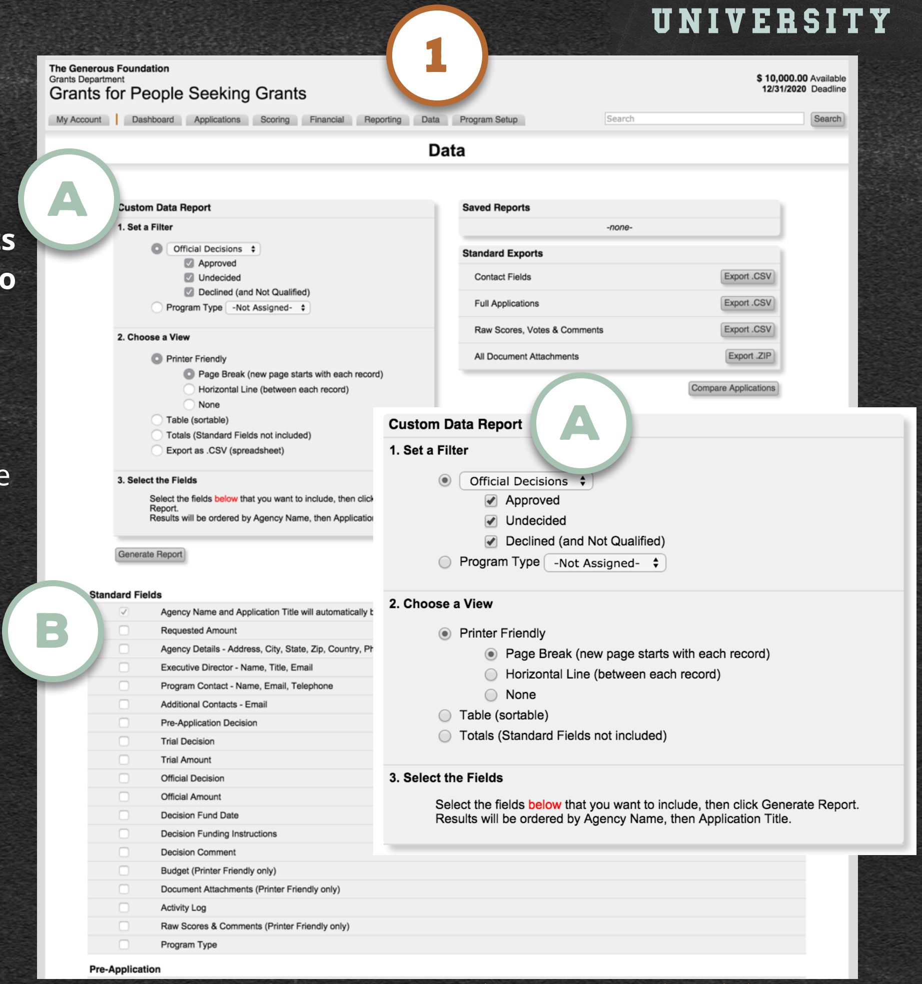
**2. Choose a View** – Tell the system how you would like the results presented.

*Please note: some fields (such as Tables) are limited to select views.*

**3. Select the Fields** – Scroll down and click the checkbox(es) next to the field(s) that you'd like to include in the Report (**B**).

## C. STANDARD EXPORTS

**Use one of these buttons to download Standard Exports.**



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# APPLICATION REVIEW QUESTIONS?

We’re always happy to help.

Send us an email: Questions@ZoomGrants.com

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

# PART THREE:

# Post-Decision Activity Management

Once your review process has concluded and you have finalized the committee decisions, you're ready to begin Post-Decision Activities, such as signing Contracts, managing Invoices, accepting Post-Funding Reports, etc.

**Note: Only Approved Applicants who have been 'notified' will be able to sign Contracts, create Invoices, or submit Reports.**

Please refer to the next two slides for instructions for notifying your applicants.

