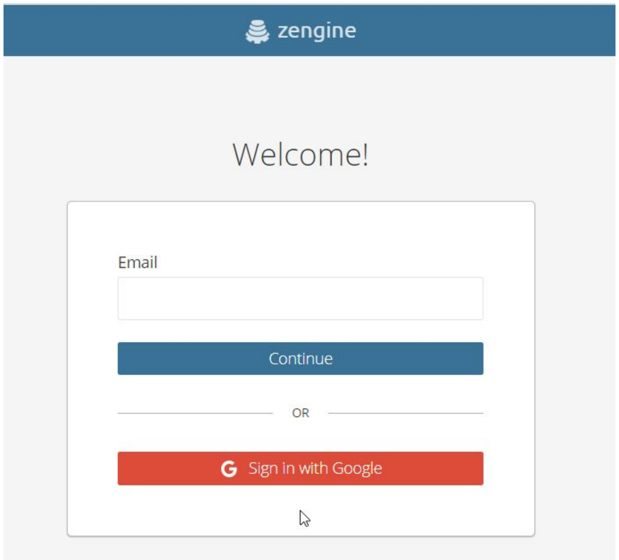
Zengine Overview Guide

This guide is for new and current Administrators looking to explore the Zengine platform for everyday use, as well as common practices within the workspace

Login



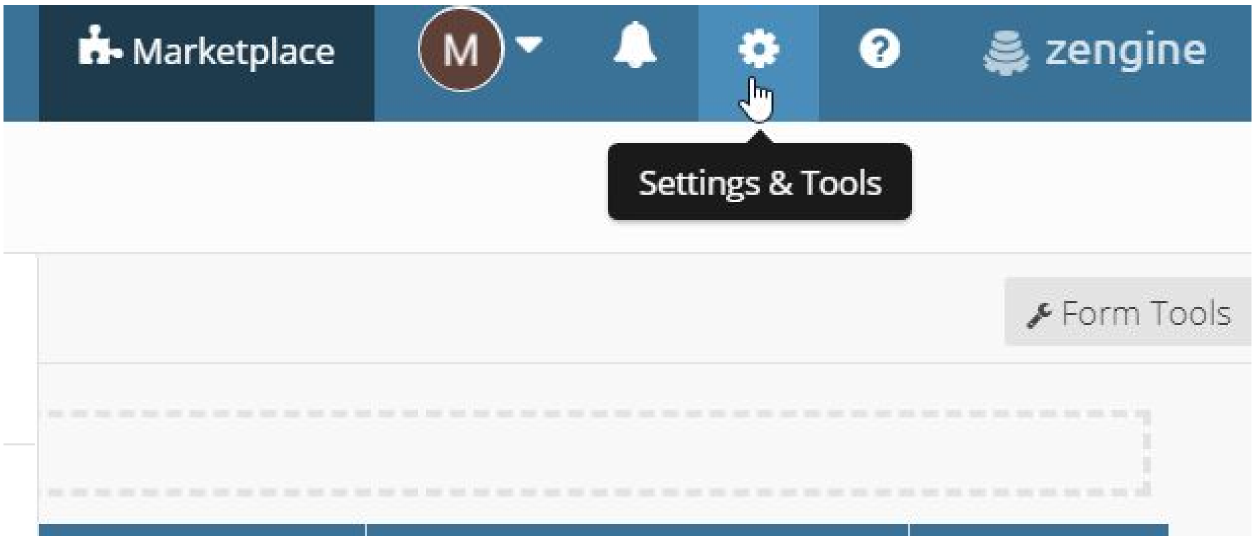
To begin, you will need to login in at https://platform.zenginehq.com/

Enter your email address and select Continue to enter your password -or- Sign in with Google

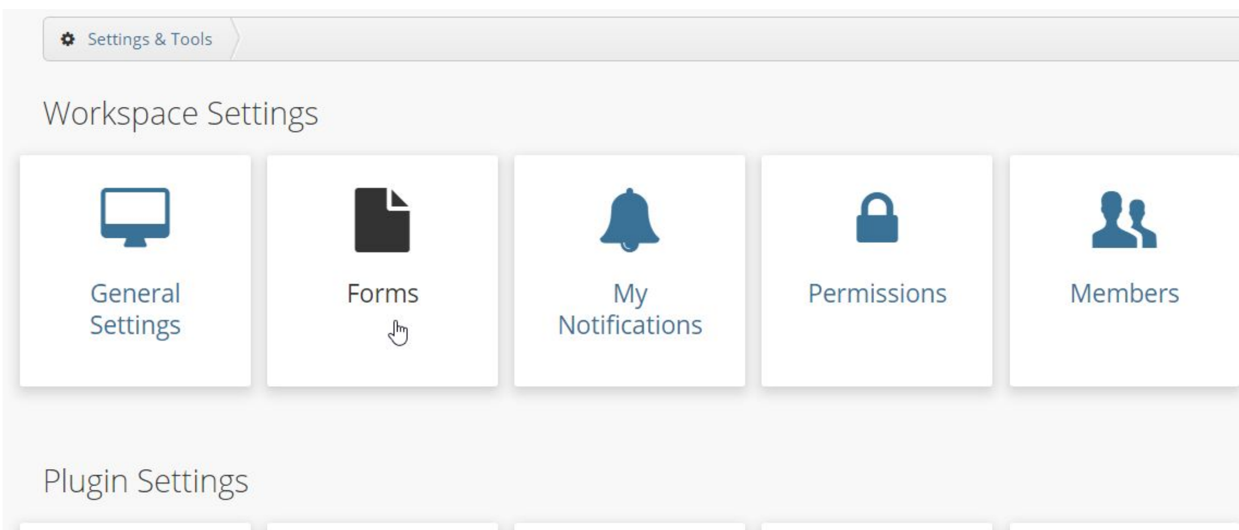
Once logged in, you will be directed to the Zengine Home screen. Select the workspace you want to access. After accessing the workspace, you will be taken to the “Data View”.

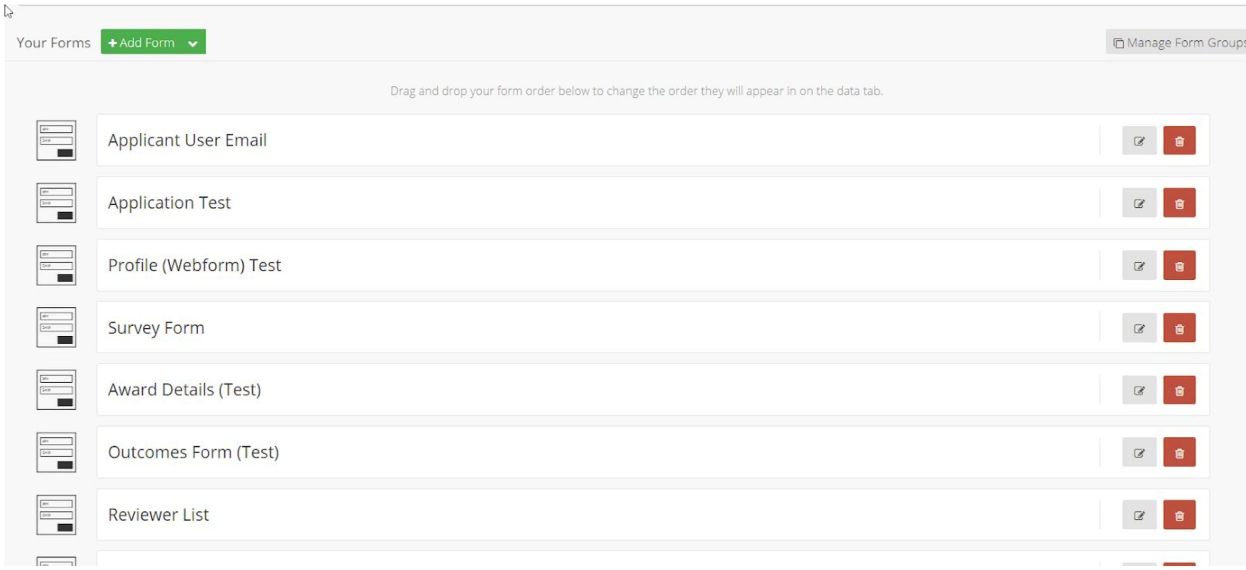
Forms

We discussed that you can view all your forms in the Data View, but there is another way to view your forms. To do this, go to the **Settings & Tools** icon:



Under Workspace Settings, click on **Forms** and this will bring you to all the forms in the workspace:



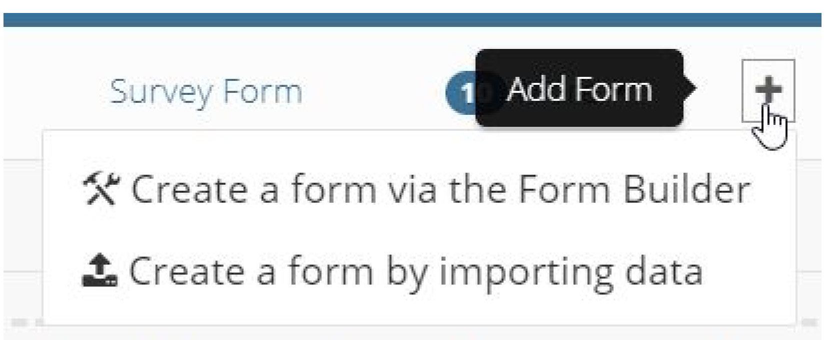


Here, you can also do the following:

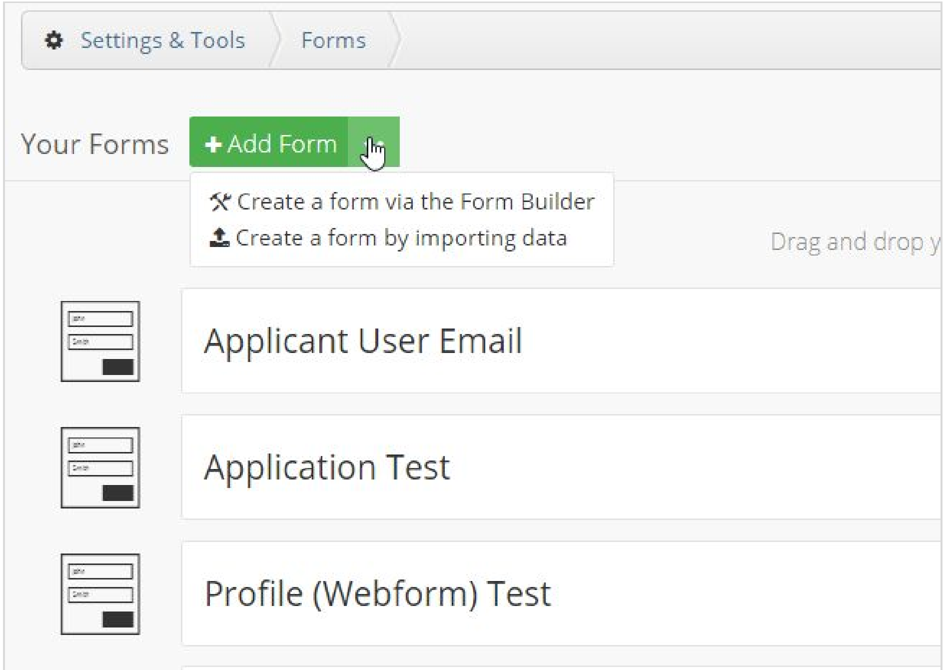
- Manage Form Groups
- Create a new form
- Edit an existing form
- Delete a form

Create a New Form

There are two locations to create a form via the Form Builder. On the Data View by clicking the plus sign:

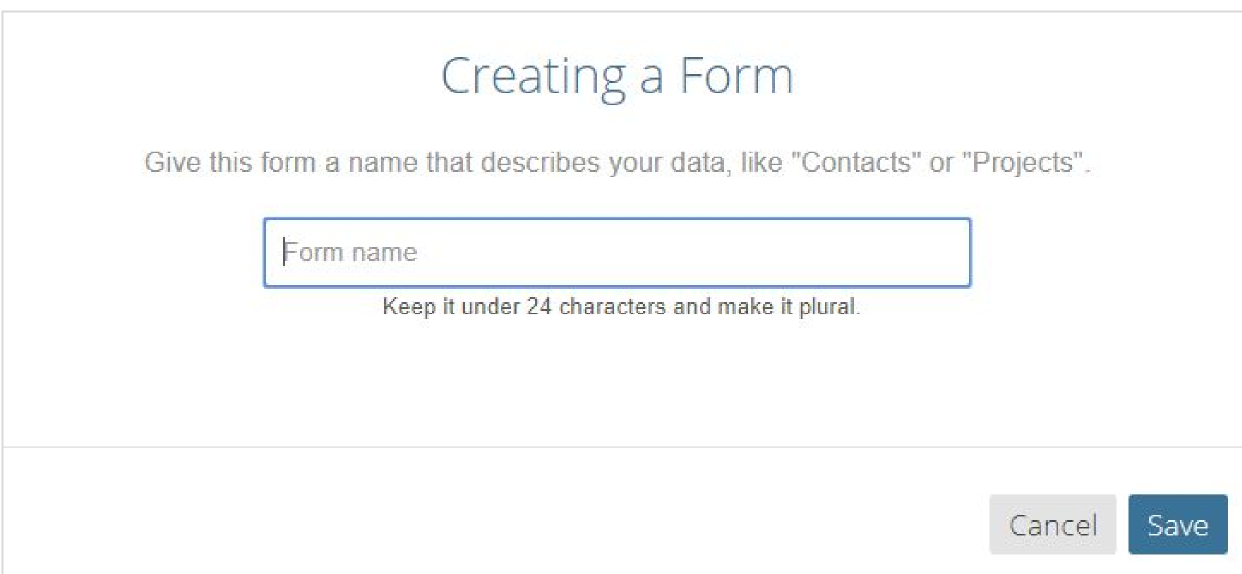


Or you can also add a form by navigating to **Settings & Tools** and then **Forms:**



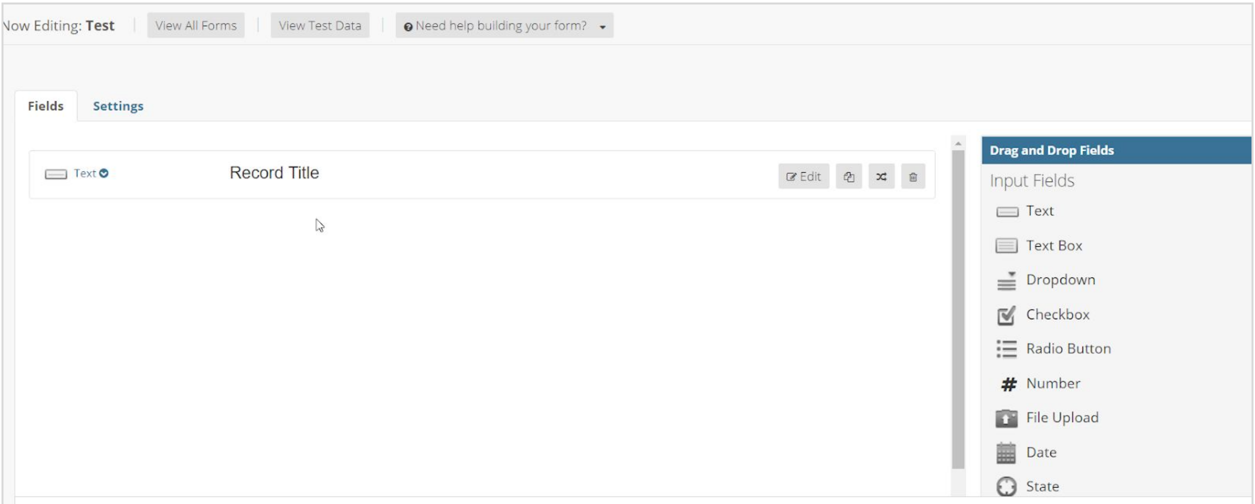
There is an option to create a form by importing data. To learn more about this, click here: [Building a Form via Import - Zengine]

When using the Form Builder to create a new form, you will first be asked to name your form:



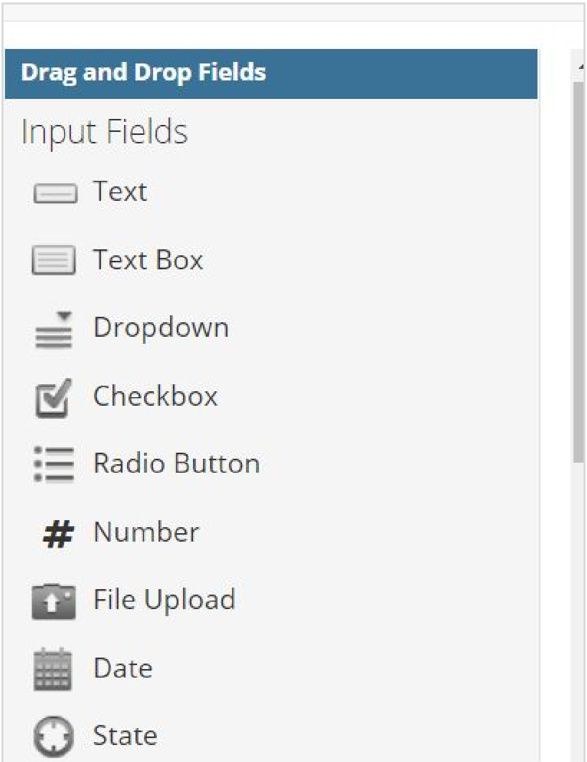
Note: if you need to change the name, you can at a later time!

Once you have named your form, you will be redirected to the **Form Builder**:



The **Drag and Drop Fields** on the right are the fields available to create your form. The defaulted field **Record Title** will be the first field in your newly created form. You can rename it or keep it as is.

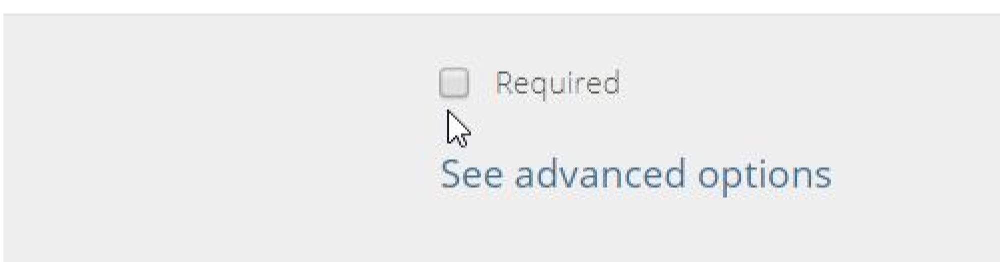
Drag-and-Drop Fields



The drag and drop fields are easy to use and self-explanatory. To add a field, select the field type, drag it into your form and drop it where you want within the form.

In our Knowledge Base article, you can find more detail about each field type: [Form Builder Overview: Field Types]

Fields can be set as required. Click the gray Edit button next to a certain field, and select the required checkbox:

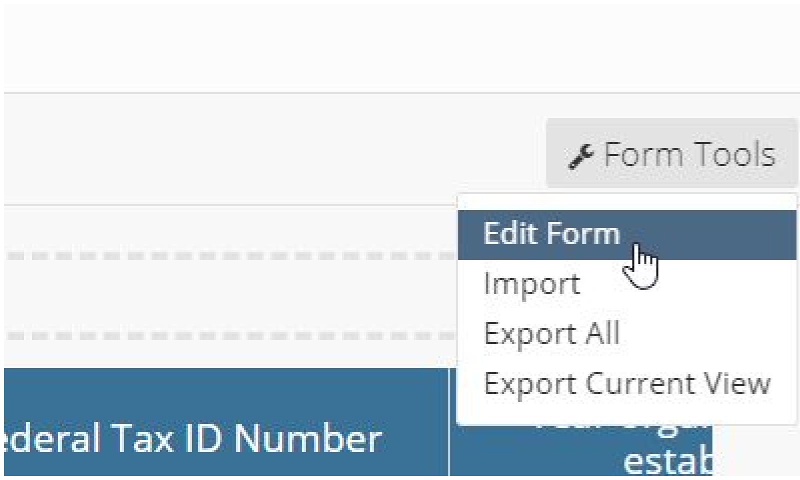


***Please note: There is a limit to the number of fields you can add to the form. To review the current workspace limits, click here:**

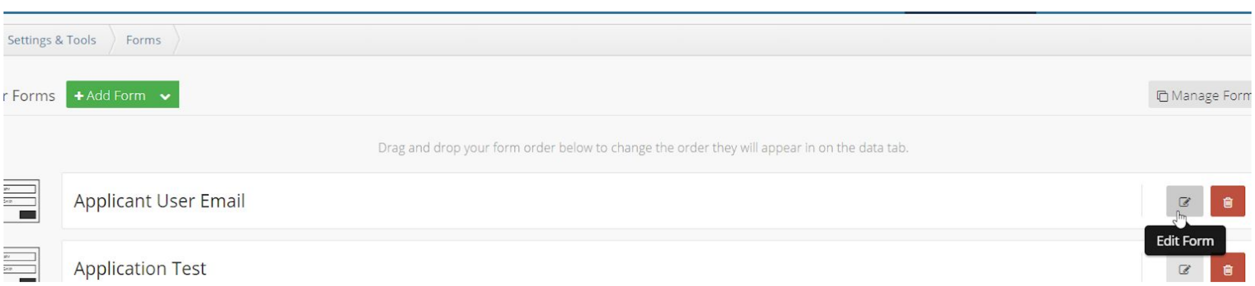
[What are the current workspace limits?]

Edit a Form

If you need to edit an existing form, you can easily access the Form Builder from the **Data view.** Click **Form Tools** and then select **Edit Form:**



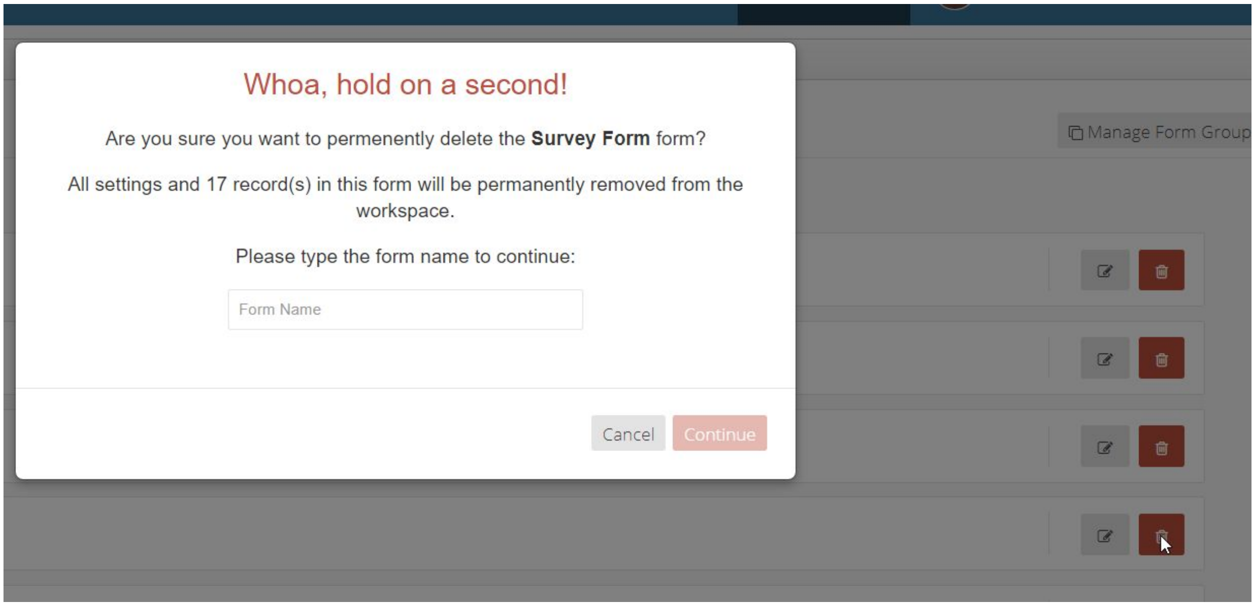
You can also access the Form builder if you are within **Forms** in **Settings & Tools** by clicking the gray Edit box next to the form:



Delete a Form

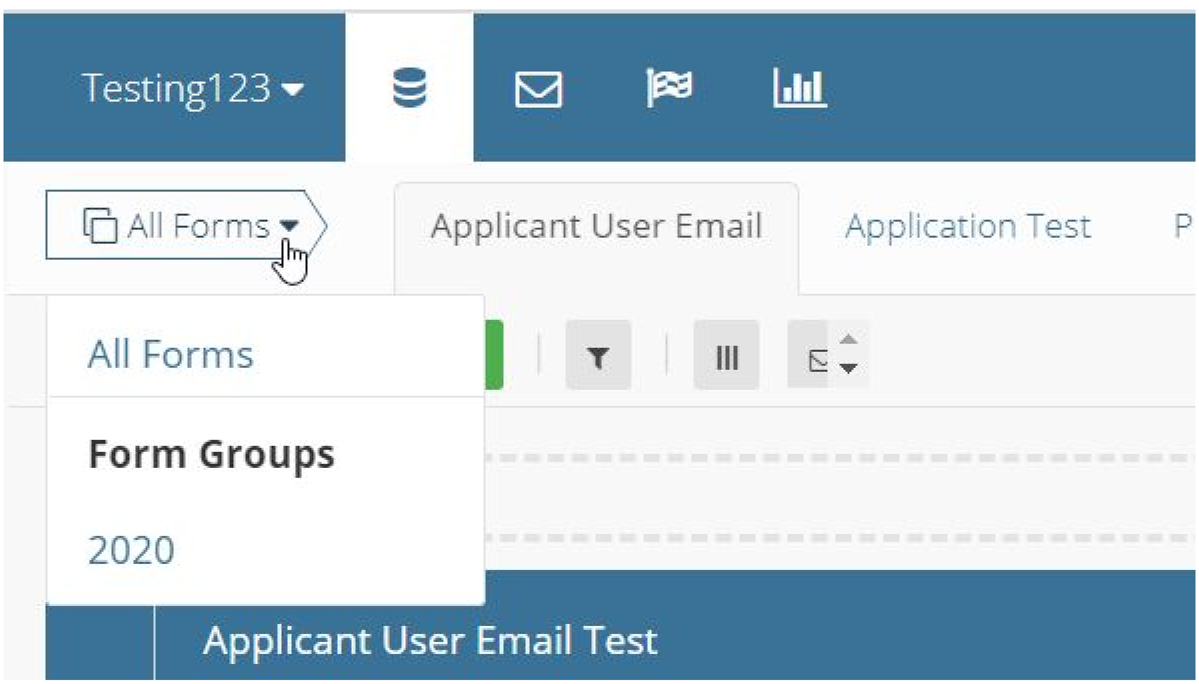
If you ever need to delete a form, you will need to go to **Settings & Tools** > **Forms** and click on the red trash icon.

<u>*Please note: You will have to type in the form name in order to delete it. If you delete the form, you will also delete all data within the form.</u>

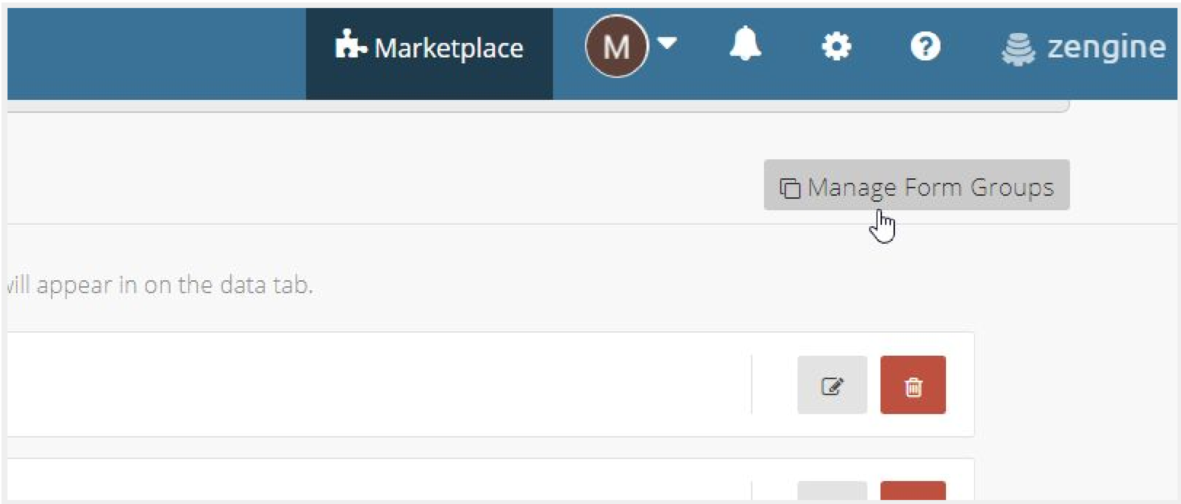


Form Groups

Form Groups are a great way to organize your forms by year, cycle or programs.

