

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.

PART ONE:

Program Setup

MY ACCOUNT: A Quick Tour

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.

The Generous Foundation
Powered by ZoomGrants™

Welcome, Emily ZoomGrants [Not Emily ZoomGrants?](#)
HELP LOGOUT ▲▼

The Generous Foundation

My Account Program History Applicant Contacts Manage Users Account Details Announcements Search

My Account

1

Programs Waiting to Open	Balance Due			
Community Development Department Generous Foundation Funding Program 2019 10/20/2019 - 12/31/2019	\$2,000			
	Program Setup	Preview		

Open Programs	Submitted	Incomplete	Need Attention	Total Awarded	
Grants Department Grants for People Seeking Grants 12/31/2010 - 12/31/2020	3	1	2	\$ 600.00	Dashboard Program Setup
2016 Scholarship 12/31/2008 - 6/15/2019	4	2	0	\$ 0.00	Dashboard Program Setup

Recently Closed Programs	Submitted	Incomplete	Need Attention	Total Awarded
<i>none</i>				

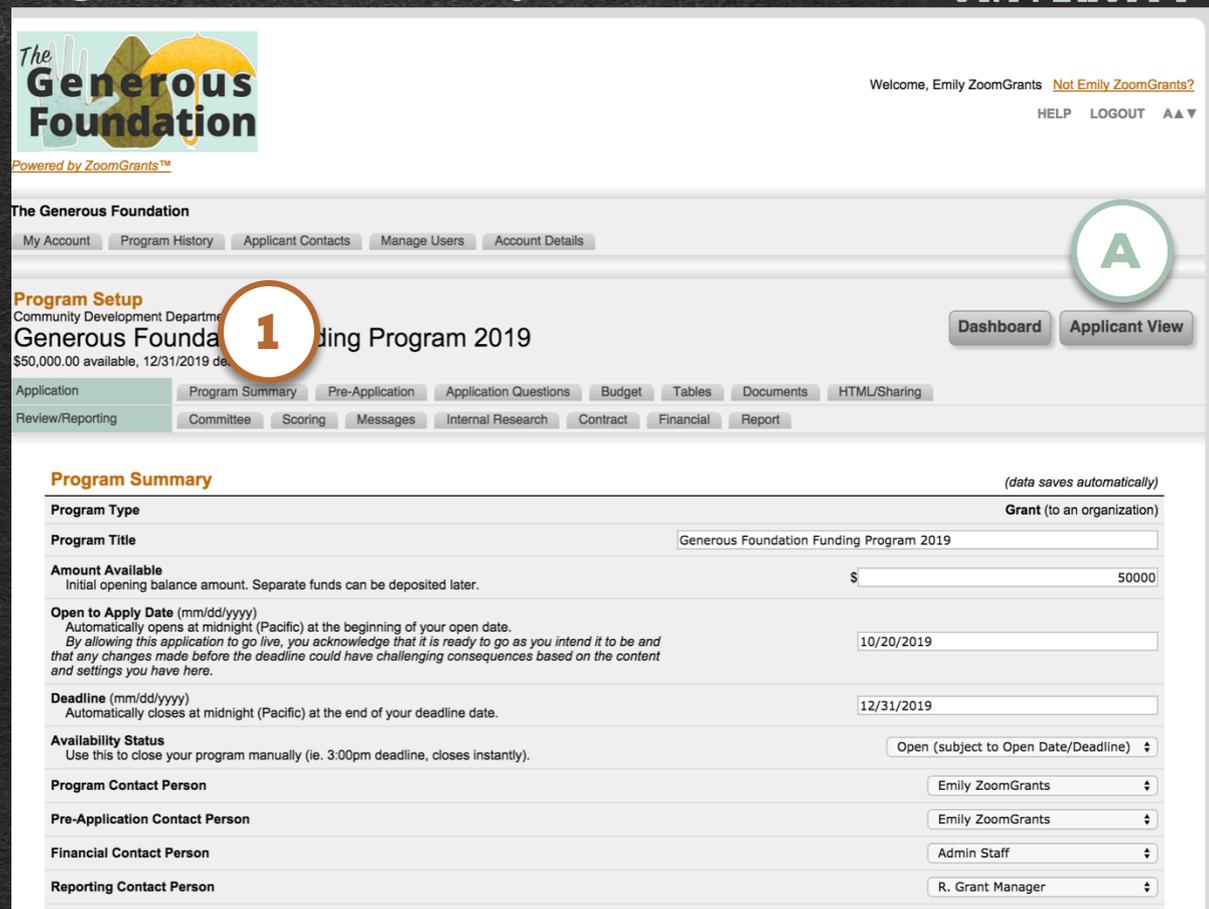
PROGRAM SETUP: Program Summary - I

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.



The screenshot shows the ZoomGrants interface for 'The Generous Foundation'. The top navigation bar includes 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The main content area is titled 'Program Setup' and 'Funding Program 2019'. A red circle with the number '1' highlights the 'Program Summary' tab in the navigation menu. Below the navigation menu, the 'Program Summary' form is displayed with the following fields:

Program Summary		(data saves automatically)
Program Type		Grant (to an organization)
Program Title	Generous Foundation Funding Program 2019	
Amount Available	Initial opening balance amount. Separate funds can be deposited later.	\$ 50000
Open to Apply Date (mm/dd/yyyy)	Automatically opens at midnight (Pacific) at the beginning of your open date. <i>By allowing this application to go live, you acknowledge that it is ready to go as you intend it to be and that any changes made before the deadline could have challenging consequences based on the content and settings you have here.</i>	10/20/2019
Deadline (mm/dd/yyyy)	Automatically closes at midnight (Pacific) at the end of your deadline date.	12/31/2019
Availability Status	Use this to close your program manually (ie. 3:00pm deadline, closes instantly).	Open (subject to Open Date/Deadline) ▾
Program Contact Person		Emily ZoomGrants ▾
Pre-Application Contact Person		Emily ZoomGrants ▾
Financial Contact Person		Admin Staff ▾
Reporting Contact Person		R. Grant Manager ▾

PROGRAM SETUP: Program Summary - II

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](#)

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

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*

1

Applicant Settings

Summary Tab Label 2

Summary Instructions
Describe what you want included in the Summary section.

Please provide general information about your application as well as contact information for yourself (the applicant), your organization, and the Executive Director of your organization.

Application Title Field Label A

Amount Requested Comment

Secondary Amount Label

Secondary Amount Comment

Organization Legal Name Label

Hide Fields EIN
 DUNS

Executive Director Label

Multiple Applications Allowed
Do you want to allow applicants to submit multiple applications? Yes No

Automatically Lock Submitted Applications
Do you want to prevent applicants from changing submitted applications before the Deadline? Yes No

Hide Activity Log tab
If you choose to use this, applicants will not see the Activity Log tab on their application unless there is an active Applicant Action Requested. Yes No

Character Limit (default setting for paragraph questions only)
Sets the limit for all paragraph questions that you do not otherwise specify. Maximum 65,000. A 'normal' page of data is about 3,000 characters

Follow-Up Questions Tab Label

Widget Label

This feature allows the applicant to embed a third-party tool, like a Google map of their project or a YouTube video, directly on their application. This will appear directly above the main application question set on the application and can only be viewed on single applications, not reports generated from the Data tab.

Instructions

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.