# DECISION NOTIFICATION: 'Notify' Applicants

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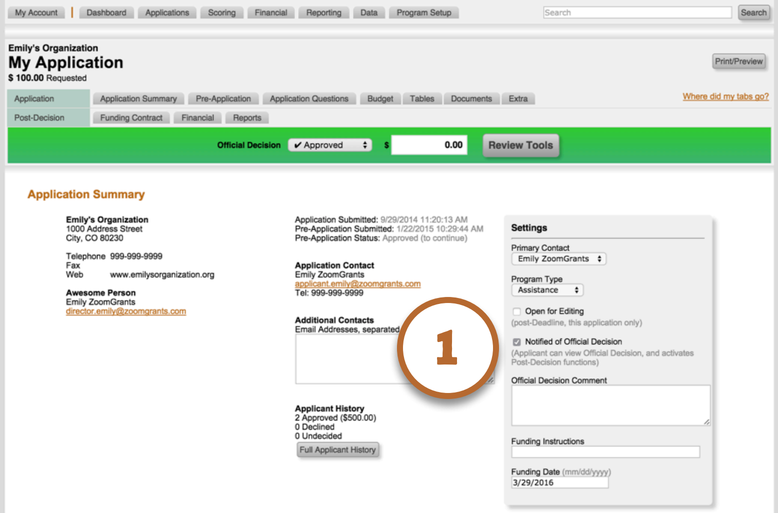
**After you've made your decisions, you will be able to notify your Applicants to make them aware of their Application status.** When an Applicant is notified, they are able to see the Decision in their ZoomGrants™ account and, if they were Approved, can access the Post-Decision features such as Contracts*, Invoices*, and Reports*. (Remember, Applicants ***must*** be notified of their Approved status in order to access Post-Decision features.)

## 1. 'NOTIFIED' – APPLICATION SUMMARY TAB

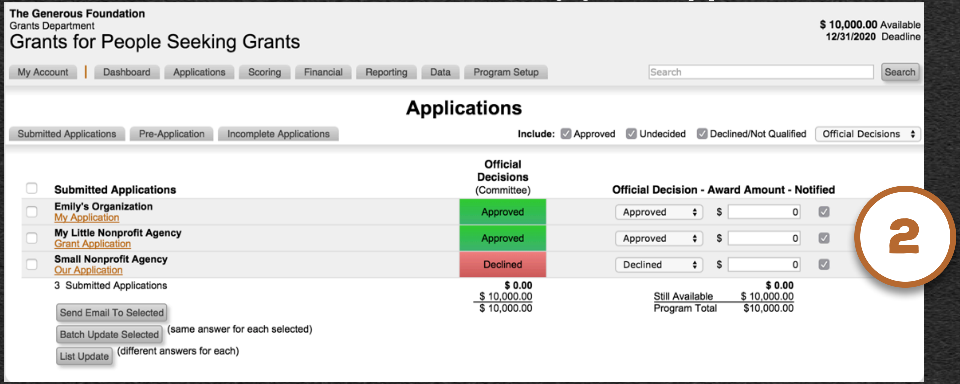
**In an individual Application, check the 'notified' box to allow the Applicant to see the Decision.**




**OR**

## 2. 'NOTIFIED' – APPLICATIONS LIST – LIST UPDATE

**In the Applications list, click the List Update button at the bottom of the page. Select which columns to keep in view and edit, then click the Update Now button. Use the checkboxes in the 'Notified' column to notify your Applicants.**




*This feature may have a different label or may not appear at all, depending on the settings in Program Setup.

