How to Apply for Funding Via ZoomGrants™

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

3 Quick Things to Know:

THE AUTO-SAVE FEATURE

ZoomGrants™ automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your Application. YOU DO NOT NEED TO COMPLETE YOUR APPLICATION IN ONE SITTING. Whenever 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: If you see the 'Saving' message for more than a few seconds your Internet connection may have blinked for a moment during the saving process and the change may not have been saved. Double click anywhere on the page to cancel the save and make a note of the change that you made. If you made the change in a text field, tweak the answer slightly, then click outside of the field to try the save again. If you selected a radio button or checkbox, select a different checkbox or radio button, wait for the save to occur, then make your original choice again. If you continue to have difficulty, check your Internet connection. You can also call our Technical Support team – (866) 323-5404 x2.)

THE TAB SYSTEM

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

THE CHECK FOR COMPLETION

ZoomGrants™ will double-check your Application to ensure that it is complete before the Application is submitted. This means that <u>every</u> question field in the Application as it appears online in your ZoomGrants™ account must be completed, including any Document Requests that are marked as 'required'.

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

About This Tutorial:

To provide instructions for creating, submitting, and managing your Applications while also giving a tour of the ZoomGrants™ 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 submit their Applications via ZoomGrants™.

BLUE/GREEN LETTERS

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

GETTING STARTED: Create Your Account

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

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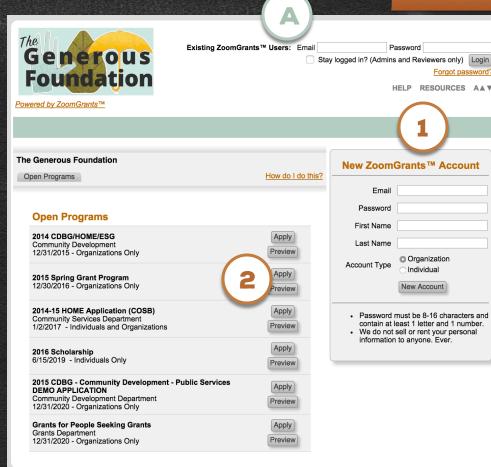
1. NEW ZOOMGRANTS™ ACCOUNT

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

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

2. APPLY

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

A

Existing ZoomGrants™ Users: Email [   ] Password [   ]
☐ Stay logged in? (Admins and Reviewers only) Login
Forgot password?

HELP RESOURCES A A ▼

Powered by ZoomGrants™

1

New ZoomGrants™ Account

Email [   ]
Password [   ]
First Name [   ]
Last Name [   ]
Account Type ○ Organization
○ Individual
New Account

- 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.

The Generous Foundation
Open Programs   How do I do this?

Open Programs

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

2

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

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

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

2015 CDBG - Community Development - Public Services DEMO APPLICATION
Community Development Department
12/31/2020 - Organizations Only
Apply
Preview

Grants for People Seeking Grants
Grants Department
12/31/2020 - Organizations Only
Apply
Preview

PART TWO:
Application Completion
& Submittal

TUTORIALS BY
ZoomGrants

THE APPLICATION: A Quick Tour

1. CONTACT ADMIN

Click here to send an email to the Program Administrator.

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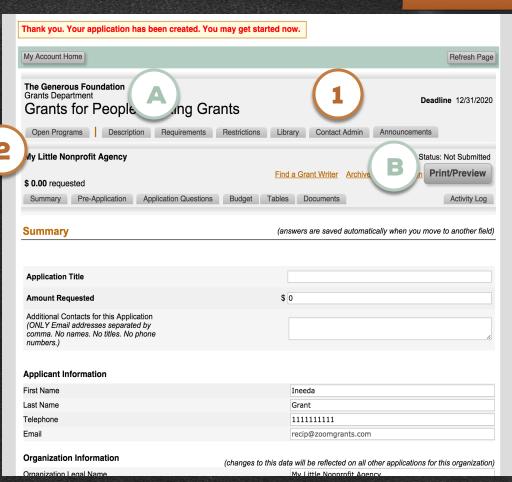
2. OPEN PROGRAMS