The screenshot shows the 'Pre-Application Section Titles' interface. At the top, there are two tabs: 'Pre-Application Section Titles show/hide' and 'Branching Question show/hide'. Below the tabs, there are four questions listed, each with an 'Edit' button to its right:

- 1. When was your organization founded?** (Text input field: 'Their Answer')
- 2. Which demographic would your proposed program primarily serve?** (Radio button options: Youth (<15 years old), Young Adults (15-25 years old), Adults (30-64 years old), Not-As-Young Adults (65-85 years old), Young-At-Heart Adults (>85 years old))
- 3. What type(s) of service would your program provide?** (Checkbox options: Education, Outreach, Housing Assistance, Job Training, Child Care, Companion Services, Other: [Text input field])
- 4. How much funding have you received in the past five (5) years?** (Text input fields for years 2014-2018, with a note: 'Please include ALL funding sources, including other grants, private donations, income from program fees, etc.') A green circle with the letter 'A' is overlaid on this question.

At the bottom of the list is an 'Add a Question' button, which is circled in orange with the number '1' inside. Below the button, there is a note: 'To remove a question, empty the question field and leave it blank'. At the very bottom, there is a section for 'Answer Types' with a sub-section for 'Short Answers (maximum 10 questions combined)'.

PROGRAM SETUP: Question Types

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)

Pre-Application Section Titles [show/hide](#)

Branching Question [show/hide](#)

1 1. When was your organization founded?
Their Answer:

2 2. Which demographic would your proposed program primarily serve?
 Youth (<15 years old)
 Young Adults (15-25 years old)
 Adults (30-64 years old)
 Not-As-Young Adults (65-85 years old)
 Young-At-Heart Adults (>85 years old)

3 3. What type(s) of service would your program provide?
 Education
 Outreach
 Housing Assistance
 Job Training
 Child Care
 Companion Services
 Other:

4 4. How much funding have you received in the past five (5) years?
Please include ALL funding sources, including other grants, private donations, inc
Their Answer: 2014
Their Answer: 2015
Their Answer: 2016
Their Answer: 2017
Their Answer: 2018

[Add a Question](#)

To remove a question, empty the question field and leave it blank

Answer Types
Short Answers (maximum 10 questions combined)

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/>

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'.

The screenshot shows the 'Application Questions' tab in the ZoomGrants system. At the top, there is a navigation bar with 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. A circular 'A' icon is visible in the top right corner. Below the navigation bar, the 'Program Setup' section is active, showing 'Community Development Department' and 'Generous Foundation Funding Program' with a '\$50,000.00 available, 12/31/2019 deadline'. A large orange circle with the number '1' highlights the 'Application Questions' tab in the sub-navigation bar. The main content area is titled 'Application Questions' and includes a text box for 'Application Questions Instructions' and a list of 'Application Questions Section Titles'. A sample question is displayed: '1. Which of the following best describes the service provided by your proposed program?' with radio button options: 'Homelessness Prevention', 'Youth Services', 'Community Outreach', and 'Other: Their Answer'. An 'Edit' button is next to the question. The bottom of the page shows the start of question 2: '2. What is your organization's mission statement?'.

PROGRAM SETUP: Budget – I

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.

The screenshot shows the ZoomGrants interface for 'The Generous Foundation'. The 'Program Setup' section is titled 'Community Development Department Generous Foundation Funding Program 2019' with a note that '\$50,000.00 available, 12/31/2019 deadline'. A navigation bar includes tabs for 'Application', 'Program Summary', 'Pre-Application', 'Application Questions', 'Budget', 'Tables', 'Documents', and 'HTML/Sharing'. The 'Budget' tab is selected and highlighted with a red circle labeled '1'. Below the navigation bar, the 'Budget' configuration section is visible, featuring a 'Turn Budget On' toggle set to 'Yes' (circled with a red '2'), a 'Budget Tab/Section Label' field containing the text 'Budget', and a large text area for 'Budget Instructions'. A 'Section 1' configuration section is also present, with 'Item Descriptions' and 'Section Instructions' options, both set to 'Yes'. At the bottom, there is a 'Calculated Columns' section with a 'show/hide' link and a 'Title' field.

PROGRAM SETUP: Tables

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.

The screenshot shows the 'The Generous Foundation' program setup interface. At the top right, it says 'Welcome, Emily ZoomGrants' with a link to 'Not Emily ZoomGrants?'. Below that are 'HELP', 'LOGOUT', and a dropdown arrow. The main navigation bar includes 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The 'Program Setup' section is titled 'Community Development Department' and 'Generous Foundation Funding Program 2019' with a '\$50,000.00 available, 12/31/2019 deadline'. A '1' in a circle highlights the 'Tables' tab in the navigation bar. Below the navigation bar, the 'Tables' configuration section is shown. A '2' in a circle highlights the 'Turn Tables On' section, which includes a question 'Do you want applicants to complete a Tables with their application?' with 'Yes' and 'No' radio buttons. Below this is a 'Tables Tab/Section Label' field containing the text 'Tables'. Further down is a 'Tables Instructions' text area. At the bottom, there is a 'Table 1' configuration section with a 'Table 1 Title' field and a 'Table 1 Instructions' text area. Below that is a 'Table 1 Columns' table with columns for 'Column Title', 'Label', 'Answer Size', and 'Editable'. The table has three rows: 'Line Items Column Header', 'A', and 'B'. The 'Answer Size' for 'A' is 'Medium' and for 'B' is 'Small'. The 'Editable' checkbox is checked for all three rows.

The Generous Foundation
Powered by ZoomGrants™

Welcome, Emily ZoomGrants [Not Emily ZoomGrants?](#)
HELP LOGOUT ▲▼

The Generous Foundation
My Account Program History Applicant Contacts Manage Users Account Details

Program Setup
Community Development Department
Generous Foundation Funding Program 2019
\$50,000.00 available, 12/31/2019 deadline

Dashboard Applicant View

Application Program Summary Pre-Application Application Questions Budget Tables Documents HTML/Sharing
Review/Reporting Committee Scoring Messages Internal Research Contract Financial Report

Tables updates automatically

Turn Tables On
Do you want applicants to complete a Tables with their application?
 Yes No

Tables Tab/Section Label

Tables Instructions
Describe what you want included in this tab.

Table 1

Table 1 Title

Table 1 Instructions

Table 1 Columns
Type a column title, then enter a column label - \$, %, acres, etc. - and select an answer size - checkbox or small (10 characters), medium (25 characters), or large (paragraph) text fields. To open a single column for editing after the program deadline (for reports, amendable budgets, etc.), check the box in the Editable column.

	Column Title	Label	Answer Size	Editable
	Line Items Column Header		Medium	<input type="checkbox"/>
A			Small <input type="text" value="↓"/>	<input type="checkbox"/>
B			Small <input type="text" value="↓"/>	<input type="checkbox"/>

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.

The screenshot shows the 'Documents' setup page for 'The Generous Foundation'. At the top, there are navigation tabs: My Account, Program History, Applicant Contacts, Manage Users, and Account Details. Below this is the 'Program Setup' section for the 'Generous Foundation Funding Program 2019', with a deadline of 12/31/2019. A red circle with the number '1' highlights the 'Documents' tab in the top navigation bar. Below the program setup, there are more tabs: Application, Program Summary, Pre-Application, Application Questions, Budget, Tables, Documents, and HTML/Sharing. The 'Documents' tab is selected. Below this, there are more tabs: Review/Reporting, Committee, Scoring, Messages, Internal Research, Contract, Financial, and Report. A red circle with the number '2' highlights the 'Turn Documents On' toggle, which is currently set to 'Yes'. Below this, there is a text input field for 'Documents Tab/Section Label' containing the word 'Documents'. Underneath is a large text area for 'Instructions for Documents'. A modal window titled 'Add a Document Request' is open, showing a text input for 'Describe the document requested', a character count (250/250), and several checkboxes: 'Required' (checked), 'Trigger an email', and 'Hide from Reviewers'. Below the modal, there is a table with columns: Documents Requested, Location, Required?, Trigger email?, and Hide from Reviewers?. The table contains one row: '501(c)3 Documentation', 'Documents', 'Required' (checked), 'Trigger email?' (unchecked), and 'Hide from Reviewers?' (unchecked). An 'Upload Template' button is at the end of the row. At the bottom, there are two footnotes: '* ZoomGrants™ is not responsible for the content of uploaded documents.' and '** 'Required' Invoice Documents are not currently being enforced.'