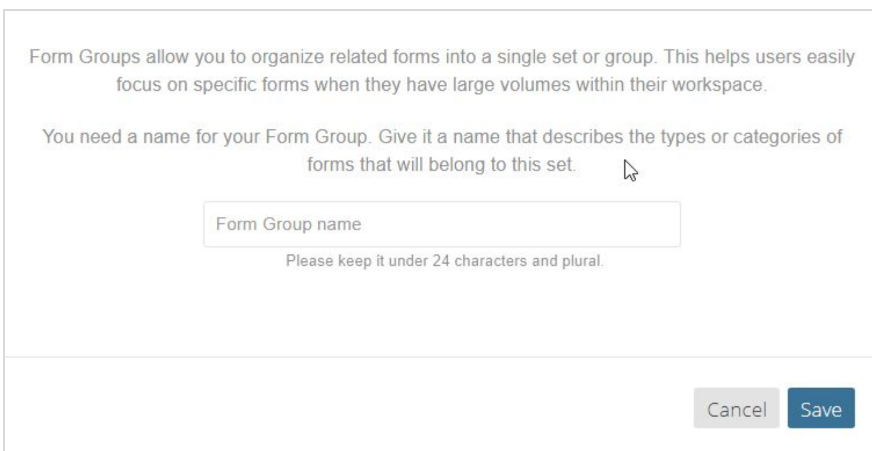


To manage your Form Groups, go back to **Settings & Tools** and then click on "Forms." Click on the **Manage Form Groups** button:



Manage Form Groups

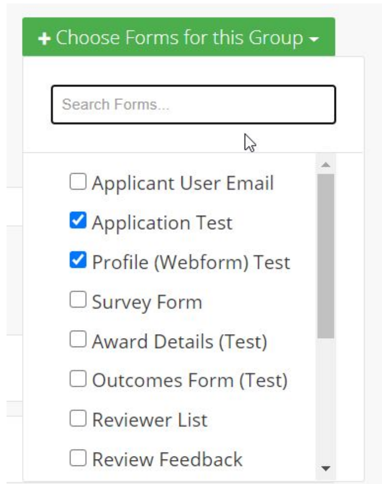
If you are creating a new *Form Group*, Click on **Add Group** and this message will appear:



Name your *Form Group* and click **Save**.

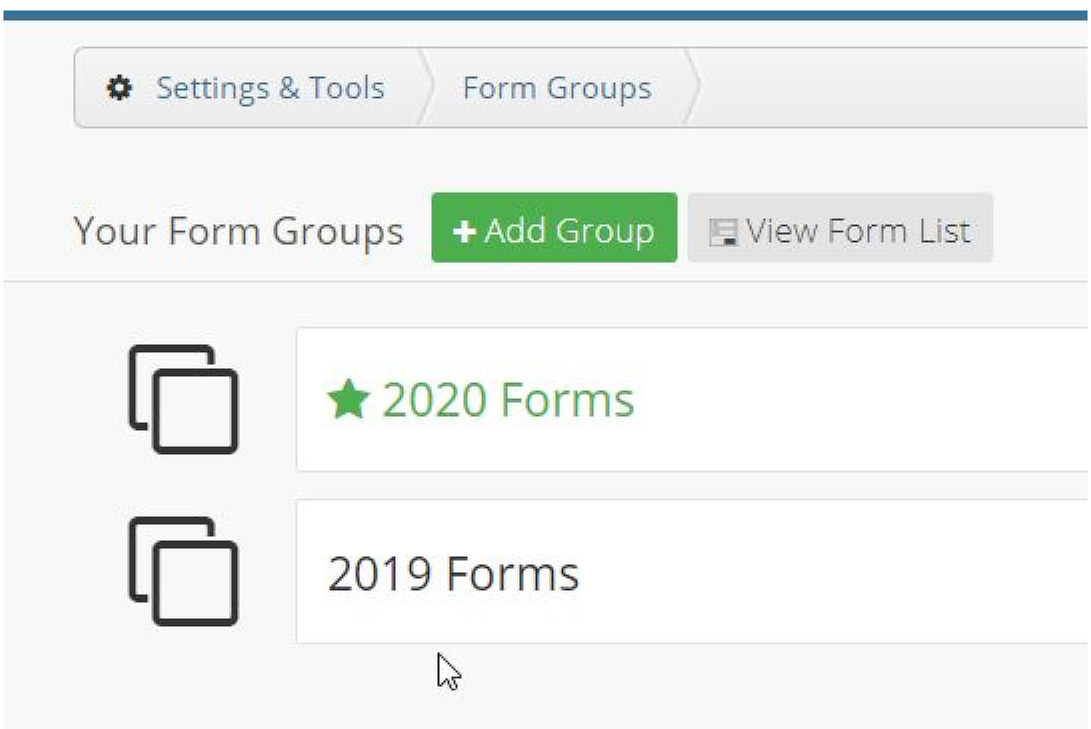
You can also make any of your form groups your default group by selecting the ★ **Set as Default Group**:

Then add the forms you want to include in the **Group** by selecting the **Choose Forms for this Group** button:

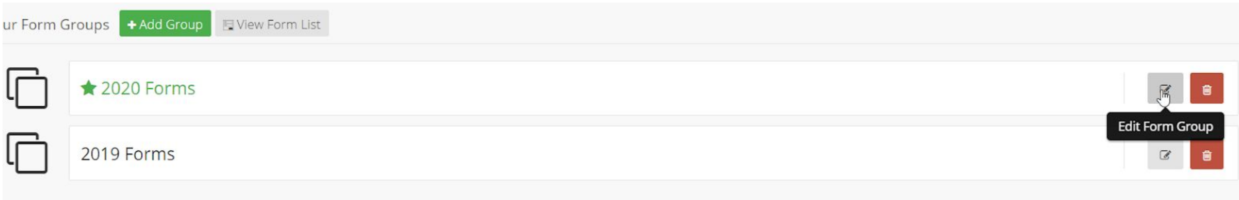


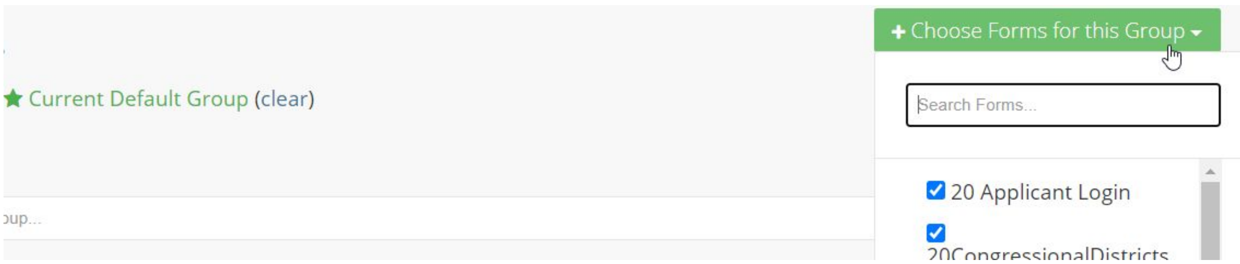
Now you have successfully created a form group.

You can have multiple Form Groups to organize your data as seen below:

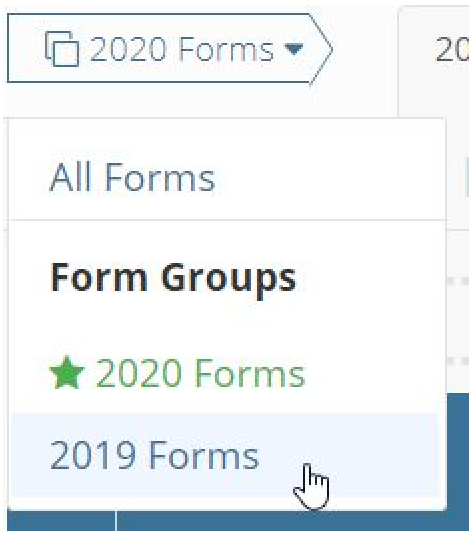


If you need to edit or add additional forms to any of the **Form Groups**, click on the edit icon to open the group. Then select or deselect the forms you want to add or remove.





Form Groups that you have created will display on the **Data View** page:

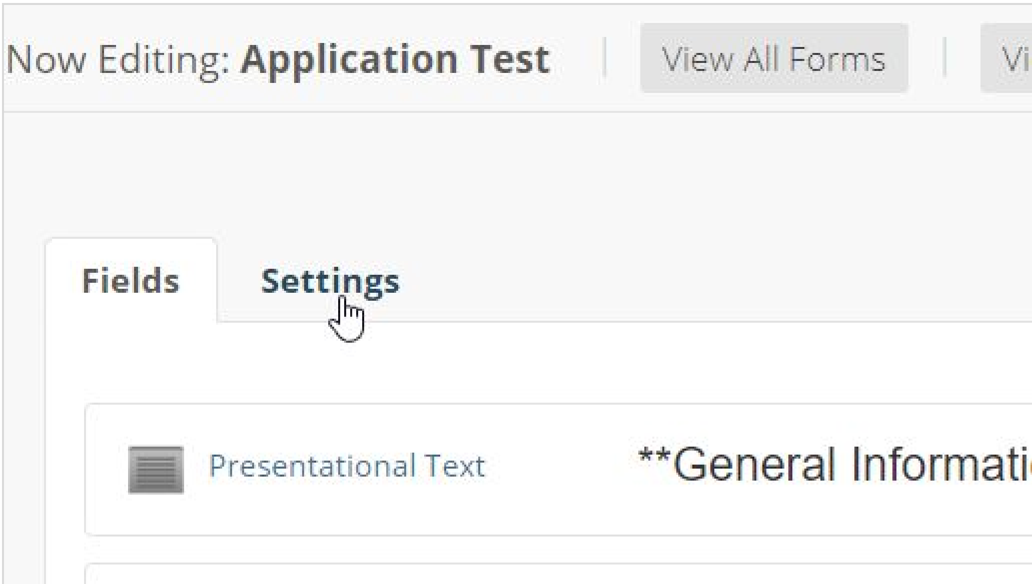


This is very helpful if you have many forms in your workspace and gives you the ability to quickly navigate to the data you need to see.

Form Settings & Folders

Creating and managing your **Folders** is essential if you want to organize how your data is stored, such as Submitted applications are in the Submission folder, Incomplete applications are in the In Progress folder, etc. **Folders** are not only used to show status, but are also required to use certain Plugins properly.

Folders are specific to each form. To add or edit your folders, go to the **Form Builder** and click the Settings tab.:

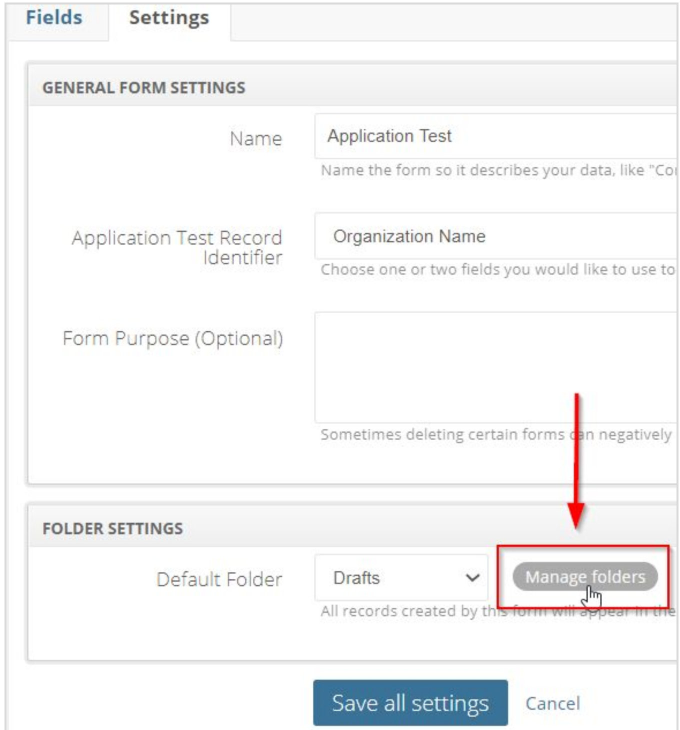


***Please note: There is a limit to the number of folders you can add to each form. To review the current workspace limits, click here:**
[What are the current workspace limits?]

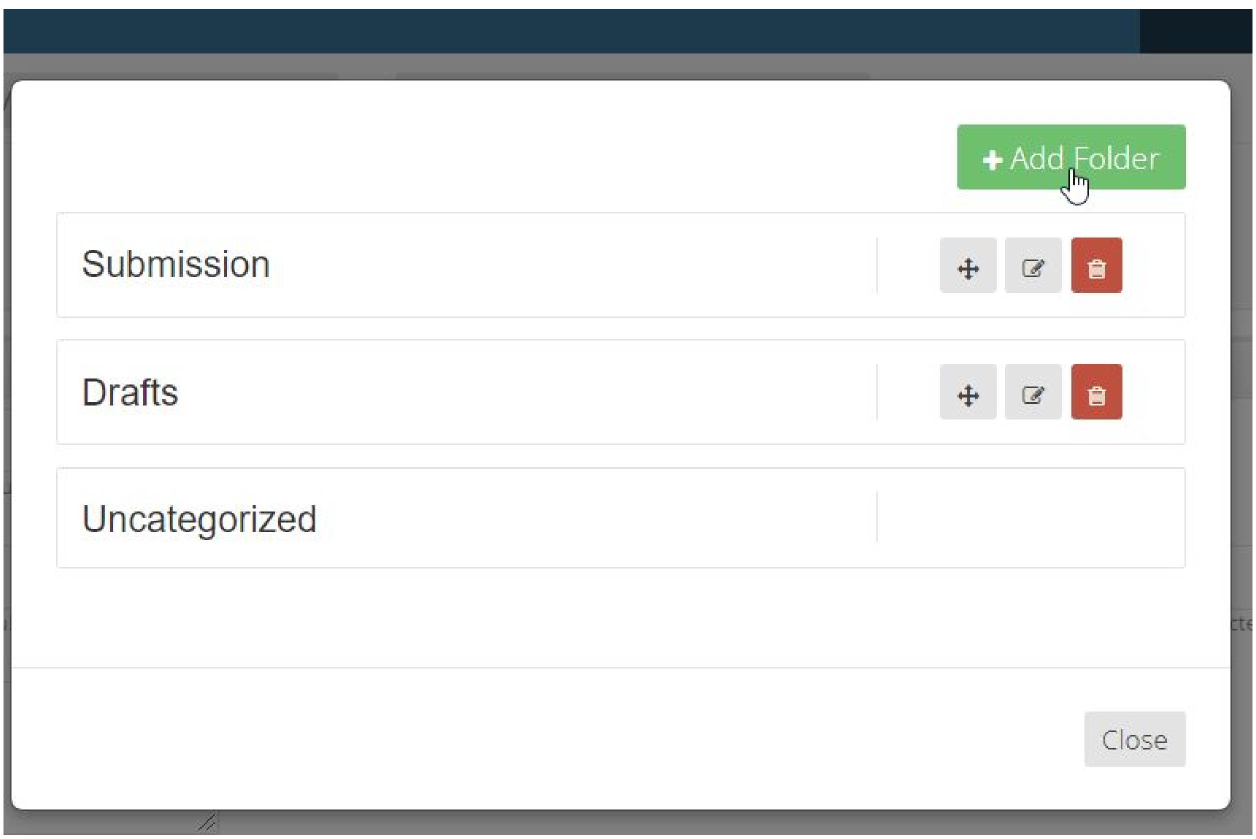
Under Form Settings - Record Identifier will be displayed in the following places:

a. Record Overlay
b. Linked Record Overlay
c. *Data View* - Linked Field displays "Record Identifier Label"
d. This also is shown in the Review Form

Additionally, you can manage your folders by scrolling down and clicking on the **Manage Folders** button:

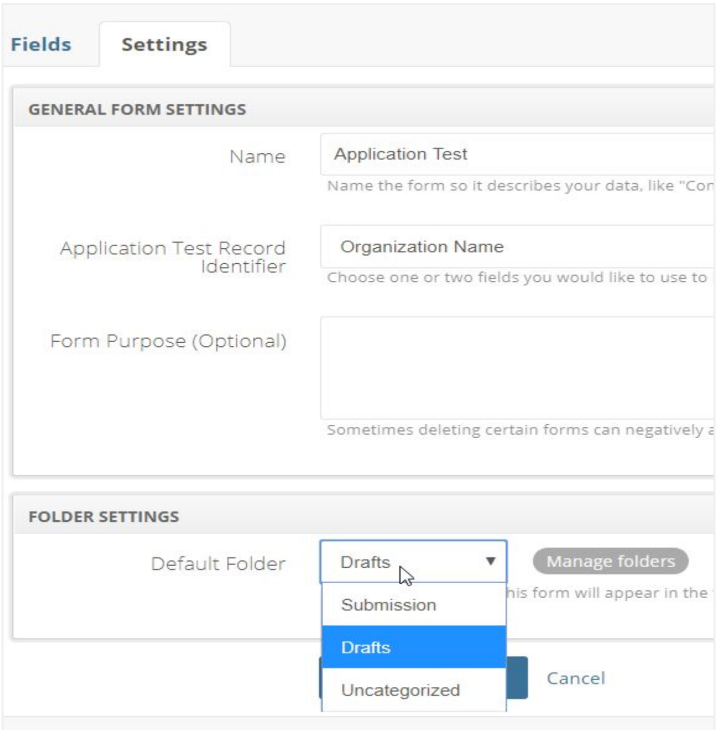


Here is where you can make changes to your folders.

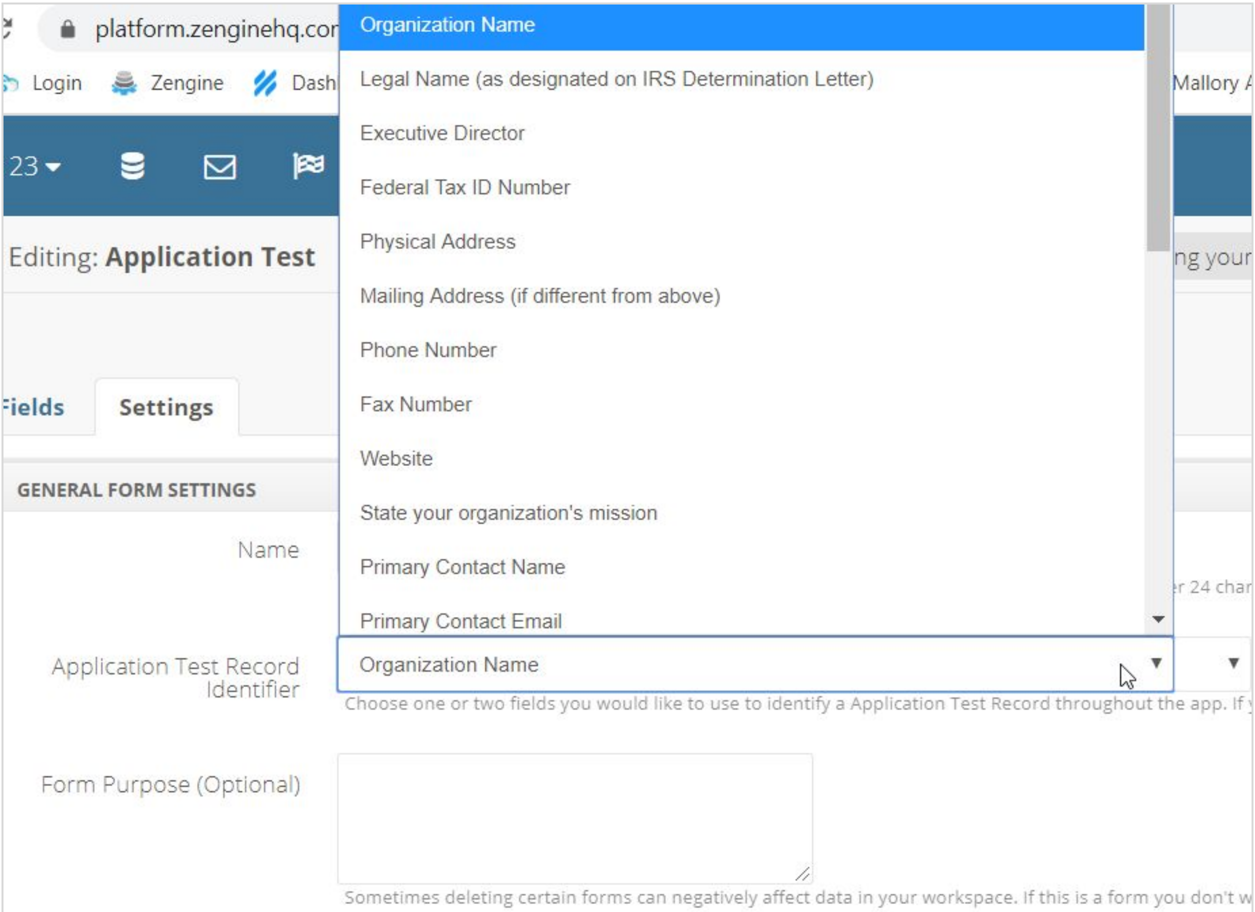


You can also update the default folder. When records in the form are created, they are placed into a default folder to start.

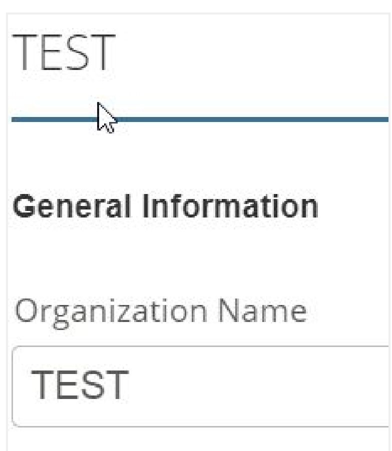
Please Note: The Uncategorized folder will automatically be set as the default folder, this folder cannot be removed or edited, but you can update the default folder to your choosing.



In **Form Settings**, you can update the record identifier for each record:

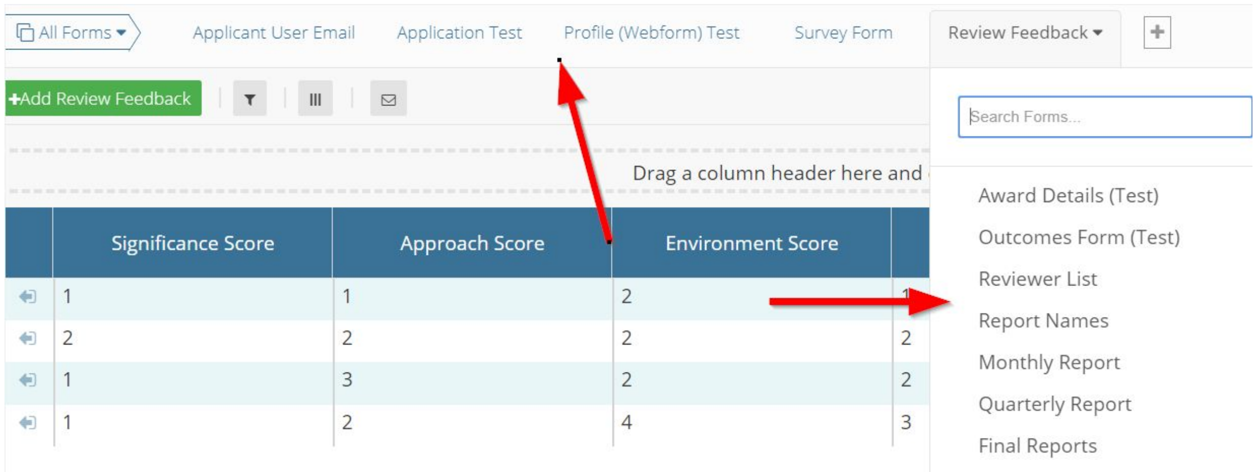


For example, in the image below the Record Identifier has been set to be the “Organization Name” field.



Data View

The **Data View** is where you can see all the existing data for each of your forms. As seen in the screenshot below, forms are listed across the top of the data view. Any additional forms are listed in a dropdown as seen below. This is a quick way to access/view all the different forms data.



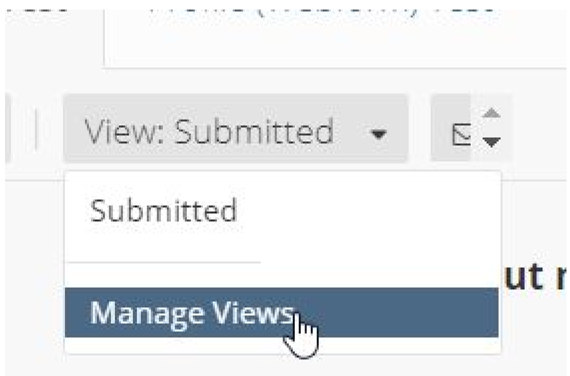
Setting up Views

When you are looking at your data, you may want to filter and adjust your columns to see a particular set of data. You can save the order of the columns, filter, and display certain data points by setting up what is called a **View**. Once you have your view set, a yellow banner will appear indicating that the "View" has changed. You can now "Save as a New View" or "Save as an Existing View", which will override the current view.

This is particularly helpful if you...

- Have a specific data set you need to collect for a report.
- Would like to manage several different data sets or "Views", for reporting.
  - For example, filtering for only submitted applications, awarded constituents, or applications in review.

You can manage your different Views by selecting the dropdown in Views menu and click on **Manage Views**:

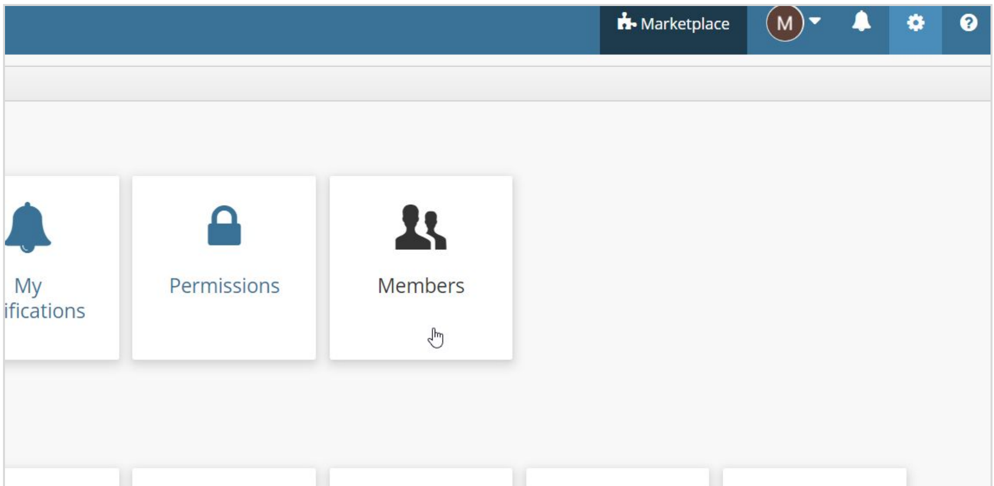


You can **edit** a current view, delete or mark a view as default.

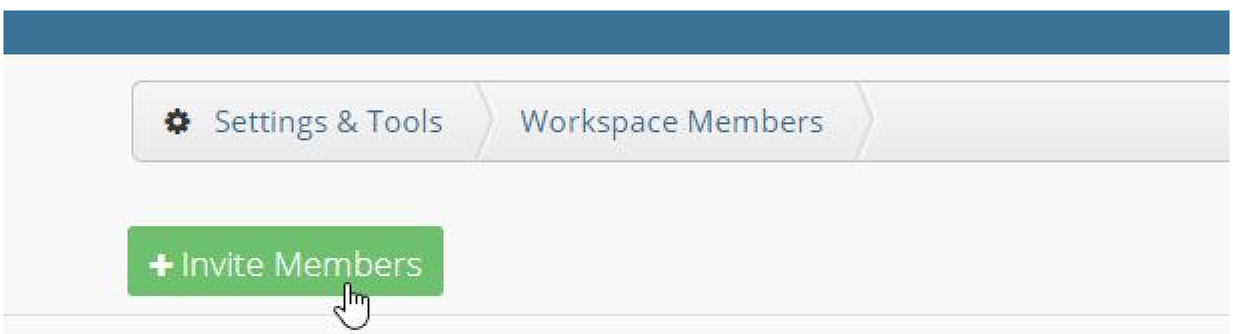
<u>*Please note that data views are shared with all workspace members. To review the current view limits, click here:</u> [What are the current workspace limits?]

