

# Applying using ZoomGrants

## Applicants: Completing the Application

As a cloud-based system, ZoomGrants makes it easy for applicants to work on and submit their applications. ZG takes the program content and requirements set up by the program administrator and provides helpful features to facilitate the application process. Read about the basics, below.

### Step 1: Go to Organization's ZoomGrants Page

Navigate to the ZoomGrants page for the organization by using the link provided to you by the program administrator.

The screenshot displays the ZoomGrants interface. At the top, there's a navigation bar with the ZoomGrants logo and a search bar. Below this, the 'Open Programs' section is visible, listing two programs: 'ZoomGrants Tutorial' and 'ZoomGrants University'. Each program has an 'Apply' button and a 'Preview' button. A message states 'You must be logged in to start a new application.' To the right, there's a 'New ZoomGrants Account' button. Below the 'Open Programs' section, there's a 'New ZoomGrants Account' form with fields for Email, Password, First Name, and Last Name. The form also includes a radio button for 'Organization' and a 'New Account' button. A note at the bottom of the form states: 'If you already have an account, Login Here as an existing ZoomGrants user.' Below this, there are two bullet points: 'Password must be 8-16 characters and contain at least 1 letter and 1 number.' and 'We do not sell or rent your personal information to anyone. Ever.'

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- Step 1: Go to Organization's ZoomGrants Page
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- Step 6: Upload Documents
- Step 7: Submit the Application

**NOTE:** For this first step, do not go to the ZoomGrants homepage. Once you've started an application using the link above, you can log in at <https://ZoomGrants.com/login>

# Applying using ZoomGrants (continued)

## Step 2: Create an Account & Log In

Create your ZoomGrants account and log in using the New ZoomGrants Account box on the righthand side. If you already have an account, log in using the boxes in the upper right corner of the page.

**New ZoomGrants™  
Account**

Email

Password

First Name

Last Name

Account Type

☒ Organization  
☐ Individual

New Account

If you already have an account,  
[Login Here](#) as an existing  
ZoomGrants user.

- Password must be 8-16 characters and contain at least 1 letter and 1 number.
- We do not sell or rent your personal information to anyone. Ever.

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**NOTE:** In ZoomGrants, each application is officially associated with a single account and each account is 'owned' by a single user and accessed by a single email address. We recommend that the person who will be the primary contact for applications creates the first account for an organization. Once that person creates their account, gets logged in, and starts the application(s), they will be able to invite other people to collaborate on all or some of the applications in their account.

# Applying using ZoomGrants (continued)

**Before you begin your application please complete the Notice of Intent!**

## Step 3: Create Your Application

Click the Apply button next to the appropriate program to create your first application for that program.

### ZoomGrants University

Open Programs

[How do I do this?](#)

### Open Programs

**ZoomGrants University**  
12/31/2021 - Organizations Only

Apply

Preview

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# Applying using ZoomGrants (continued)

## Step 4: Invite Others to Collaborate (as necessary)

**Summary Tab (1st tab of application) > Collaborators**

Use the Collaborators section in the first tab of the application to invite others to work on this application with you.

A. Enter their email address, first/last name, and title.

B. Indicate on which sections they are allowed to collaborate.

C. Click the Invite button. An invitation will be sent to their email address. They'll be able to set up an account by which they can access and edit the application.

### Collaborators

Collaborators can only edit application data (answers). They cannot submit, archive, or delete this application.

A	Email Address	A	First Name	A	Last Name	A	Title	Editing Access	Status
Application									
	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	B <input type="checkbox"/>	C <input type="button" value="Invite"/>
<input type="checkbox"/> Add to Additional Contacts (below)									
							Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### Additional Contacts for this Application

Additional Contacts will be copied on all emails sent to the application owner regarding this application. Enter ONLY email addresses separated by a comma. No names. No titles. No phone numbers.

**NOTE:** If granted access, collaborators can do everything that the application owner can do except: editing the Applicant and Organization information sections in the first tab of the application and submitting, archiving, or deleting the application

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# Applying using ZoomGrants (continued)

## Step 5: Fill out Questions, Budget, & Tables

Answer the questions and fill in the budget and tables.

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

**Summary** (answers are saved automatically when you move to another field,

**Instructions** [Show/Hide](#)

The **Summary Tab** is the first tab that appears in all applications and is where ZoomGrants captures the basic Applicant and Organization Information from your applicants (as applicable).  
[ZGU: Program Summary](#)  
[ZGU: Application Summary](#)

Application Type ☐ Individual ☒ Organization

Application Title/Project Name

Amount Requested \$

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- Program/Application Content
- Auto-Save Feature
- Step 6: Upload Documents
- Step 7: Submit the Application



# Applying using ZoomGrants (continued)

## Program/Application Content

In each program, the program administrator decides **what content** they'd like to request from the applicant. As a result, the tabs, questions, and requested documents will differ between programs and organizations. *(For ZGU search and training purposes, refer to the [default tab labels](#) to find the appropriate resources.)*

Admins also decide **how to capture the information** from their applications. They can choose the question type for each question, what features to use, what files to request, etc.

**i** The program admin controls the application content.

ZoomGrants staff plays no role in determining the content requested by the administrator from the applicants.