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

A. PROGRAM INFORMATION TABS

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

B. PRINT/PREVIEW

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

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

My Account Home | Refresh Page

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

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

My Little Nonprofit Agency
Status: Not Submitted

$ 0.00 requested
Find a Grant Writer · Archive ... ... · Print/Preview

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

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

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

Applicant Information

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

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

Organization Legal Name	My Little Nonprofit Agency

APPLICATION TABS: Summary*

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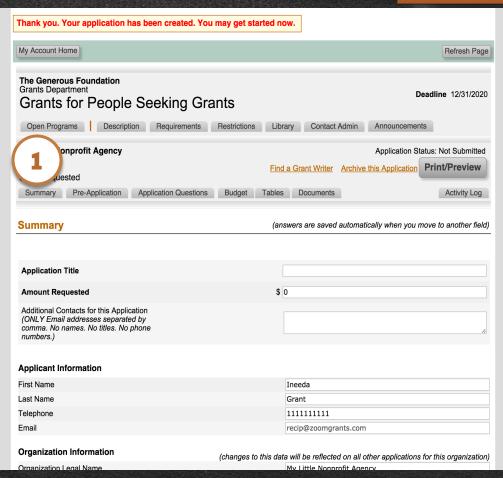
TUTORIALS BY
ZoomGrants

1. SUMMARY* TAB

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

REMEMBER:

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

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

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

My Account Home   Refresh Page

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

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

① Nonprofit Agency   Application Status: Not Submitted

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

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

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

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

Applicant Information

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

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

| Organization Legal Name | My Little Nonprofit Agency |

APPLICATION TABS: Pre-Application*

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1. PRE-APPLICATION* TAB

Some Funders use a Pre-Application to vet Applicants. If there is a Pre-Application and you see the red message that appears in the screenshot to the right, you must fill out this tab and submit it for review.

Only if your Pre-Application is Approved can you continue with the rest of the Application. You will receive an email notification when a decision is made.

2. SUBMIT PRE-APPLICATION*

When you're finished answering the questions in the Pre-Application, click the Submit button.

When the Pre-Application has been successfully submitted, a timestamp of the submittal time will appear in lieu of the Submit button. Refresh the page using the gray Refresh Page button near the top of the page to confirm the timestamp.

A. ASK A PRE-APPLICATION* QUESTION

If you have questions regarding the Pre-Application* content or the status of your submittal, use the Ask a Pre-Application Question link to send an email to the Program Administrator.

The Generous Foundation
Grants Department
Grants for People Seeking Grants

Deadline 12/31/2020

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

My Little Nonpro...   Application Status: Not Submitted

$ 0.00 requested   Find a Grant Writer   Archive this Application   Print/Preview

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

Your Pre-Application must be submitted AND approved before continuing.

Pre-Application   *(answers are saved automatically when you move to another field)*

Pre-Application Status   **Undecided**
                                                    ation deadline: 12/15/2020
                                                    Submit Pre-Application

Ask a Pre-Application Question

Instructions Show/Hide

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

3. Briefly (less than 3 paragraphs) describe the program for which you are requesting funding.
Use of alliteration and onomatopoeia is highly commended.

APPLICATION TABS: Questions*

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

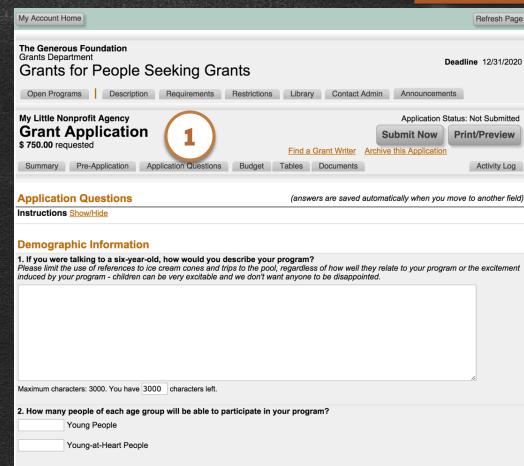TUTORIALS BY ZoomGrants

1. APPLICATION QUESTIONS* TAB

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

A NOTE RE: BRANCHING QUESTIONS

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

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

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

My Account Home | Refresh Page

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

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

My Little Nonprofit Agency
Grant Application
$ 750.00 requested

Application Status: Not Submitted

(1) Submit Now | Print/Preview

Find a Grant Writer | Archive this Application

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

---

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

Instructions Show/Hide

Demographic Information

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

Maximum characters: 3000. You have [3000] characters left.