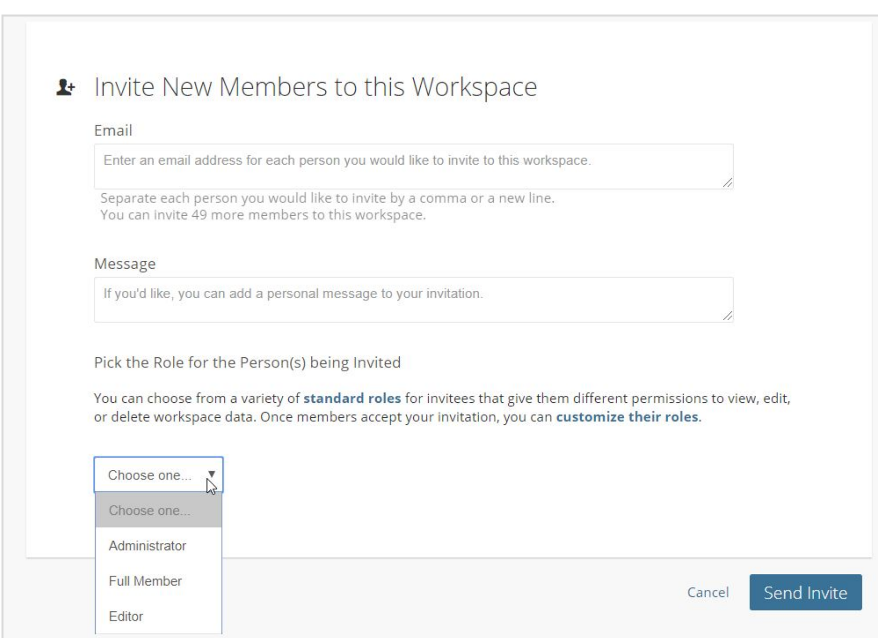
Inviting Members to the Workspace

You can invite your additional team members to your workspace. To get started, go to **Settings & Tools** and click on Members:



Click on the **Invite Members** button:





You will then enter your team member's email address, a message (optional) and the role they will need to have in the workspace:

Lastly, click **Send Invite** to send the invitation to your team members inbox.

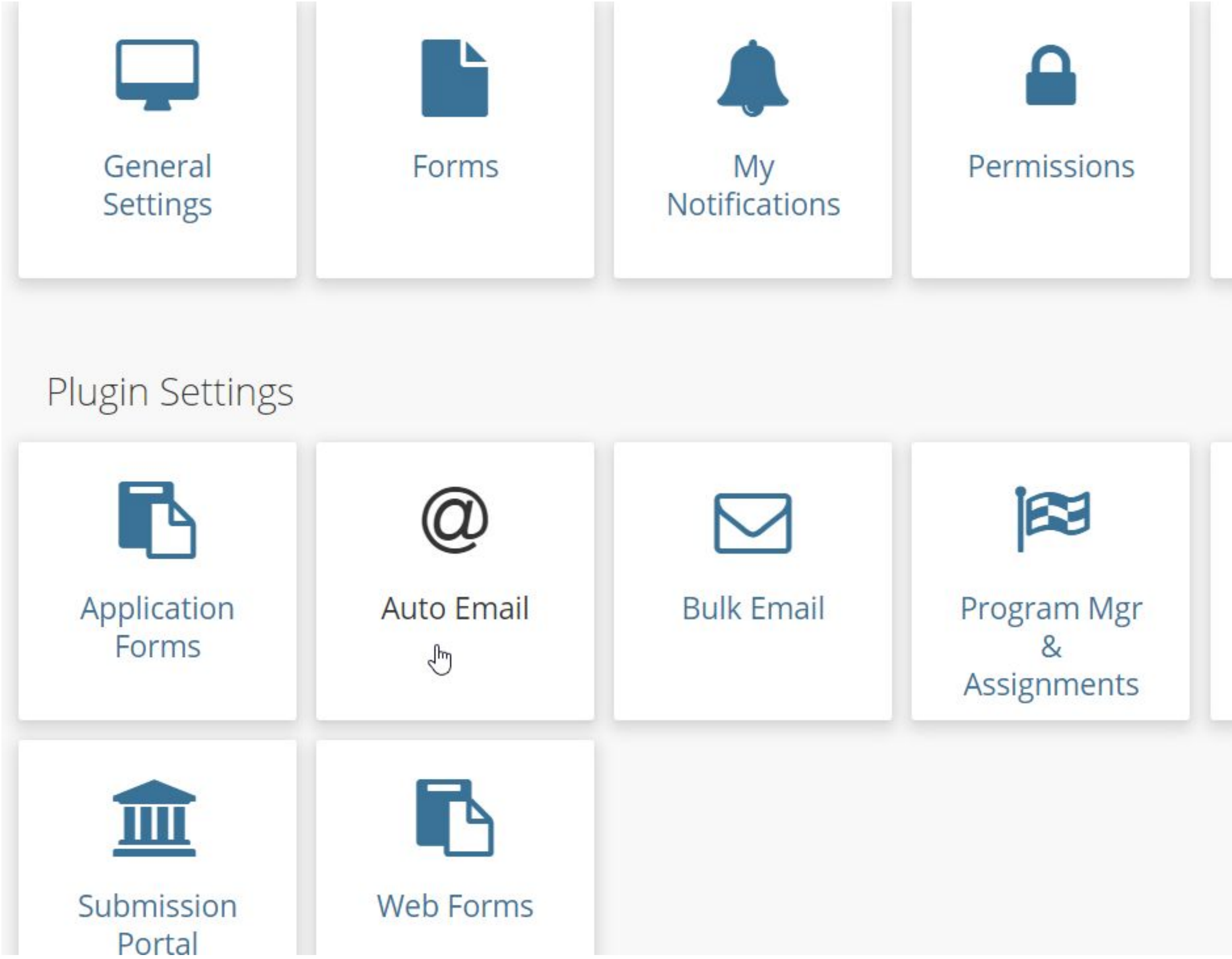
You can learn more about each role available to your team members here: Standard Roles

The new **Member** will then receive an email. They will need to accept the invitation and create an account to gain access to the workspace. If the user does not receive the email, please check the email address you invited or suggest they check their spam folder.

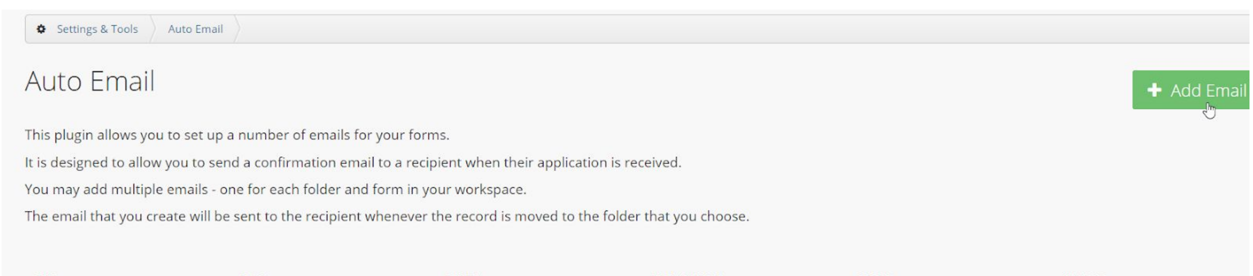
If you would like to learn more about the Custom roles, you can read about it here: Custom Roles

Auto Email

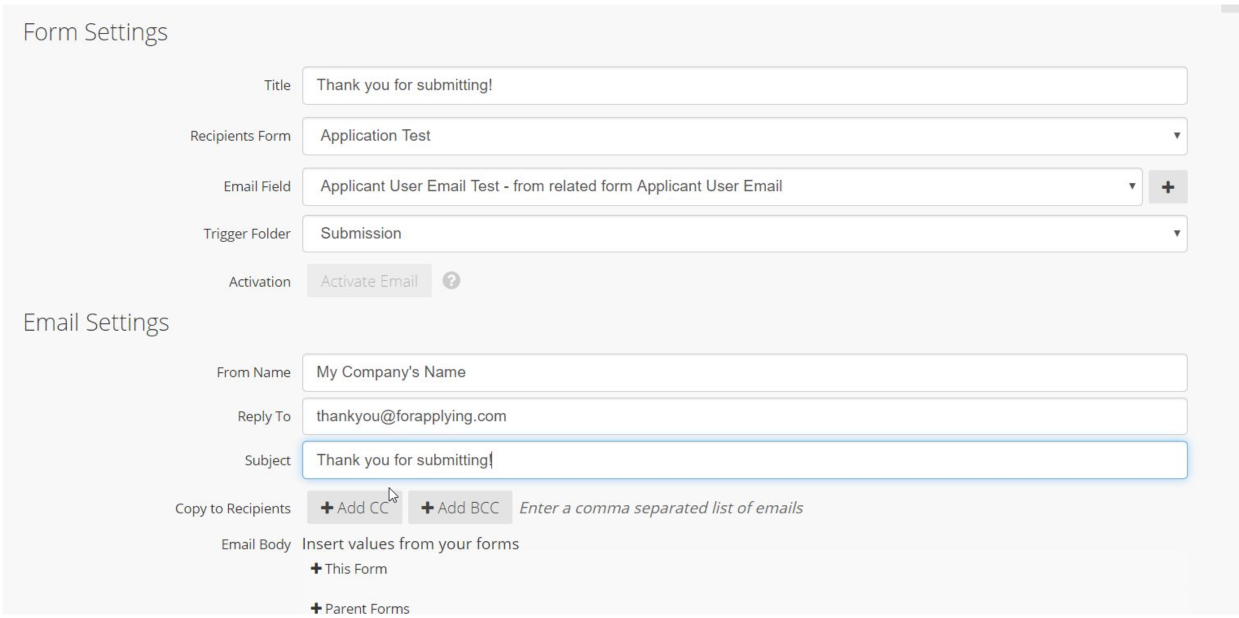
In Zengine there are two email tools. The first is **Auto Email.** Auto Email will automatically send emails to your constituents based upon folder movements. To view and set up Auto Emails, go to **Settings & Tools** and click on the Auto Email plugin:



To get started, click on the **Add Email** button:



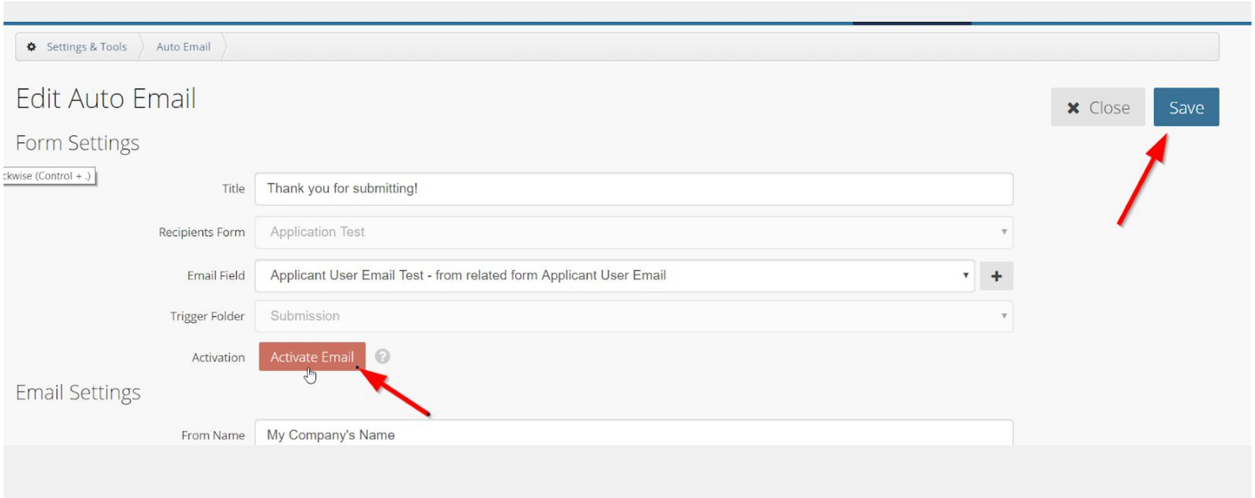
Then fill in the settings to create the Auto Email. To learn more about each of these settings, take a look at our Knowledge Base article: [Auto Email]



You can then create the body of your email:

As you can see in the image above, you can open the **This Form** section or the **Parent Form** section and select specific fields from your forms to make the email personalized. For example, you can include the name of the email recipient.

Once complete, remember to hit **Save** and **Activate Email**:

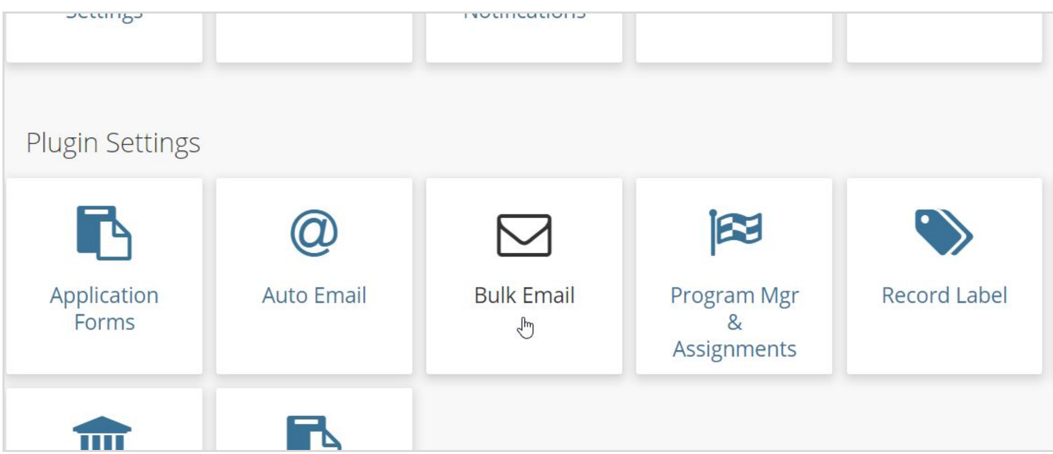


Here are a couple examples of Auto Emails:

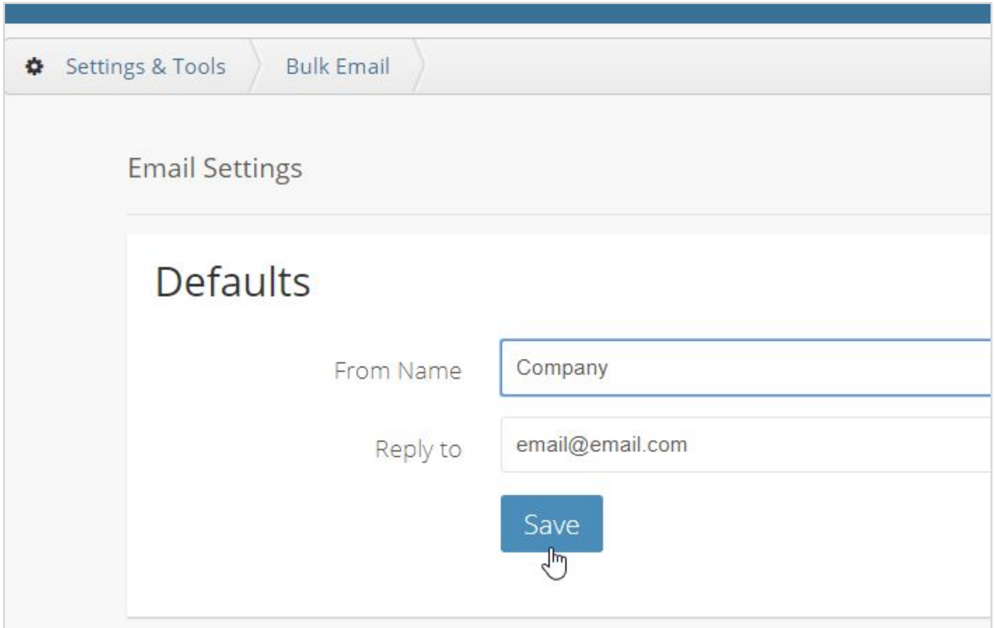
- Thank you for Submitting, cc an admin if you want to get notified of a new submission.
- You have been Awarded!

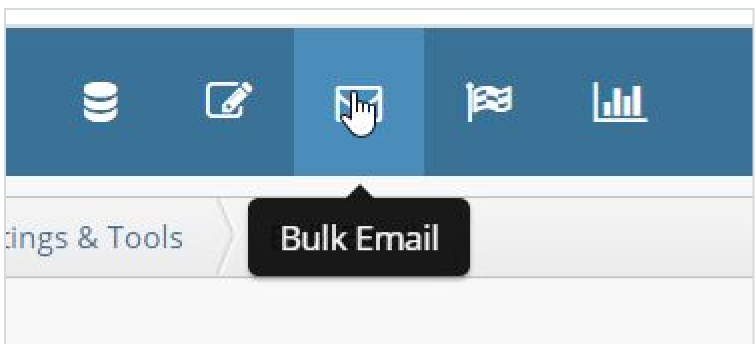
Bulk Email

The second email tool in Zengine is Bulk Email. The **Bulk Email** also has two steps of configuration. For the first, you will go to **Settings & Tools** and select Bulk Email under Plugin Settings:



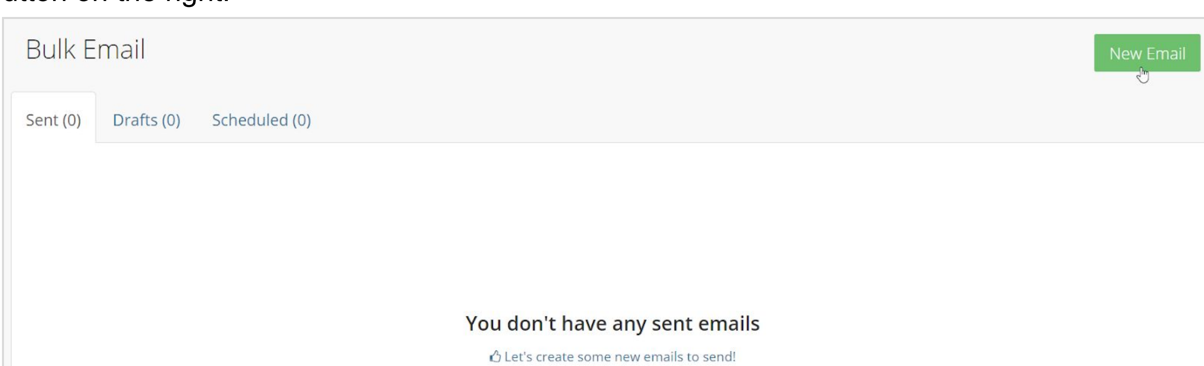
And enter in the two fields here to establish some defaults. You will not need to do this step again.



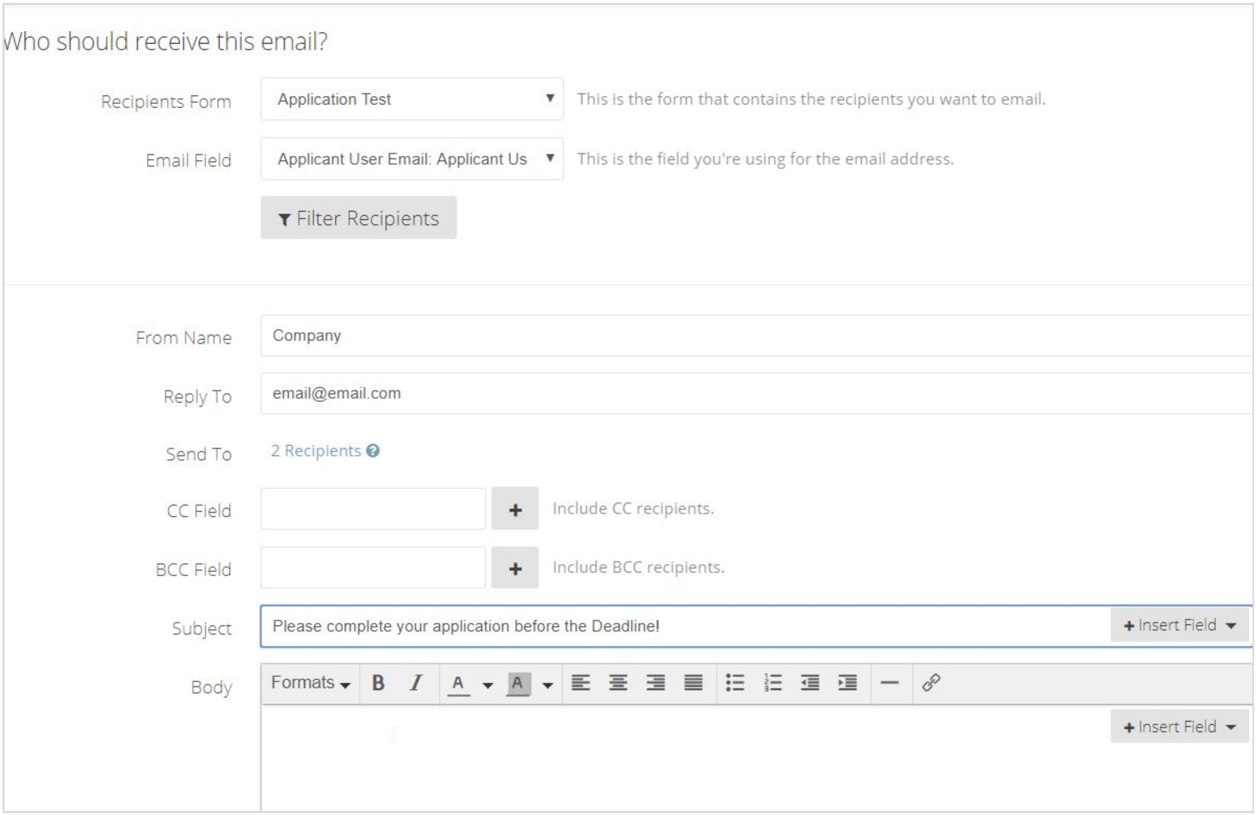


Make sure to **Save**. Then go to the **Bulk Email** icon in the navigation bar.

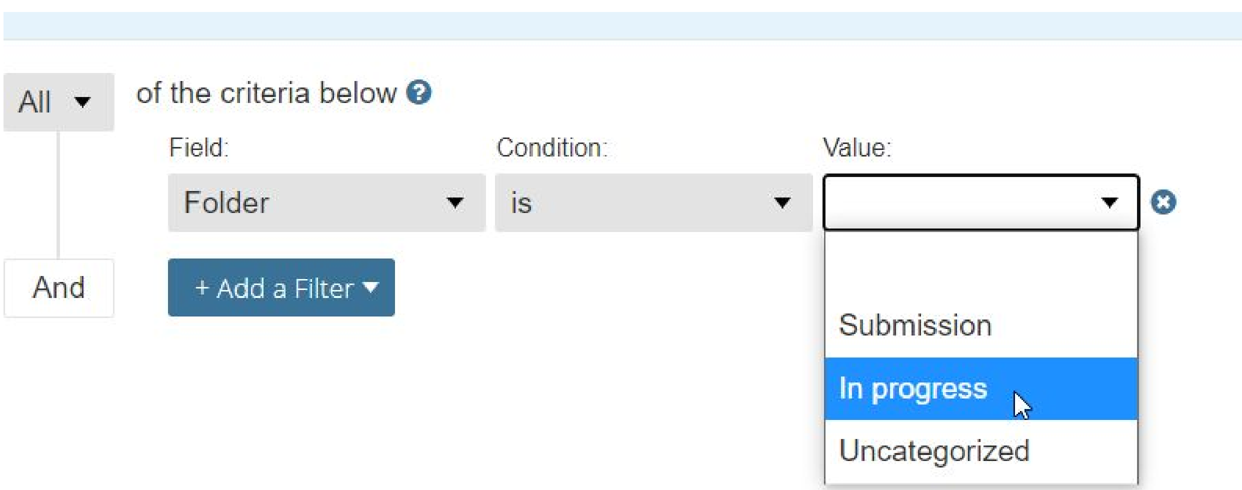
Here you will see the emails that have been Sent, currently in Drafts and emails that are Scheduled to be sent by clicking on each tab. To create a new email, click on the **New Email** button on the right:



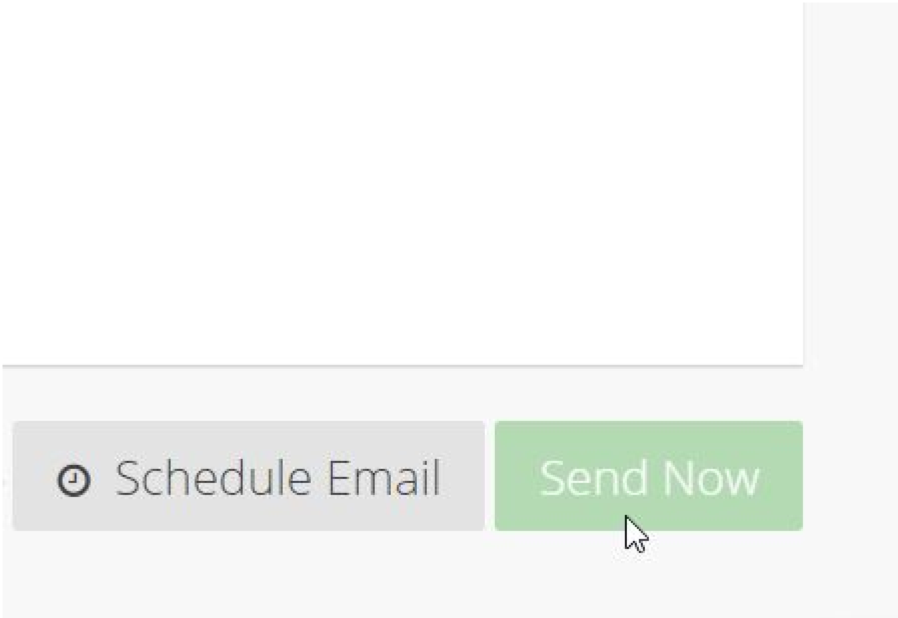
The settings for **Auto Email** are set up very similar to the **Bulk Email** plugin. To learn more about each of these settings, take a look at our Knowledge Base article:Bulk Email.



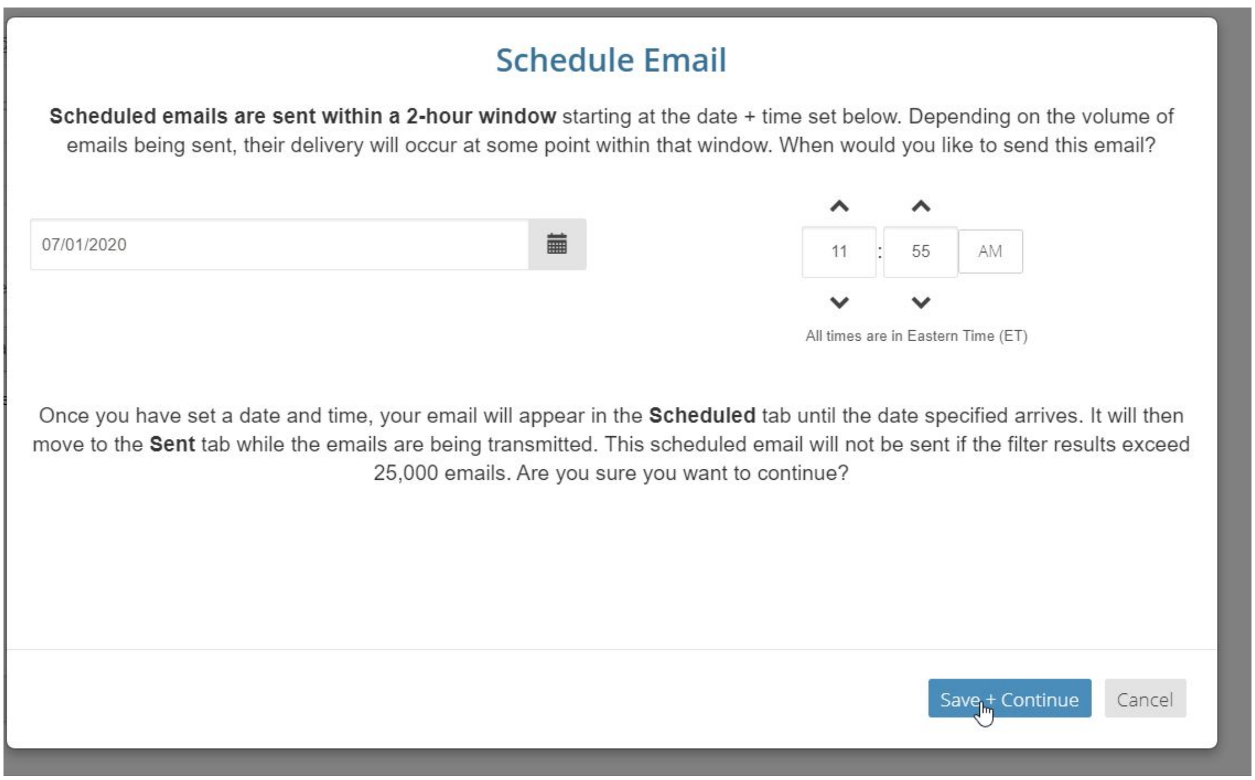
You can also **Filter** if you need to send the email to a group of *Recipients*. For example, if you need to send a reminder email to recipients who have still not submitted, your filter would look like this:



Once you have completed all the fields and the body of the email, you can either **Schedule Email** to be sent at a later date or **Send Now**:



To schedule your email, you need to fill in the date and time you want the email to be sent. Note: all dates and times are currently in ET:



Select **Save & Continue** and you are all set!

