

A Guide for Applicants

Creating, Submitting,
and Managing Your
Applications

TUTORIALS BY

ZOOMGRANTS

4 THINGS TO KNOW FIRST...

1) YOU MUST HAVE A DIRECT LINK TO APPLY AND APPLICANT ACCOUNT

To create an application, you must have a ZoomGrants™ account. Check to make sure you have the correct applicant credentials to begin and are using the direct link to apply for the program provided by the administrator.

2) THE TAB SYSTEM

ZoomGrants™ predominantly uses a tab system to separate different sections of the application. You can click on each tab to access the content housed there.

...4 THINGS TO KNOW FIRST

3) THE AUTO-SAVE FEATURE

ZoomGrants™ automatically saves your progress, allowing you to log in and out as often as needed to complete the application. When you make a change in a field then click outside of that field, you'll see a flash of the 'Saving' screen as your change is being saved.

*Side Note: If you see the 'Saving' message flash for more than a few seconds, tap twice anywhere on the page to cancel the save. Refresh and click outside of the field to attempt the save again.
Be sure to paste only as plain text [Ctrl+ Shift +V] to ensure formatting is accepted.*

4) THE CHECK FOR COMPLETION

Before you can submit, ZoomGrants will check your Application to ensure that:

- Every application question field is completed
- Document Requests marked as 'Required' are uploaded

GETTING STARTED: Create Your Account

The Funder will provide a link to apply.

Recipient accounts can only be created using this link to the Funder's ZoomGrants page (not the ZoomGrants™ homepage).

1. Preview the application before you apply. You can preview before you apply.

2. To create an application, you must have a ZoomGrants account. Use the same account to submit Applications to any other funder that uses ZoomGrants.

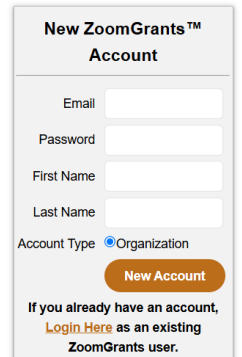
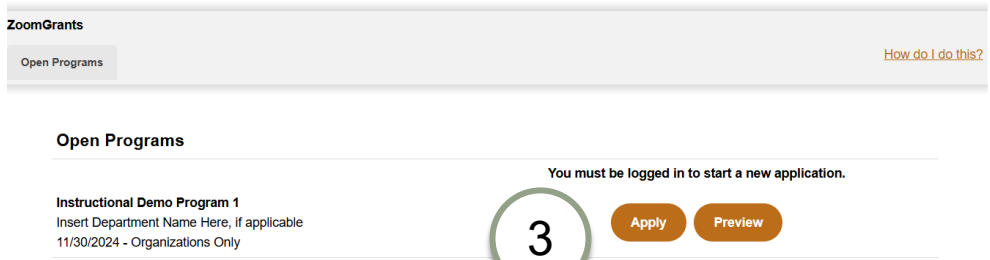
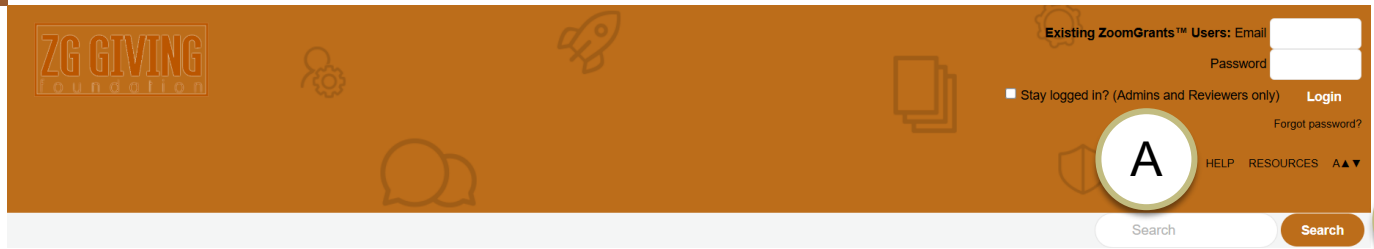


A. New ZoomGrants Users Password must be 8-16 characters and contain at least 1 letter and 1 number.

B. Existing ZoomGrants Users Log in as an existing user then click 'Apply'

GETTING STARTED: Create Your Account

3. Click Apply
Click the Apply button next to the Program title in the Open Programs section to create your Application.



A. HELP

ZoomGrants offers resources such as ZoomGrants University (ZGU) and ZG Tech Support.