# DECISION NOTIFICATION: 'Notify' Applicants, cont.

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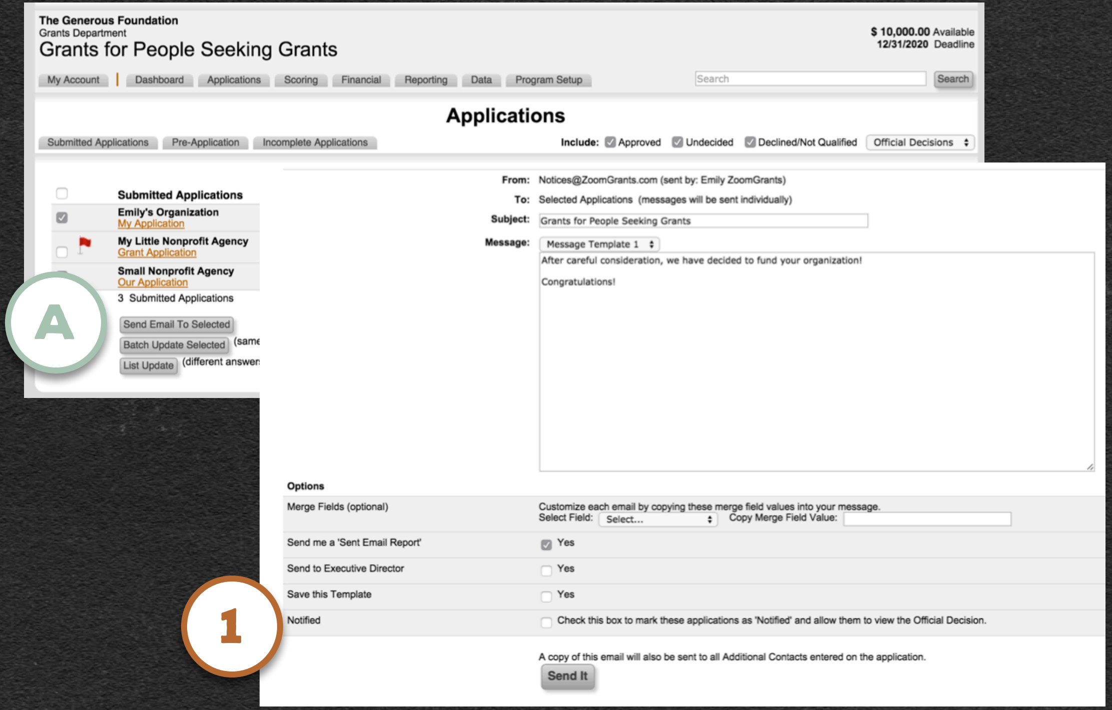
**You can also mark the Applications as 'notified' and allow Approved Applicants to access the Post-Decision Features through the Send Email to Selected option on the Applications List.**

You could use this feature to mark the Applicants 'notified' as soon as you use ZoomGrants™ to send an email to congratulate them on receiving funding, for example.

## 1. 'NOTIFIED' – APPLICATIONS LIST – SEND EMAIL TO SELECTED

**In the Applications list, check the boxes next to the appropriate Applications, then click the Send Email to Selected button (A) at the bottom of the page. Select which columns to keep in view and edit, then click the Update Now button. Use the checkboxes in the 'Notified' column to notify your Applicants.**



# POST-DECISION ACTIVITIES: Contracts*

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## 1. CONTRACT*

**ZoomGrants™ can be used to execute a Contract between the funding organization and the recipient.** Choose the Contract settings and template text in Program Setup, then click Copy from Template (**A**) on an Application to insert that template text into the Contract. You can also type or copy-and-paste directly into the box.

## 2. VIEWABLE TO APPLICANT

**When you are ready for the Applicant to review and sign the Contract, be sure to choose the 'yes' option to make it visible to the Applicant.**

