

# Applicants – Submitting Invoices & Reports

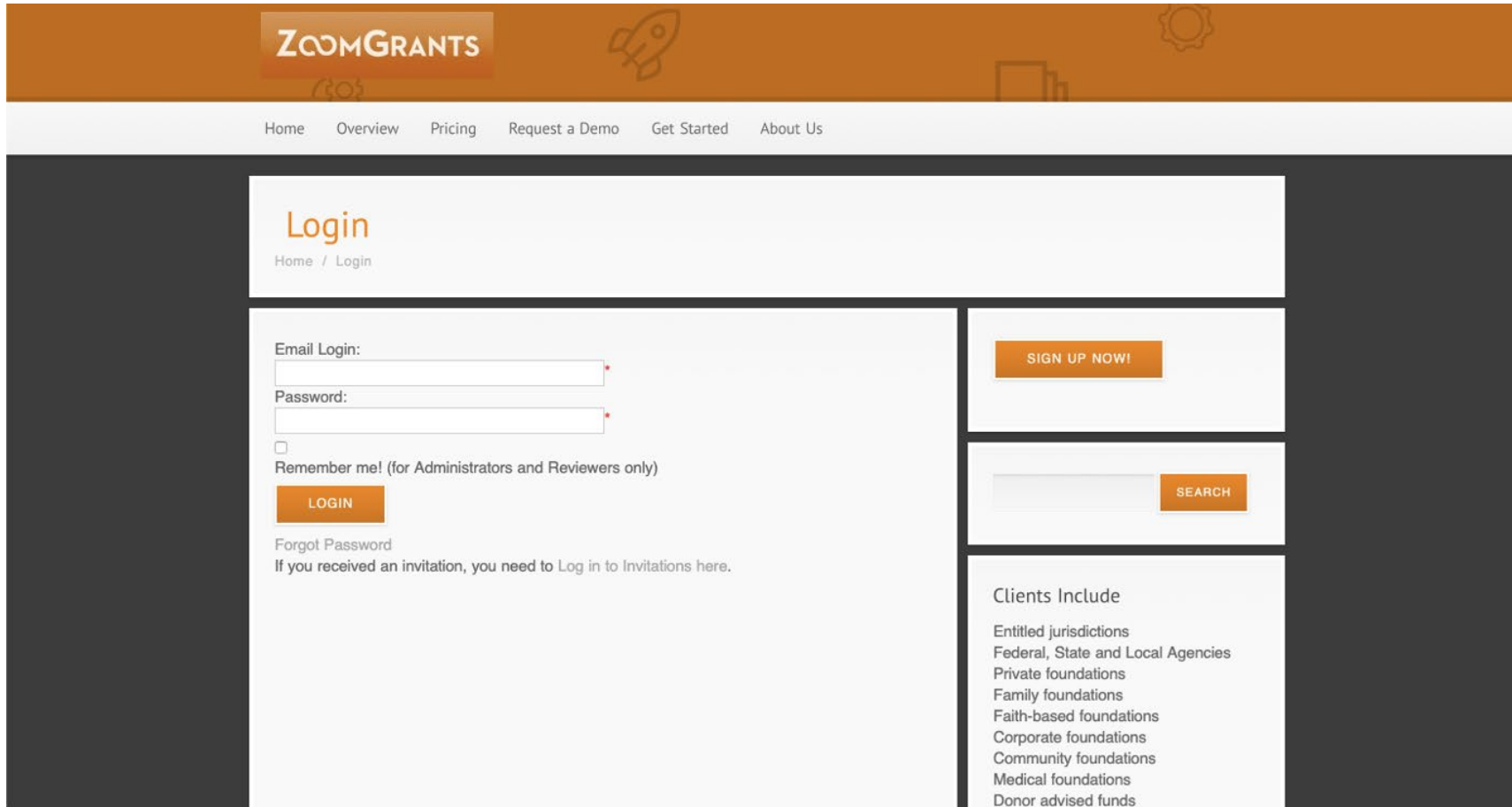
*Instructions on Submitting Invoices  
and Reports for Applicants*

TUTORIALS BY

ZOOMGRANTS

# Accessing Your ZoomGrants Account

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



**ZOOMGRANTS**

Home Overview Pricing Request a Demo Get Started About Us

## Login

Home / Login

Email Login:

Password:

Remember me! (for Administrators and Reviewers only)

**LOGIN**

[Forgot Password](#)  
If you received an invitation, you need to Log in to Invitations here.