2. How many people of each age group will be able to participate in your program?

[   ] Young People

[   ] Young-at-Heart People

APPLICATION TABS: Budget*
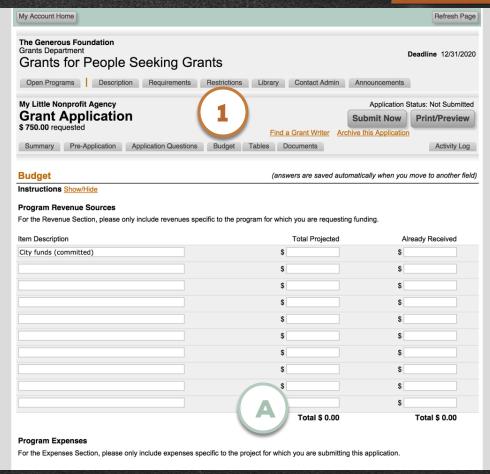
TUTORIALS BY
ZoomGrants

1. BUDGET* TAB

Funders may request budget information in this tab.

A. TOTALS

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

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

My Account Home | Refresh Page

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

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

My Little Nonprofit Agency | Application Status: Not Submitted
Grant Application
$ 750.00 requested | Submit Now | Print/Preview

Find a Grant Writer
Archive this Application

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

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

Instructions Show/Hide

Program Revenue Sources
For the Revenue Section, please only include revenues specific to the program for which you are requesting funding.

Item Description	Total Projected	Already Received
City funds (committed)	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	$	$
	Total $ 0.00	Total $ 0.00

Program Expenses
For the Expenses Section, please only include expenses specific to the project for which you are submitting this application.

APPLICATION TABS: Tables*

TUTORIALS BY
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1. TABLES* TAB
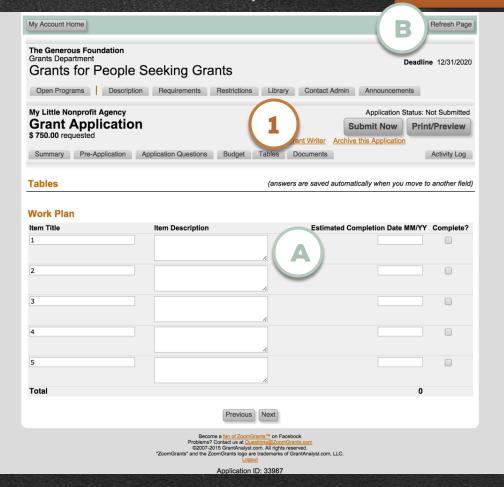
This tab captures uniquely-formatted data.

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

A. RESIZABLE FIELDS

Depending on which Internet browser you are using (ZoomGrants™ recommends Chrome), you may be able to resize the larger text boxes. Click and drag in the corner to make the box larger or smaller.

B. REFRESH TO UPDATE TOTALS

Values for Subtotals, Totals, and Calculated columns can be updated by clicking the Refresh Page button.

My Account Home | Refresh Page — **B**

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

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

My Little Nonprofit Agency
Grant Application
$ 750.00 requested
1
Application Status: Not Submitted
Submit Now | Print/Preview
Grant Writer | Archive this Application

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

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

Work Plan

Item Title	Item Description	Estimated Completion Date MM/YY	Complete?
1		**A**	☐
2			☐
3			☐
4			☐
5			☐
Total		0	

Previous | Next

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Problems? Contact us at Questions@ZoomGrants.com
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"ZoomGrants" and the ZoomGrants logo are trademarks of GrantAnalyst.com, LLC.
Logout

Application ID: 33987

APPLICATION TABS: Documents*

1. DOCUMENTS* TAB

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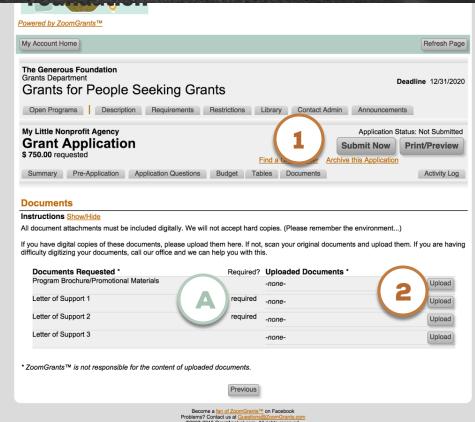
2. UPLOAD