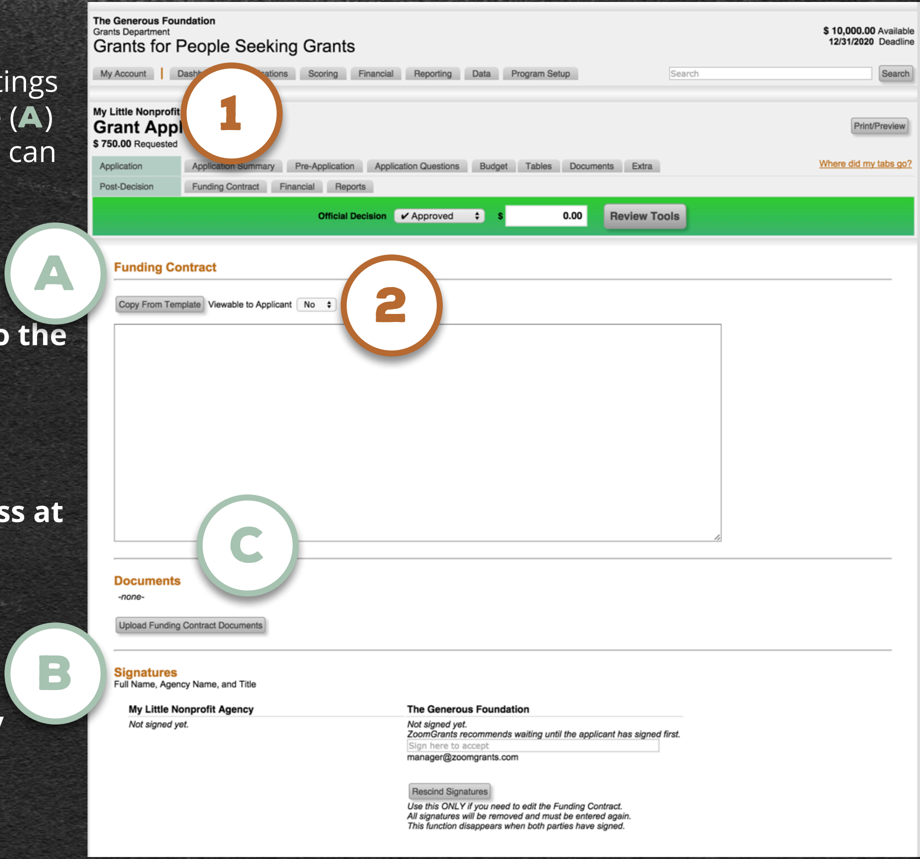
## B. SIGNATURES

**The Applicant will sign according to your instructions. ZoomGrants™ will also provide a timestamp and their IP address at the time of the signature.** ZoomGrants™ recommends that the Administrator sign after the Applicant has signed.

## C. DOCUMENTS

After the parties have signed the Contract, the text becomes un-editable. **To amend the contract, upload Documents. Each party must sign off on each uploaded document.**

*For more detailed information, check out this video:* *[http://youtu.be/d7w8RCEgbt4](http://youtu.be/d7w8RCEgbt4)*

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# **POST-DECISION ACTIVITIES:** Financial* – *Application-Level*

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## 1. FINANCIAL*

**Click into the Financial* tab to view the Invoices submitted by Applicants.** Click an orange Invoice number (**A**) to view the Invoice.

