

ZoomGrants: A How-To Guide for Applicants

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

Need a printer-friendly version?

<https://zoomgrants.com/welcome/applicantslideshowpf.pdf>

Please consider sharing the link to this file instead of printing it.

*Using the link will ensure you have the latest version of this guide
(and it'll save paper!).*

Want to learn more? Go to <http://help.zoomgrants.com/>.

4 Quick Things to Know

ZOOMGRANTS UNIVERSITY (ZGU)

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.

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. Whenever 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.

(Note: If you see the 'Saving' screen for more than a few seconds your Internet connection may have blinked during the saving process and the change may not have been saved. Read more on how to troubleshoot that issue on ZGU: <http://help.zoomgrants.com/>.)

THE TAB SYSTEM

ZoomGrants uses a tab system to set apart the different sections and features of the system. You can click on each tab of the application 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. Every application question must be completed, and any Document Requests that are marked as 'Required' must be uploaded before the system will allow you to submit the application.

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

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.

The Generous Foundation
 Powered by ZoomGrants™

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

HELP RESOURCES ▲▼

1

The Generous Foundation
 Open Programs [How do I do this?](#)

Open Programs

2014 CDBG/HOME/ESG Community Development 12/31/2015 - Organizations Only	<input type="button" value="Apply"/> <input type="button" value="Preview"/>
2015 Spring Grant Program 12/30/2016 - Organizations Only	<input type="button" value="Apply"/> <input type="button" value="Preview"/>
2014-15 HOME Application (COSB) Community Services Department 1/2/2017 - Individuals and Organizations	<input type="button" value="Apply"/> <input type="button" value="Preview"/>
2016 Scholarship 6/15/2019 - Individuals Only	<input type="button" value="Apply"/> <input type="button" value="Preview"/>
2015 CDBG - Community Development - Public Services DEMO APPLICATION Community Development Department 12/31/2020 - Organizations Only	<input type="button" value="Apply"/> <input type="button" value="Preview"/>
Grants for People Seeking Grants Grants Department 12/31/2020 - Organizations Only	<input type="button" value="Apply"/> <input type="button" value="Preview"/>

2

New ZoomGrants™ Account

Email
 Password
 First Name
 Last Name
 Account Type
 Organization
 Individual

- 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 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.

The screenshot shows a web application interface for 'The Generous Foundation Grants Department'. At the top, a green banner reads 'Thank you. Your application has been created. You may get started now.' Below this is a navigation bar with 'My Account Home' and 'Refresh Page'. The main header displays 'Grants for People' and 'Grants' with a 'Deadline 12/31/2020'. A navigation menu includes 'Open Programs', 'Description', 'Requirements', 'Restrictions', 'Library', 'Contact Admin', and 'Announcements'. A callout 'A' points to the 'Open Programs' tab. Below the menu, the user is identified as 'My Little Nonprofit Agency' with a 'Status: Not Submitted'. A callout 'B' points to the 'Print/Preview' button. The application details show '\$ 0.00 requested' and a 'Find a Grant Writer' link. A callout '1' points to the 'Find a Grant Writer' link. Below this is a 'Summary' section with a note '(answers are saved automatically when you move to another field)'. The form includes fields for 'Application Title', 'Amount Requested' (set to \$ 0), and 'Additional Contacts for this Application'. The 'Applicant Information' section contains fields for 'First Name' (Ineeda), 'Last Name' (Grant), 'Telephone' (1111111111), and 'Email' (recip@zoomgrants.com). The 'Organization Information' section shows 'Organization Legal Name' as 'My Little Nonprofit Agency'.

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

APPLICATION TABS: Summary*

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 required 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

Requested

[Find a Grant Writer](#) | [Archive this Application](#) | [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	<input type="text"/>
Amount Requested	\$ <input type="text" value="0"/>
Additional Contacts for this Application <small>(ONLY Email addresses separated by comma. No names. No titles. No phone numbers.)</small>	
<input style="width: 100%;" type="text"/>	

Applicant Information

First Name	<input type="text" value="Ineeda"/>
Last Name	<input type="text" value="Grant"/>
Telephone	<input type="text" value="1111111111"/>
Email	<input type="text" value="recip@zoomgrants.com"/>

Organization Information

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

Organization Legal Name	<input type="text" value="My Little Nonprofit Agency"/>
-------------------------	---

APPLICATION TABS: Pre-Application*

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

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 Nonprofit | 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 (Application 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.