Submission Portal

The **Submission Portal** allows you to collect data from your constituents. You can collect data in several stages, as well as blind letters of recommendations. Your constituents will access the Submission Portal via a url.

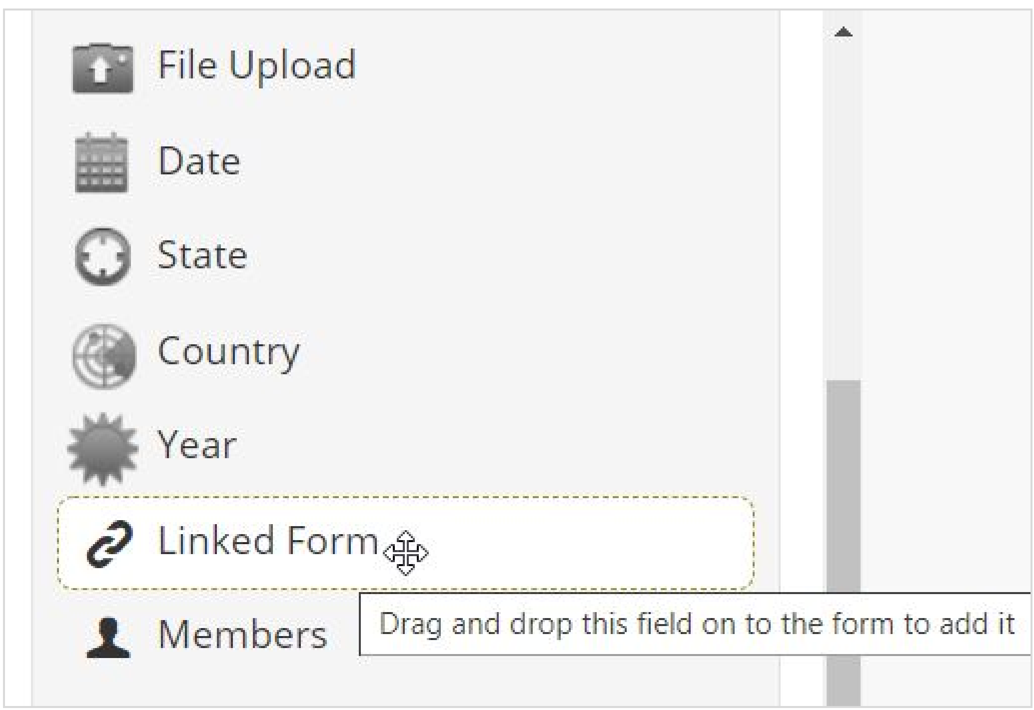
In order to set up a **Submission Portal**, you will need to make sure you have these 3 forms in your workspace:

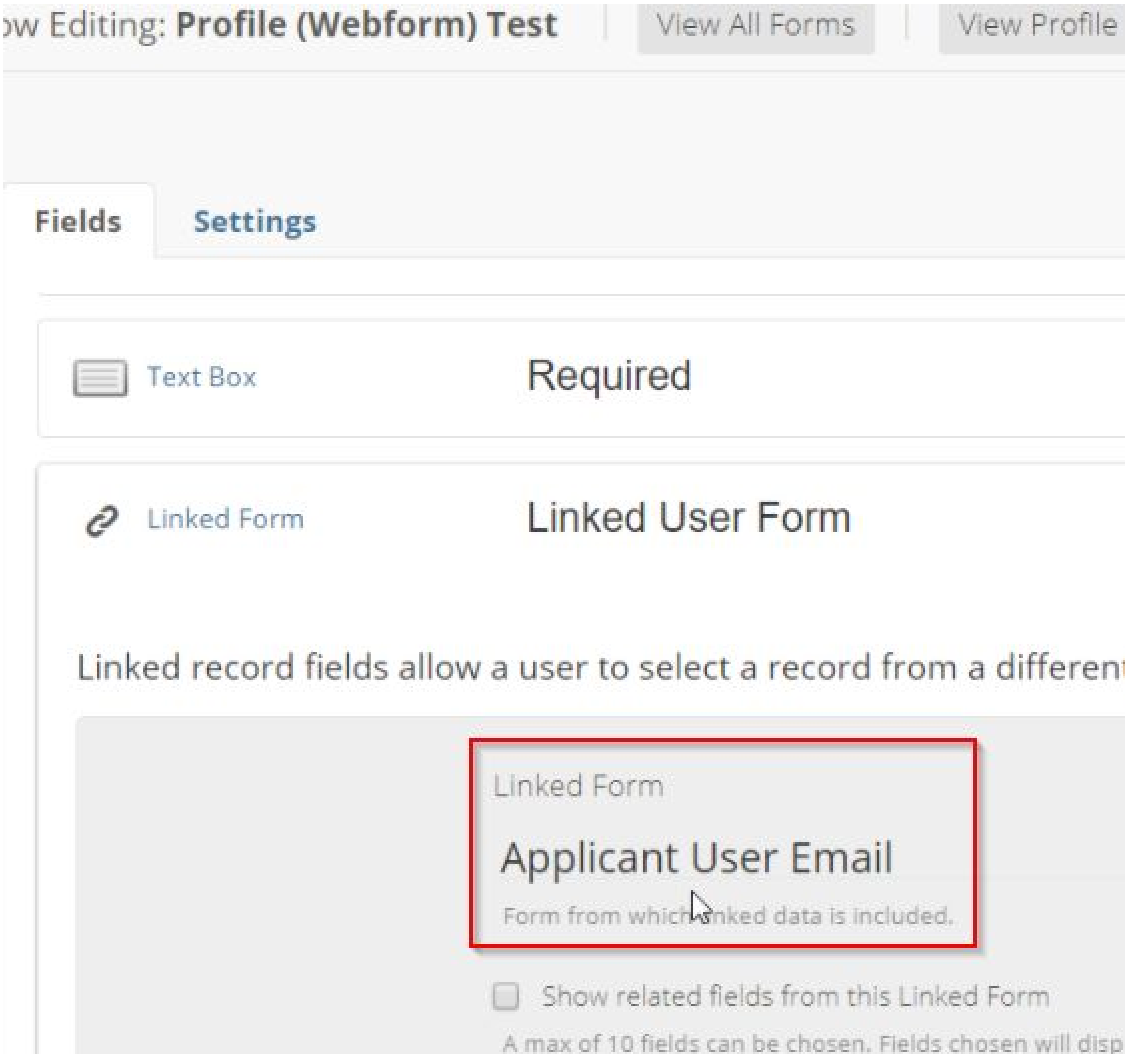
A User Form: The User Form has one Text Field with an email validation.

This form will collect & store the email address of the constituent, allowing them to login.

A Profile Form: This form collects & stores basic information such as, Name, Address, Phone.

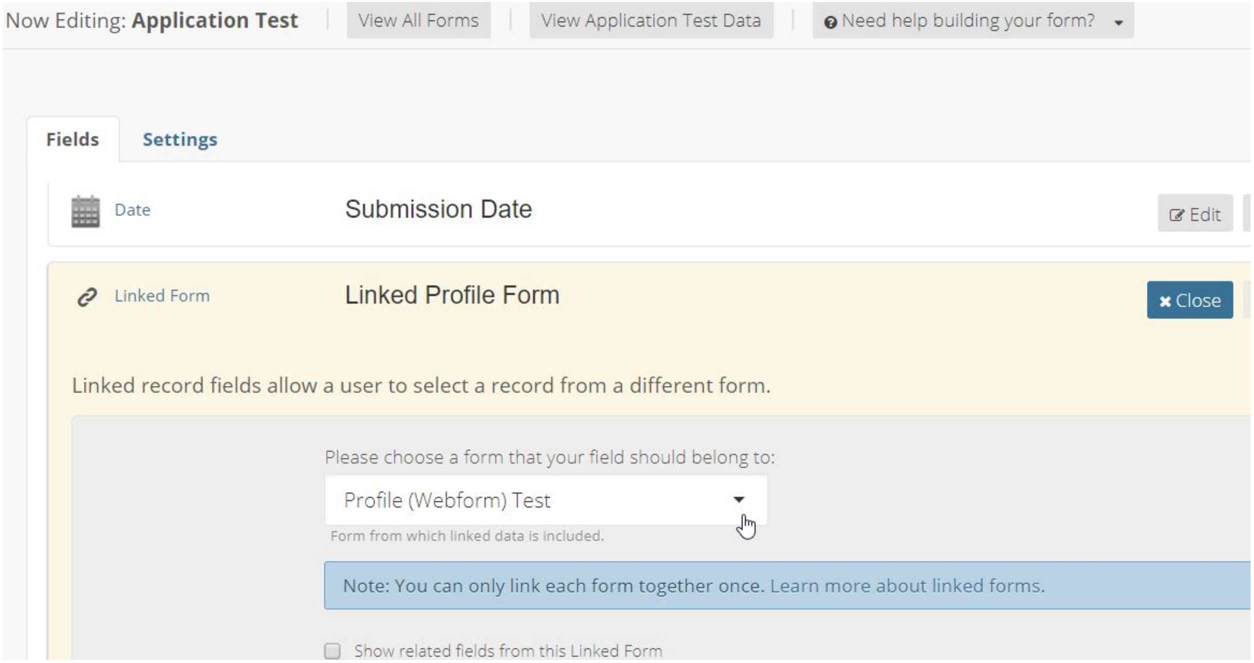
- The Profile Form will need to be linked to the User Form. You can do this by using a Linked Form field in the Form Builder when you are creating your Profile form. In the Linked Form dropdown, select your User Form.





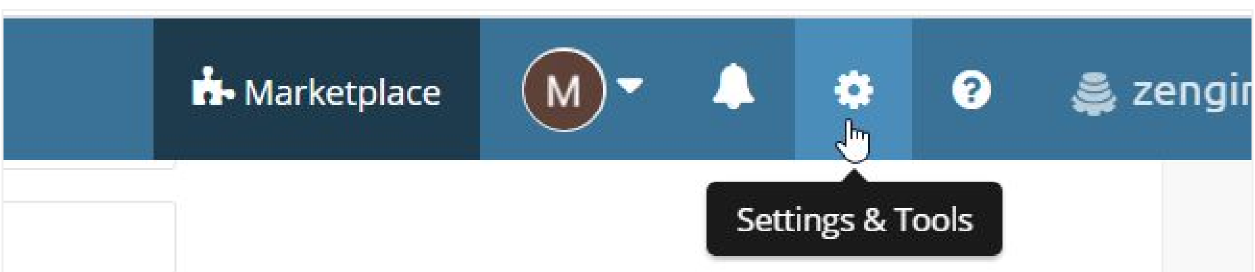
A Primary Form: This is the main form you wish the constituent to fill out.

- This form will need to be Linked to the “**Profile Form”** using a linked form filed in the Form Builder. Select the Profile Form from the Linked Form dropdown**.**

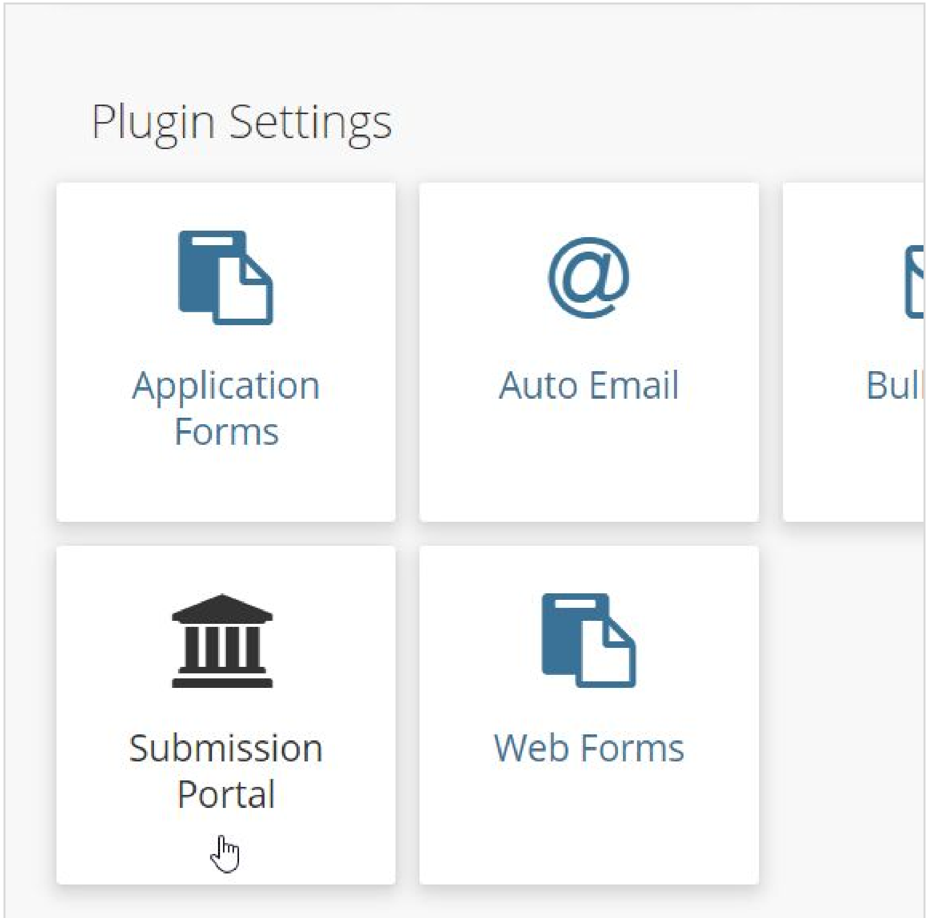


Once these three forms have been created and linked properly, you can begin creating your Submission Portal!

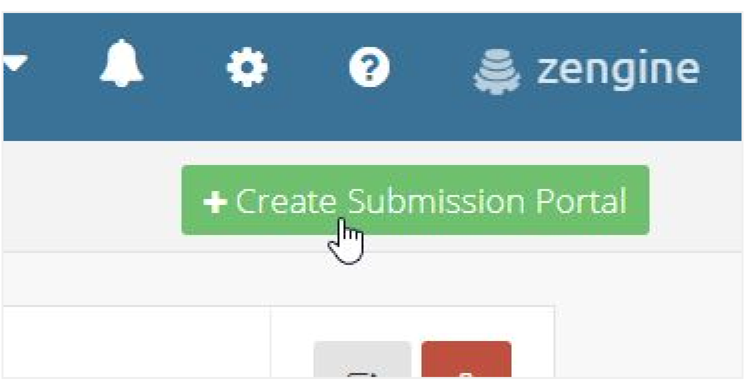
To start, we will go to **Settings & Tools**:



Locate the **Submission Portal** Plugin:

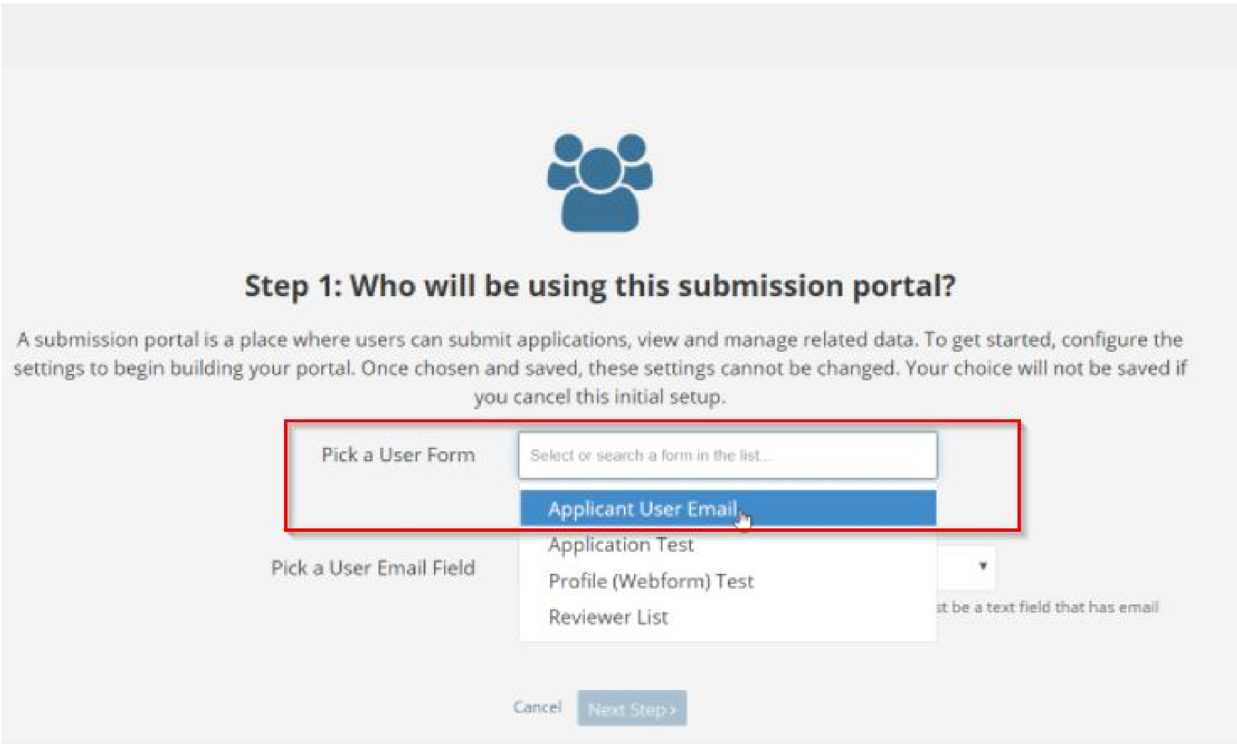


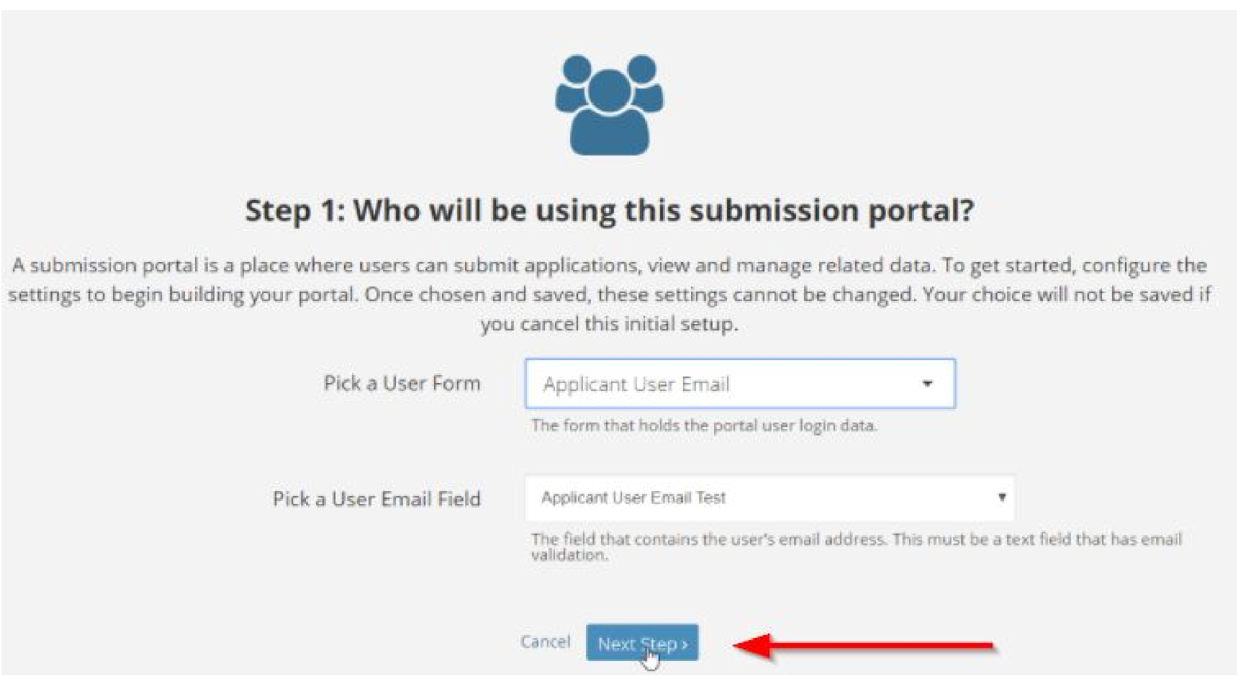
Create Submission Portal



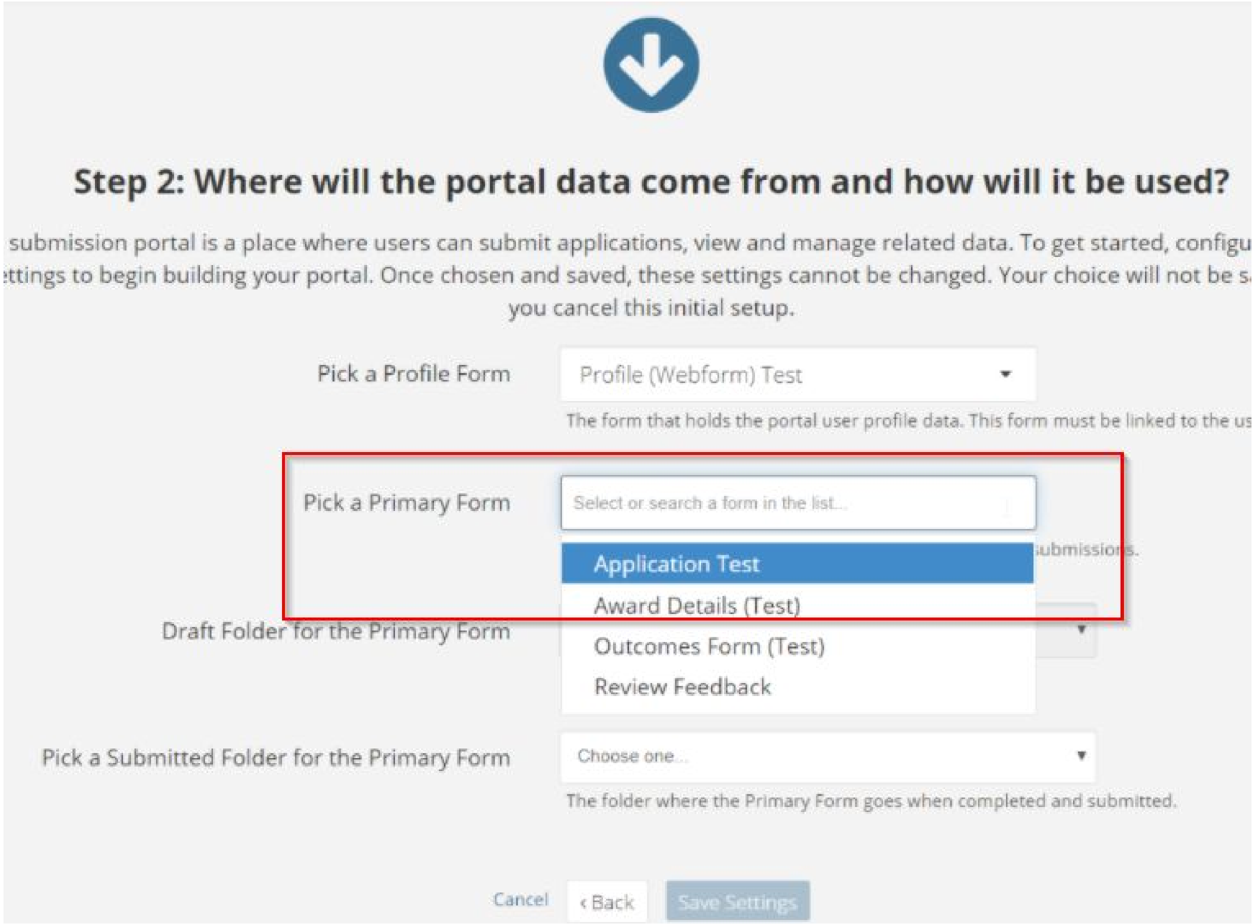
Click on the “+Create Submission Portal” button. You will then need to select the **User Form** and the **Email Field**. The email field will automatically populate. If it does not, select the email field from the dropdown.

Note: If your email field is not showing in the list, return back to the User Form you created a few steps back and confirm you added the email field on the form.

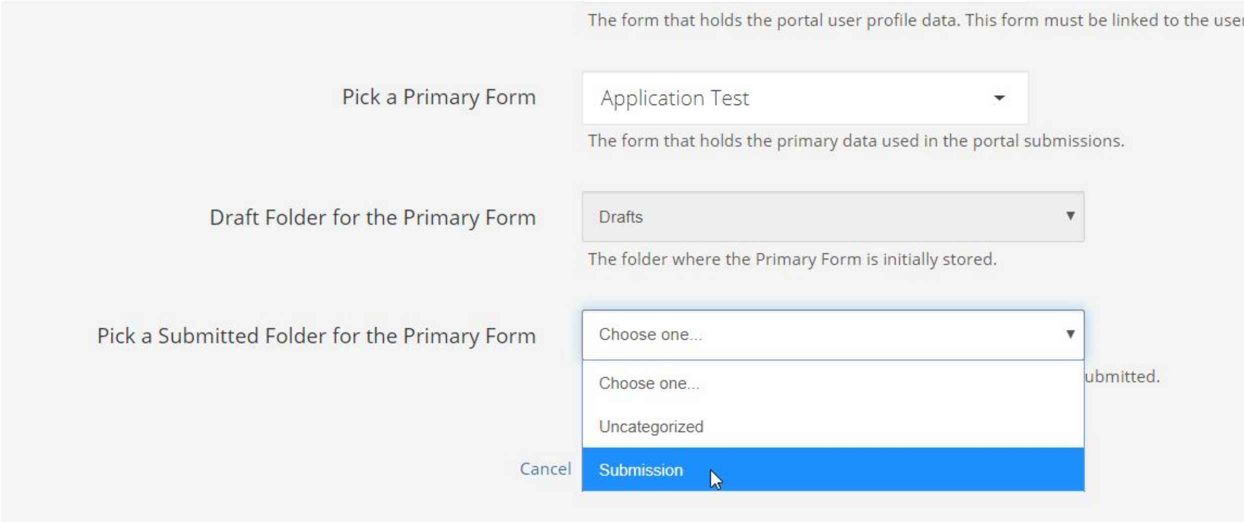




Next you will select the **Profile** and **Primary forms**:

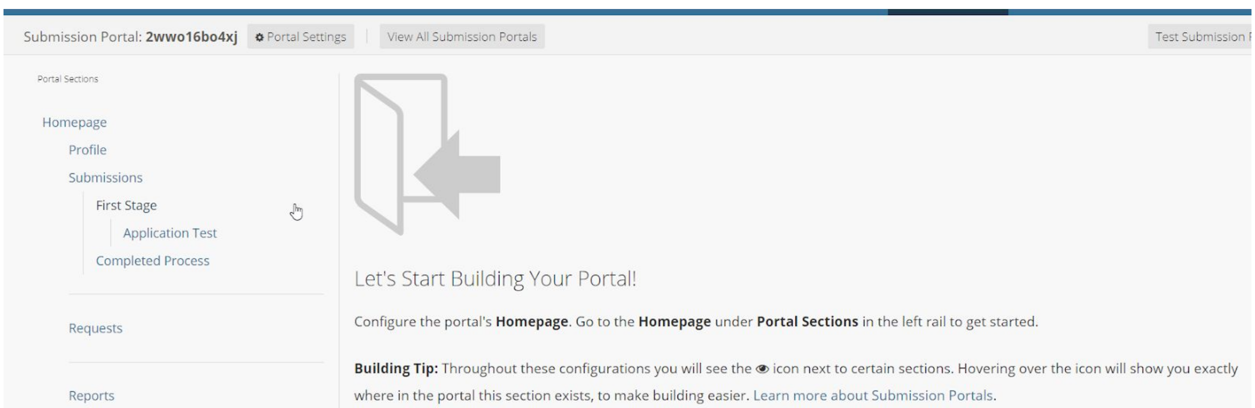


The “Draft Folder for the Primary Form” will automatically populate to the default folder set in your primary form’s settings. This folder will indicate which applications are still In Progress. Then select your Submitted folder for the Primary Form and click Save Settings to continue. If you forgot to add folders to your Primary Form, please refer to this article: **Form Settings & Folders**.