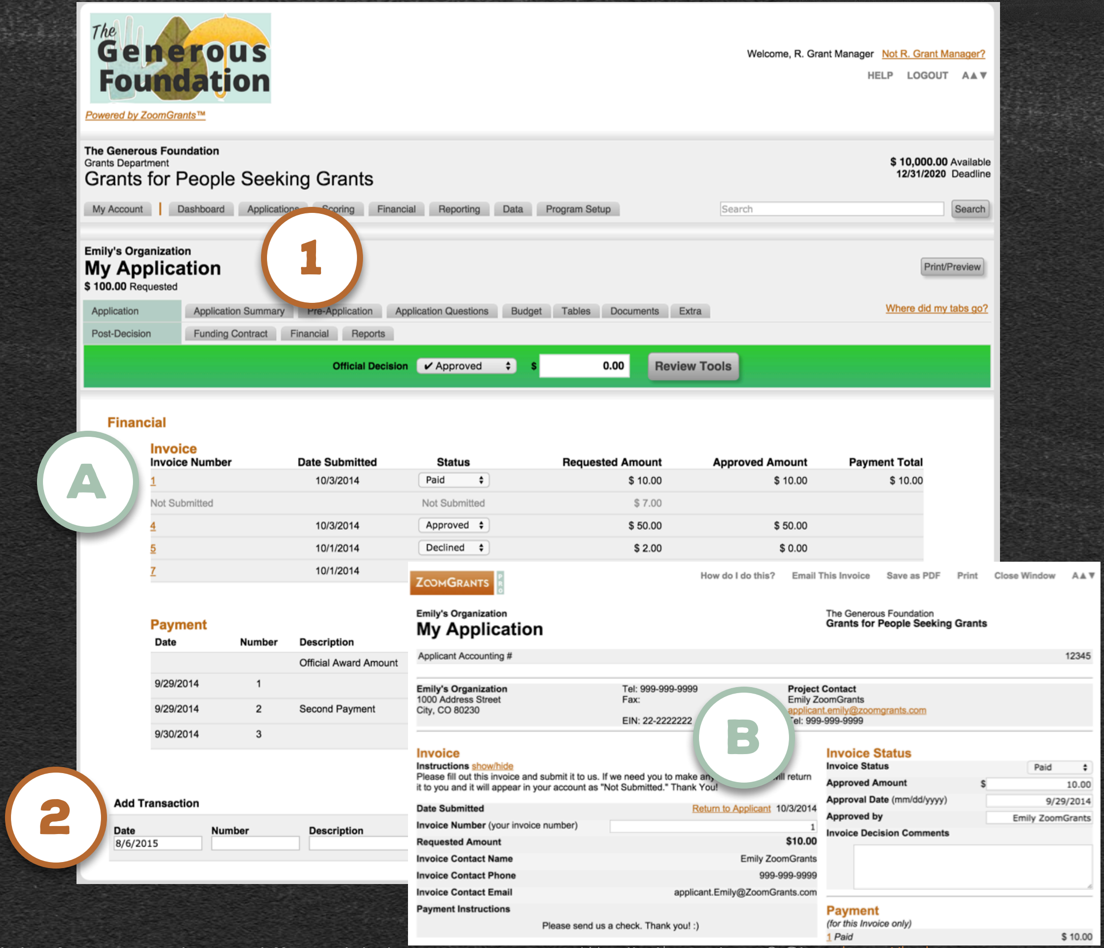
## 2. ADD TRANSACTION

**Use the Add Transaction field at the bottom of the page to add Payments* to an Application.** You an also add Payments* directly on a specific Invoice* by opening up that Invoice* and entering the Payment on that page.

## B. RETURN TO APPLICANT

**If there is an error on the Invoice* or the Applicant needs to make a change, you can return it to that Applicant by clicking the Return to Applicant link in the Invoice.**

*For more detailed information, check out this video:* *[http://youtu.be/K0VHWfNs8YM](http://youtu.be/K0VHWfNs8YM)*

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# POST-DECISION ACTIVITIES: Financial* – *Program-Level*

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## 1. FINANCIAL*

**Click into the Program-Level Financial* tab to view all of the Invoices*, Payments*, and Deposits* for that Program.** Click an orange Invoice/Payment/Deposit status (**A**) to view a list of the transactions with that status.