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

APPLICATION TABS: Questions*

1. Application questions* tab

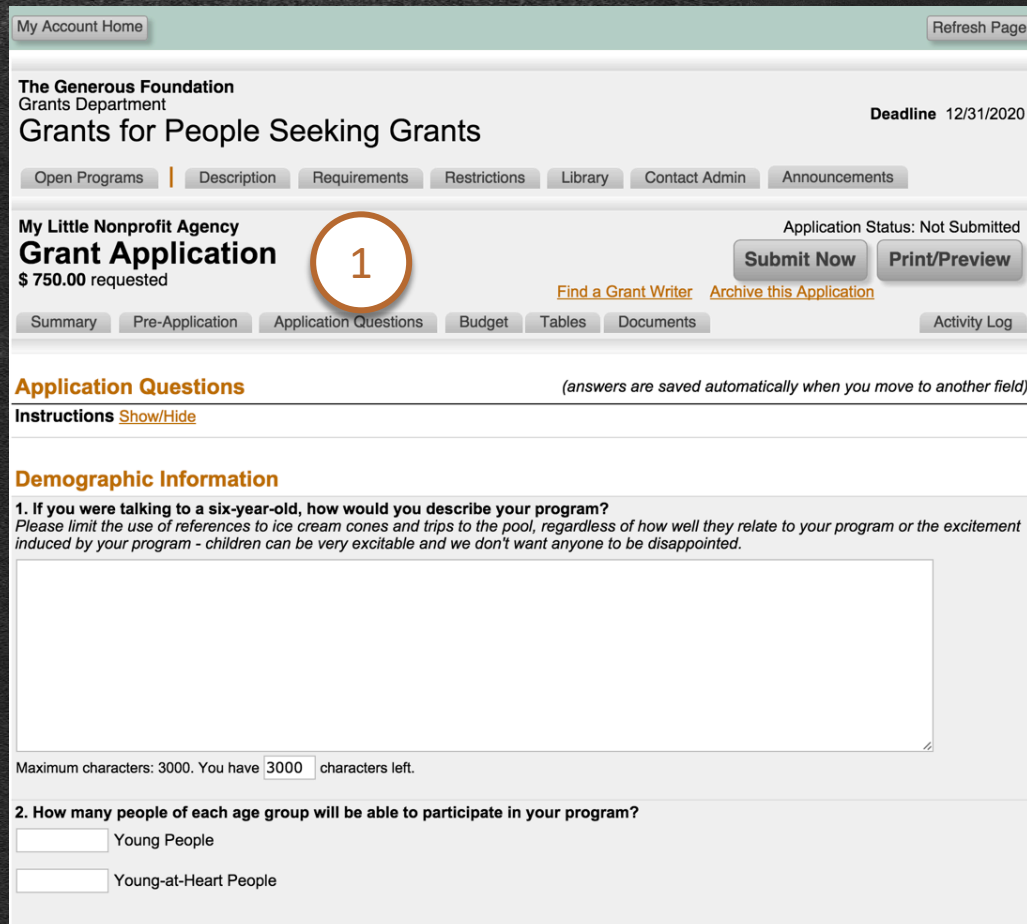
Most funders put the bulk of their Application content here. Be sure to fill every field that appears in this tab in the live, online version of your Application.

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 live version of your Application in your ZoomGrants™ account (not 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.



The screenshot shows a web application interface for 'The Generous Foundation Grants Department'. At the top, there is a navigation bar with 'My Account Home' and 'Refresh Page'. Below this, the main header includes 'The Generous Foundation Grants Department' and 'Grants for People Seeking Grants' with a 'Deadline 12/31/2020'. A secondary navigation bar contains tabs for 'Open Programs', 'Description', 'Requirements', 'Restrictions', 'Library', 'Contact Admin', and 'Announcements'. The main content area is titled 'My Little Nonprofit Agency Grant Application' with a '\$ 750.00 requested' and an 'Application Status: Not Submitted'. A large orange circle with the number '1' is overlaid on the 'Application Questions' tab. Other buttons include 'Submit Now', 'Print/Preview', 'Find a Grant Writer', and 'Archive this Application'. Below the main content, there are tabs for 'Summary', 'Pre-Application', 'Application Questions', 'Budget', 'Tables', 'Documents', and 'Activity Log'. The 'Application Questions' section is active, showing 'Instructions Show/Hide' and 'Demographic Information'. The first question is: '1. If you were talking to a six-year-old, how would you describe your program?' with a note: '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.' Below the question is a large text input area with a character count: 'Maximum characters: 3000. You have 3000 characters left.' The second question is: '2. How many people of each age group will be able to participate in your program?' with two input fields: 'Young People' and 'Young-at-Heart People'.

APPLICATION TABS: Budget*

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



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 Deadline 12/31/2020

Grants for People Seeking Grants

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

My Little Nonprofit Agency Application Status: Not Submitted

Grant Application

\$ 750.00 requested
[Find a Grant Writer](#)
[Archive this Application](#)

Submit Now
Print/Preview

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
<input type="text" value="City funds (committed)"/>	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
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.

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

APPLICATION TABS: Tables*

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

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 Application Status: Not Submitted
\$ 750.00 requested 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			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
Total			0

Previous Next

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[Logout](#)

Application ID: 33987

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

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: [How to Upload Files](#)

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.

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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

My Little Nonprofit Agency Application Status: Not Submitted
Grant Application 1
\$ 750.00 requested Submit Now Print/Preview

Find a Grant [Archive this Application](#)

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

Documents

Instructions [Show/Hide](#)

All document attachments must be included digitally. We will not accept hard copies. (Please remember the environment...)

If you have digital copies of these documents, please upload them here. If not, scan your original documents and upload them. If you are having difficulty digitizing your documents, call our office and we can help you with this.