PROGRAM SETUP: HTML/Sharing

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.

The screenshot shows the ZoomGrants website interface. At the top left is the logo for 'The Generous Foundation' with the tagline 'Powered by ZoomGrants™'. On the top right, there is a welcome message for 'Emily ZoomGrants' and links for 'HELP', 'LOGOUT', and a dropdown arrow. Below the logo is a navigation bar with tabs: 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The main content area is titled 'Program Setup' for the 'Community Development Department' and 'Generous Foundation Funding Program 2019', with '\$50,000.00 available, 12/31/2019 deadline'. A large orange circle with the number '1' highlights the 'HTML/Sharing' tab in the top navigation bar. Below this, there are two rows of sub-tabs: 'Application' (with sub-tabs: Program Summary, Pre-Application, Application Questions, Budget, Tables, Documents, HTML/Sharing) and 'Review/Reporting' (with sub-tabs: Committee, Scoring, Messages, Internal Research, Contract, Financial, Reports). The 'HTML Code' section contains instructions to select how the application should appear and provides three code snippets: 'Embedded' (iframe), 'Apply Button' (a href), and 'Direct Link' (a href). A '1' in a circle is also placed over the 'HTML/Sharing' tab in the sub-tab row.

Welcome, Emily ZoomGrants [Not Emily ZoomGrants?](#)
HELP LOGOUT ▲▼

The Generous Foundation
My Account Program History Applicant Contacts Manage Users Account Details

Program Setup
Community Development Department
Generous Foundation Funding Program 2019
\$50,000.00 available, 12/31/2019 deadline

Application Program Summary Pre-Application Application Questions Budget Tables Documents **HTML/Sharing**
Review/Reporting Committee Scoring Messages Internal Research Contract Financial Reports

HTML Code

Select how you would like your application(s) to appear, then copy the HTML below and paste it into your web page. For the application to appear properly, today's date must be between your Open Date and Deadline Date, and your payment recorded.

For THIS Application ONLY
None of your other available applications will be visible.
This HTML will change for future applications on the same web page.

For ALL Available Applications
All of your available applications will be accessible through one place.
This HTML will include future applications on the same web page.

Embedded
The application will sit on your web page in an iframe.
`<iframe name="I1" id="I1" src="https://zoomgrants.com/gprop.asp?donorid=4&limited=721" width="750px" height="750px" style="border: 1px solid #e0e0e0" scrolling="yes">
Please use a browser with frames enabled to view and apply for our grants.</iframe>`

Apply Button
The application will open in a new window.
Example: `Apply via ZoomGrants™`

Direct Link
Email this to anyone who can't seem to find your application.
Example: `https://zoomgrants.com/gprop.asp?donorid=4&limited=721`

PROGRAM SETUP: Committee

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.

Program Setup
Community Development Department
Generous Foundation Funding Program 2019
\$50,000.00 available, 12/31/2019

Application | Review/Reporting | **Committee** | Pre-Application | Application Questions | Budget | Tables | Documents | HTML/Sharing | Scoring | Messages | Internal Research | Contract | Financial | Report

Committee (data saves automatically)

Notes
Do you want to allow the Committee to maintain their own Notes for each application? Yes No

Discussion
Do you want to allow the Committee to maintain a discussion of each application? Yes No

Blind Review
Do you want to hide identifiable contact information and application titles from the Committee? Yes No

Assigned Review
Do you want to assign individual applications to individual Committee members? No assignments Individually By Committee Groups

Committee Members
Only selected users will have access to this program.

Access	Committee Chair*	Name	Email
<input type="checkbox"/>	<input type="checkbox"/>	Jane Doe	funding4@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	Jerry Doe	funding3@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	Jim Doe	funding7@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	John Doe	funding5@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	Josey Doe	funding6@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	Julie Doe	funding2@zoomgrants.com
<input type="checkbox"/>	<input type="checkbox"/>	O. Shawn Peer	funding@zoomgrants.com

* Committee Chairs review and score applications as normal Committee members, and can also:

- edit Trial Decisions and Amounts
- send group emails to Applicants
- enter answers to Internal Research questions
- send Follow-Up Questions questions via the Activity Log
- view the committee averages and totals in the Scoring report

Administrative Users
Only Senior Admins and selected Administrators will have access to this program.

A Note About Committee Chairs:

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

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.

The screenshot displays the 'Program Setup' interface for 'The Generous Foundation'. The page title is 'Program Setup' for 'Community Development Department' and 'Program 2019'. A navigation menu includes 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The 'Program Setup' section shows '\$50,000.00 available, 12/31/2019 deadline'. A secondary navigation bar includes 'Application', 'Program Summary', 'Pre-Application', 'Application Questions', 'Budget', 'Tables', 'Documents', and 'HTML/Sharing'. Below this, a 'Review/Reporting' section includes 'Committee', 'Scoring', 'Messages', 'Internal Research', 'Contract', 'Financial', and 'Report'. The 'Scoring' section is active, with a '1' circled around the 'Program Setup' header. The 'Scoring' section includes the following options:

- Turn Scoring On** (Do you want your Committee to score applications?): Yes No
- Scoring Tab/Section Label**: Scoring
- Scores plus Comments** (Do you want Committee members to have the option to add comments for each Scoring question?): Yes No
- Lock Scores** (Do you want to lock the scores to prevent the Committee from changing scores?): Yes No
- Allow Administrators to edit/enter Reviewer scores**: Yes No

The 'Scoring Section Titles' are [show/hide](#). Below this is a 'Scoring Instructions (for your Committee)' text area. At the bottom, there is a 'Scoring Example [show/hide](#)' section and a table header for 'Committee Scoring Questions' with columns for 'Scoring Scale', 'Weight', and 'Max Score'.

PROGRAM SETUP: Scoring - II

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.

1

11	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
12	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
13	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
14	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
15	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
16	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
17	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
18	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
19	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
20	<input type="text"/>	<input type="text"/>	X	<input type="text"/>	=	<input type="text"/>
Total Committee Score Possible						0

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.

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 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
2 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
3 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
4 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
5 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
6 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
7 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
8 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
9 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
10 <input type="text"/>	<input type="text"/>	X <input type="text"/>	= <input type="text"/>
Total Administrative Score Possible			0

PROGRAM SETUP: Messages

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.

The screenshot shows the ZoomGrants interface for 'The Generous Foundation'. The user is logged in as 'Emily ZoomGrants'. The page is titled 'Program Setup' for 'Community Development Department' and 'Generous Foundation Fund 1 am 2019'. A red circle highlights the number '1' in the program title. Below the title, there are navigation tabs for 'Application', 'Program Summary', 'Pre-Application', 'Application Questions', 'Budget', 'Tables', 'Documents', and 'HTML/Sharing'. The 'Messages' tab is selected. The 'Message Templates' section explains that users can save different template email messages. It includes an 'Available Merge Fields' section with a green circle containing the letter 'A' next to a dropdown menu labeled 'Select a Field to Merge'. Below this, there is an 'Application Submission Confirmation' section with a text area for editing the message template. The text area contains the following text: 'This will automatically go to Applicants when they submit their application. This will be embedded within the standard ZoomGrants™ submission confirmation email that is sent.'

PROGRAM SETUP: Internal Research - I

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.

The screenshot shows the ZoomGrants interface for 'The Generous Foundation'. The top navigation bar includes 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The main content area is titled 'Program Setup' for the 'Community Development Department' and 'Generous Foundation Funding Program'. A red circle with the number '1' highlights the 'Internal Research' tab in the top navigation bar. Below this, there is a section for 'Internal Research' with a red circle and the number '2' highlighting the 'Internal Research Tab/Section Label' input field, which contains the text 'Internal Research'. Below this, there is a table with 10 rows of 'Question' labels and 'Include on Invoice?' checkboxes.