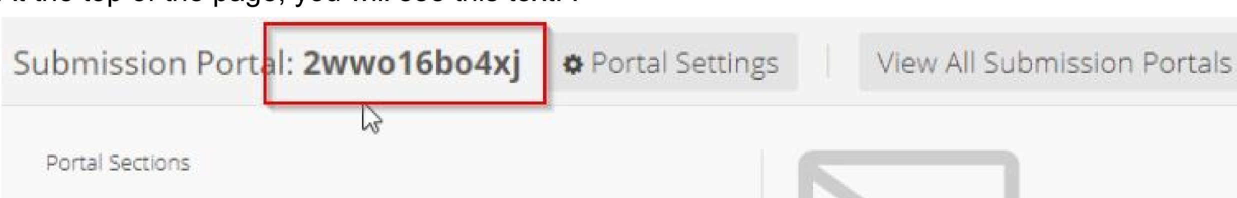


Portal Settings

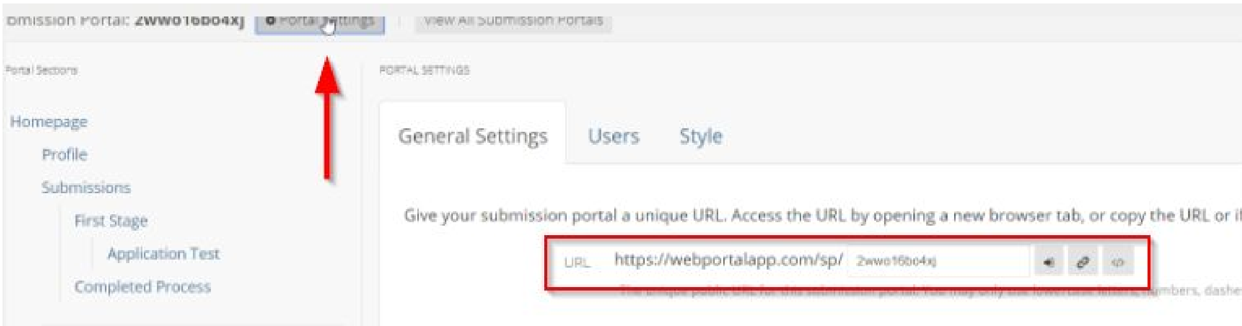
After you have your User Form, Profile Form and Primary Form configured, you will land on the Submission Portal Settings page.



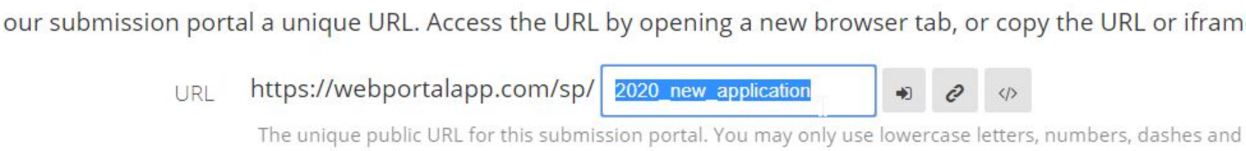
At the top of the page, you will see this text: :



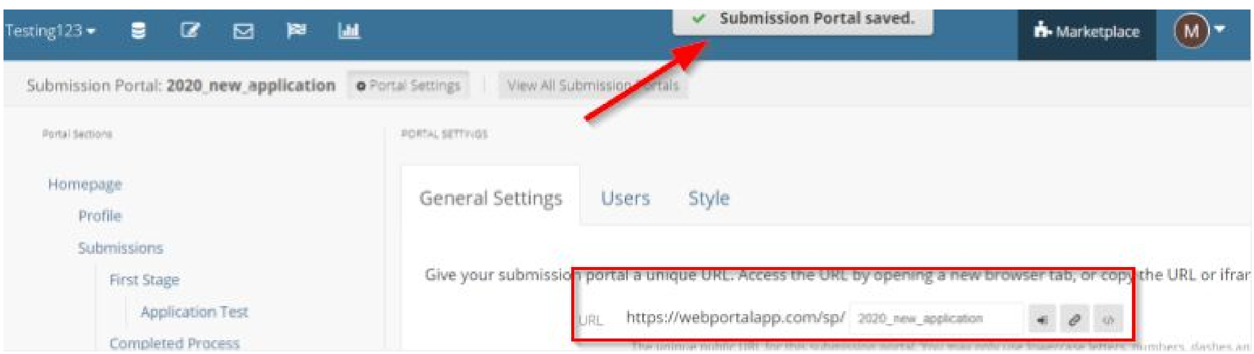
This text is the default slug of the URL for your Submission Portal. This is configurable and can be changed by selecting the **Portal Settings** button to the right:

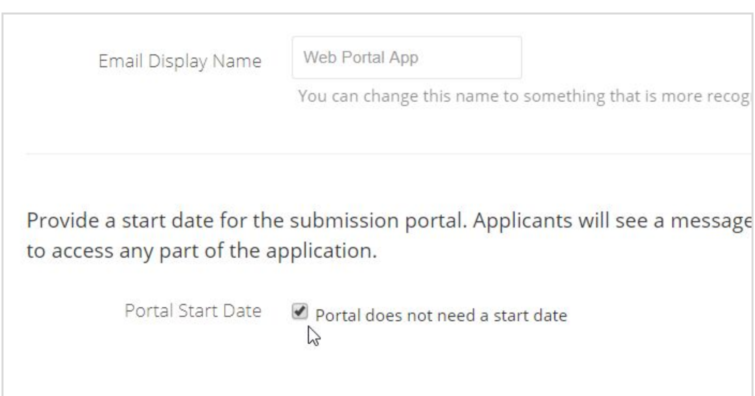


For example, here’s an updated URL below...



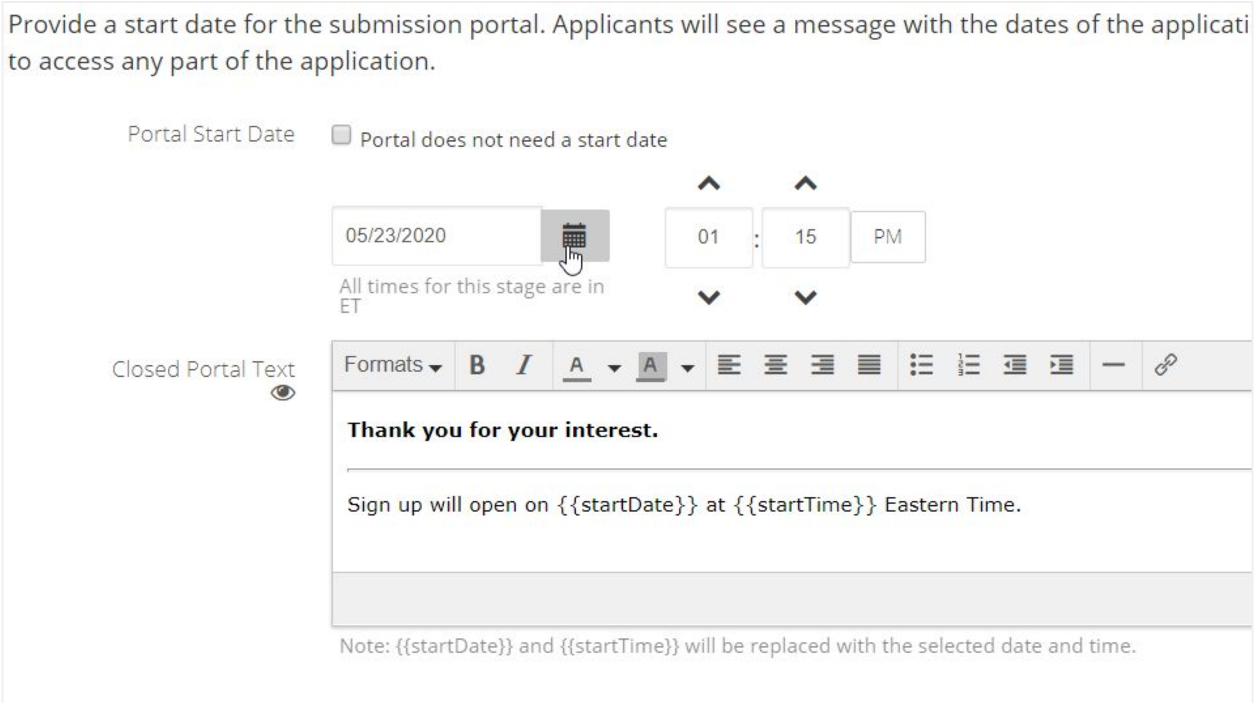
Now the URL has been changed!





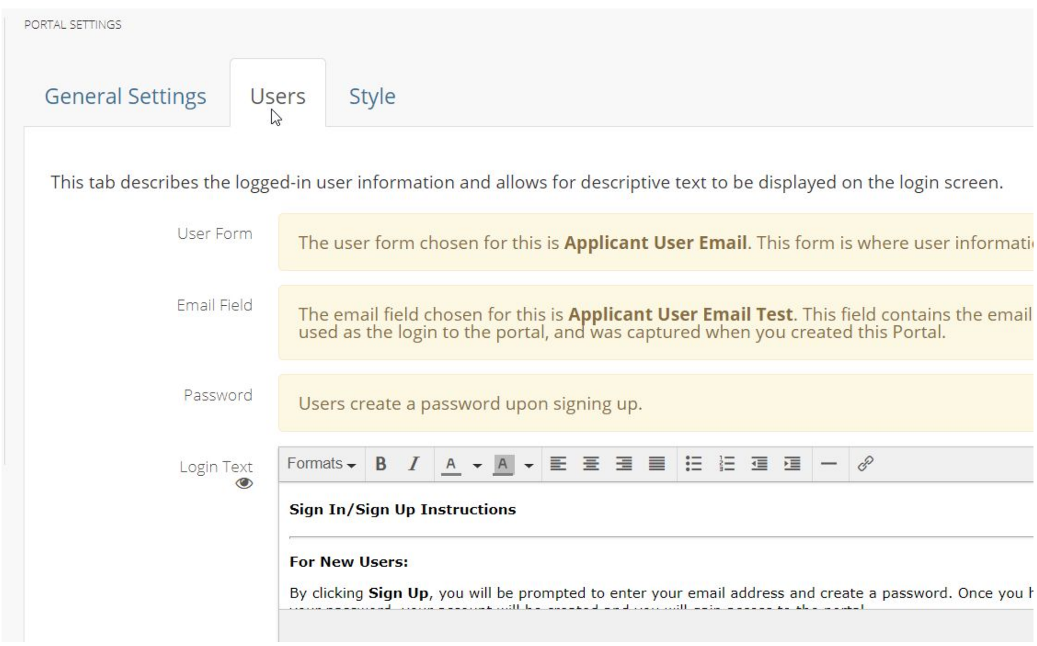
Please Note: if you would like to set up an opening date for your Submission Portal, this setting is also on this screen.

In order to add a **Portal Start Date**, uncheck “Portal does not need a start date” and adjust for the date that you would like your portal to open. You can also update the language that will show to constituents if they attempt to access the portal before the indicated Start Date. Remember to Save all settings.

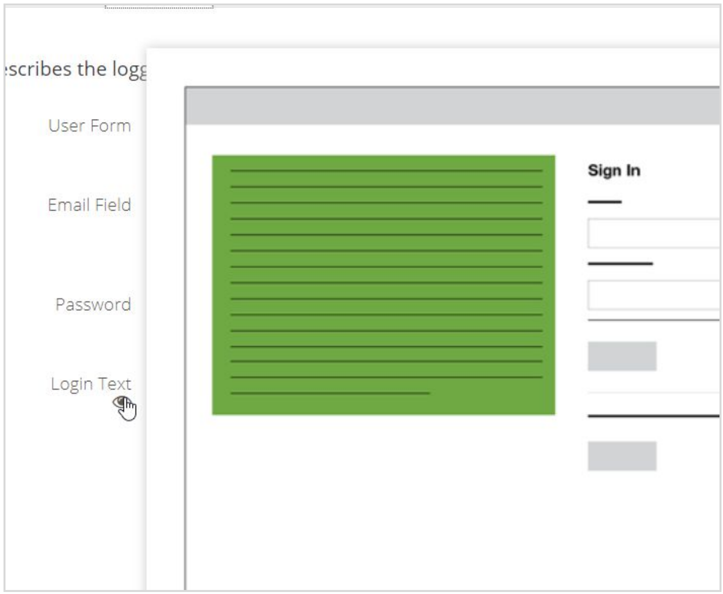


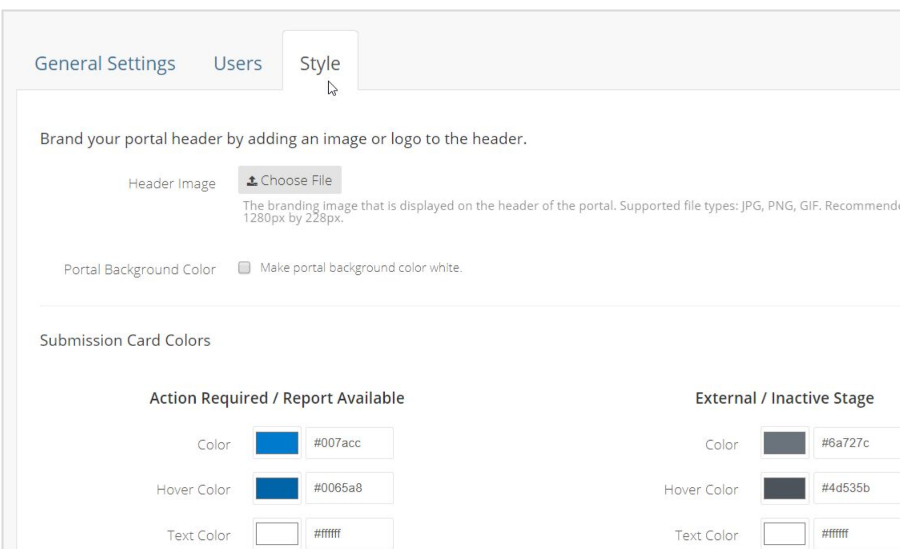
**Please note that all times are Eastern Standard Time*

Next, click on the Users tab in the **Portal Settings** section:

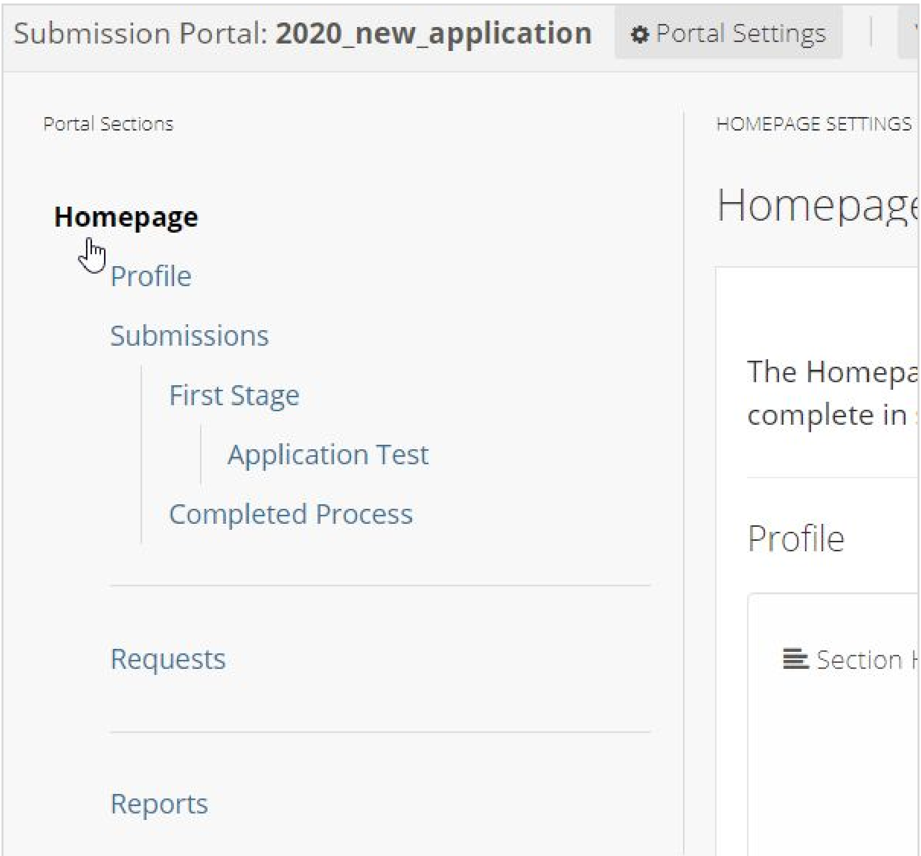


You can update the **Login Text** here. If you hover over the eye icon, it will display where in the Portal a section exists:



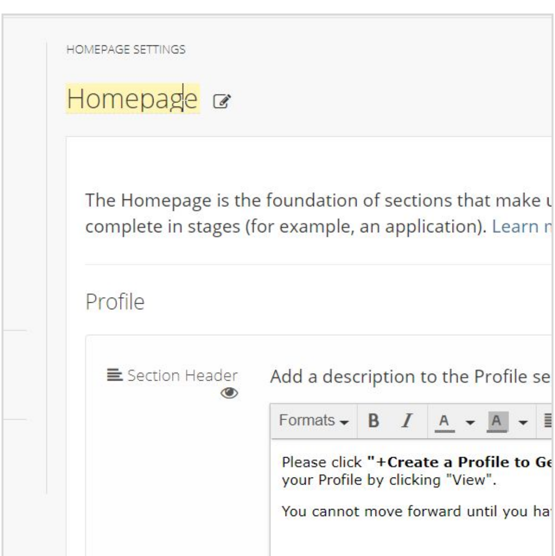


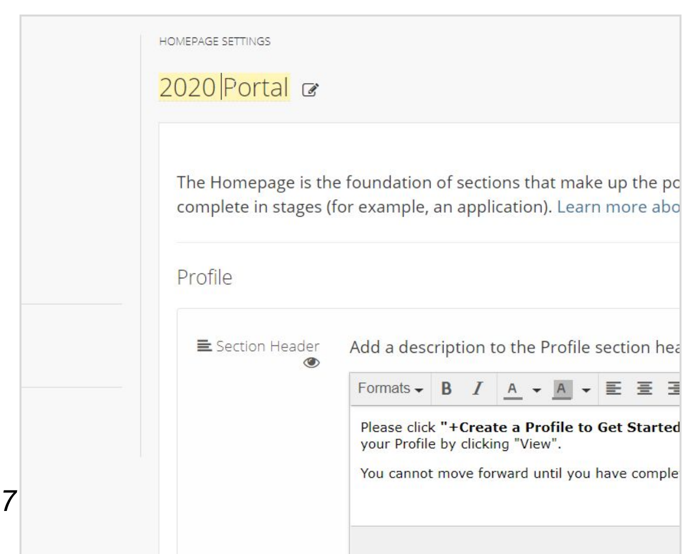
Under the **Style** tab, you can upload your logo and change the submission card colors .

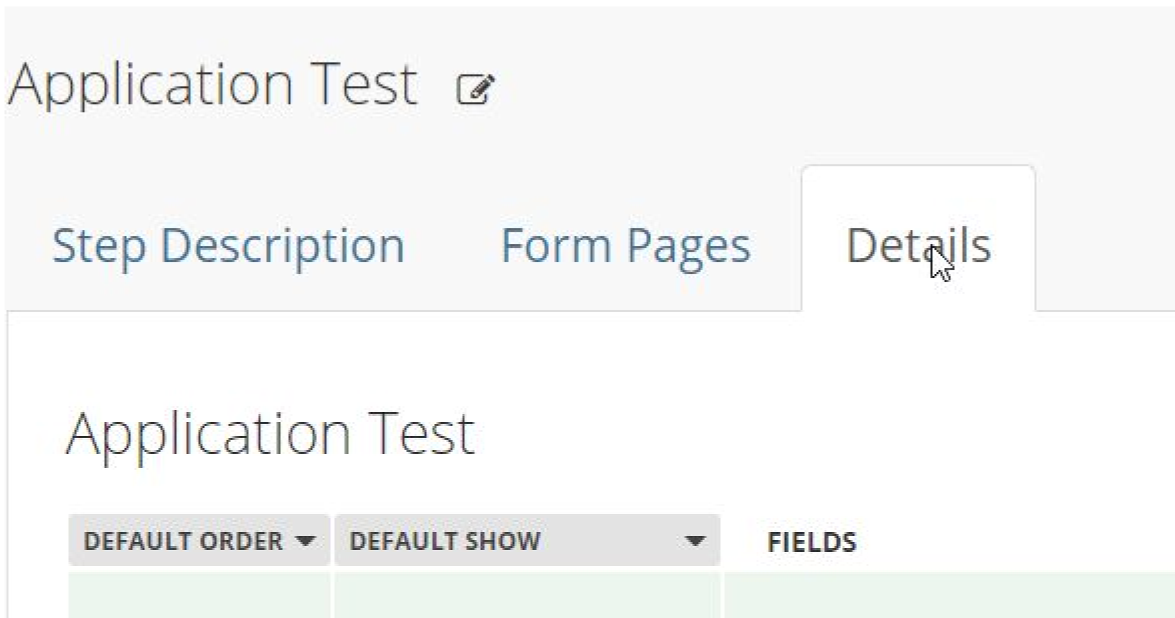


Once all Portal Settings have been configured, you can start customizing each Portal Section. Start by clicking on any of the Stages or Steps under Portal Sections to the left.

You can change the name of these Stages and Steps by clicking on the text :

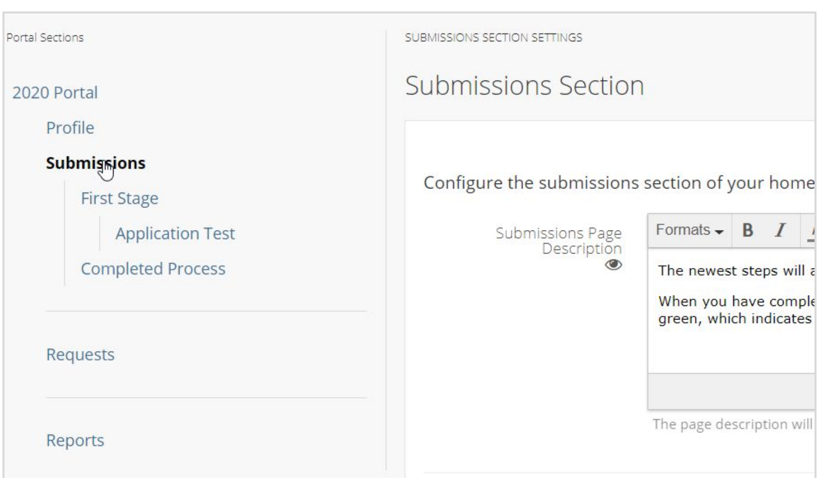




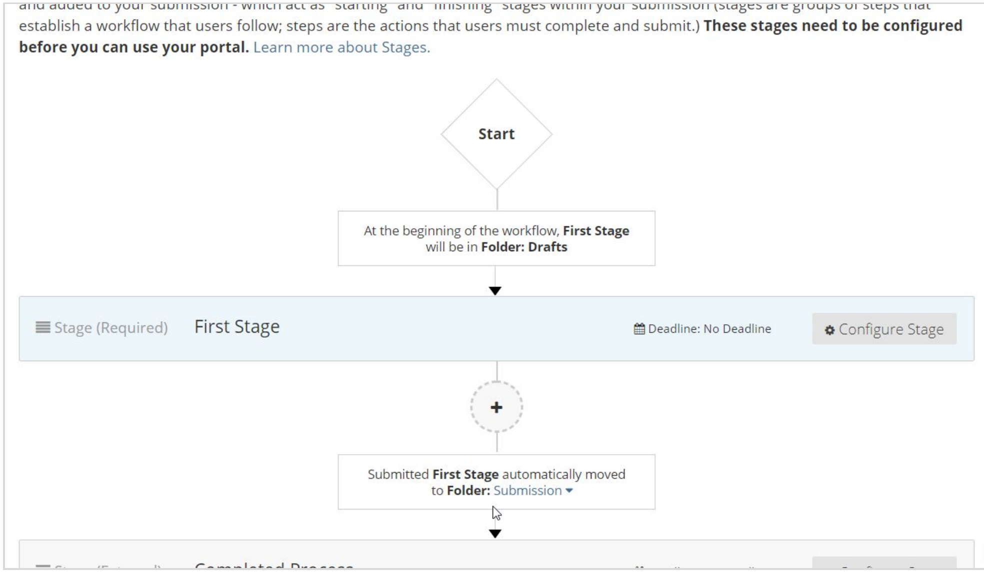


When you get to a **Stage** that has the **Details** tab, you can customize the **Details** of the form displayed. As seen in the image above, for this example: this form is the **Profile** form.

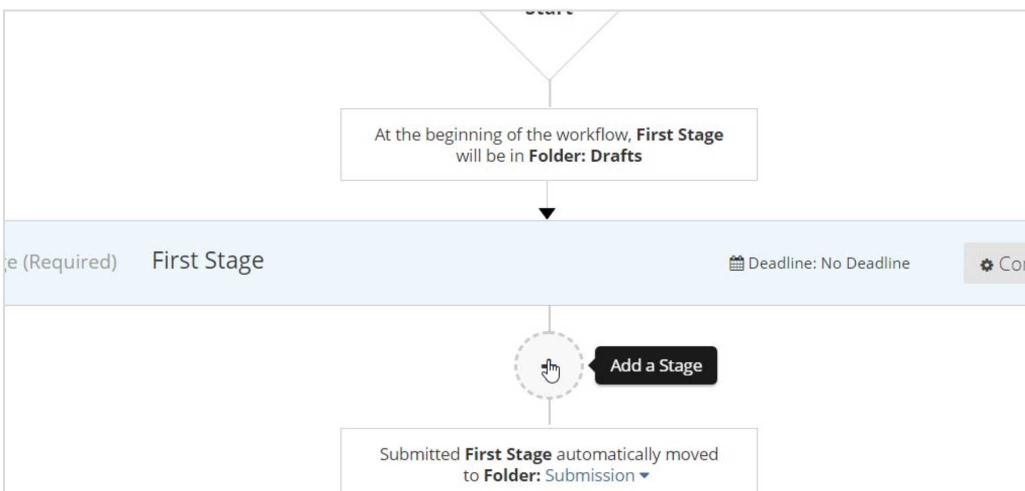
Stages & Steps



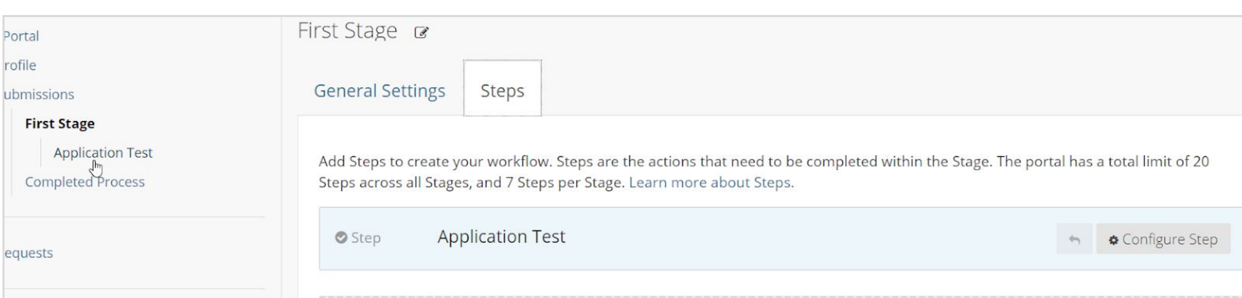
When you come to the **Submission Section**, you will see how the workflow functions for each stage.