Documents Requested *	Required?	Uploaded Documents *	
Program Brochure/Promotional Materials		-none-	2 Upload
Letter of Support 1	required	-none-	2 Upload
Letter of Support 2	required	-none-	2 Upload
Letter of Support 3		-none-	2 Upload

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

Previous

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[Logout](#)

Application ID: 33987

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.

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 **Submit Now** **Print/Preview**
\$ 750.00 requested [Find a Grant Writer](#) [Archive this Application](#)

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

By entering your initials here you certify this application truthfully and accurately represents your request and is hereby submitted for review. Submission of this application does not, in any way, guarantee that you will receive funding. Submission of this application also indicates your Initials

Submit Now

Thank you. Your information has been saved. This application has been submitted. You will receive a confirmation email shortly (from Notices@ZoomGrants.com). Additional confirmation is the presence of a submission timestamp instead of the 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 section. If your Application is there, it was submitted successfully. Additionally, you will receive a confirmation email.

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: Submitted
Grant Application **Print/Preview**
\$ 750.00 requested Submitted: 3/2/2015 2:47:47 PM (Pacific)

Summary | Pre-Application | Application Questions | Budget | Tables | Documents 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 it. Learn more here:

<http://help.zoomgrants.com/>

WORKING ON YOUR APPLICATIONS

After you've started your Application using the direct link to apply, you can log in directly on the ZoomGrants™ homepage at <https://ZoomGrants.com/login> whenever you need to work on your Application.

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.

My Account Home 1

My Applications Account Profile

My Little Nonprofit Agency

Incomplete Applications (4)
(full application not yet submitted)
[show/hide](#)

The Generous Foundation
Community Development Department
[2017 CDBG Public Service Grants](#) (deadline 12/31/2019)
\$25,000.00 [Small Application](#)

The Generous Foundation
Community Development Department
[Generous Foundation Funding Program 2019](#) (deadline 12/31/2019)
\$0.00 [Application ID 82973](#)

Approved Applications (7) 1
[show/hide](#)

The Generous Foundation
Community Development Department
[2017 CDBG Public Service Grants](#) (deadline 12/31/2020)
\$100,000.00 [Big Application](#) [Add Invoice](#) [Add Report](#)

The Generous Foundation
Grants Department
[Grants for People Seeking Grants](#) (deadline 11/10/2015)
\$500.00 [Grant Application](#) [Add Invoice](#) [Add Report](#)

Submitted Applications (18) 1
(full application submitted, decision pending)
[show/hide](#)

Archived Applications (20)
(application abandoned)
[show/hide](#)

ACCESSING APPLICATIONS

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

1. Approved section

Click into the Approved section 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).

My Account Home

My Applications | Account Profile

My Little Nonprofit Agency

Incomplete Applications (4)
(full application not yet submitted)
[show/hide](#)

The Generous Foundation
Community Development Department
[2017 CDBG Public Service Grants](#) (deadline 12/31/2020)
\$25,000.00 [Small Application](#) [Print] [Copy] [Trash]

The Generous Foundation
Community Development Department
[Generous Foundation Seeking Funding Program 2019](#) (deadline 12/31/2019)
\$0.00 [Application ID 82973](#) [Print] [Copy] [Trash]

Approved Applications (7) 1 [Flag]
[show/hide](#)

The Generous Foundation
Community Development Department
[2017 CDBG Public Service Grants](#) (deadline 12/31/2020)
\$100,000.00 [Big Application](#) [Add Invoice] [Add Report] [Print] [Copy] [Trash]

The Generous Foundation
Grants Department
[Grants for People Seeking Grants](#) (15)
\$500.00 [Grant Application](#) [Add Invoice] [Add Report] [Print] [Copy] [Trash]

Submitted Applications (18) 1 [Flag]
(full application submitted, decision pending)
[show/hide](#)

Archived Applications (20)
(application abandoned)
[show/hide](#)

Declined Applications (0)

*These features may have a different label, depending on the settings chosen by the Administrator.

HOW TO ARCHIVE & DELETE APPLICATIONS

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

FROM MY ACCOUNT HOME:

1. Archive application

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

Note: Submitted applications may not be archived nor deleted by applicants. Archived applications must be moved to the Incomplete folder before they can be revived and submitted.

2. ARCHIVED TAB

Click into the Archived section 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 section.

The Generous Foundation
Community Development Department
[2017 CDBG Public Service Grants](#) (deadline 12/31/2020)

\$5,001.00	Free Math Tutoring Program	
\$0.00	New Application	
\$25,000.00	Small Application	

Archive This Application

My Account Home

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
2015 CDBG - Community Development - Public Services DEMO APPLICATION Community Development Department 12/31/2020 - Organizations Only Archive Our Best Application	Apply Again Preview

Tips from the ZoomGrants™ Team:

Save yourself the stress! Try to start early, finish early, and submit early.

Start your Application as soon as the Program opens so you can get familiar with the requirements and gather your materials. Save a copy of the application in Print/Preview to look over when you're not online and share with other. Work on the Application throughout the submittal period, giving 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.

TECHNICAL QUESTIONS?

We're always happy to help.

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

Contact tech support: questions@zoomgrants.com

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