Question	Include on Invoice?
Question 1	<input type="checkbox"/>
Question 2	<input type="checkbox"/>
Question 3	<input type="checkbox"/>
Question 4	<input type="checkbox"/>
Question 5	<input type="checkbox"/>
Question 6	<input type="checkbox"/>
Question 7	<input type="checkbox"/>
Question 8	<input type="checkbox"/>
Question 9	<input type="checkbox"/>
Question 10	<input type="checkbox"/>

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.



Question 14	<input type="text"/>	<input type="checkbox"/>
Question 15	<input type="text"/>	<input type="checkbox"/>
Question 16	<input type="text"/>	<input type="checkbox"/>
Question 17	<input type="text"/>	<input type="checkbox"/>
Question 18	<input type="text"/>	<input type="checkbox"/>
Question 19	<input type="text"/>	<input type="checkbox"/>
Question 20	<input type="text"/>	<input type="checkbox"/>

Custom Status/Stage

Label	<input type="text"/>
Options <i>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.</i>	<ul style="list-style-type: none">Social ServicesInfrastructureEducation/AwarenessYouth ServicesHealthcareSecurityPoverty Prevention
Viewable to Applicant Do you want the applicant to be able to see this on their application/activity log?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Custom Status/Stage #2

Label	<input type="text"/>
Options <i>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.</i>	<div style="border: 1px solid #ccc; height: 80px;"></div>
Viewable to Applicant Do you want the applicant to be able to see this on their application/activity log?	<input type="radio"/> Yes <input checked="" type="radio"/> No

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[Logout](#)

PROGRAM SETUP: Contract

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>

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
Community Development Department
Generous Foundation Funding Program 2019
\$50,000.00 available, 12/31/2019 deadline

1

Dashboard Applicant View

Application

Program Summary

Pre-Application

Application Questions

Tables

Documents

HTML/Sharing

Review/Reporting

Committee

Scoring

Messages

Internal Research

Contract

Financial

Report

Contract (data saves automatically)

Turn Contract On Yes No

Contract Tab/Section Label

Contract Instructions
Include any instructions you have for the Applicant.

Contract Text
This is the template that you will copy to individual applications (on each application). You will be able to edit each Contract before allowing the applicant to view/sign. Once either party has signed, the text will become un-editable. (The applicant can never edit the text.)

Contract Documents
There will be a document upload button on each application Contract for appendices and amendments. Only administrators can upload Contract documents. Both parties are required to sign on all Contract documents. Once both parties have signed, documents can no longer be deleted.

Contract Signature Instructions
The complete signature will include anything you ask for here (initials, full name, title, etc.). ZoomGrants™ will add the timestamp, userid, and IP address. There will be a place for a signature from the Applicant and also an Administrator from your account. Once both parties have signed, the only way to make changes is by adding documents.

Previous Next



PROGRAM SETUP: Financial - I

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/KOVHWfNs8YM>

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.

The screenshot shows the 'Financial' tab setup page for 'The Generous Foundation'. The page title is 'Program Setup' for the 'Community Development Department' and 'Generous Foundation Funding Program 2019'. A '1' in a circle highlights the 'Financial' tab in the top navigation bar. Below the navigation, the 'Financial' section is active, and a '2' in a circle highlights the 'Turn Financial On' toggle, which is currently set to 'No'. The 'Financial Tab/Section Label' is set to 'Financial', 'Invoice Label' is 'Invoice', and 'Payment Label' is 'Payment'. There is a 'Hide Payment' checkbox which is currently unchecked. A green circle with the letter 'A' highlights the 'Hide Payment' checkbox. Below this is a 'Financial Instructions' text area. At the bottom, there are fields for 'Invoice' information: 'Date Submitted' (auto-generated), 'Invoice Number' (Their number), and 'Requested Amount'. To the right, there is an 'Invoice Status' dropdown set to 'Pending', an 'Approved Amount' field, and an 'Approval Date' field.

PROGRAM SETUP: Financial - II

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.

Applicants will complete the left column, including **A** add.

Invoice
Date Submitted auto-generated
Invoice Number Their number
Requested Amount \$
Invoice Contact Name
Invoice Contact Phone
Invoice Contact Email
Payment Instructions

Invoice Status
Invoice Status Pending
Approved Amount \$
Approval Date (mm/dd/yyyy)
Approved by
Invoice Decision Comments

Payment
(for this Invoice only)
Their payment number Pending \$
Their payment number Pending \$
Their payment number Pending \$
Add Payment Total \$

Current Funding Snapshot
(for this full application only)
Invoice
Initial Award Amount \$
Pending (-) \$
Approved (-) \$
Paid (-) \$
This Invoice (-) \$
Still Available \$

Payment
Initial Award Amount \$
Pending (-) \$
Completed (-) \$
Still Available \$

Internal Research Questions and Answers can/will be inserted here on the live Invoice.

-
-
-
-
-
-
-
-
-
-
-

Documents Requested
Add Document Requests on the Documents tab and select 'Invoice' for the location to make them appear here.
doc 1
doc 2
doc 3

Previous Next

PROGRAM SETUP: Reports

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.

The screenshot displays the 'Program Setup' interface for 'The Generous Foundation'. The top navigation bar includes 'My Account', 'Program History', 'Applicant Contacts', 'Manage Users', and 'Account Details'. The 'Program Setup' section is titled 'Generous Foundation Funding Program 2019' with a \$50,000.00 available and a 12/31/2019 deadline. The 'Reports' tab is highlighted in the navigation menu. The 'Reports' configuration section includes a 'Turn Reports On' toggle set to 'Yes', a 'Reports Tab/Section Label' field containing 'Reports', and an 'Automatically Send Reminders' toggle set to 'None/Off'. The 'Reports Description' and 'Reports Section Titles' fields are also visible.

PROGRAM SETUP QUESTIONS?

We're always happy to help.

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

PART TWO:
Application Review & Review Tools

APPLICATION REIEW: My Account

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.

The screenshot shows the 'My Account' dashboard for 'The Generous Foundation'. The dashboard includes a navigation menu with tabs: My Account, Program History, Applicant Contacts, Manage Users, Account Details, and Announcements (4). A search bar is located on the right. The main content area is titled 'My Account' and is divided into three sections: 'Programs Waiting to Open', 'Open Programs', and 'Recently Closed Programs'. Callouts A, B, C, and D are placed over specific elements: A points to the 'Programs Waiting to Open' section, B points to the 'Balance Due' field, C points to the 'Program Setup' button, and D points to the 'Program History' tab. The 'Open Programs' table is as follows:

Open Programs	Submitted	Incomplete	Need Attention	Total Awarded	
Community Development Department Generous Foundation Funding Program 2019 10/20/2019 - 12/31/2019					Program Setup Preview
Grants Department Grants for People Seeking Grants 12/31/2010 - 12/31/2020	3	1	2	\$ 600.00	Dashboard Program Setup
2016 Scholarship 12/31/2008 - 6/15/2019	4	2	0	\$ 0.00	Dashboard Program Setup

APPLICATION REVIEW: Program Dashboard

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.