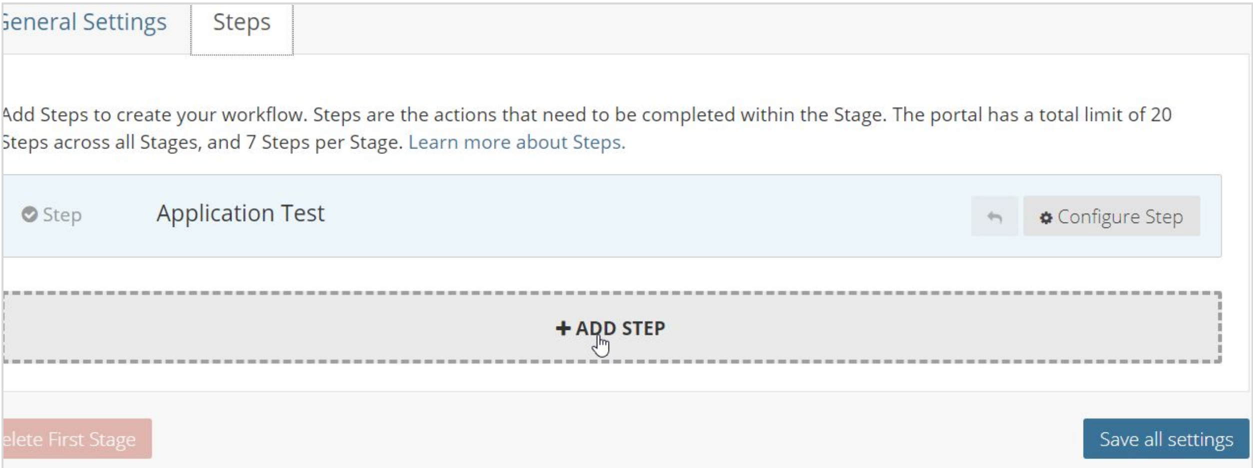


If you have a process that involves more than one stage, you can **Add a Stage** here:



Typically each stage has a Step. You can add more steps by clicking on the Stage you want the Step to be added to:

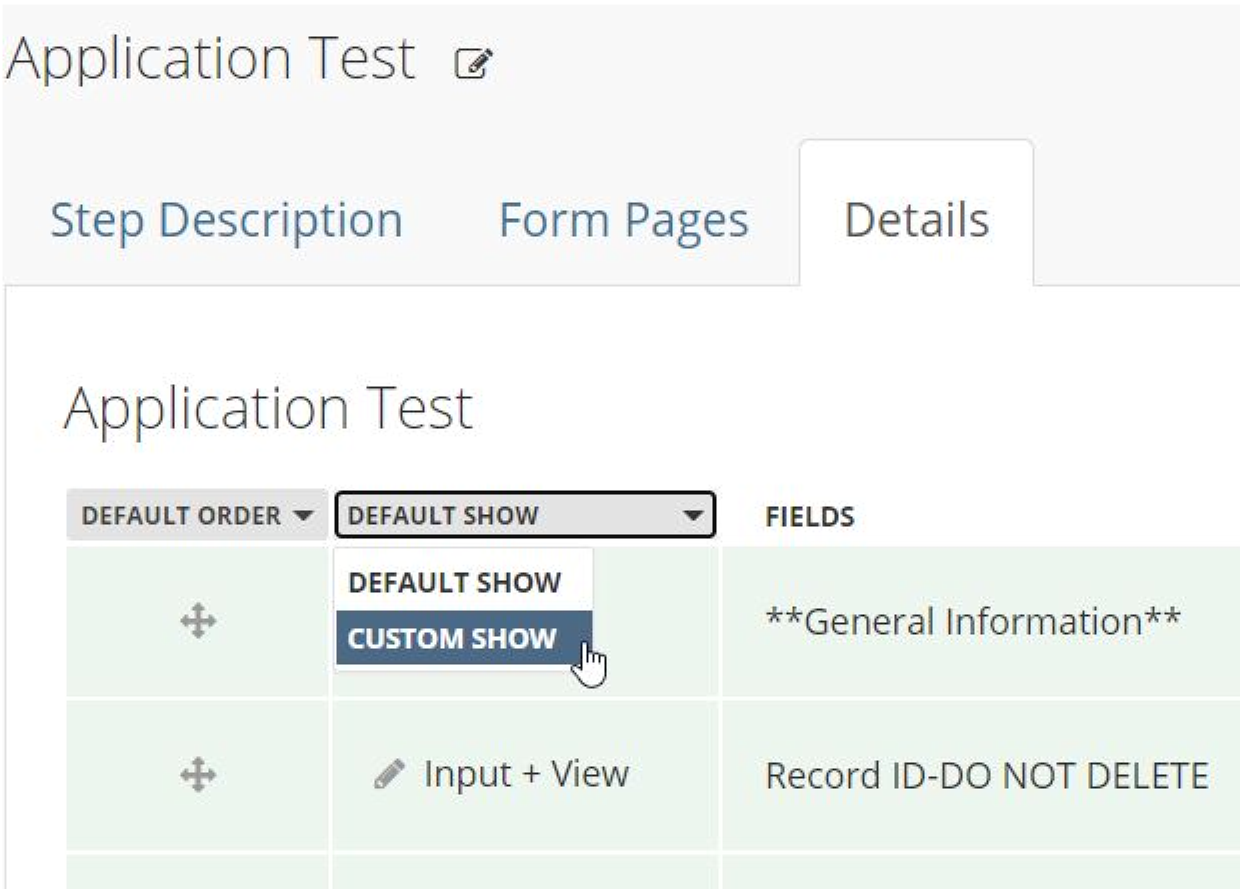




If you’re thinking about adding Stages and Steps, check out our Knowledge base for more information: [Stages and Steps]

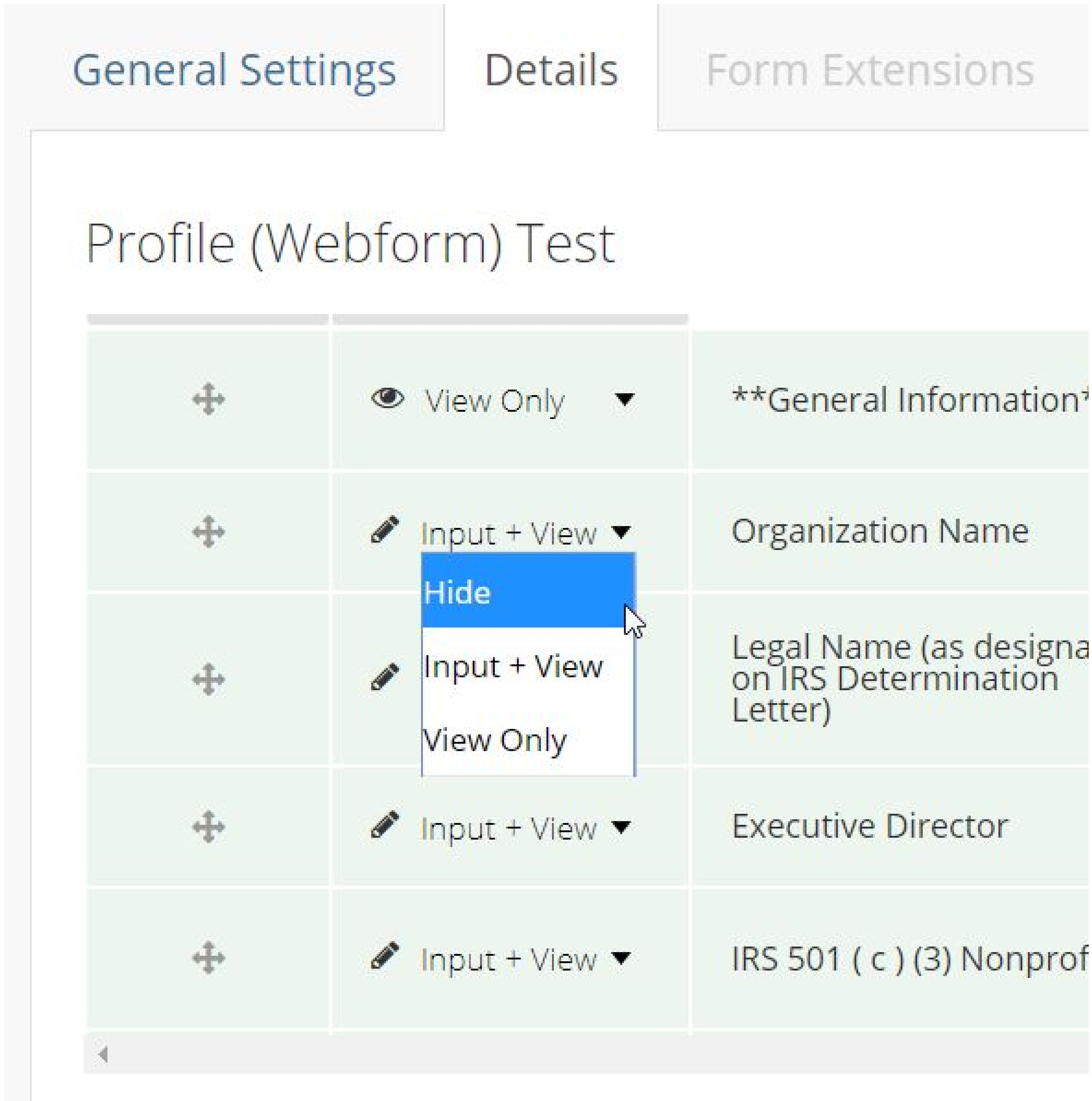
Show/Hide Details

There is often the need to hide certain fields from your constituents (internal fields, etc)... This is possible by clicking on a Step in your Portal Sections, and selecting the Details tab. Here, you can change the **Default Show** dropdown to **Custom Show**:



This will allow you to customize the “Show” for each field on your form. There are three options available to you on most fields:

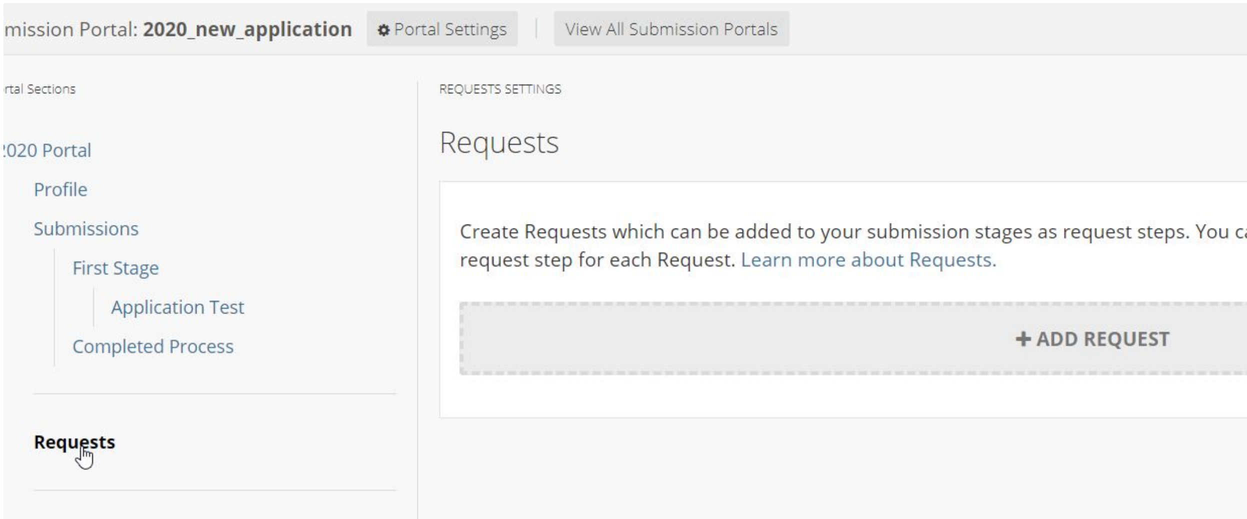
1. Hide: This will hide a field from your constituents in the Submission Portal.
2. Input & View: This allows your constituents to enter data into a field in the Submission Portal
3. View Only: This allows your constituents to view data within a field, but not interact with it.



*Please note, any field that is marked **Required*, you CANNOT Hide. You will first need to go back to the **Form Settings** and uncheck the **Required** box. Then, come back to this page to select **Hide** in order to hide the field.

Once you have customized the fields, remember to **Save** to keep the changes!

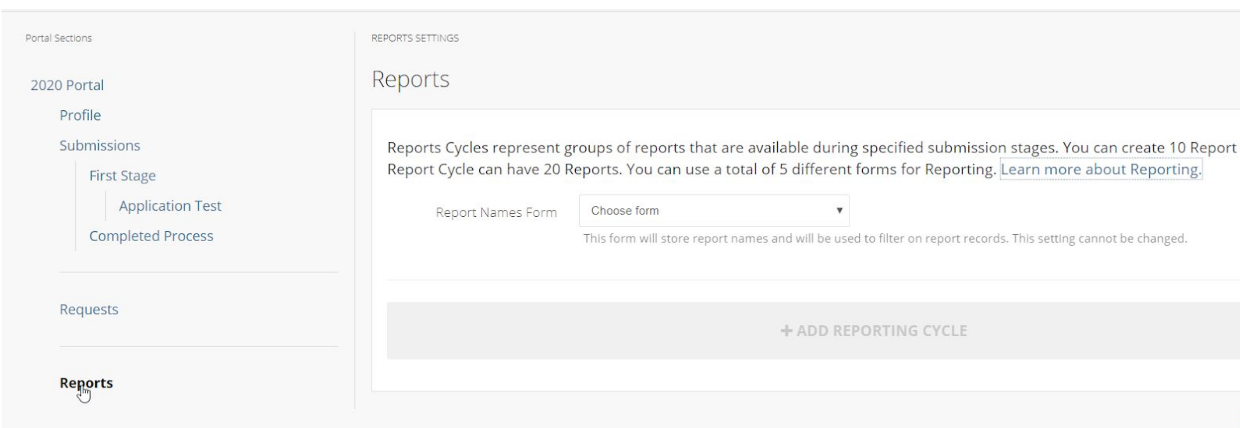
Requests



The Requests feature is a great tool if you need your constituents to have a collaborator submit data on their behalf. For example, letters of recommendation, transcripts, etc. You can learn more about Requests here: [Requests]

Reports

Whether you have a one-time post-award report or need to collect the same information monthly, quarterly, or annually, the reports feature in the submission portal will allow you to define unique reporting schedules and deadlines.



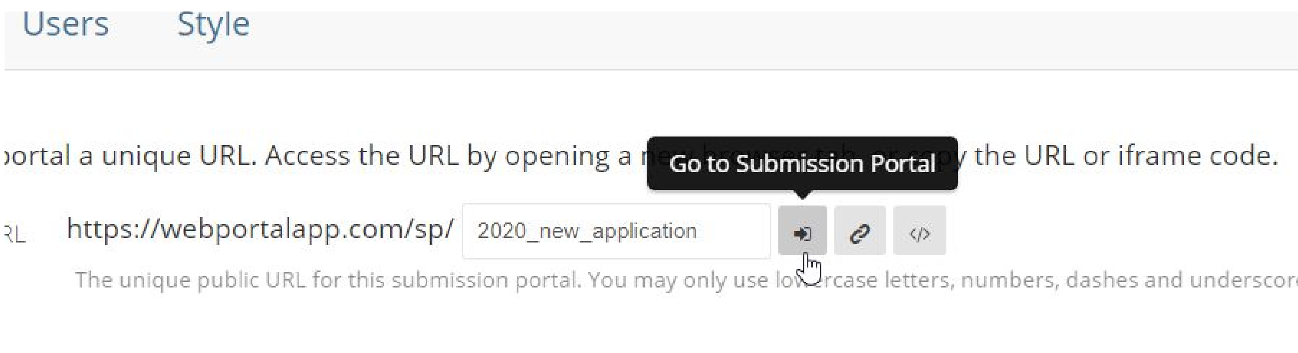
Learn more about the Reports section here: [Progress Reporting]

Once everything is configured to meet your process needs, your Submission Portal is ready to go!

Testing out the Submission Portal

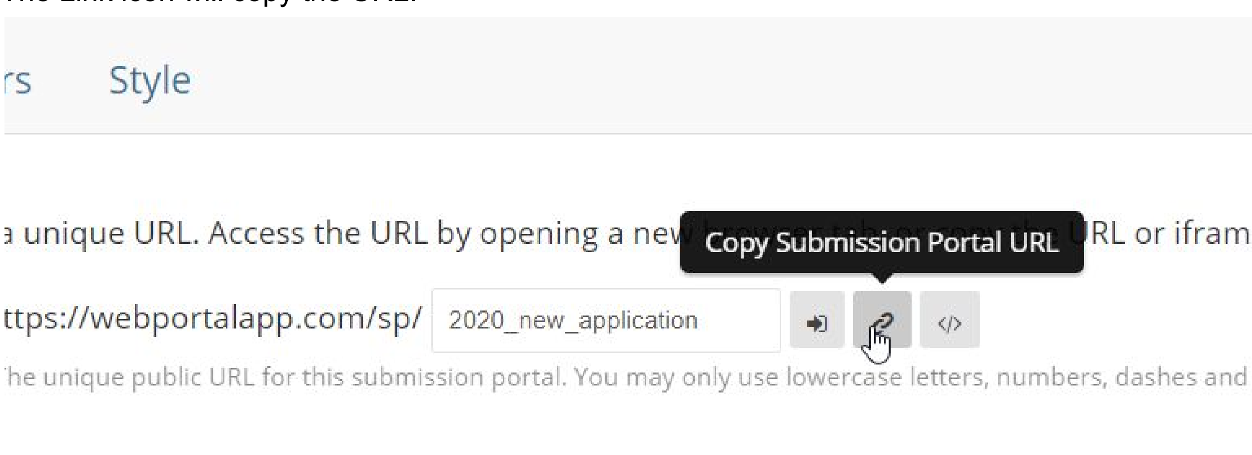
You can test your submission portal at anytime. To test, you can access the portal in the following ways.

Please Note: We highly recommend testing the submission portal prior to collecting data from your constituents.

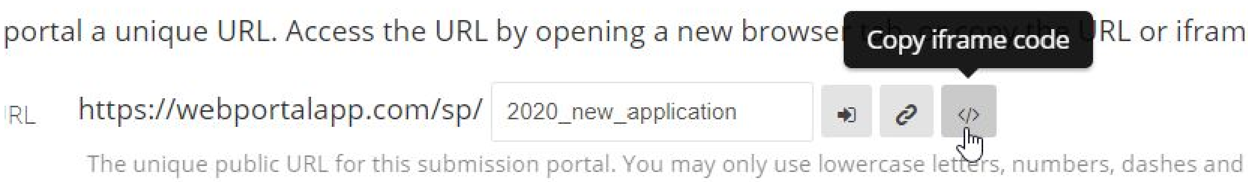


The arrow will open a new tab to go to the Submission Portal

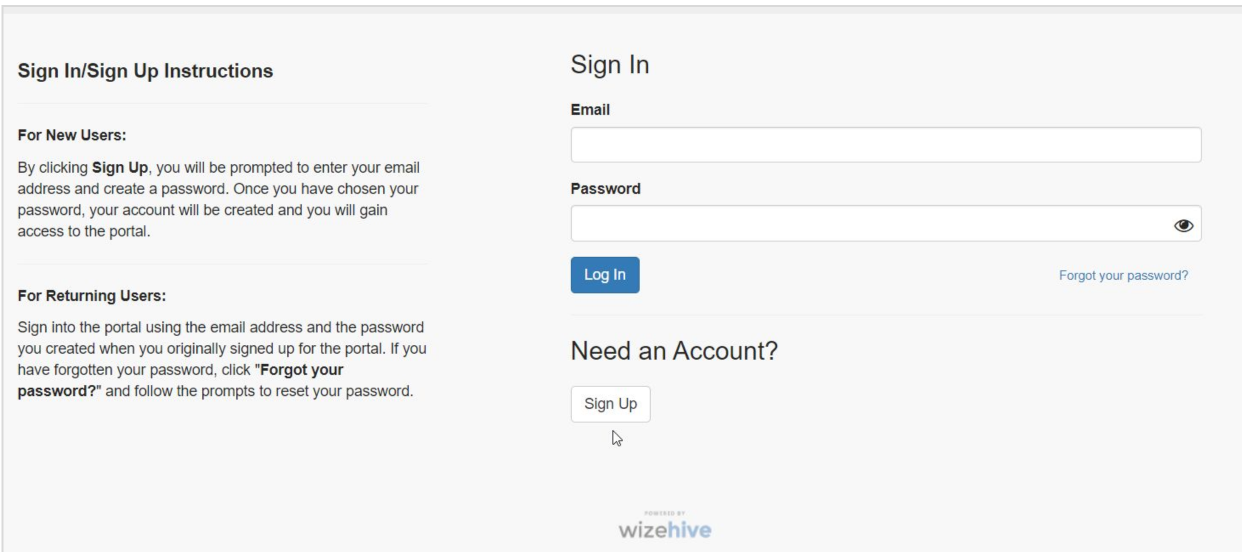
The Link icon will copy the URL:



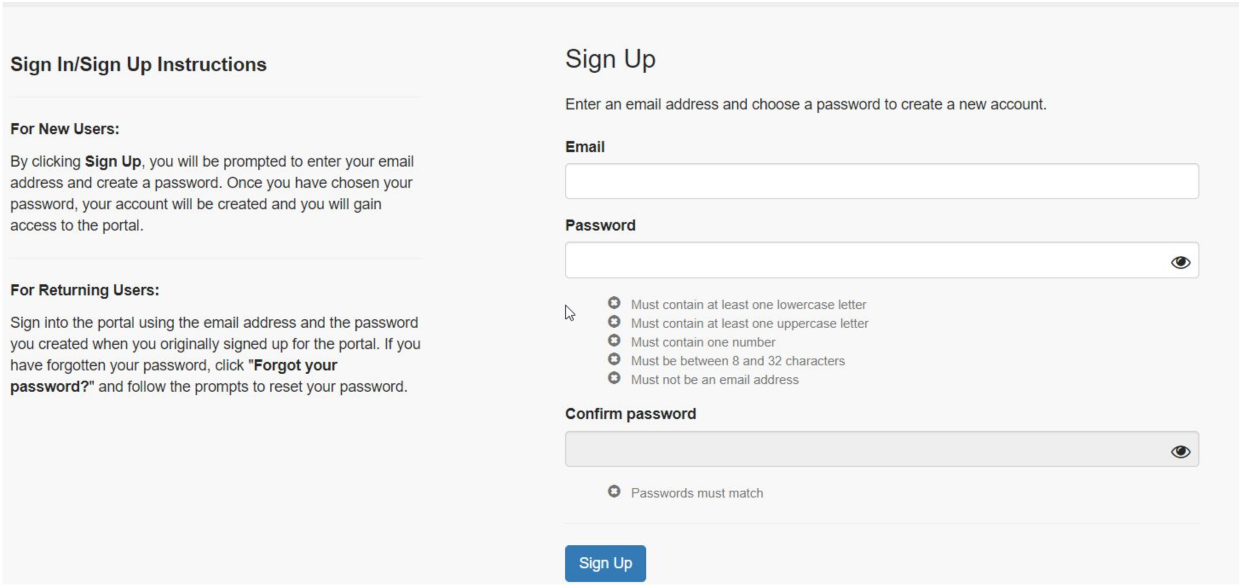
And the last icon is the iframe code if you would like to embed the **URL** into your Company’s website.



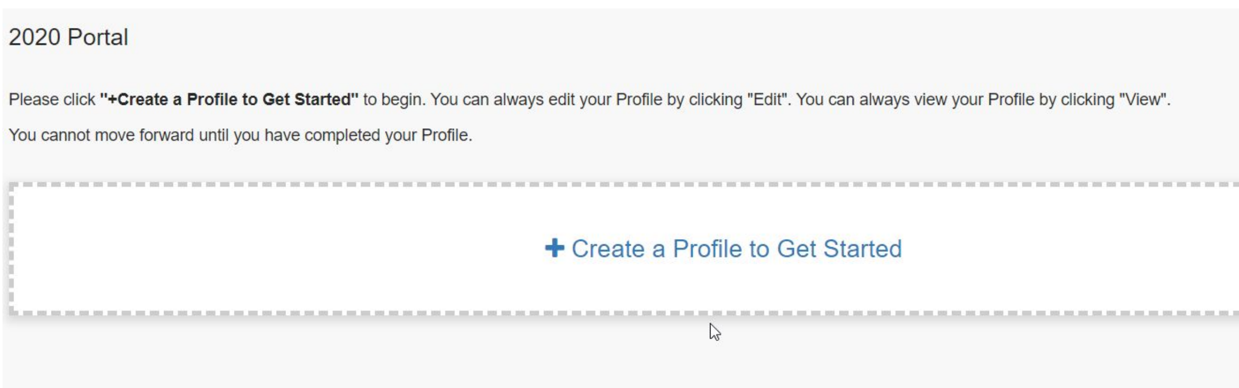
When testing the submission portal, you land on a Sign In/Sign Up page:



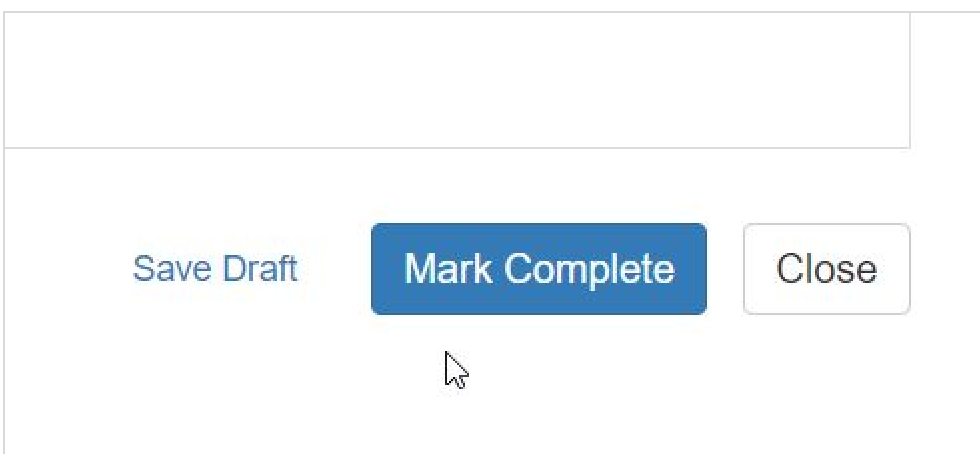
If this is the first time accessing the Portal, you will use the **Sign Up** option, enter your email, and create a password:



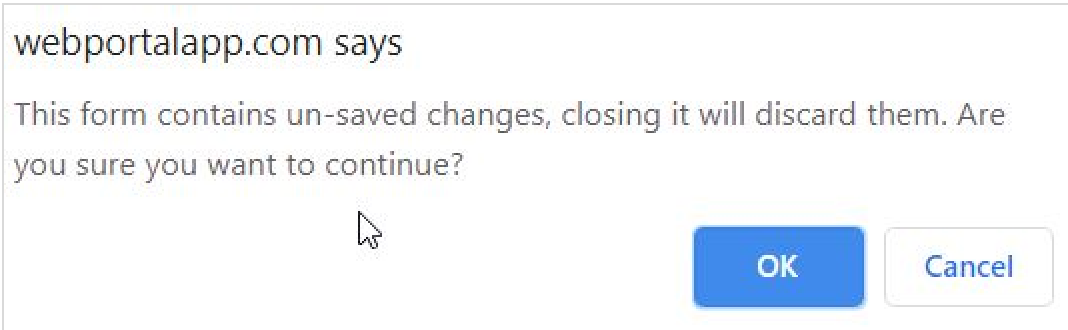
After Sign Up, you will be directed to the Submission Portal Homepage. Here you are able to create your Profile to get started:



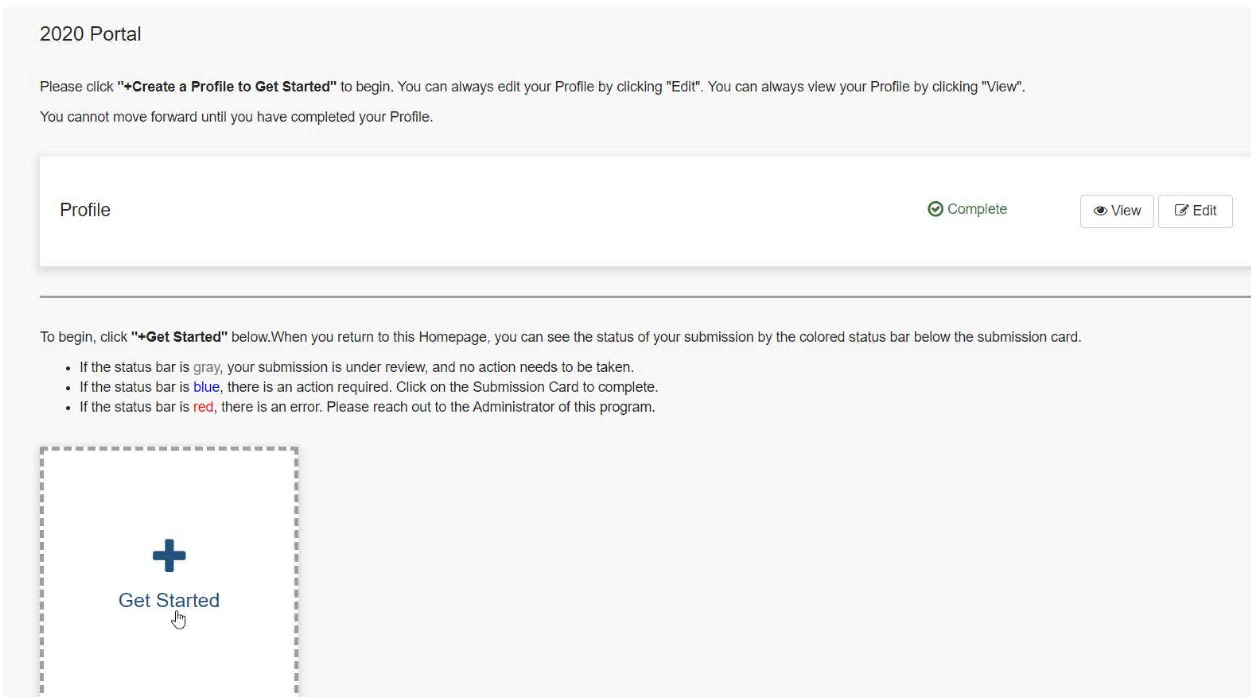
Complete the Form and choose either the Save Draft or Save icon on the bottom:



Selecting **Mark Complete** will let you continue to the next **Stage** in the process. Selecting **Save Draft** will only **Save** the form as a **Draft** and you will not be able to continue until you select the **Save** button. If you select the **Close** option, your form will not save any changes.