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

Check out this video for more specific instructions:
http://youtu.be/b0Ixkjss_Ow

A. REQUIRED DOCUMENTS

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

SUBMITTING YOUR APPLICATION

1. SUBMIT NOW

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

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

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

2. SUBMITTED

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

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

WORKING ON YOUR APPLICATIONS

After you've started your Application, you can log in directly on the ZoomGrants™ homepage – https://ZoomGrants.com - whenever you need to work on your Application (rather than going through the Funder's website).
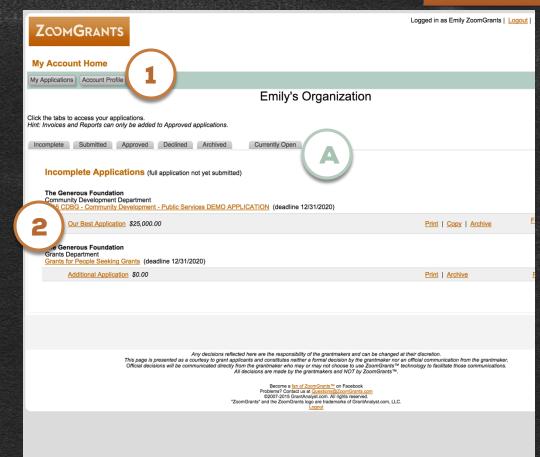
1. MY ACCOUNT HOME

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

2. INCOMPLETE APPLICATIONS

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

A. CURRENTLY OPEN

To view a list of all of the Open Programs from every Funder to which you've submitted an Application in the past, click here.

So you submitted your Application and were chosen to receive funding.

Congratulations!

… Now what?

PART THREE:
Managing Post-Funding Activities

POST-FUNDING: Accessing Applications

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

TUTORIALS BY
ZoomGrants

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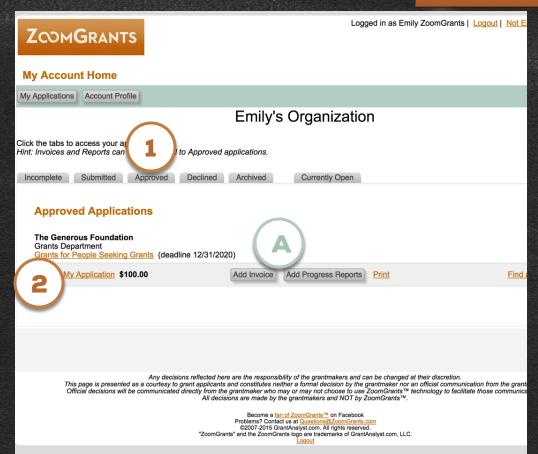
1. APPROVED TAB

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

A. EASY ACCESS BUTTONS

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

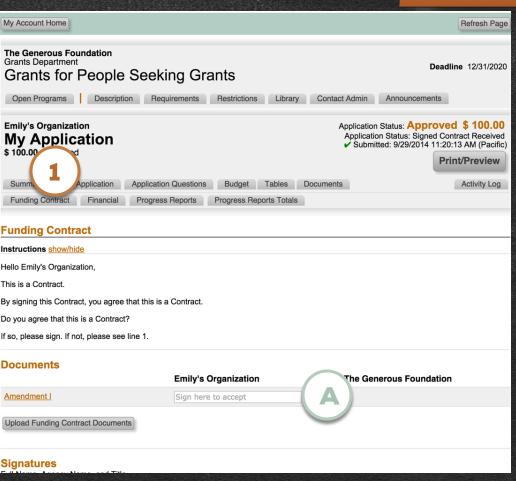**To view the entire Application and the Post-Funding* tabs, click the orange Application title (2).**

ZoomGrants

Logged in as Emily ZoomGrants | Logout | Not E

My Account Home

My Applications   Account Profile

Emily's Organization

Click the tabs to access your ap
Hint: Invoices and Reports can ***1*** *d to Approved applications.*

Incomplete   Submitted   Approved   Declined   Archived   Currently Open

Approved Applications

The Generous Foundation
Grants Department
Grants for People Seeking Grants   (deadline 12/31/2020)

A

My Application $100.00   Add Invoice   Add Progress Reports   Print   Find a

2

Any decisions reflected here are the responsibility of the grantmakers and can be changed at their discretion.
This page is presented as a courtesy to grant applicants and constitutes neither a formal decision by the grantmaker nor an official communication from the grant
Official decisions will be communicated directly from the grantmaker who may or may not choose to use ZoomGrants™ technology to facilitate those communica
All decisions are made by the grantmakers and NOT by ZoomGrants™.