1

The Generous Foundation
Community Development Department
2016 CDBG - Community Development - Public Services

\$ 1,020,155.00 Available
12/31/2020 Deadline

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Program Setup

Program Dashboard

Applications Official Decisions

3 Undecided
8 Approved \$ 380,000.00
1 Declined

12 Total Submitted [View All](#) **2 New**
[4 Not Submitted](#)

Letter Of Intent

1 Undecided
14 Approved

15 Total Submitted [View All](#)
[4 Not Submitted](#)

Activity Stream

7/30/2015 2:07:17 PM 15947 (Our Application) PreApp submitted by recip@zoomgrants.com
7/30/2015 2:06:32 PM 15947 (Our Application) Preapp unsubmitted by ZG Support
7/27/2015 11:53:49 AM Availability Status changed to Open by manager@zoomgrants.com
7/27/2015 11:53:11 AM Availability Status changed to Closed by manager@zoomgrants.com
6/22/2015 1:49:03 PM 28 (Spring Application) Application submitted by ZG Support
6/22/2015 1:49:01 PM 28 (Spring Application) Application unsubmitted by ZG Support
6/22/2015 1:47:38 PM 37 (Money Management for Dummies) Application submitted by ZG Support
6/22/2015 1:47:24 PM 37 (Money Management for Dummies) Application unsubmitted by ZG Support
5/27/2015 10:40:06 AM 15947 (After School Daycare Program) Preapp Declined by manager@zoomgrants.com
5/27/2015 10:37:54 AM 15947 (After School Daycare Program) Preapp submitted by ZG Support
5/27/2015 10:37:50 AM 15947 (After School Daycare Program) Preapp unsubmitted by ZG Support
5/11/2015 10:26:10 AM Availabil...

[Show More](#) [Sortable Version](#)

Add Comment [Add Comment](#)

Contract Stage (Custom Label/Tag)

2 Not Assigned
1 Contract Sent
2 Signed Contract Received
2 Project Started
3 Project Completed
2 Final Report Submitted

Grant Type (Custom Label/Tag)

1 Not Assigned
5 Human Services
1 Facilities
5 Capital Improvement

Saved Reports

Project Summary Report	View	Export
Nonprofit Verification	View	Export
Agency Background #2	View	Export
Favorite Report	View	Export

Sample Map

A map of Washington, D.C. showing major landmarks like the White House, National Museum, and Capitol Hill. A red location marker is placed near the Potomac River. The map includes street names, highways, and a search bar.

APPLICATION REVIEW: Applications List

1. INDIVIDUAL APPLICATION

Click an orange Application Title to open up that Application.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

Welcome, R. Grant Manager [Not R. Grant Manager?](#)
HELP LOGOUT ▲▼

Powered by ZoomGrants™

\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard Applications Scoring Financial Reporting Data Program Setup

Search

Applications

Submitted Applications Pre-Application Incomplete Applications

Include: Approved Undecided Declined/Not Qualified Official Decisions ▼

	\$ Requested	Votes (For-Against)	Trial Decisions (Committee)	Official Decisions (Committee)
<input type="checkbox"/> Submitted Applications				
<input type="checkbox"/> Emily's Organization My Application	\$ 100.00 Print PDF	1 - 0	\$ 50.00	Approved
My Little Nonprofit Agency Grant Application	\$ 750.00 Print PDF	0 - 0	Undecided	Approved
Small Nonprofit Agency Our Application	\$ 1,000.00 Print PDF	1 - 0	Undecided	Declined
3 Submitted Applications	\$ 1,850.00		\$ 50.00	\$ 0.00
			\$ 9,950.00	\$ 10,000.00
			\$ 10,000.00	\$ 10,000.00

[Send Email To Selected](#)
[Batch Update Selected](#) (same answer for each selected)
[List Update](#) (different answers for each)

[Copy to Official](#)

APPLICATION REVIEW: Application Summary

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.

The screenshot displays the ZoomGrants application interface. At the top, there is a navigation bar with tabs: My Account, Dashboard, Applications, Scoring, Financial, Reporting, Data, and Program Setup. A search bar is on the right. Below the navigation, the page title is "Emily's Organization My Application" with a sub-header "\$ 100.00 Requested". A red circle with the number "1" highlights the "Application Summary" tab in the sub-navigation bar. Below the tabs, there is a green bar showing "Official Decision" as "Approved" with a dropdown arrow, a dollar sign, and the amount "0.00". A "Review Tools" button is on the right. The main content area is titled "Application Summary" and contains several sections: "Emily's Organization" (1000 Address Street, City, CO 80230, Telephone 999-999-9999, Fax, Web www.emilysorganization.org), "Awesome Person" (Emily ZoomGrants, director.emily@zoomgrants.com), "Application Contact" (Emily ZoomGrants, applicant.emily@zoomgrants.com, Tel: 999-999-9999), "Additional Contacts" (Email Addresses, separated by comma), "Application History" (2 Approved (\$500.00), 0 Declined, 0 Undecided, Full Applicant History button), and "Settings". The "Settings" panel includes "Primary Contact" (Emily ZoomGrants), "Program Type" (Assistance), "Open for Editing" (checkbox), "Notified of Official Decision" (checkbox), "Official Decision Comment" (text area), and "Funding Instructions" (text area). A green circle with the letter "A" highlights the "Primary Contact" dropdown, and a blue circle with the letter "B" highlights the "Assistance" dropdown. The "Funding Date" is shown as 3/29/2016.

APPLICATION REVIEW: Pre-Application*

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.*

The screenshot displays the ZoomGrants application review interface. At the top, there is a navigation bar with tabs: My Account, Dashboard, Applications, Scoring, Financial, Reporting, Data, and Program Setup. A search bar is located on the right. Below the navigation bar, the user is logged in as 'Emily's Organization' and is viewing 'My Application' with a requested amount of '\$ 100.00'. A large orange circle with the number '1' highlights the 'Pre-Application' tab in the application navigation menu. Below the menu, there is a green bar showing the 'Official Decision' as 'Approved' with a dropdown arrow, a dollar sign, and the amount '0.00', along with a 'Review Tools' button. The main content area is titled 'Pre-Application' and features a large orange circle with the number '2' highlighting the 'Pre-Application Status' section. This section shows the status as 'Approved' with a dropdown arrow and a note: 'Only "Approved" will be allowed to continue to the full application. Email notification will be sent automatically to the applicant.' Below this, there are two questions for the reviewer to answer:

- 1. Do you really want us to fund your program?**
 - Yes
 - No
 - Kind of, explain:
- 2. Choose up to 3 (three) adjectives to describe your program. Our project will be...**
 - Fun
 - Helpful
 - Socially-Responsible
 - Awesome
 - Totally Cool

*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*

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.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

Welcome, R. Grant Manager [Not R. Grant Manager?](#)
HELP LOGOUT AA V

Powered by ZoomGrants™

\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard Applications Scoring Financial Reporting Data Program Setup Search Search

Emily's Organization
My Application \$ 100.00 Requested Print/Preview

Application Application Summary Pre-Application Application Questions Budget Tables Documents Extra [Where did my tabs go?](#)

Post-Decision Funding Contract Financial Reports

Official Decision Approved \$ 0.00 Review Tools

Budget

Program Revenue Sources	Total Projected	Already Received	Expected
City funds	\$ 100.00	\$ 50.00	\$ 50.00
State funds	\$ 500.00	\$ 350.00	\$ 150.00
Small donations	\$ 500.00	\$ 500.00	\$ 0.00
Total	\$ 1,100.00	\$ 900.00	\$ 200.00

Program Expenses	Program Budget	Annual Budget
Fun supplies	\$ 100.00	\$ 200.00
Cups for refreshments	\$ 20.00	\$ 40.00
Venue rental	\$ 100.00	\$ 200.00
Costumes	\$ 30.00	\$ 110.00
Total	\$ 250.00	\$ 550.00

*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.