Once your profile is complete, you can click “Get Started” to begin your application.



Continue through the Submission section until you have completed all required steps in your portal. Once completed, you will be able to click on the Submit button.

Now you have successfully setup and tested your Submission Portal!

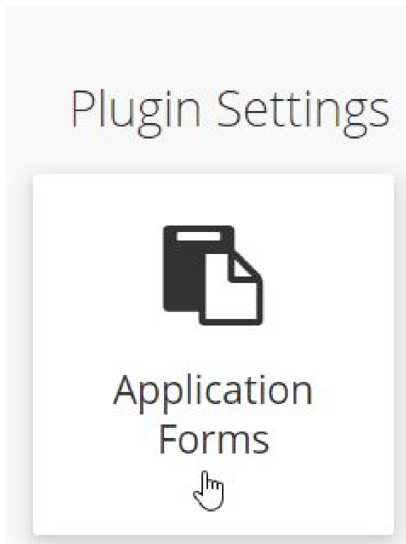
NOTE: The Record Identifier is shown by default on all “Cards” within this portal. Furthermore, ‘(untitled)’ displays on the card when the record does not contain data, thus the record identifier has no information to display until data is entered.

Application Forms

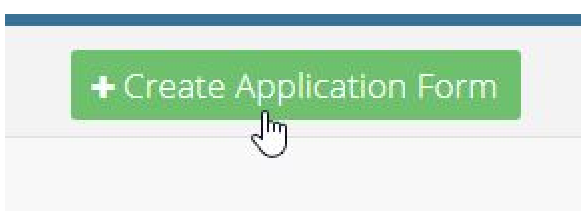
Application Forms are similar to the Submission Portal, however there are no stages or steps. This plugin allows for one (1) form submission per user.

Please Note: *Typically, this plugin is used instead of the Submission portal for those on our Core Plan*

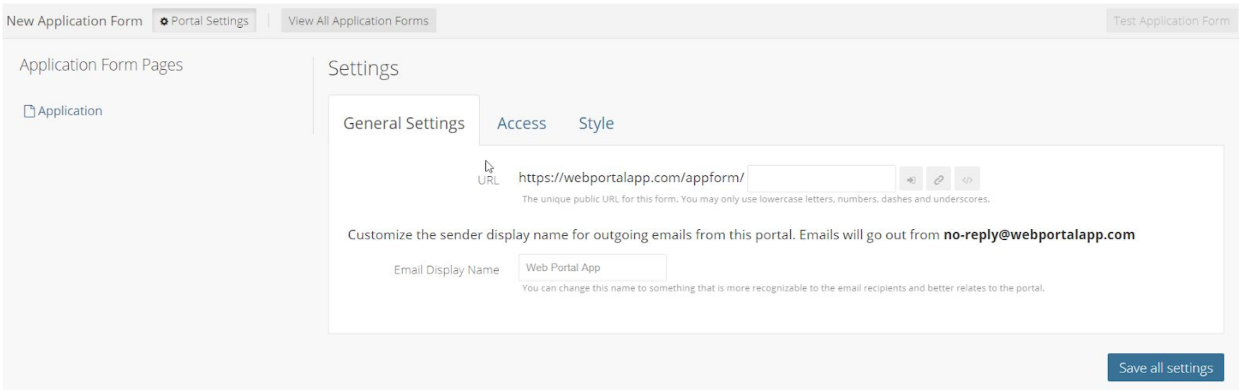
To begin, head over to **Settings & Tools** and select the **Application Forms** plugin:



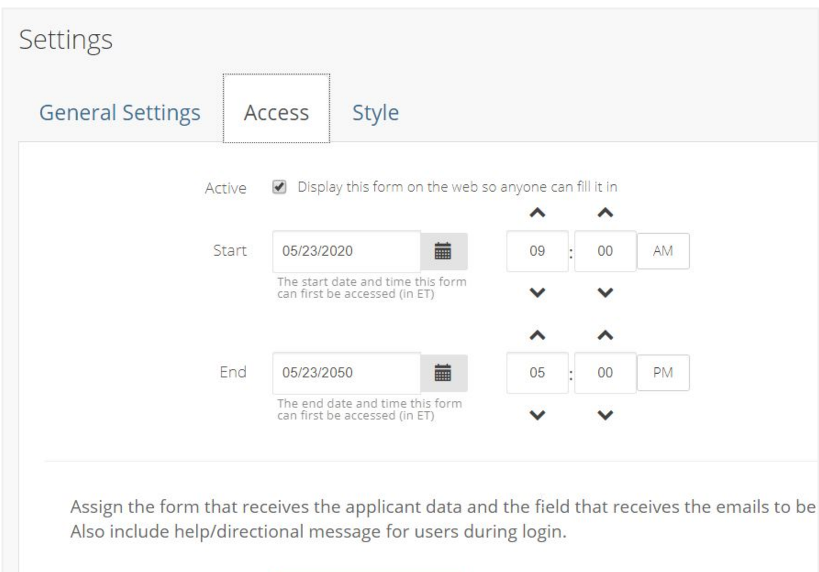
Click on **Create Application Form**:



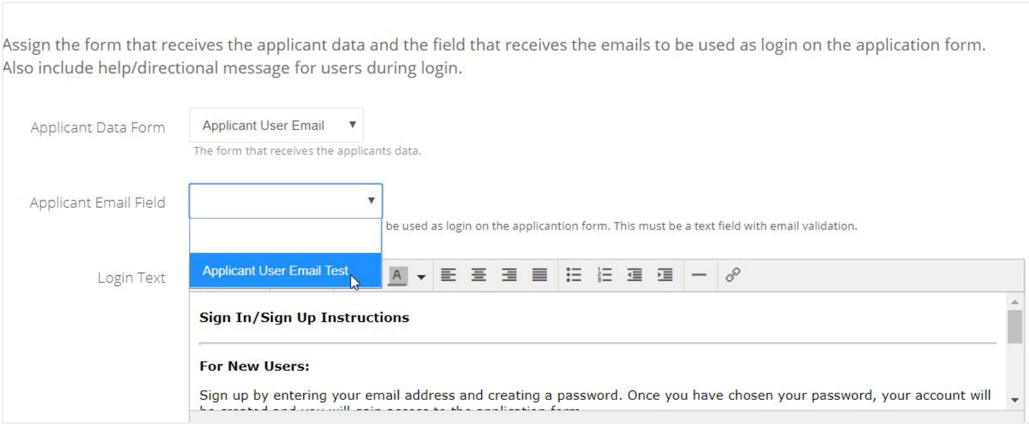
Next, complete the *General Settings* section and set a URL. Continue through the **Access** and **Style** tab and update as you see fit:



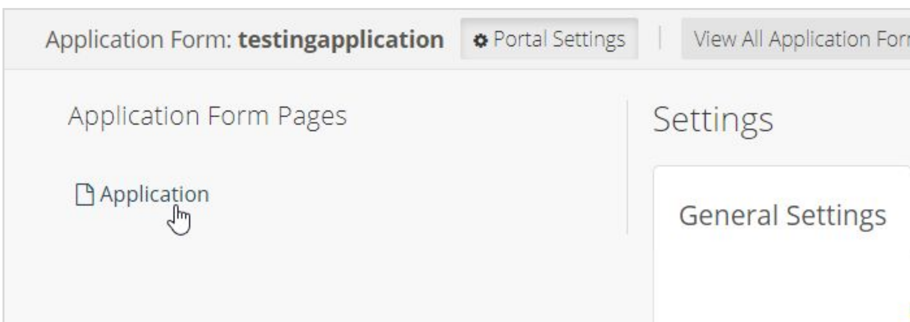
The *Access* tab is important to note as this is where you can set the **start or end date** of your application as well as pick out the **Applicant Form** (Email User Form):



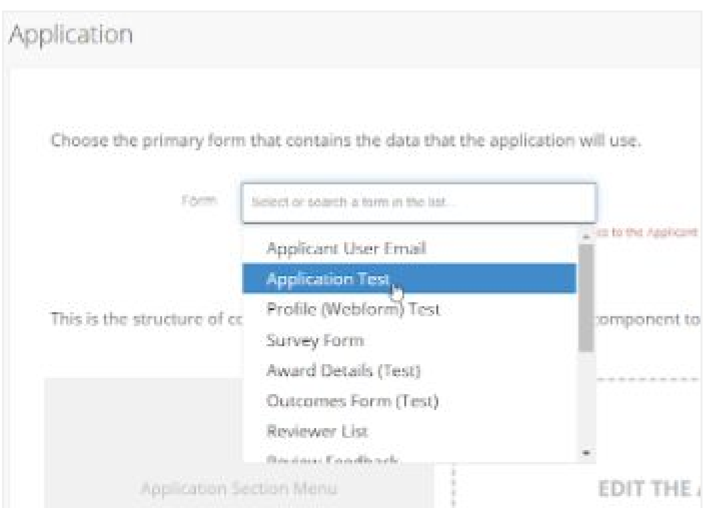
Make sure you are using the **User form** that is linked to your application.



Select **Save** to continue.



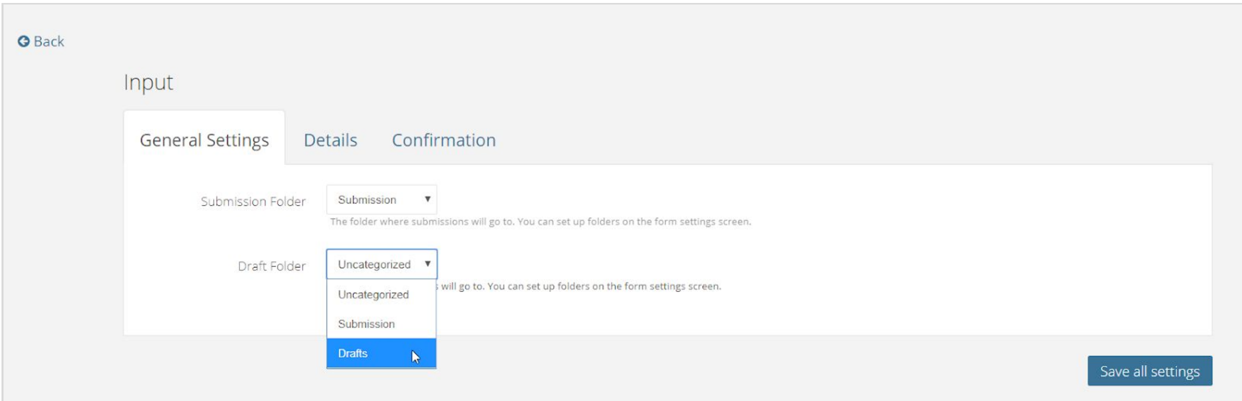
Select “**Application**” on the left to open the setting for the Application form:



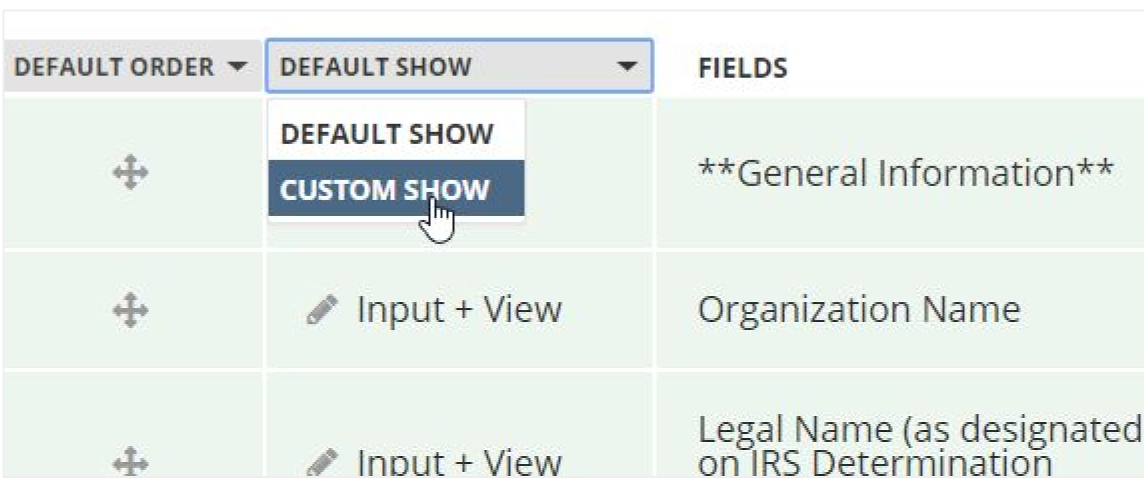
Next, choose the **Application Form** from the dropdown menu.

Then click “Edit The Application Section” to open additional settings.

You will then select the **Folders** you want the submissions to go into along with the designated "In-Progress" folder where Drafts will be stored. Then click the **Details** and **Confirmation** tabs.



When you are in the **Details** tab, you are able to choose the **Default Show Dropdown** or **Custom Show** if you want to customize the fields:

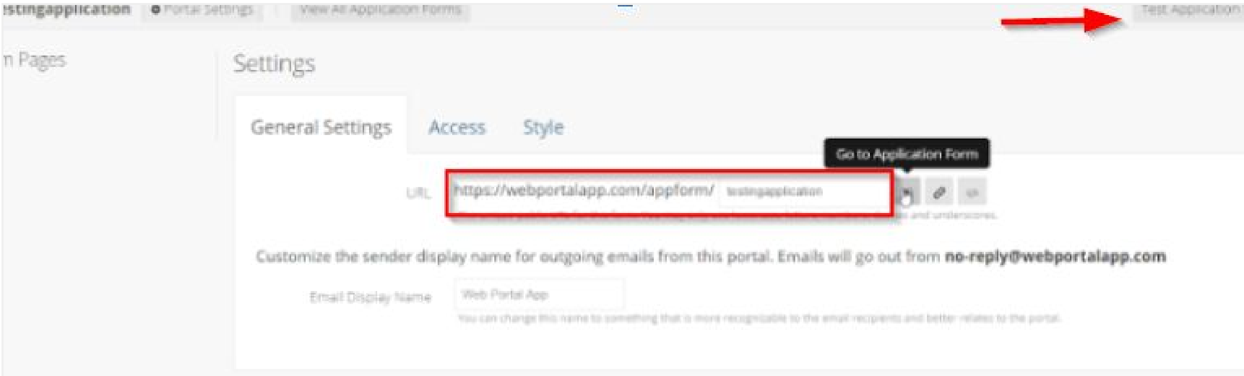


As mentioned earlier, you can **Custom Show** the fields to *Hide, Input + View or View Only*.

- Reminder, you cannot *Hide* a *Required field.

Save all settings when you are done!

Make sure to test the application by clicking into the URL or clicking the **Test Application Form** button on the top-right:



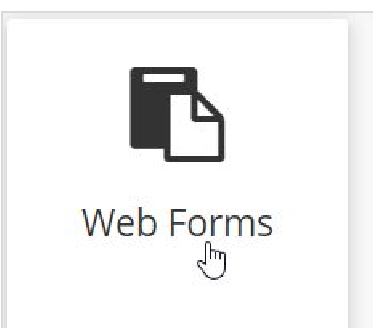
Once you have submitted your test application, make sure to go back to the Platform and review your application in the Data view!

Webforms

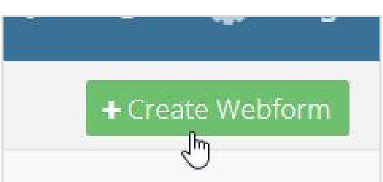
Webforms are also another great way to collect data similar to the **Submission Portal** or the **Application Forms**, except with **Webforms**, you do not need to log in to complete the form!

Some examples of using a Webform are:

- Gather Contact information
- Information on a Survey, or...
- An Application that does not require a username and password

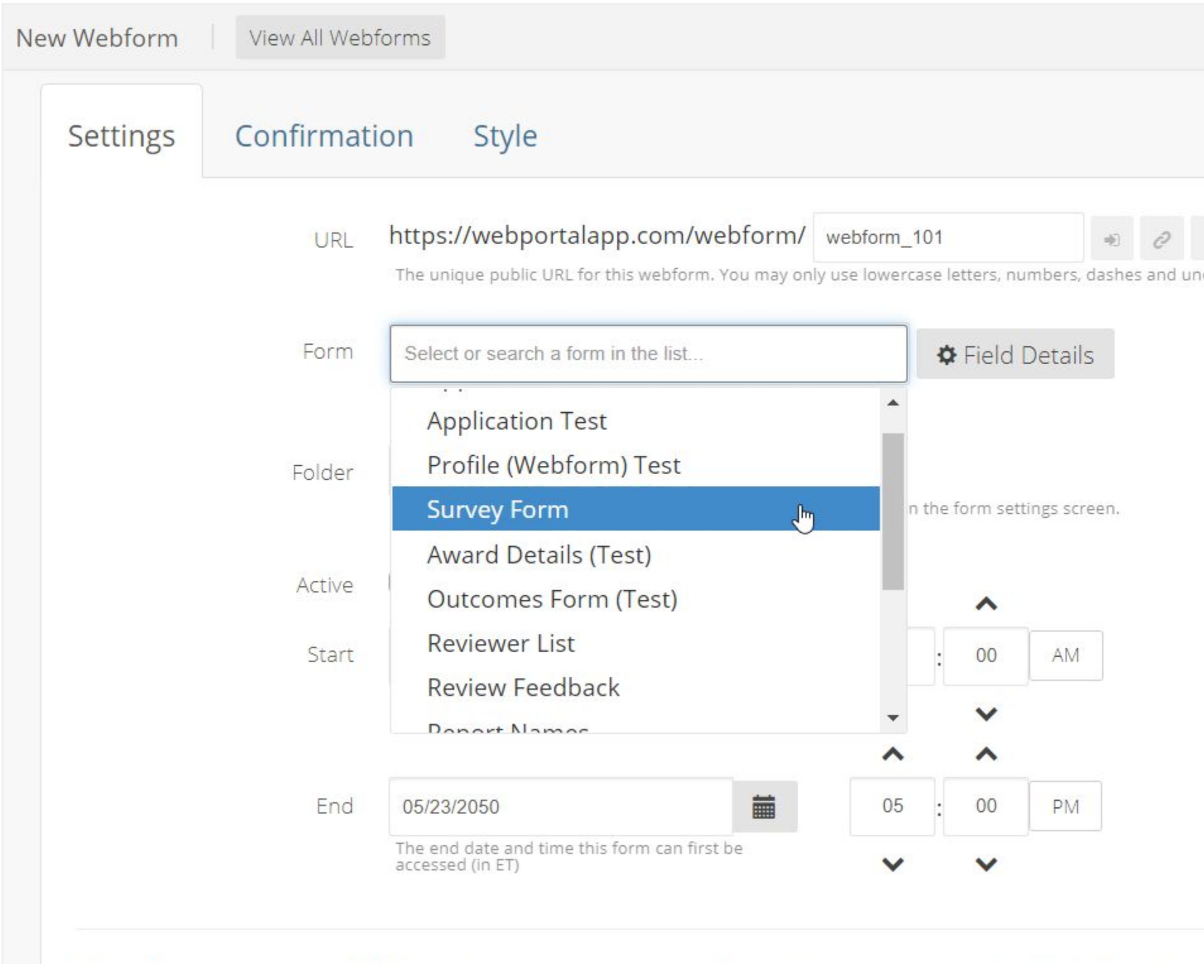


To get started with **Webforms**, go to the Webform plugin under **Settings & Tools**.

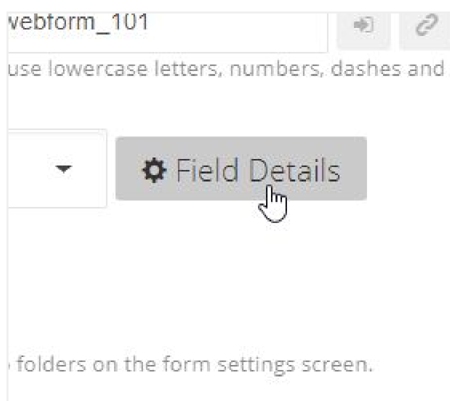


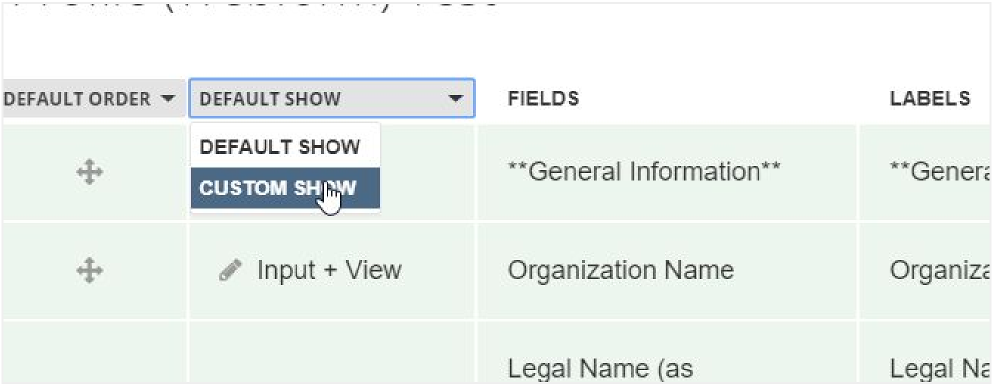
Click on **Create Webform** button on the top-right.

Enter a **URL** name, select the **Form** you would like the user to complete, and set the **Dates** the form should be viewable.

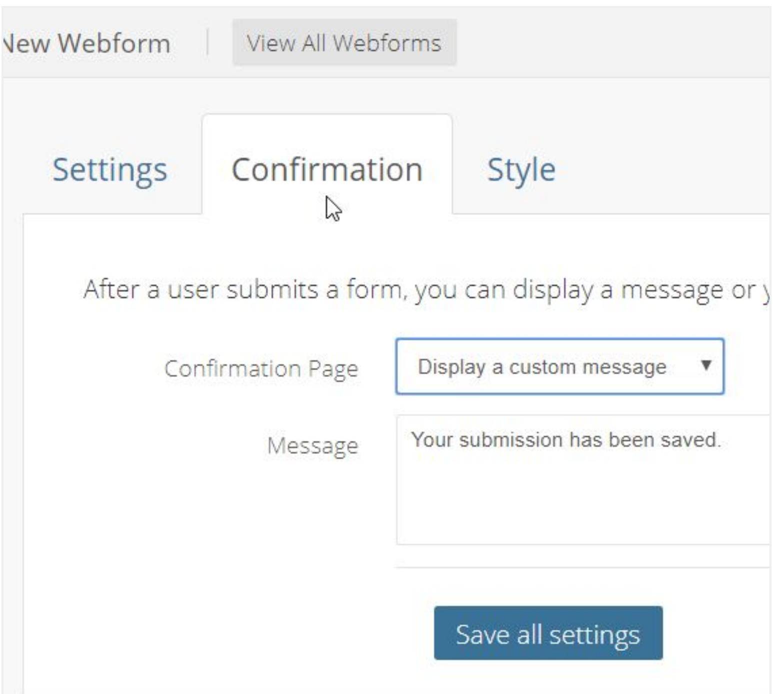


If you would like to adjust any of the fields to **custom show** as [discussed earlier](), select **Field Details**:

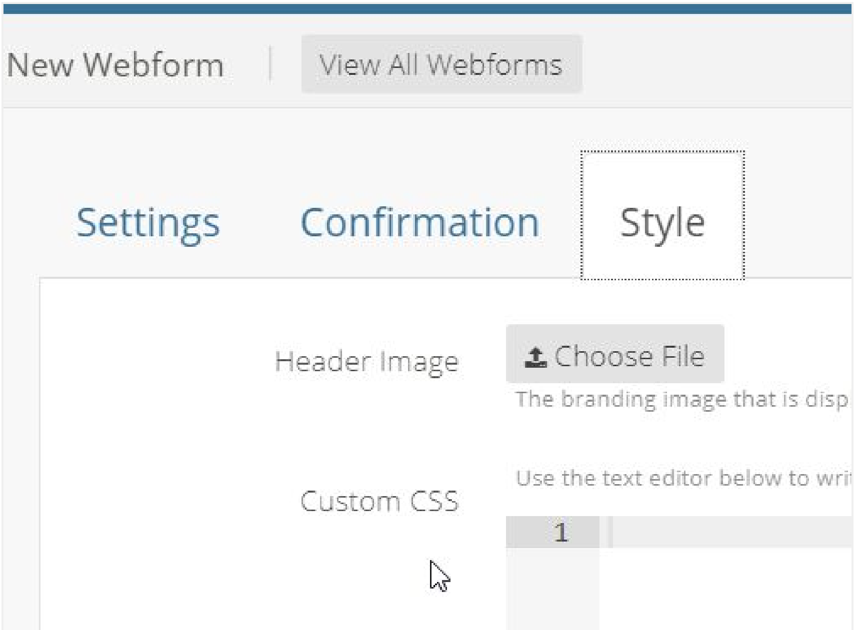




Within the **Confirmation** tab, you can update the **Confirmation message** that appears once the constituent submits.



Within the Style tab, if you have CSS, you can place here and update the navigation bar image, such as your Company's logo:



Save all settings when you are done!

Return back to the **Main Settings** tab and click on the **URL** to test:

If everything looks good, then you are all set up with a **Webform**!

You can learn more about webforms by clicking here: [Webforms]

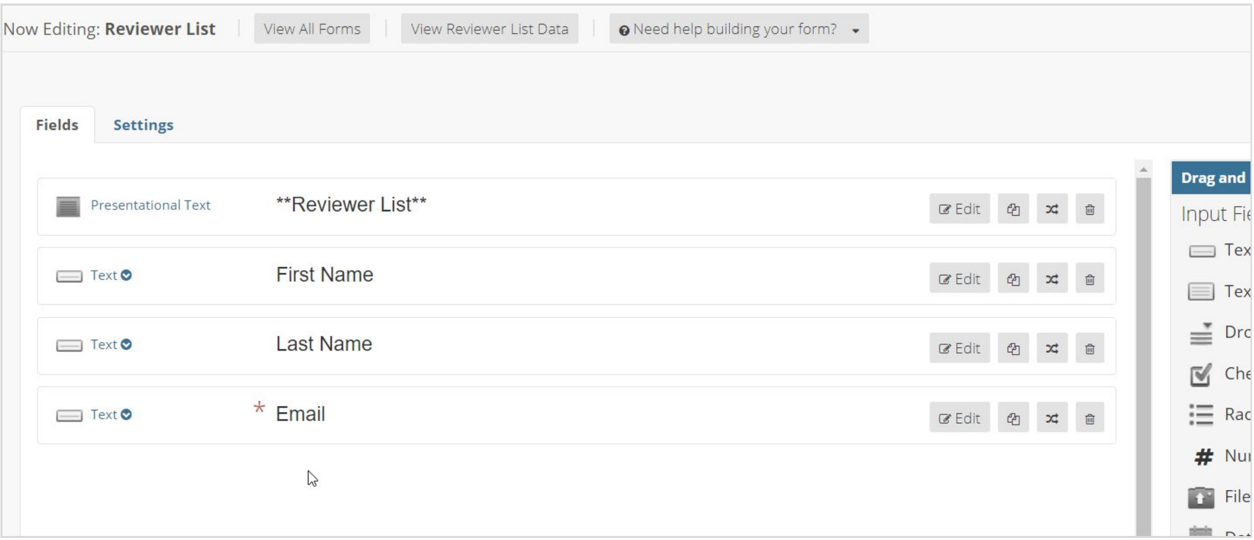
Program Manager & Assignments

The **Program Manager & Assignments** plugin is essential if you are going to be collecting feedback from Reviewers and setting up a **Review Portal**.