B. SEARCH

'Search' for applications by application title, or Application ID (at the bottom of every application).

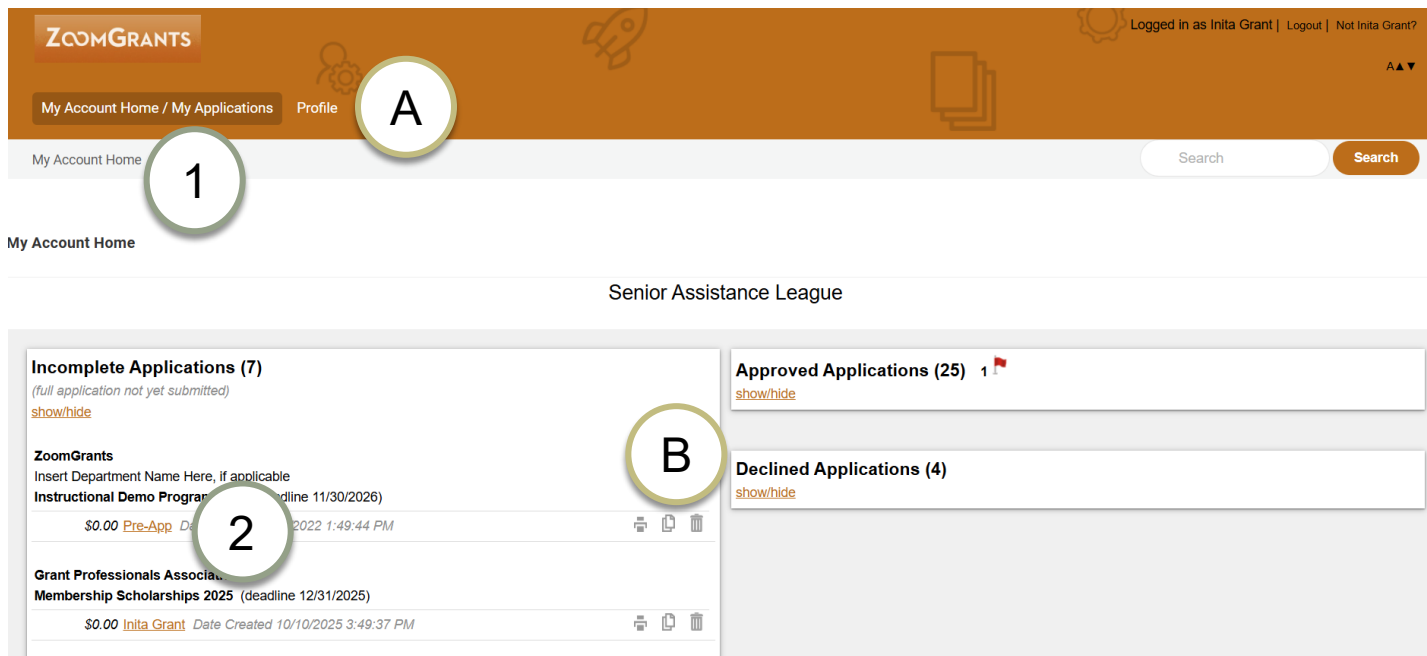
**Once you have created the application using the link to apply, it is no longer needed.*

LOGIN between sessions at

<https://www.zoomgrants.com/login/>

1. My Account Home

Your main homepage when you log in. Click to view Applications in stage of progress: Incomplete, Submitted, Archived, Approved and Declined Applications.



2. Click Application Title From the Incomplete Applications folder, click the application title to access and edit content.

A. Profile

Name, Email and password info. Your applicant profile information can be updated and edited here as needed.

B. Print, Duplicate, or Archive

Print/PDF, Duplicate an application, or Archive using the icons to the right of your application title.

A. Program Information Tabs*

These tabs contain program and contact information. They may be set to automatically open or click 'Show/Hide' to expand or retract.

B. Refresh Page

Click here often to make sure work has auto-saved. This is especially important after a period of inactivity, as you progress, or just before submittal.