The screenshot shows the ZoomGrants application review interface for 'The Generous Foundation'. The page is titled 'The Generous Foundation' and 'Grants Department'. It shows the user 'R. Grant Manager' and a 'Not R. Grant Manager?' link. The page is powered by ZoomGrants™. The main navigation includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial', 'Reporting', 'Data', and 'Program Setup'. The current application is 'Emily's Organization My Application' with a '\$ 100.00 Requested' amount. The 'Documents' tab is selected, and a circled '1' highlights the 'Documents' tab in the navigation bar. The 'Documents' section is divided into three categories: 'Documents Requested', 'Administrative Documents', and 'Pre-Application Documents *'. The 'Documents Requested' section shows a table with columns for 'Required?' and 'Uploaded Documents *'. The 'Administrative Documents' section shows a table with columns for 'Visibility' and 'Uploaded Documents *'. The 'Pre-Application Documents *' section shows a table with columns for 'Required?' and 'Uploaded Documents *'. A circled 'A' highlights the 'Administrative Documents' section. The 'Official Decision' section shows 'Approved' and '\$ 0.00'. The 'Review Tools' button is visible.

The Generous Foundation
Grants Department
Grants for People Seeking Grants
\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard Applications Scoring Financial Reporting Data Program Setup Search Search

Emily's Organization
My Application
\$ 100.00 Requested

Application Application Summary Pre-Application Application Questions Budget Tables Documents Extra Print/Preview Where did my tabs go?

Post-Decision Funding Contract Financial Reports

Official Decision Approved \$ 0.00 Review Tools

Documents

Documents Requested	Required?	Uploaded Documents *
Program Brochure/Promotional Materials	<input type="checkbox"/>	Brochure link: Promotional Materials

Administrative Documents

Administrative Documents	Visibility	Uploaded Documents *
		-none-

Pre-Application Documents *

Pre-Application Documents *	Required?	Uploaded Documents *
Pre-Application Document	<input checked="" type="checkbox"/>	Pre-Application Document

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

APPLICATION REVIEW: Extra*

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.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

Welcome, R. Grant Manager [Not R. Grant Manager?](#)
HELP LOGOUT ▲▼

Powered by ZoomGrants™

The Generous Foundation
Grants Department
Grants for People Seeking Grants

\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard Applications Scoring Financial Reporting Data Program Setup

Search Search

Emily's Organization
My Application
\$ 100.00 Requested

Print/Preview

Application Application Summary Pre-Application Application Questions Budget Tables Documents Extra

Post-Decision Funding Contract Financial Reports

Where did my tabs go?

Official Decision Approved \$ 0.00 Review Tools

Extra

A Add entry on Activity Log

1 How much money have you received from other organizations this year? [Add/Edit Question](#) (for this applicant only, answer type will be paragraphs)

2 Your Question

Maximum characters: 250. You have characters left.
Be sure to Add an entry (Applicant Action Requested) to the Activity Log when you have finished editing Extra Questions.

Save Question

3 [Add/Edit Question](#) (for this applicant only, answer type will be paragraphs)

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

APPLICATION REVIEW: Activity Log

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.

The screenshot displays the ZoomGrants application interface. At the top, it shows the user's name 'Wilson, R. Grant Manager' and navigation links for 'HELP', 'LOGOUT', and 'ALL Y'. Below this is the 'The Generous Foundation' logo and a navigation menu with options like 'My Account', 'Dashboard', 'Applications', 'Budgets', 'Reports', 'Tools', and 'Program Data'. The main content area is titled 'My Application' and includes a 'View/Hide' link. The 'Activity Log' section is highlighted with a green circle and the letter 'A'. It contains a list of actions with timestamps and descriptions, such as '9/19/2014 1:23:51 PM (Emily Wilson) Grant maker action requested: Pre-Application submitted and waiting for approval'. The 'Audit Log' section is highlighted with a green circle and the letter 'B'. It includes a form to 'Add a new entry to Activity Log' with radio buttons for 'Applicant action requested', 'Administrator action requested', 'Administrator action completed', and 'Other'. Below the form is a 'Describe your request or action' text box and an 'Add Entry' button.



APPLICATION REVIEW: Scoring

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.

The screenshot displays the ZoomGrants application review interface. At the top, the logo for 'The Generous Foundation' is visible, along with the text 'Presented by ZoomGrants™'. The user is identified as 'Walsons, R. Grant Manager'. The application title is 'The Generous Foundation Grants Description: Grants for People Seeking Grants'. The application status is 'Approved' with a score of 3.00. The total combined score is 72.5. The interface is divided into several sections: 'My Organisation My Application', 'Application Content', 'Proposed Project Merits', 'Administrative Scoring Questions', and 'Committee Scoring Questions'. A table shows the scores for each question, and a section for 'Committee Scoring Comments' is also present. A table at the bottom lists the committee members assigned to review the application.

Instructions	Available
Committee Scoring Questions	Available
Application Content	Available
Proposed Project Merits	Available
Administrative Scoring Questions	Available
Committee Scoring Questions	Available

Application Content	App. Score	Weight	Est. Score
1 Application uses descriptive adjectives effectively.	7.5	X 1 =	7.5
Subtotal 7.5			
Proposed Project Merits			
2 Program described in application sounds fun.	7.0	X 1 =	7.0
3 I would go to the proposed program.	7.0	X 5 =	35.0
Subtotal 42.0			
Average Total Score 49.5			
Administrative Scoring Questions	Score	Weight	Est. Score
1 Please rate the previous experiences working with this applicant. Comment: We've worked with this applicant before and they did a great job!	5	X 1 =	5
2 Does this applicant have a history of success with funding we have provided? Comment: Yes	7	X 1 =	7
3 Does this applicant have a history of being truthful on their proposals? Comment: To our knowledge, yes.	5	X 1 =	5
Total Admin Score 17.0			
Total Combined Score 72.5			

Assigned	Email	Name	Review
<input checked="" type="checkbox"/>	funding@zoomgrants.com	Jill Doe	Update Profile
<input type="checkbox"/>	funding@zoomgrants.com		Update Profile

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

APPLICATION REVIEW: Decisions

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.

The screenshot displays the 'My Application' page for 'Emily's Organization' with a requested amount of \$100.00. The top navigation bar includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial', 'Reporting', 'Data', and 'Program Setup'. A search bar is located on the right. Below the navigation, a green bar contains the 'Official Decision' dropdown menu, currently set to 'Approved', and a 'Review Tools' button. A red circle with the number '2' highlights the 'Official Decision' dropdown, and another red circle with the number '1' highlights the 'Review Tools' button. The 'Application Summary' tab is active, showing contact information for 'Emily's Organization' and 'Awesome Person', application submission dates, and a 'Settings' panel. The 'Settings' panel includes a 'Primary Contact' dropdown (Emily ZoomGrants), a 'Program Type' dropdown (Assistance), and checkboxes for 'Open for Editing' (unchecked) and 'Notified of Official Decision' (checked). A text area for 'Official Decision Comment' is visible below. The 'Applicant History' section shows 2 Approved (\$500.00), 0 Declined, and 0 Undecided applications, with a 'Full Applicant History' button. A red circle with the letter 'A' highlights the 'Open for Editing' checkbox, and another red circle with the letter 'B' highlights the 'Notified of Official Decision' checkbox.

APPLICATION TOOLS: Data

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.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Program Setup

Data

Custom Data Report

1. Set a Filter

- Official Decisions
 - Approved
 - Undecided
 - Declined (and Not Qualified)
- Program Type: -Not Assigned-

2. Choose a View

- Printer Friendly
 - Page Break (new page starts with each record)
 - Horizontal Line (between each record)
 - None
- Table (sortable)
- Totals (Standard Fields not included)
- Export as CSV (spreadsheet)

3. Select the Fields

Select the fields below that you want to include, then click Report. Results will be ordered by Agency Name, then Application.