VIEW OPEN PROGRAMS

SHOW DESCRIPTION

SHOW REQUIREMENTS

SHOW RESTRICTIONS

SHOW LIBRARY

CONTACT ADMIN

### Contact Admin Tab

If you have a question about the application content or what is expected of you, please use the **Contact Admin** tab in the application in your account to send an email directly to the program contact. *The ZoomGrants tech support staff cannot answer content-related or requirement-related questions.*

### Character Counts

**Text questions will be limited to a specific character count.** Characters include letters, numbers, spaces, punctuation marks, and carriage returns. A page of text is approximately 3000 characters. ZoomGrants automatically limits short-answer responses to 255 characters or fewer (a healthy sentence or two). Paragraph-style response limits are set by the admin on each question, so they may differ. Learn more about the character counter [here](#).

### + Formatted vs. Unformatted Text

### + Tables

### + Required Document Requests

**NOTE:** Some question tabs may have a **branching question**, which will hide certain questions based on your answers to the branching question

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Program/Application Content

Auto-Save Feature

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# Applying using ZoomGrants (continued)

## Auto-Save Feature

The system will automatically save your answers as you move through the application and enter text then click outside of each text box or select a multiple choice or checkbox item and click into a new field. Click on the tabs to quickly jump to another section of the application or use the 'Next' and 'Previous' buttons at the bottom of the tabs to move sequentially through the application. You do not need to finish the application in one sitting nor do you need to intentionally save it.

Read more about the auto-save feature [here](#).

# Applying using ZoomGrants (continued)

## Step 6: Upload Documents

Click the **Upload** button next to each applicable document request set up by the administrator to open up the File Upload Window for that request. Follow the instructions in the window to upload or link a file (or multiple) in that slot.

**ZOOMGRANTS** Close Window Help

### File Upload Window

Document Requested	Uploaded Document *
Document Request 1 - Required means must be uploaded before the application may be submitted	-none-

**1** File description

(e.g. IRS Letter, Financials, etc.)

**2** Type of attachment

☒ File Upload (file size limited to 4MB each)  
☐ Link to File (YouTube, Dropbox, cloud storage, webserver, etc.)

**3** Select a file to upload

Choose File No file chosen

No 'I' or 'J' allowed in filenames.  
Be sure to include the file extension  
File size is limited to 4MB.  
Supported file extensions:  
.DOC, .XLS, .XLSM, .DOCK, .XLSX, .TXT, .RTF, .WPS,  
.SXW, .ODT, .TAB, .CSV, .WKS, .SXC, .ODS, .PPT, .PPTX, .PPS, .SLI, .ODP, .PDF, .GIF, .JPG, .PNG, .MW, .WAV, .AIF, .MP3, .MP4, .MID, .MPG, .MOV, .WMV, .RM, .JPEG, .SHP, .SHX, .DBF, .KML, .KMZ, .TIF, .TIFF

Document type

PROPOSAL DOCUMENT

Upload Now

Be sure to verify that your upload was successful by testing the link to download your file after this page reloads.

\* ZoomGrants™ is not responsible for the content of uploaded or linked documents.

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### NOTES:

- Any document request marked with a yellow **'Required'** note **MUST** have something uploaded or linked in that slot in order for your application to be submitted. If you feel a required request is not applicable to you, create a document in which you note the inapplicability and upload that into the slot.
- If the administrator has provided a **template**, click the orange **'Template'** link to download that template. Fill it out, then upload it into that slot.
- Click the **Help** button in the File Upload Window to access a quick tutorial video (also available here: [http://youtu.be/b0lxkjss\\_Ow](http://youtu.be/b0lxkjss_Ow)).
- If you finish your application by uploading documents, use the grey **Refresh Page** button to reload the page before clicking the **Submit Now** button to submit your application.



# Applying using ZoomGrants (continued)

## Step 7: Submit the Application

Click the gray **Submit Now** button (indicated by blue box) at the top of the application when you've completed the applicable content in every tab. The system will check to ensure you have answered every question and uploaded all 'Required' documents. Any skipped questions or missing documents will be listed in red (indicated by red box). When you're done with your edits, use the gray Refresh Page button in the application to reload the page, then click the Submit Now button to re-run the check. If your application is complete, you'll be able to enter your initials and officially submit the application.

Application Status: Not Submitted

**Submit Now** **Print/Preview**

[Archive this Application](#)

**Our Best Application**  
\$ 25,000.00 requested

Application Completion [\[hide this\]](#)

By entering your initials here you certify this submission truthfully and accurately represents your application and is hereby submitted for review. Submission of this application does not, in any way, guarantee that your application will yield a favorable result. Submission of this application also indicates your agreement to the [terms](#) of using ZoomGrants™.

I am telling the truth. Really.

**Some fields are missing answers:**

- Summary - EIN
- Application Questions Question 13
- Application Questions Question 14
- Required Documents Requested

If you have completed these fields, click Refresh Page above (we will re-check all of your answers) and then Submit again.

This RED message will be replaced with a place to enter your initials.

Summary Pre-Application Application Questions Budget Tables Documents Follow-Up Results Activity Log

*NOTE: If the administrator has chosen to let you make changes to your application even after it has been submitted, you can edit your submitted application up until the deadline passes. If you do make any changes, you do NOT need to 're-submit' it. The changes are automatically reflected in the submitted application.*

## Check for Completion

The **completion check** verifies that you have answered the applicable questions and uploaded 'Required' documents, but you are responsible for ensuring you have completed the content requested in the budgets and tables (as applicable) and uploaded the documents that are requested but not 'Required'.

Read more about the check for completion [here](#).

## Application Print Preview

Click the **Print/Preview** button to print a copy of your entire application. The Print/Preview also shows the calculated columns in tables in the Budget tab (if the program admin has set any up).

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