C. 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.

The screenshot shows the ZoomGrants application interface. At the top, there is a navigation bar with the ZoomGrants logo and user information. Below this is a breadcrumb trail: "My Account Home / My Applications / Account Profile". A search bar is located on the right side. The main content area displays the application details for "Senior Assistance League Pre-App". A row of tabs is visible, including "VIEW OPEN PROGRAMS", "SHOW DESCRIPTION", "SHOW REQUIREMENTS", "SHOW RESTRICTIONS", "SHOW LIBRARY", "SHOW CONTACT ADMIN", "SHOW ZOOMGRANTS HELP", and "SHOW ANNOUNCEMENTS 2". Callout A points to the "SHOW DESCRIPTION" tab. Callout B points to the "Refresh Page" button. Callout C points to the "Print/Preview" button. Callout D points to the "Delete / Archive this Application" button. The application status is shown as "Not Submitted".

D. Delete/Archive Applications

Submitted applications may not be archived nor deleted. To delete any application, you must first archive it. Once the application has been 'Archived', it is moved from your Incomplete Applications folder to your Archived Applications folder on your homepage. From there, you can permanently delete it or 'restore' if you archive any application by mistake. Restoring an application moves it back to your Incomplete Applications folder.

***Applications cannot be submitted from the archived applications folder - only from the Incomplete applications folder!**

Applicants, Collaborators, and Additional Contacts

Users who can be associated with an application:

- **One Application Owner (or email address)** – **An application owner is the only user who can create, archive, delete, or submit the application and control other users’ access to it.**
- **Unlimited Collaborators** – those who can be assigned to edit applications (and post-award modules if approved). **Collaborators cannot create nor submit applications.**
- **Unlimited Additional Contacts**, whose email address can be added to an application to receive email communication that is sent via ZoomGrants to the **Application Owner**. They do not have access to ZoomGrants.

Collaborators

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

Email Address	First Name	Last Name	Title	Editing Access	Status
<input type="text" value="Email Address"/>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Title"/>	<input type="checkbox"/> Application <input checked="" type="checkbox"/>	<input type="button" value="Invite"/>
<input type="checkbox"/> Add to Additional Contacts (below)					
collaborator@zoomgrants.com	Chadwick	Von Collaborator	Collaborator	<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.

1. Summary* tab

Enter your contact information and the contact information for your organization (if first time – ZoomGrants will auto-fill this information going forward). May include general Application information – title, amount requested, etc. – in this first tab of the Application.

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

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

You must fill out every required field to be able to submit the full Application.

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

1. Pre-Application* tab

Some Funders may use a Pre-Application to vet Applicants. If there is a Pre-Application you see a red message as it appears in the screenshot to the right, meaning 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 have 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 instead of the Submit button.

3. Refresh

Refresh the page using the Refresh Page button near the top of the page to confirm the timestamp.

The screenshot shows the ZoomGrants application interface. At the top right, there is a 'Refresh Page' button with a circled '3' next to it. The main header area includes 'ZoomGrants', a placeholder for a department name, and the 'Instructional Demo Program 2025' title. A 'Deadline 11/30/2026' is also visible. Below the header is a navigation bar with buttons for 'VIEW OPEN PROGRAMS', 'SHOW DESCRIPTION', 'SHOW REQUIREMENTS', 'SHOW RESTRICTIONS', 'SHOW LIBRARY', 'SHOW CONTACT ADMIN', 'SHOW ZOOMGRANTS HELP', and 'SHOW ANNOUNCEMENTS 2'. The main content area shows the 'Senior Assistance League' application with a 'Pre-App' status and '\$ 0.00 requested'. A circled '1' highlights the 'Pre-App' label. To the right, the 'Application Status: Not Submitted' is shown, along with a 'Print/Preview' button and a 'Delete / Archive this Application' link. Below this is a tabbed interface with 'Pre-Application' selected, and other tabs for 'Summary', 'Application Questions', 'Budget', 'Tables', 'Documents', and 'Activity Log'. A red message 'Undecided / Not Submitted' is displayed, with a circled '2' next to it. Below the message is a 'Submit Pre-Application' button. At the bottom left, there is an 'Instructions Show/Hide' button.

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

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.

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. Questions will appear or disappear, based on your answer.

The Print/Preview view shows *all* Application content, though you may not be responsible for every field.

So long as you have filled out everything that appears in the live version of your Application in your ZoomGrants™ account (not the Print/Preview), you will be able to submit.

The system automatically checks to make sure you completed every required component. If you accidentally miss a question, it will tell you when you try to submit.