Generate Report

Standard Exports

-none-

Standard Exports

- Contact Fields
- Full Applications
- Raw Scores, Votes & Comments
- All Document Attachments

Custom Data Report

1. Set a Filter

- Official Decisions
 - Approved
 - Undecided
 - Declined (and Not Qualified)
- Program Type: -Not Assigned-

2. Choose a View

- Printer Friendly
 - Page Break (new page starts with each record)
 - Horizontal Line (between each record)
 - None
- Table (sortable)
- Totals (Standard Fields not included)

3. Select the Fields

Select the fields below that you want to include, then click Generate Report. Results will be ordered by Agency Name, then Application Title.

Pre-Application

APPLICATION REVIEW QUESTIONS?

We're always happy to help.

Send us an email: Questions@ZoomGrants.com

Give us a call: [\(866\) 323-5404 x2](tel:(866)323-5404)

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

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.

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Program Setup

Emily's Organization
My Application
\$ 100.00 Requested

Application Summary | Pre-Application | Application Questions | Budget | Tables | Documents | Extra

Official Decision: Approved | \$ 0.00 | Review Tools

Application Summary

Emily's Organization
1000 Address Street
City, CO 80230

Telephone 999-999-9999
Fax www.emilysozomgrants.com
Web www.emilysozomgrants.com

Awesome Person
Emily ZoomGrants
Director.emily@zoomgrants.com

Application Submitted: 9/29/2014 11:20:13 AM
Pre-Application Submitted: 1/22/2015 10:29:44 AM
Pre-Application Status: Approved (to continue)

Application Contact
Emily ZoomGrants
applicant.emily@zoomgrants.com
Tel: 999-999-9999

Additional Contacts
Email Addresses, separated

Applicant History
2 Approved (\$500.00)
0 Declined
0 Undecided
Full Applicant History

Settings
Primary Contact
Emily ZoomGrants

Program Type Assistance

Open for Editing (post-Deadline, this application only)

Notified of Official Decision (Applicant can view Official Decision, and activates Post-Decision functions)

Official Decision Comment

Funding Instructions

Funding Date (mm/dd/yyyy)
3/29/2016

2. 'NOTIFIED' - APPLICATIONS LIST - LIST UPDATE

OR

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.

The Generous Foundation
Grants Department
Grants for People Seeking Grants
\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Program Setup

Applications

Submitted Applications | Pre-Application | Incomplete Applications

Include: Approved Undecided Declined/Not Qualified Official Decisions

Submitted Applications	Official Decisions (Committee)	Official Decision - Award Amount - Notified
<input type="checkbox"/> Emily's Organization My Application	Approved	Approved \$ 0 <input checked="" type="checkbox"/>
<input type="checkbox"/> My Little Nonprofit Agency Grant Application	Approved	Approved \$ 0 <input checked="" type="checkbox"/>
<input type="checkbox"/> Small Nonprofit Agency Our Application	Declined	Declined \$ 0 <input checked="" type="checkbox"/>
3 Submitted Applications		\$ 0.00
Send Email To Selected		\$ 10,000.00
Batch Update Selected (same answer for each selected)		\$ 10,000.00
List Update (different answers for each)		Still Available \$ 10,000.00 Program Total \$ 10,000.00

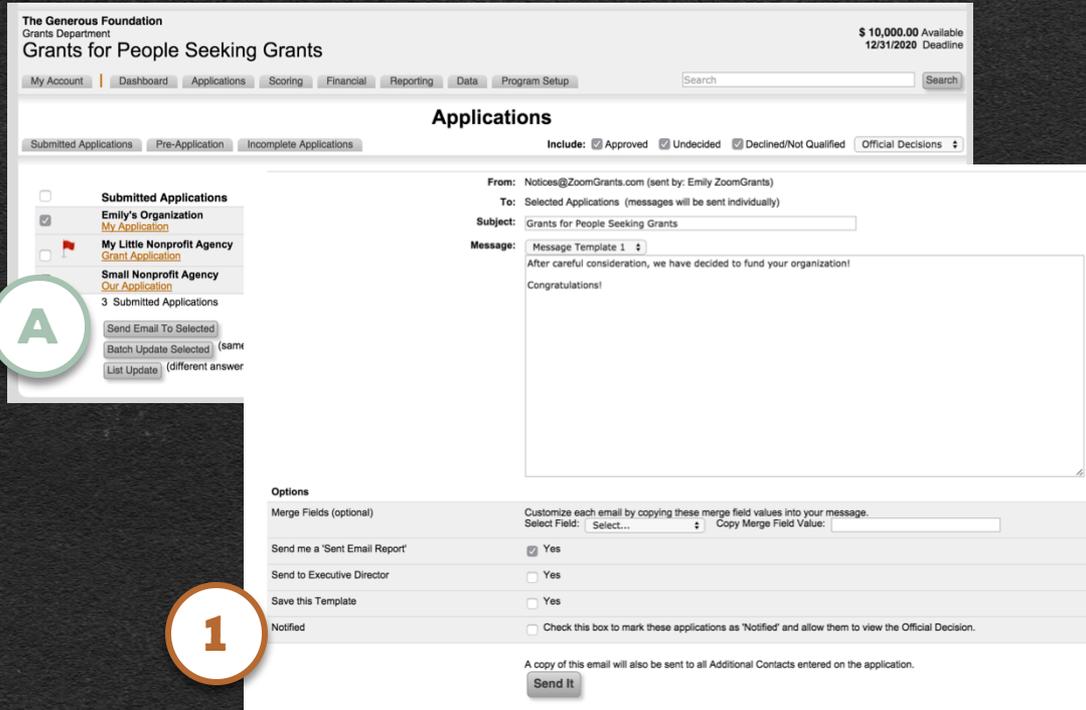
DECISION NOTIFICATION: 'Notify' Applicants, cont.

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.



The screenshot displays the ZoomGrants 'Applications' page for 'The Generous Foundation Grants Department'. The page title is 'Grants for People Seeking Grants' with a '\$ 10,000.00 Available' and '12/31/2020 Deadline'. The navigation bar includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial', 'Reporting', 'Data', and 'Program Setup'. The 'Applications' section shows a list of submitted applications with checkboxes for selection. A green circle with the letter 'A' highlights the 'Send Email to Selected' button. The right side of the page shows the email composition interface, including fields for 'From', 'To', 'Subject', and 'Message'. The 'Message' field contains a pre-written template: 'After careful consideration, we have decided to fund your organization! Congratulations!'. Below the message field are 'Options' for customizing the email, such as 'Merge Fields (optional)', 'Send me a 'Sent Email Report'', 'Send to Executive Director', 'Save this Template', and 'Notified'. A 'Send It' button is at the bottom.

1

POST-DECISION ACTIVITIES: Contracts*

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>

The screenshot displays the ZoomGrants interface for 'The Generous Foundation Grants Department'. The main heading is 'Grants for People Seeking Grants'. In the top right corner, it indicates '\$ 10,000.00 Available' and '12/31/2020 Deadline'. The user is logged in as 'My Account'. The page shows a 'My Little Nonprofit Grant Application' with a status of 'Approved' and a value of '\$ 750.00 Requested'. The 'Funding Contract' section is highlighted, showing a 'Copy From Template' button (labeled A) and a 'Viewable to Applicant' dropdown menu (labeled B). Below this is a large empty box for the contract text (labeled C). The 'Documents' section shows '-none-' and an 'Upload Funding Contract Documents' button. The 'Signatures' section shows fields for 'My Little Nonprofit Agency' and 'The Generous Foundation', both with 'Not signed yet' status. A 'Rescind Signatures' button is also present.

