

Welcome to the ZoomGrants family!

Let me start by saying 'Thank You' for your business. We are looking forward to working with you and excited about making this the best grant management experience you have ever had.

In this packet, you will find a Getting Started Guide to point you in the right direction. Any of your administrative users can create your initial ZoomGrants account, then create additional accounts for your other administrative users.

You will also find Tip Sheets that you can forward to your different types of users. These are some of the best user tips we've received from other users, and we are sure that your users will appreciate having them available.

We work hard to make sure that ZoomGrants serves your grantmaking needs, and I want you to be sure to feel free to call us at anytime with questions, comments and suggestions. We really do enjoy talking with our customers.

With warm regards,



Geoff Hamilton
President
ZoomGrants

Welcome to ZoomGrants!

This guide will help get you started using ZoomGrants. After you have created an account for your organization, everything, including creating new programs and setting up new users, can be done from within your account, so these steps need only be done once.

- 1. Create an account at ZoomGrants.com.** Click Sign Up Now or the Get Started tab on our homepage, then select Sign Up under the Grant Makers heading to create your account.
 - Enter the obvious information.
 - Select the version of ZoomGrants you are going to use.
 - Enter the number of programs to start with (and be billed for).
 - Click 'New Account'.
- 2. Activate your account.** Print or Save your Invoice and send it off to your Finance Department. (We will activate everything when we receive your payment, but you can still get started right away.)
- 3. Go to your Admin Home page.** Click the Get Started button or log in later at ZoomGrants.com.
- 4. 'Edit' your New Grant Program.** Set deadline and open dates, add questions, select which features to include (Pre-Application Questions, Budget, Document Requests, etc.). You can set up Invoices and Reporting at a later time.
- 5. Create accounts for Reviewers and Administrative users.** Once you have created Committee Member accounts, edit your program and assign review committee members for each grant program - click on the Committee tab in the program and select reviewers to add to the committee for that program.
- 6. Install the HTML code.** Cut and paste the HTML code onto a page on your website to embed ZoomGrants. You can preview how it will look by visiting ZoomGrants.com/sandbox and entering your Donor ID.
- 7. Fine tune your Program** - You can add Scoring, Invoices and Post-Funding Reporting while your applicants are creating their proposals.

After you have created your program(s) and assigned committees, your program is ready to go. Now, grab a cup of coffee, sit back, and watch the applications come rolling in.

Email us with questions at Questions@ZoomGrants.com or call us at (866) 323-5404.

Things to Avoid:

- Changing questions after the open date. (This irreparably alters applicant data.)
- Asking redundant, unnecessary, or unnecessarily redundant questions.
- Giving early access to reviewers. (Applicants can edit their proposal up until the deadline, so answers to questions may change before the deadline.)

By default, Hints Mode is turned on in your account, and you can hover over the question marks on each page to view contextual hints. To turn Hints Mode off, click Turn Hints Off at the top of the page.

Pre-Launch

Use Pre-Applications - Pre-screen applicants for eligibility, get an idea of how many proposals to expect, and gain pre-submission access to the proposals.

Simplify your RFP - Streamline your program to get only the answers and documents that you really need.

Review your RFP before releasing it - Call us to go over your RFP before the open date.

Plan ahead - Set your deadline for a time during the day when your team is available to answer questions and also to give yourself a buffer before 'locking the door.'

During the Open Period

Eliminate the rush for Applicants - Deadlines can be hectic, so here are a couple ideas to relieve stress by promoting early submissions:

- Assign presentation times based on submission times.
- Offer Technical Assistance to applicants who submit in advance of the deadline.

Stay ahead of the rush - Download document attachments as they come in, delete them when you are done.

After the Deadline

Ensure objectivity - The Scoring feature can help you and your reviewers compare proposals objectively.

Check Reviewer's work - The Scoring Report shows who in the Review Committee has reviewed and scored each application... and who hasn't.

Contact all Applicants - Use Contact All (with mail merge capabilities) to send emails to groups of applicants.

Compare proposals - Click on Compare Proposals to create a page that allows you to review and compare the same component from all applications.

Use Trial Decisions - Trial Decisions are an effective way to test your funding allocations before committing them to Official Decisions.

Getting Started

5. Go to the grantmaker's website.
6. Create a ZoomGrants account or log in as an existing user.
7. Select the grant for which you want to apply.
8. Click the Apply button to start your proposal.
9. Start entering data (your answers will be saved automatically).

Apply for the right grant - Log in and begin a new proposal from the grantmaker's website directly.

Keep it clean - Cutting and pasting from other software packages removes all formatting (bullets, fonts, bold, italics, etc.).

Check your work - Modern browsers (Firefox, Chrome, Safari, etc.) have spell checking features built in.

Work offline - Open the print preview of the proposal (Print/Preview button), copy the contents into a Word document, fill out the application, then copy and paste each of your answers into the proposal online.

Link to your documents - Linking to your documents (hosted on your website) instead of uploading will be faster and more convenient, especially if you have common documents that will be attached to multiple proposals.

Submit early - You can make changes to your proposal up until the deadline. (Any revisions are saved on the submitted application so there's no need to resubmit your proposal.)

Beat the rush - Don't wait for the deadline to get close before you submit your proposal. Who needs that kind of anxiety, anyway?

Use Full Screen view - Click on the Full Screen link to remove distractions and get a cleaner view of your proposal while you are working on it.

Use the Print/Preview - The Print/Preview page will show your proposal the way the Reviewers will see it.

Adjust the page view size - Control + and Control - can be used to zoom in and out of any web pages for easier readability.

Hire a grantwriter - Our Resources section features grantwriters whom you can contact directly to help you craft your best proposal.

Getting Started

1. Go to ZoomGrants.com or your organization's website.
2. Log in using the username and password provided by your organization.
3. Click on My Voting Decisions.
4. Select a proposal to review.

By default, Hints Mode is turned on in your account, and you can hover over the question marks on each page to view contextual hints. To turn Hints Mode off, click Turn Hints Off at the top of the page.

Adjust the font size - Control + and Control - can be used to zoom in and out of any web pages.

Jump to other proposals and Review Tools – The drop-down menus in the blue navigation bar at the top of the page will quickly take you to other proposals and review tools.

Monitor your progress - Use My Voting Decisions or the Scoring Report to keep track of the work you still have left to do.

Compare proposals side-by-side - Use the Compare Proposals feature for an apples-to-apples comparison based on specific questions or features.

Keep your Notes in a separate window - Use the Compare Proposals feature (select My Notes as a question) to access all of your notes in a separate window while reviewing individual proposals in your main window.

Bring your Notes to your next meeting - If you won't have access to a computer during your next meeting, print your Notes for all of the proposals in the Compare Proposals feature.

Bring your Scoring Report to your next meeting - If you won't have access to a computer during your next meeting, print your Scoring Report and bring it with you. (You can also print your Scoring Comments in the Compare Proposals feature.)

Maintain objectivity - To improve or ensure the objectivity of your evaluation, read all of the proposals before scoring or voting on any of them.