The screenshot shows the ZoomGrants application interface. At the top right is a 'Refresh Page' button. The main header area includes 'ZoomGrants', a text input field for 'Insert Department Name Here, if applicable', and a 'Deadline 11/30/2026'. Below this is the title 'Instructional Demo Pr 1 2025', where the number '1' is circled in red. A navigation bar contains buttons for 'VIEW OPEN PROGRAMS', 'SHOW DESCRIPTION', 'SHOW REQUIREMENTS', 'SHOW RESTRICTIONS', 'SHOW LIBRARY', 'SHOW CONTACT ADMIN', 'SHOW ZOOMGRANTS HELP', and 'SHOW ANNOUNCEMENTS 2'. The main content area shows 'Senior Assistance League' with an 'Application Status: Not Submitted' and a 'Print/Preview' button. Below this is a 'Pre-App' section with '\$ 0.00 requested' and a 'Delete / Archive this Application' link. A tabbed interface at the bottom shows 'Summary', 'Pre-Application', 'Application Questions' (selected), 'Budget', 'Tables', 'Documents', and 'Activity Log'. Below the tabs is the 'Application Questions' section with a note '(answers are saved automatically when you move to another field)' and an 'Instructions Show/Hide' link.

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

1. Tables* tab

This tab captures information formatted in a table.

A. Resizable fields

Resize 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.

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

ZoomGrants

Insert Department Name Here, if applicable

Instructional Demo Program 2025

B

Refresh Page

Deadline 11/30/2026

VIEW OPEN PROGRAMS | SHOW DESCRIPTION | SHOW REQUIREMENTS | SHOW RESTRICTIONS | SHOW LIBRARY

SHOW CONTACT ADMIN | SHOW ZOOMGRANTS HELP | SHOW ANNOUNCEMENTS 2

Senior Assistance League Application Status: Not Submitted

Pre-App Delete / Archive this Application [Print/Preview](#)

\$ 0.00 requested

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

1

Tables

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

Instructions [Show/Hide](#)

Instructions go here on how to complete the Table.

A 'lite' version of a spreadsheet that can be used to capture workplans, complicated budgets, checklists, and more.

Table 1

Instructions to complete the table goes here.

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Personnel					<input type="checkbox"/>
Acquisition					<input type="checkbox"/>
Construction					<input type="checkbox"/>
SUBTOTAL			0		

A

1. Documents* tab

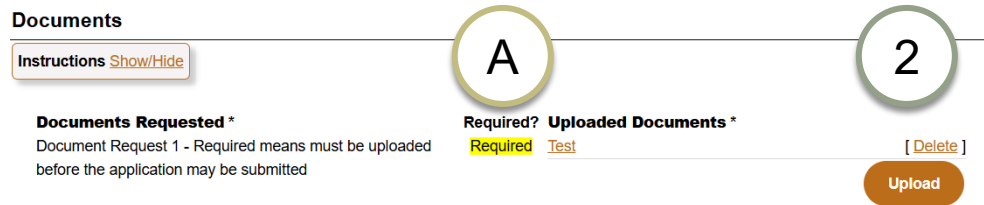
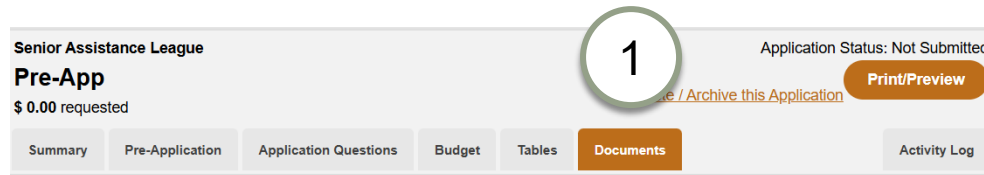
Upload the requested Documents in this tab. Download templates, complete, and upload.

2. Upload Docs/links

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. Delete/replace if needed prior to submittal

A. Required Documents

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



Documents Requested *

Document Request 1 - Required means must be uploaded before the application may be submitted

[Download template: 11](#)

Document Request 2 - Trigger email means admin will receive an email every time a document is uploaded here by an applicant.

Document Request 3 - Admin can hide certain Documents from reviewers if sensitive information is within, or if not applicable to their review.

Document Request 4 - Admin can allow external uploads as a convenience to make sure information is uploaded from a third party directly to this place.