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Logout

POST-FUNDING: Contracts*

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

TUTORIALS BY
ZoomGrants

1. CONTRACT* TAB

You may be asked to review and sign a Contract* in this tab. Add your signature in the Signatures section. If any amending documents are uploaded, you will also be asked to enter your signature for each document (**A**).

My Account Home   Refresh Page

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

Open Programs | Description   Requirements   Restrictions   Library   Contact Admin   Announcements

Emily's Organization   Application Status: **Approved $ 100.00**
My Application   Application Status: Signed Contract Received
$ 100.00   ✔ Submitted: 9/29/2014 11:20:13 AM (Pacific)

(1)   **Print/Preview**

Summary   Application   Application Questions   Budget   Tables   Documents   Activity Log
Funding Contract   Financial   Progress Reports   Progress Reports Totals

Funding Contract

Instructions show/hide

Hello Emily's Organization,

This is a Contract.

By signing this Contract, you agree that this is a Contract.

Do you agree that this is a Contract?

If so, please sign. If not, please see line 1.

Documents

	Emily's Organization	The Generous Foundation
Amendment I	Sign here to accept **(A)**	

Upload Funding Contract Documents

Signatures

POST-FUNDING: Financial*

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

TUTORIALS BY
ZoomGrants

1. FINANCIAL* TAB

If the Funder chooses to use ZoomGrants™ to manage Invoices* and Payments*, you can submit Invoices* and view Payments* in the Financial* tab.
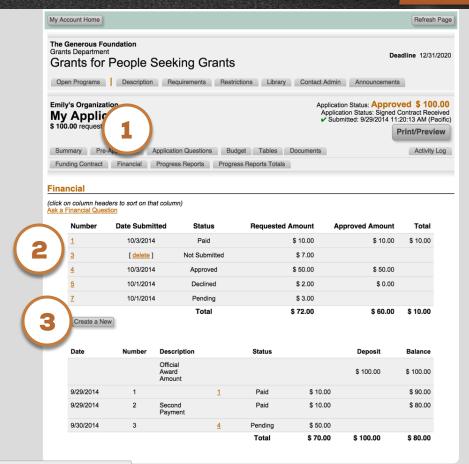
Check out this video for more specific instructions:
http://youtu.be/GjxSnU4QhdQ.

2. EDIT AN INVOICE*

Click an orange Invoice* number to open that Invoice*. If its status is Not Submitted, you can edit then submit it.

3. CREATE A NEW INVOICE*

Click this button to start a new Invoice. (This is the same as the easy access Create Invoice* button in your My Account Home page.)

POST-FUNDING: Reports*

TUTORIALS BY
ZoomGrants

1. REPORTS* TAB

Some Funders require funding recipients to submit Post-Funding Reports*. Click into this tab to fill out and submit those Reports*.
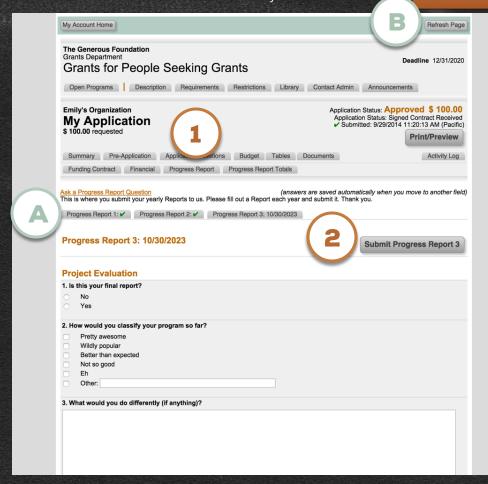
2. SUBMIT REPORT*

When you're done working on your Report, click the button to submit it. The system will check to make sure you completed every field presented in the live, online version. Use the Refresh Page button (**B**) to verify that your Report* was submitted.