**SIGN UP NOW!**

**SEARCH**

**Clients Include**

- Entitled jurisdictions
- Federal, State and Local Agencies
- Private foundations
- Family foundations
- Faith-based foundations
- Corporate foundations
- Community foundations
- Medical foundations
- Donor advised funds

*Passwords can be recovered via the ZoomGrants login page 'Forgot Password' link if misplaced or forgotten.*

# Find Your Application

Navigation: Summary Tab (first tab of your application) > **Collaborators**

1. Look in the **Approved Applications** section to access your application.

2. Once you've found the application, click the application title link to open the application.

The screenshot shows a user account dashboard with a navigation bar at the top containing 'My Account Home / My Applications' and 'Profile'. Below the navigation bar, there are search boxes. The main content area is titled 'My Account Home' and 'ZoomGrants University'. It features several sections for application status:

- Incomplete Applications (2)**: (full application not yet submitted) [show/hide](#). This section contains two entries:
  - ZoomGrants University**: **ZoomGrants University** (deadline 12/31/2021) with a status of **\$0.00 Declined Pre-App**.
  - ZoomGrants University**: **Open Funding Program** (deadline 1/1/2021) with a status of **\$2,000.00 Our Application**.
- Approved Applications (5)**: [show/hide](#). This section is highlighted with a red box in the image.
- Declined Applications (3)**: [show/hide](#).
- Submitted Applications (4)**: (full application submitted, decision pending) [show/hide](#).
- Archived Applications (5)**: (application abandoned) [show/hide](#).

# Want to add Collaborators to your Application?

Navigation: Summary Tab (first tab of your application) > **Collaborators**

3. If you have other users that you'd like to invite to work on the **reports** in your application, *add them as collaborators* or *update the access* of existing collaborators to ensure that they can access these features.

A. Inviting a *new* collaborator to work on your application – Fill out the email, first/last name, and job title boxes. Then, put a check in the Editing Access box. Click the Invite button.

A. Updating *existing* collaborator access – You can give current collaborators additional editing access by putting checks in the other boxes that appear in the Editing Access section.

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"/>	
<input type="checkbox"/> Add to Additional Contacts (below)					<input type="button" value="Invite"/>
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.

# Submitting Invoices

# Access the Financial Tab

Navigation: Financial Tab > **Invoice** OR My Account Home > **Approved Applications**

1. Navigate to the Financial Tab OR click the 'Add Invoice' button on the My Account Home page.

Keep in mind, the label on this tab may differ depending on what the admin has chosen to call the tab. If you're not sure, contact the admin to ask what they named this feature.

## Invoice

Invoice Number	Date Submitted	Status	Requested	Funding Amount Approved	Paid Payment
<a href="#">your invoice #</a>	[ <a href="#">delete</a> ]	Not Submitted			
<a href="#">your invoice #</a>	1/16/2019	Pending			
<a href="#">2131</a>	5/14/2019	Pending	USD\$ 100.00		
<a href="#">3132</a>	[ <a href="#">delete</a> ]	Not Submitted			
<a href="#">your invoice #</a>	[ <a href="#">delete</a> ]	Not Submitted			
<b>Total</b>			<b>USD\$ 100.00</b>	<b>USD\$ 0.00</b>	<b>USD\$ 0.00</b>

Create a New Invoice

## Approved Applications (1)

[show/hide](#)

**ZoomGrants University**

**After School Program** (deadline 8/19/2017)



USD\$200,000.00

[YMCA After School Project](#)

Add Invoice

Add Report



# Complete the Invoice

2. Click the button to create a new invoice OR click the invoice title link to open an existing invoice

3. Fill in the fields and upload requested documents, as applicable

ZOOMGRANTS

[How do I do this?](#)   [Email This Invoice](#)   [Save as PDF](#)   [Print](#)   [Close Window](#)   AA ▼

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**Neighborhood Connections**  
**YMCA After School Project**

ZoomGrants University  
**After School Program**

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**Neighborhood Connections**  
5000 Kansas Drive  
Fort Collins , CO 80525

Tel: 970-970-9700  
Fax:  
EIN: [11-1111111](#)

**Project Contact**  
Petunia Petals  
[testapplicant1@zg.com](mailto:testapplicant1@zg.com)  
Tel: 970-970-9700

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**Invoice**

Date Submitted [Submit Invoice](#)

[\[delete this Invoice\]](#)

Invoice Number (your invoice number)

Requested Amount  USD\$

Invoice Contact Name

Invoice Contact Phone

Invoice Contact Email

Payment Instructions

**Invoice Status**

**Invoice Status**

**Approved Amount To Pay**

**Approval Date** (mm/dd/yyyy)

**Approved by**

**Invoice Decision Comments**

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**Payment**  
*(for this Invoice only)*

-none-

**Total USD\$0.00**

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**Current Funding Snapshot**  
*(for this full Application only)*

**Invoice**

Initial Award Amount	USD\$200,000.00
Pending	(-) USD\$100.00
Approved	
Paid	
<hr/>	
<b>Still Available</b>	<b>USD\$199,900.00</b>
This Request	(-) USD\$
<b>New Total</b>	<b>USD\$ 199,900.00</b>

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**Payment**

Initial Award Amount	USD\$200,000.00
Pending	(-)
Approved	(-)
Paid	(-)
<hr/>	
<b>Still Available</b>	<b>USD\$200,000.00</b>

**Documents Requested \***                      **Required?**                      **Uploaded Documents \***

\* ZoomGrants™ is not responsible for the content of uploaded documents.  
\*\*Documents can not be deleted once the Invoice has been submitted.