This document can be uploaded by an external user via this link:

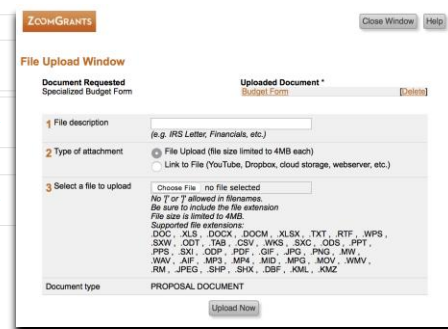
<https://www.zoomgrants.com/fileupext.asp?docid=1628&app=3789EDEF5A37405E7B403E4E5525>

Required? Uploaded Documents *

Required [Test](#)

[\[Delete \]](#)

[Upload](#)



1. Submit Now

Once you click 'Submit Now', if there are any fields that are incomplete, the system will display those fields in red. Complete those fields, then click the Refresh Page button (A) and click the Submit Now button again.

2. Enter Initials

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

3. Submitted

To verify that the Application was submitted successfully, you will receive a confirmation email. Refresh Page button (A) to see the Submitted timestamp. You can also verify that your Application was submitted by clicking the My Account Home button. If it is in the Submitted Applications folder, it was submitted successfully.

ZoomGrants
 Insert Department Name Here, if applicable
 Instructional Demo Program 2025
 Deadline 11/30/2026

VIEW OPEN PROGRAMS | SHOW DESCRIPTION | SHOW REQUIREMENTS | SHOW RESTRICTIONS
 SHOW LIBRARY | SHOW CONTACT ADMIN | SHOW ZOOMGRANTS HELP | SHOW ANNOUNCEMENTS 2

Senior Assistance League
Pre-App
 \$ 0.00 requested

Application Status: Not Submitted
 Submit Now | Print/Preview
 Delete / Archive this Application

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™.

Some fields are missing answers:
 Application Questions Question 5

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.

This is a place to include ADDITIONAL certification language which each applicant must read and Initial before submitting the application.

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™.

Initials

Submit Now

Application Status: Submitted
 Submitted: 12/5/2025 3:57:25 PM (Pacific)
 Print/Preview
 Activity Log

Not seeing a Submit Now button?

Only the application owner can submit the application. If you are a *collaborator*, you will not be able to submit nor see a submit button.

1. Archiving (NOT THE SAME AS SAVING!)

In the Incomplete Applications folder, click the trashcan icon next to an Application to send that Application to the Archived section.

To keep Applications from being accidentally deleted, the removal process requires several steps. Submitted applications may not be archived nor deleted by applicants. Archived applications must be moved back to the Incomplete folder before they can be revived and submitted.

2. ARCHIVED TAB

Click into the Archived section to delete the Application. You will be prompted again to ask if you are sure you want to permanently delete.

Incomplete Applications (6)
(full application not yet submitted)
[show/hide](#)

Grant Professionals Association
Membership Scholarships 2025 (deadline 12/31/2025)

↓

\$0.00 [Inita Grant](#) Date Created 10/10/2025 3:49:37 PM

Archived Applications (86)
(application abandoned)
[show/hide](#)

ZoomGrants
Insert Department Name Here, if applicable
Instructional Demo Program 2025 (deadline 11/30/2026)

\$0.00 [Pre-App \(copy\)](#) Date Created 5/20/2022 1:49:44 PM [Delete](#) | [Restore](#)

\$0.00 [Pre-App \(copy\)](#) Date Created 5/20/2022 1:49:44 PM [Delete](#) | [Restore](#)

Tips from the ZoomGrants™ Team:

Save yourself the stress! Start early, finish early, and submit early.

Start your Application as soon as the Program opens so you can get familiar with the requirements, update credentials and gather your materials. Save a copy of the application in Print/Preview to look over offline and share with others. Give each section the attention it deserves and **submit early to make sure that you have time to correct any deficiencies noted in the auto-check process.**

Reach out any time you need help.

Use the Help link in the Application in your ZoomGrants™ account to contact the Program Administrator if you have questions about Program requirements or content. You can also look over ZGU if you have technical questions or contact the ZoomGrants™ Tech Support Team for additional assistance.

PLEASE PROVIDE YOUR EMAIL AND APPLICATION ID, LOCATED AT THE BOTTOM OF YOUR APPLICATION.

TECHNICAL QUESTIONS?

ZoomGrants users can access the knowledgebase online guide for self-training and troubleshooting at any time by clicking the **HELP** link at the top of any application. Click the **ZoomGrants University button** to go to ZGU.

Visit ZGU: <https://help.zoomgrants.com>

Contact Tech Support: questions@zoomgrants.com

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