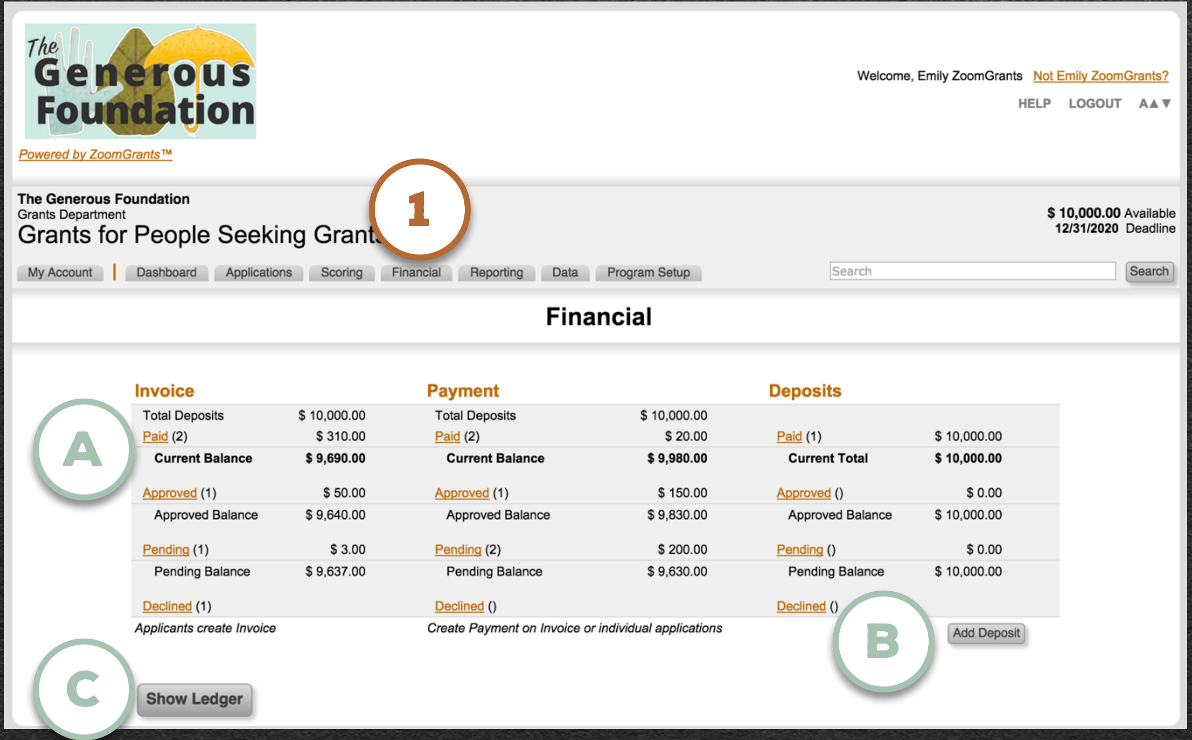
## B. ADD DEPOSIT

**You can add Deposits to a Program to increase the amount that can be allocated to your Recipients.**

## C. SHOW LEDGER

**Click the Show Ledger button to view a list of all of the Invoices* and Deposits for a Program.**

*For more detailed information, check out this video: [http://youtu.be/K0VHWfNs8YM](http://youtu.be/K0VHWfNs8YM)*

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# POST-DECISION ACTIVITIES: Reports* - *Application-Level*

## 1. REPORTS*

Click into the Report* tab within an Application to view the Reports submitted by that Applicant.

## A. DUE DATE

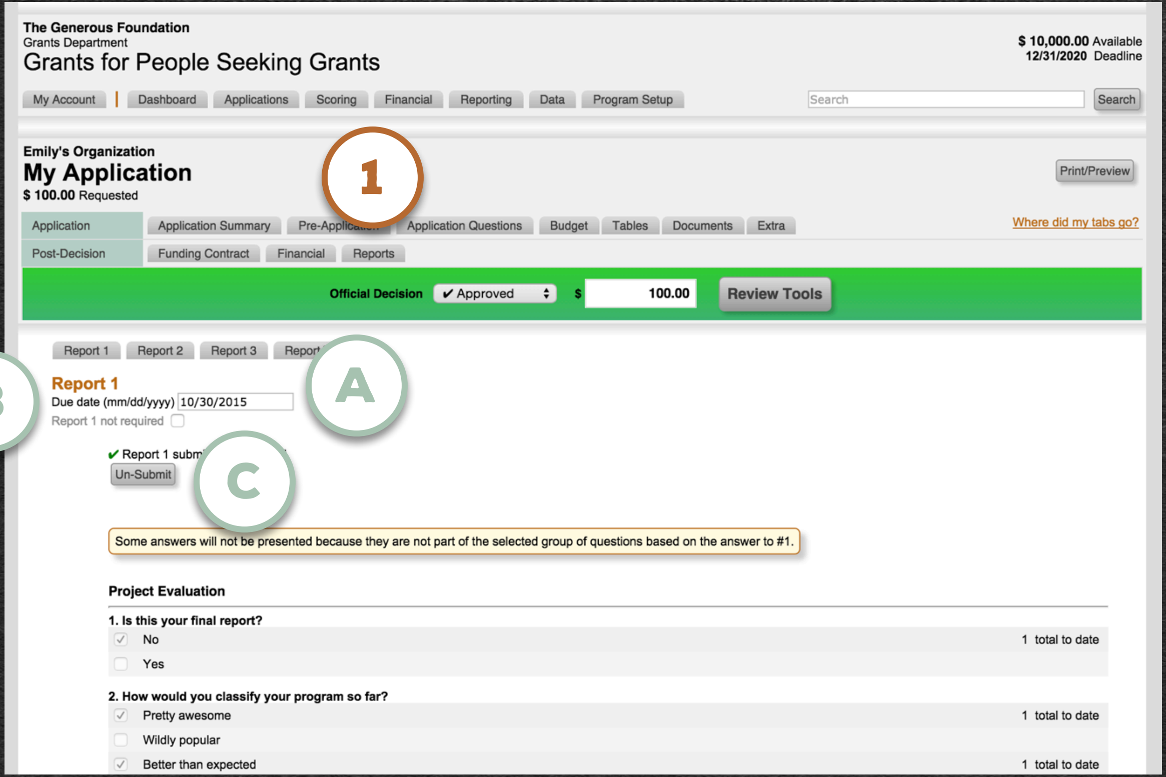
For each Report* in each Application, you can select a unique Due Date.