# Submit the Invoice

4. Click the **Submit Invoice** button near the top of the invoice.

Successful submissions will replace the 'Submit' button with the **timestamp** (in Pacific time) of when it was submitted.

**Invoice**

<b>Date Submitted</b>		<a href="#">Submit Invoice</a>
		<a href="#">[delete this Invoice]</a>
<b>Invoice Number</b> (your invoice number)		
<b>Requested Amount</b>	USD\$	
<b>Invoice Contact Name</b>		
<b>Invoice Contact Phone</b>		
<b>Invoice Contact Email</b>		
<b>Payment Instructions</b>		

**Invoice**

<b>Date Submitted</b>		5/14/2019
<b>Invoice Number</b> (your invoice number)		2131
<b>Requested Amount</b>	USD\$	100
<b>Invoice Contact Name</b>		Dg
<b>Invoice Contact Phone</b>		Dg
<b>Invoice Contact Email</b>		Dg
<b>Payment Instructions</b>		



# Submitting Reports

# Access the Report Tab

Navigation: Report Tab > **Report** OR My Account Home > **Approved Applications**

1. Navigate to the Report Tab OR click the 'Add Report' button on the My Account Home page.

Keep in mind, the label on this tab may differ depending on what the admin has chosen to call the tab. If you're not sure, contact the admin to ask what they named this feature.

The screenshot shows the 'My Application' page with a navigation menu. The 'Report' tab is selected. Below the navigation, there are buttons for 'Ask a Report Question', 'Instructions Show/Hide', and a progress bar for 'Report 3: 10/30/2020'. A 'Submit Report 3' button is visible in the top right. The main content area shows 'Approved Applications (1)' with a 'show/hide' link. The application details include 'ZoomGrants University After School Program (deadline 8/19/2017)' and a table entry for 'USD\$200,000.00 YMCA After School Project' with 'Add Invoice' and 'Add Report' buttons.

**My Application** Submitted: 9/29/2014 11:20:13 AM (Pacific)  
\$ 100.00 requested

Summary Pre-Application Application Questions Budget Tables Documents Extra

Funding Contract Financial **Report** Report Totals

Ask a Report Question Print Budget  
(answers are saved automatically when you move to another field)

Instructions Show/Hide

Report 1: ✓ Report 2: ✓ Report 3: 10/30/2020 Submit Report 3

Report 3: 10/30/2020

**Approved Applications (1)** 1 show/hide

**ZoomGrants University**  
**After School Program** (deadline 8/19/2017)

	USD\$200,000.00	<a href="#">YMCA After School Project</a>	<b>Add Invoice</b>	
			<b>Add Report</b>	

# Complete the Report

2. Click into the individual report tabs.

3. Fill out the questions and upload the requested documents (at the bottom), as applicable.

[Ask a Report Question](#) (answers are saved automatically when you move to another field)

Instructions [Show/Hide](#)

Report 1: ✓ Report 2: ✓ Report 3: 10/30/2020

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Report 3: 10/30/2020 Submit Report 3

### Project Evaluation

1. Is this your final report?

No  
 Yes

2. How would you classify your program so far?

Pretty awesome  
 Wildly popular  
 Better than expected  
 Not so good  
 Eh  
 Other:

3. What would you do differently (if anything)?

Maximum characters: 1000. You have  characters left.

4. Which of your team members has been most helpful during the administration of this program?  
*The person you list as most helpful will receive a massive gold star (and maybe a cookie).*

Maximum characters: 255. You have  characters left.

# Submit the Report

4. Click the **Submit** button near the top of the report.

The system will check to make sure that you have answered all the displayed questions and uploaded the required documents. Anything missing will be listed in red.

5. Complete the missing fields, then refresh the page using the **Refresh Page** button near the upper right corner of the application and try the submit again.

[Ask a Report Question](#) *(answers are saved automatically when you move to another field)*

Instructions [Show/Hide](#)

Report 1: ✓ Report 2: ✓ Report 3: 10/30/2020

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Report 3: 10/30/2020 **Submit Report 3**

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Report 3: 10/30/2020 **Submit Report 3**

Some fields are missing answers:

- Report Question 1
- Report Question 2
- Report Question 3
- Report Question 4
- Report Question 5
- Report Question 6
- Report Question 7
- Report Question 8
- 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.

Search **Search**

**Refresh Page**