ZoomGrants™ recommends that you use an up-to-date version of Internet Explorer, Chrome, Safari, or Firefox to submit your Reports.*

A. REPORT* TABS

Each Report* is housed in its own tab. Deadline dates are displayed for Reports* that have not yet been submitted and are not yet due. Overdue Reports* are denoted in red. Submitted Reports* are marked with green check marks.

PART FOUR:
Additional Instructions

DELETE APPLICATIONS

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

FROM MY ACCOUNT HOME:

1. ARCHIVE APPLICATION

Click the orange Archive link next to an Application to send that Application to the Archived tab.

2. ARCHIVED TAB

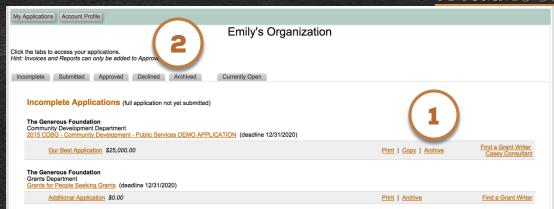Click into the Archived tab to delete the Application.
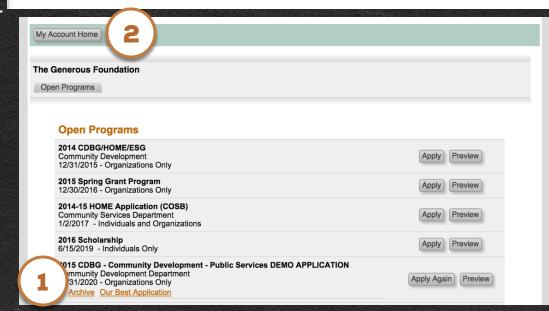
FROM A FUNDER'S OPEN PROGRAMS LIST:

1. ARCHIVE APPLICATION

Click the orange Archive link next to an Application to send that Application to the Archived tab.

2. MY ACCOUNT HOME

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

My Applications   Account Profile

2

Emily's Organization

Click the tabs to access your applications.
Hint: Invoices and Reports can only be added to Approve

| Incomplete | Submitted | Approved | Declined | Archived | Currently Open |

1

Incomplete Applications (full application not yet submitted)

The Generous Foundation
Community Development Department
2015 CDBG - Community Development - Public Services DEMO APPLICATION (deadline 12/31/2020)

    Our Best Application $25,000.00   Print | Copy | Archive   Find a Grant Writer / Casey Consultant

The Generous Foundation
Grants Department
Grants for People Seeking Grants (deadline 12/31/2020)

    Additional Application $0.00   Print | Archive   Find a Grant Writer

My Account Home   **2**

The Generous Foundation

Open Programs

Open Programs

2014 CDBG/HOME/ESG Community Development 12/31/2015 - Organizations Only	Apply	Preview
2015 Spring Grant Program 12/30/2016 - Organizations Only	Apply	Preview
2014-15 HOME Application (COSB) Community Services Department 1/2/2017 - Individuals and Organizations	Apply	Preview
2016 Scholarship 6/15/2019 - Individuals Only	Apply	Preview
1 2015 CDBG - Community Development - Public Services DEMO APPLICATION Community Development Department 31/2020 - Organizations Only	Apply Again	Preview
Archive Our Best Application	

Tips from the ZoomGrants™ Team:

START EARLY. FINISH EARLY. SUBMIT EARLY.

Putting off starting, finishing, or submitting your Application does nothing but cause stress. Don't do that to yourself.

Start your Application as soon as the Program opens. Get familiar with the requirements and gather your materials. Save a copy of the Print/Preview to look over when you're not online. Work on the Application throughout the submittal period, giving each section the attention it deserves. And **submit early**.

REACH OUT ANY TIME YOU NEED HELP

When in doubt, ask someone.

Use the Contact Admin tab and Ask a Question links in the Application in your ZoomGrants™ account to get in touch with the Program Administrator if you have questions about Program requirements or content. Contact the ZoomGrants™ office if you have questions about the system or if you need technical assistance. The Tech Support Team loves helping Applicants.

TECHNICAL QUESTIONS?

We're always happy to help.

Send us an email: Questions@ZoomGrants.com

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