## B. REPORT NOT REQUIRED

Check the 'not required' box to exempt an Applicant from submitting that Report* for that period.

## C. UN-SUBMIT REPORT

Use the Un-Submit button to return to an Applicant a Report* that they have already submitted.

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# POST-DECISION ACTIVITIES: Reports* - *Program-Level*

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## 1. REPORTING

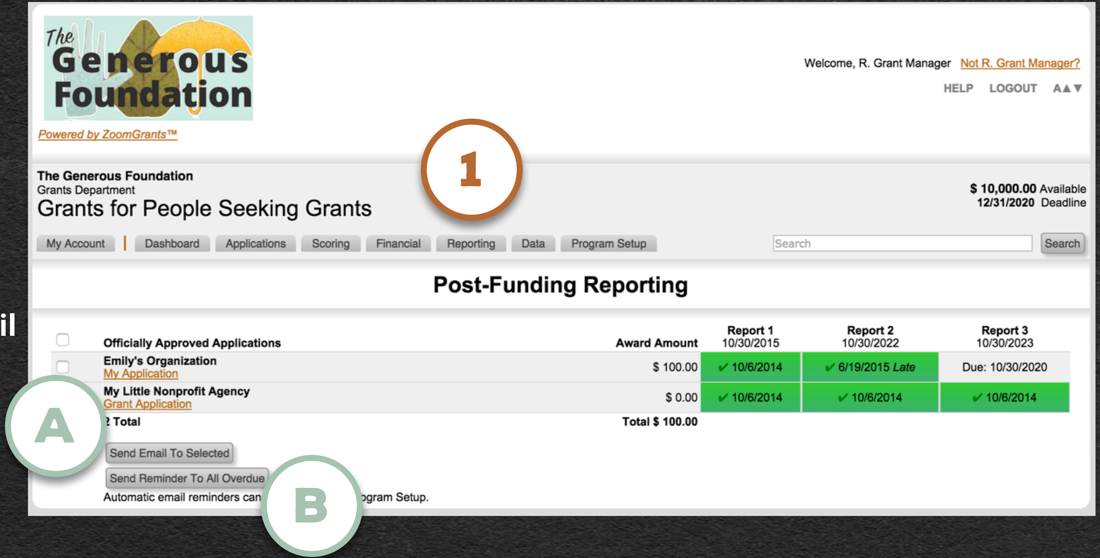
**Click the Reporting tab in the Program-Level tabs to view the Reporting Report,** which shows the Reports* that have been submitted (in green), the due dates for future Reports*, and which Reports* are overdue (in red). The dates listed at the top of each column are the default deadlines (as selected in Program Setup).

## A. SEND EMAIL TO SELECTED

**Check the boxes next to the Applicants to whom you'd like to send an email, then click the Send Email to Selected button to generate an email.**

## B. SEND REMINDER TO ALL OVERDUE

**In addition to the Automatic Reminders that go out from the ZoomGrants™ system, you can also use the Send Reminder to All Overdue button to send an extra reminder to the Applicants who have not yet submitted their Reports*.**

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# POST-DECISION ACTIVITY QUESTIONS?

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