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

POST-DECISION ACTIVITIES: Financial* – Application-Level

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 can 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/KOVHWfNs8YM>

The screenshot displays the ZoomGrants application interface. At the top, it says "The Generous Foundation" and "Powered by ZoomGrants™". The user is logged in as "R. Grant Manager". The main navigation bar includes "My Account", "Dashboard", "Applications", "Scoring", "Financial", "Reporting", "Data", and "Program Setup". The "Financial" tab is selected, and a large orange circle with the number "1" highlights it. Below the navigation bar, the page title is "Emily's Organization My Application" with a "100.00 Requested" amount. A green bar at the top of the content area shows "Official Decision" as "Approved" with a "0.00" amount and a "Review Tools" button. Below this, there are two tables: "Financial" and "Payment". The "Financial" table has columns for Invoice Number, Date Submitted, Status, Requested Amount, Approved Amount, and Payment Total. It lists three invoices: 1 (Paid, \$10.00), 4 (Approved, \$50.00), and 5 (Declined, \$2.00). A green circle with the letter "A" highlights the first invoice number. The "Payment" table has columns for Date, Number, and Description, listing three payments: 1 (Official Award Amount, 9/29/2014), 2 (Second Payment, 9/29/2014), and 3 (9/30/2014). A large orange circle with the number "2" highlights the "Add Transaction" section at the bottom of the page, which includes fields for Date, Number, and Description. To the right of the tables, there is a "ZoomGrants" logo and a "Return to Applicant" link. Below the tables, there is a "Payment" section with a "1 Paid" entry for \$10.00. A green circle with the letter "B" highlights the "Return to Applicant" link in the "Invoice" section.

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

POST-DECISION ACTIVITIES: Financial* – Program-Level

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.

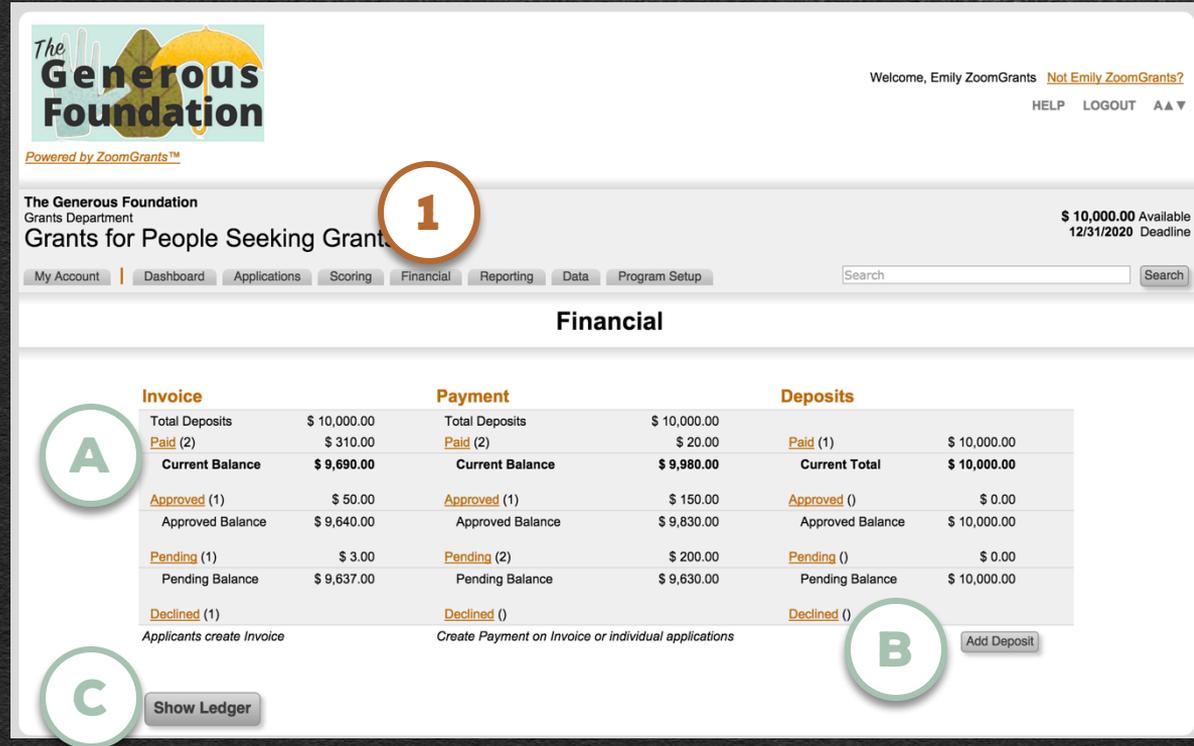
B. ADD DEPOSIT

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/KOVHWfNs8YM>



The screenshot displays the ZoomGrants interface for 'The Generous Foundation'. The page title is 'The Generous Foundation Grants Department Grants for People Seeking Grants'. A navigation menu includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial' (selected), 'Reporting', 'Data', and 'Program Setup'. A search bar is present. The main content area is titled 'Financial' and contains three tables: 'Invoice', 'Payment', and 'Deposits'. A 'Show Ledger' button is located at the bottom left, and an 'Add Deposit' button is at the bottom right. Callout boxes A, B, and C highlight specific elements: A points to the 'Paid' status in the Invoice table, B points to the 'Add Deposit' button, and C points to the 'Show Ledger' button.

Invoice		Payment		Deposits	
Total Deposits	\$ 10,000.00	Total Deposits	\$ 10,000.00		
Paid (2)	\$ 310.00	Paid (2)	\$ 20.00	Paid (1)	\$ 10,000.00
Current Balance	\$ 9,690.00	Current Balance	\$ 9,980.00	Current Total	\$ 10,000.00
Approved (1)	\$ 50.00	Approved (1)	\$ 150.00	Approved (0)	\$ 0.00
Approved Balance	\$ 9,640.00	Approved Balance	\$ 9,830.00	Approved Balance	\$ 10,000.00
Pending (1)	\$ 3.00	Pending (2)	\$ 200.00	Pending (0)	\$ 0.00
Pending Balance	\$ 9,637.00	Pending Balance	\$ 9,630.00	Pending Balance	\$ 10,000.00
Declined (1)		Declined (0)		Declined (0)	

Applicants create Invoice Create Payment on Invoice or individual applications

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

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.

The screenshot shows the 'My Application' page for Emily's Organization. The top navigation bar includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial', 'Reporting', 'Data', and 'Program Setup'. The application status is 'Approved' with a requested amount of \$100.00. The 'Reports' tab is selected, showing 'Report 1' with a due date of 10/30/2015. A green bar at the top indicates the 'Official Decision' is 'Approved' for \$100.00. Below the report details, there is a section for 'Project Evaluation' with two questions: '1. Is this your final report?' and '2. How would you classify your program so far?'. The 'Un-Submit' button is visible next to the 'Report 1 submitted' status.

POST-DECISION ACTIVITIES: Reports* - Program-Level

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*.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

Welcome, R. Grant Manager [Not R. Grant Manager?](#)
HELP LOGOUT ▲▼

Powered by ZoomGrants™

\$ 10,000.00 Available
12/31/2020 Deadline

My Account | Dashboard | Applications | Scoring | Financial | Reporting | Data | Program Setup

Search [] Search

Post-Funding Reporting

	Award Amount	Report 1 10/30/2015	Report 2 10/30/2022	Report 3 10/30/2023
<input type="checkbox"/> Officially Approved Applications				
<input type="checkbox"/> Emily's Organization My Application	\$ 100.00	✓ 10/6/2014	✓ 6/19/2015 Late	Due: 10/30/2020
<input type="checkbox"/> My Little Nonprofit Agency Grant Application	\$ 0.00	✓ 10/6/2014	✓ 10/6/2014	✓ 10/6/2014
Total	Total \$ 100.00			

A Send Email To Selected

B Send Reminder To All Overdue
Automatic email reminders can be configured in Program Setup.

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

POST-DECISION ACTIVITY QUESTIONS?

We're always happy to help.

Send us an email: Questions@ZoomGrants.com

Give us a call: [\(866\) 323-5404 x2](tel:(866)323-5404x2)