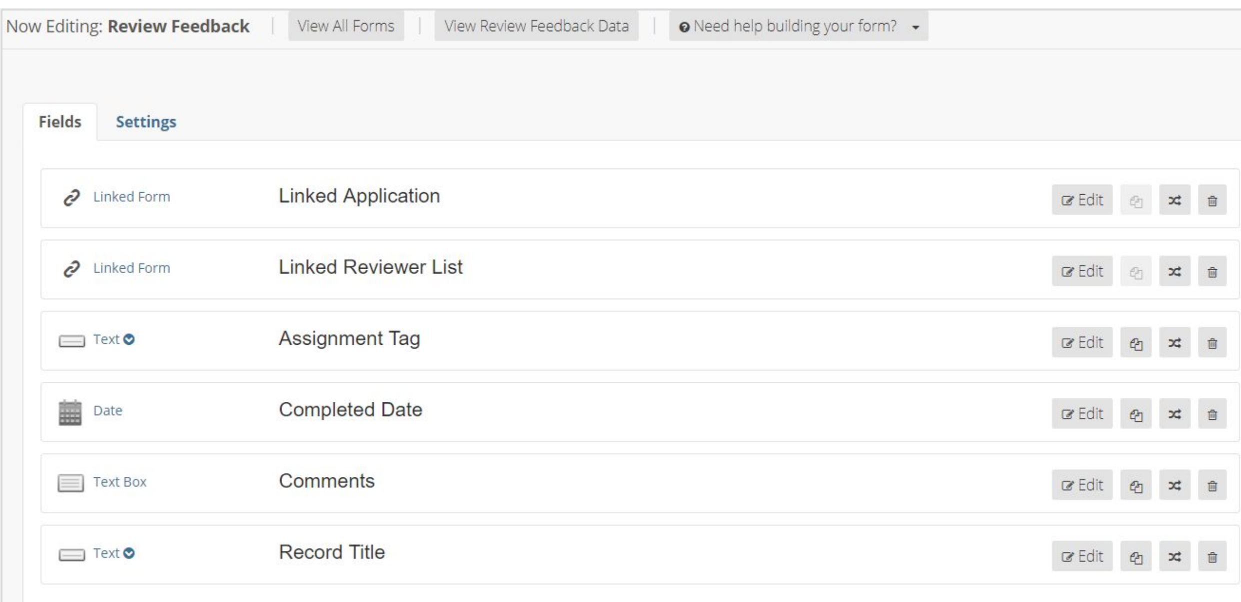
To get started, you will want to first create a **Reviewers List form** and a **Feedback form**

- Reviewers List Form - Includes email address (required), name, and other information you deem necessary (optional).

- Feedback Form - This is the form reviewers will interact with when providing feedback. Includes a linked form field back to the reviewers list form, another linked form field back to the primary form, a text field for assignments (Tag Field), and finally a date field to record the date the review is completed. Once these required fields are added, make sure to add your feedback fields.
    - You'll also need to set up 3 folders: Not Started, In Progress, and Completed to store reviews throughout the review process.

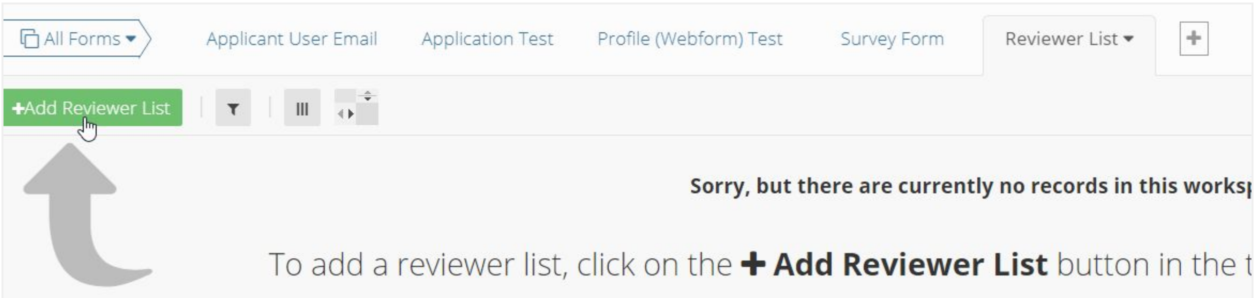


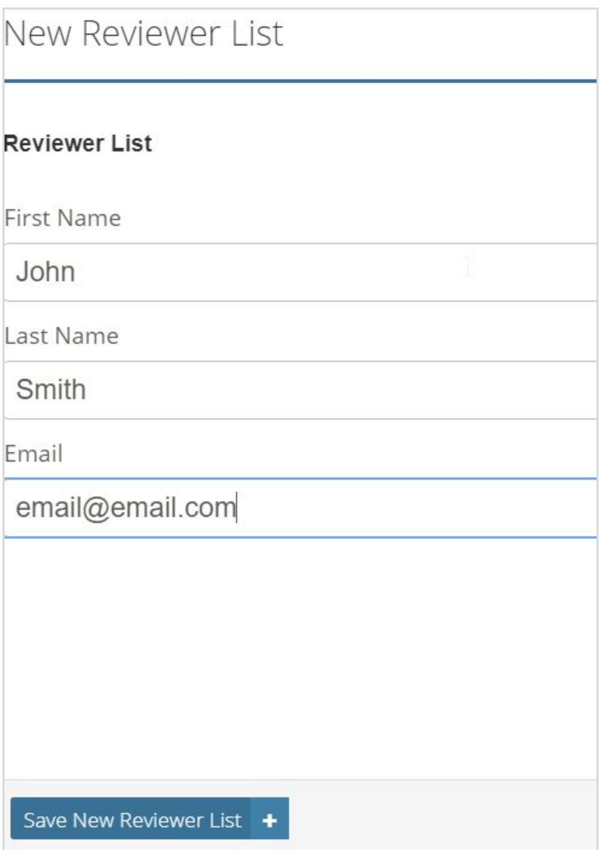
Reviewers List Form



Feedback Form

Next, add your reviewers to the Reviewers List form. Navigate to the Reviewers List form on the Data View screen, click on the **Add Reviewer List** icon on the left:





Fill-in the Reviewers information and select **Save New Reviewer List**. Complete these steps for each new reviewer until finished.

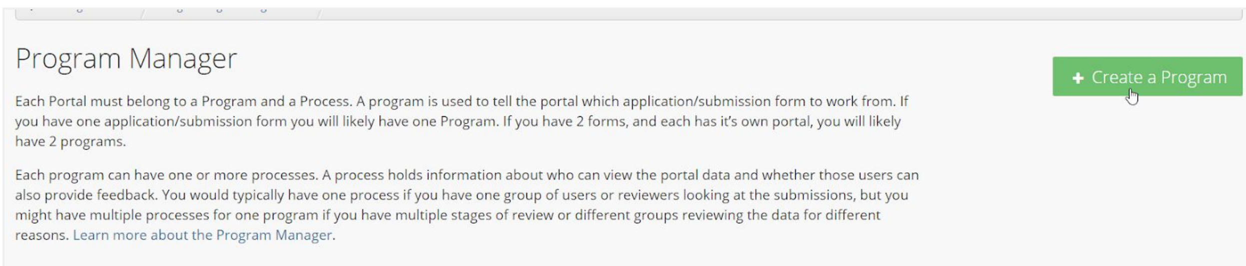
<u>It is best to add yourself to the **Reviewers List form** so you are able to test the **Review Portal**.</u>

Then you can go ahead to **Settings & Tools**:

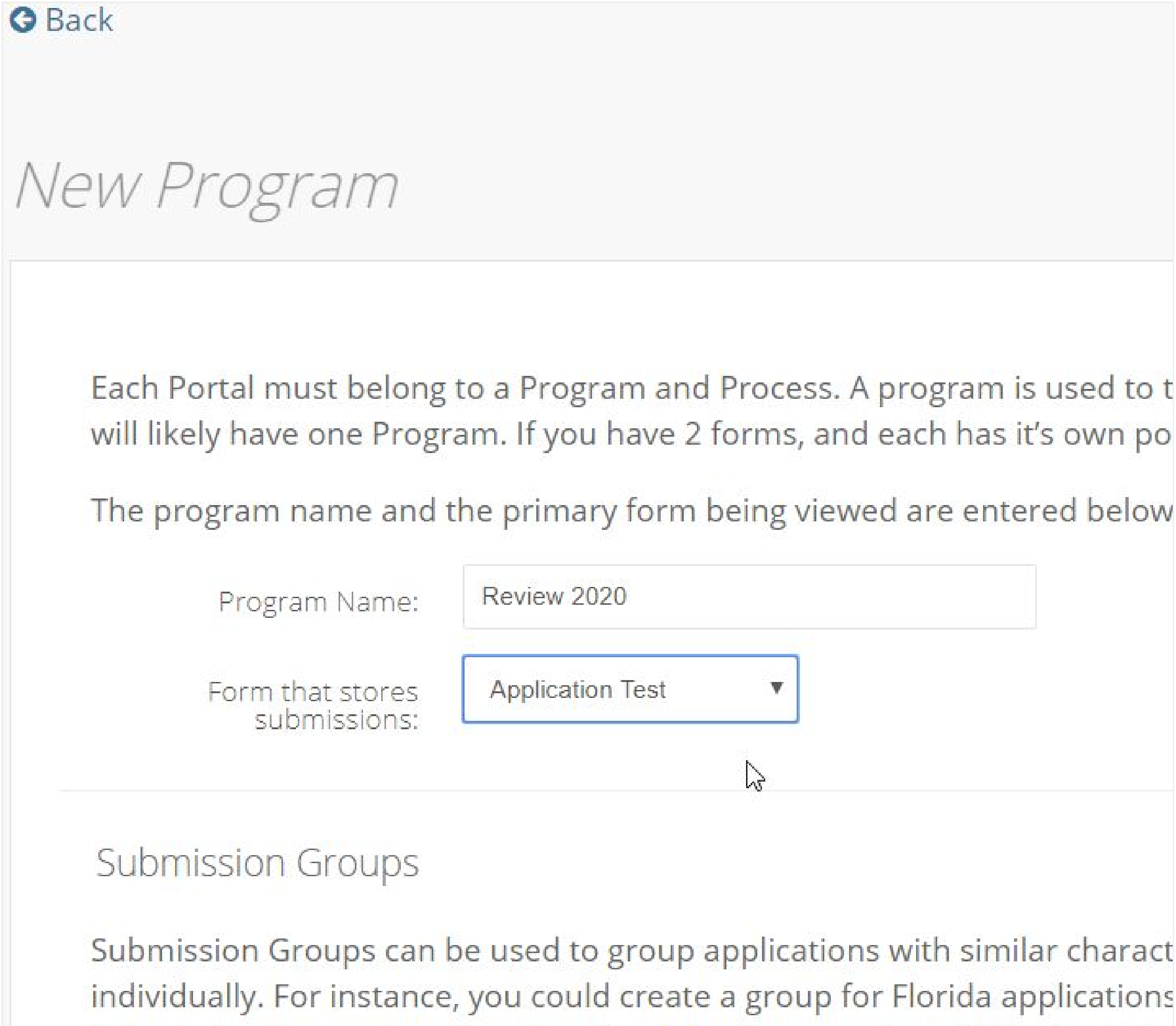
Locate the **Program Manager & Assignments** plugin:

List

Click on **Create a Program**:



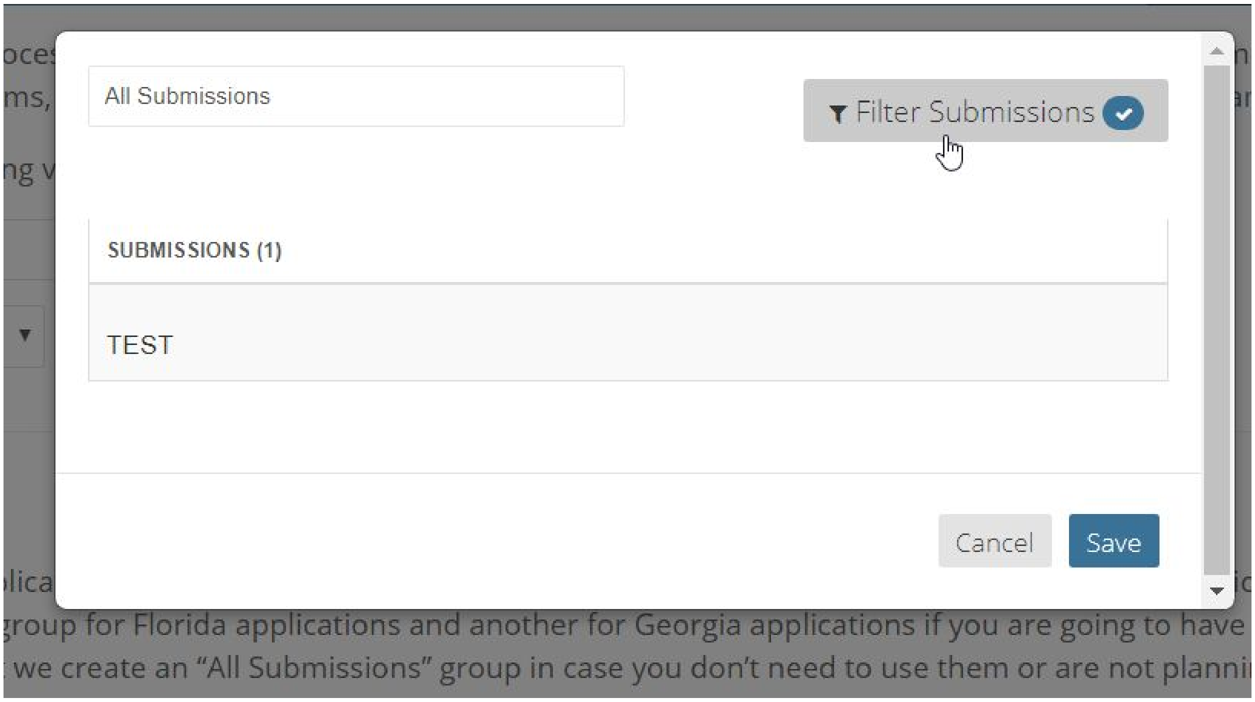
You will need to name the **Program** and select the form that stores the submissions, typically this is the **Primary Form**:



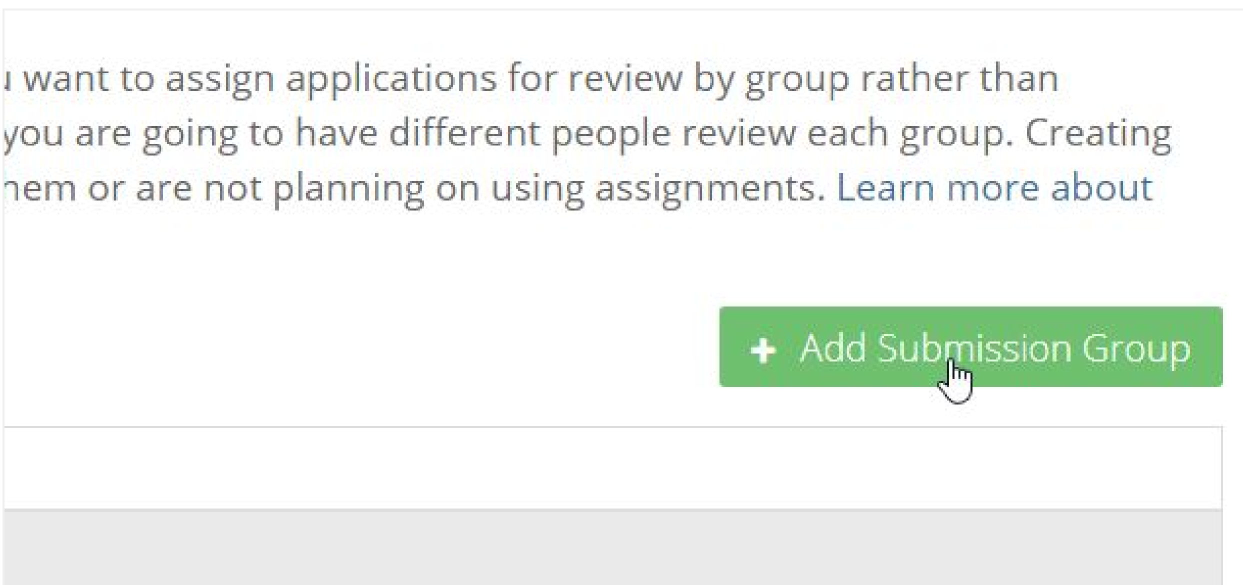
Below are **Submission Groups** that will need to be created for a specific set of groups, such as:

- Submissions by State
- Round 1 of Submissions
- Submissions by Last Name ‘A’, etc.

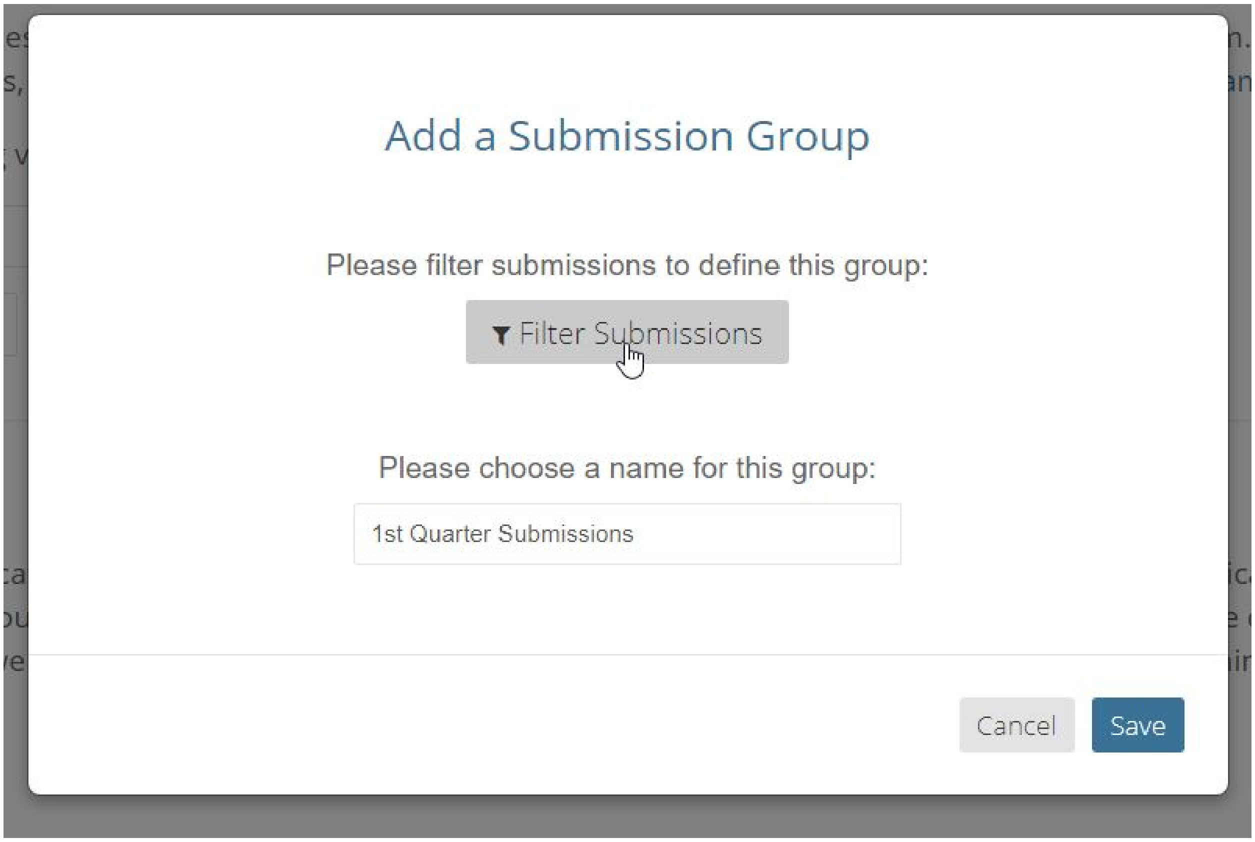
Or you can keep the defaulted Submission Group, “**All Submissions**” and filter this one to your liking:



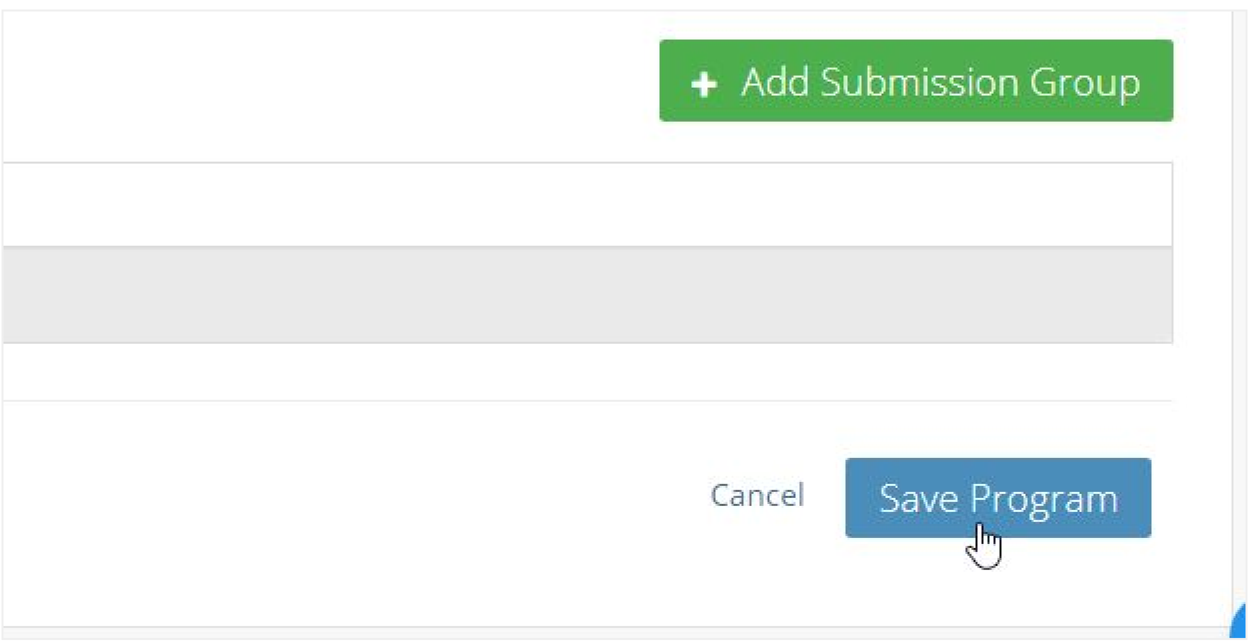
If you would like to add a new Submission Group, click on **Add Submission Group**:



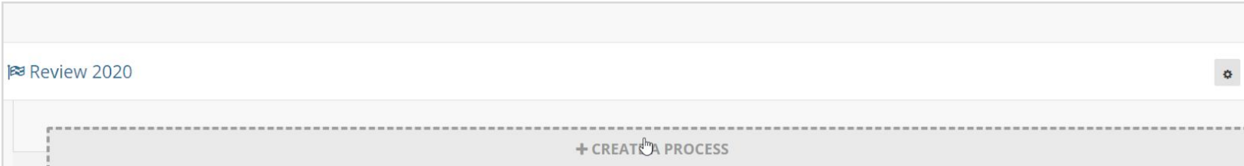
Name the Submission Group, filter and then select **Save**:



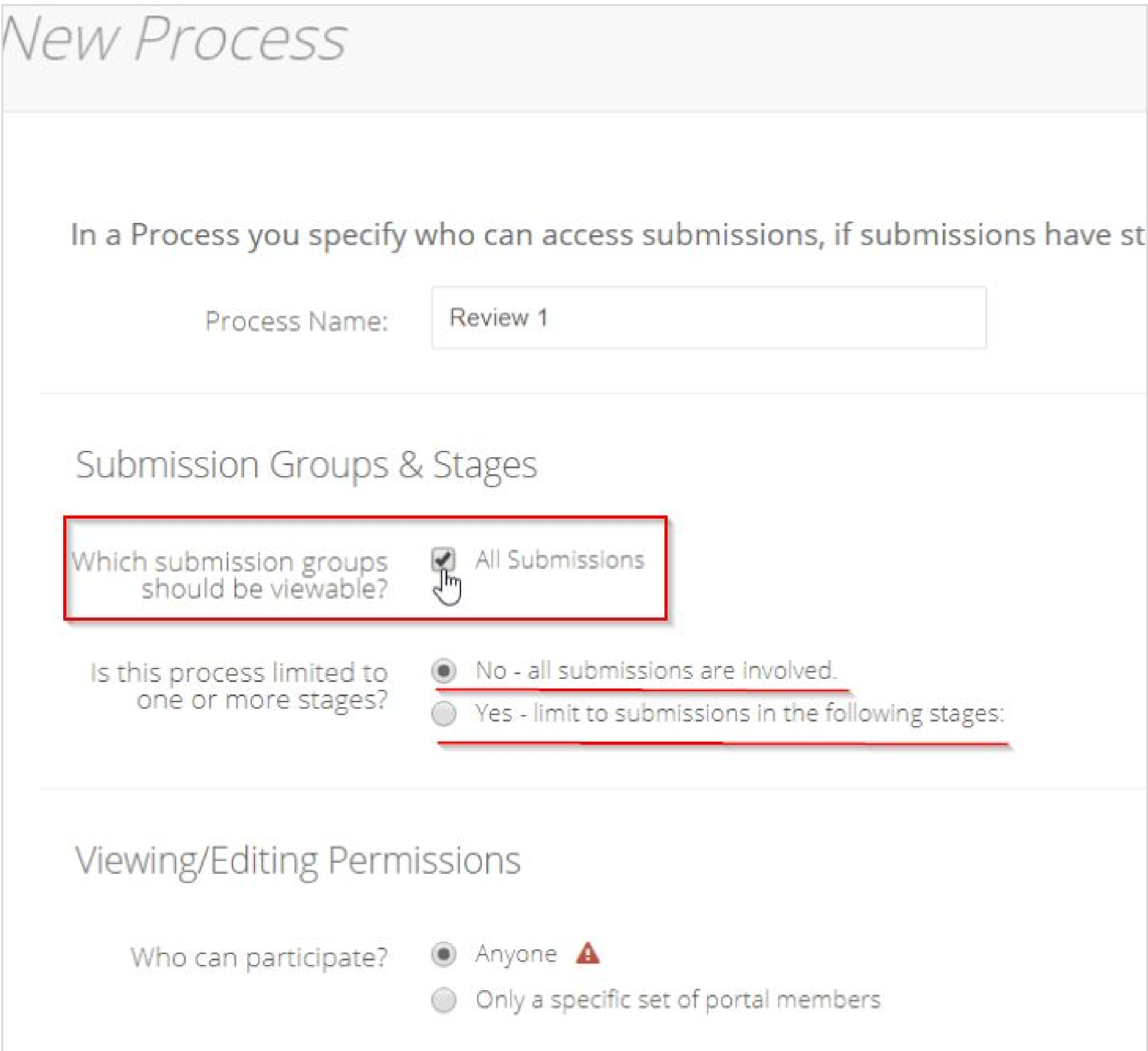
Make sure you select the **Save Program** button on the bottom of the page to save your work.



Next, you will need to create a **Process**:



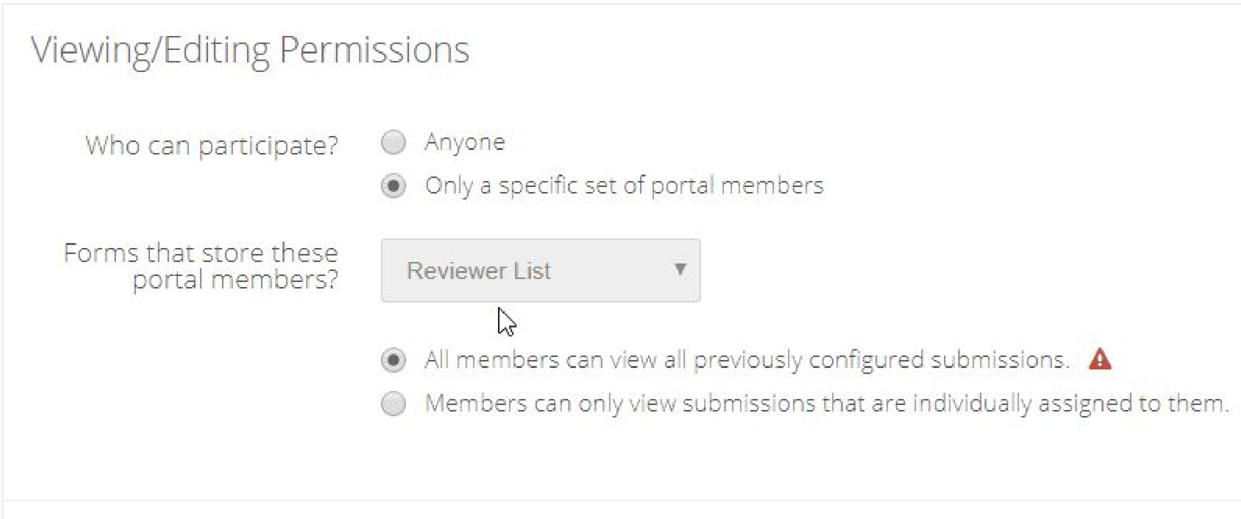
Complete the fields for the Process:



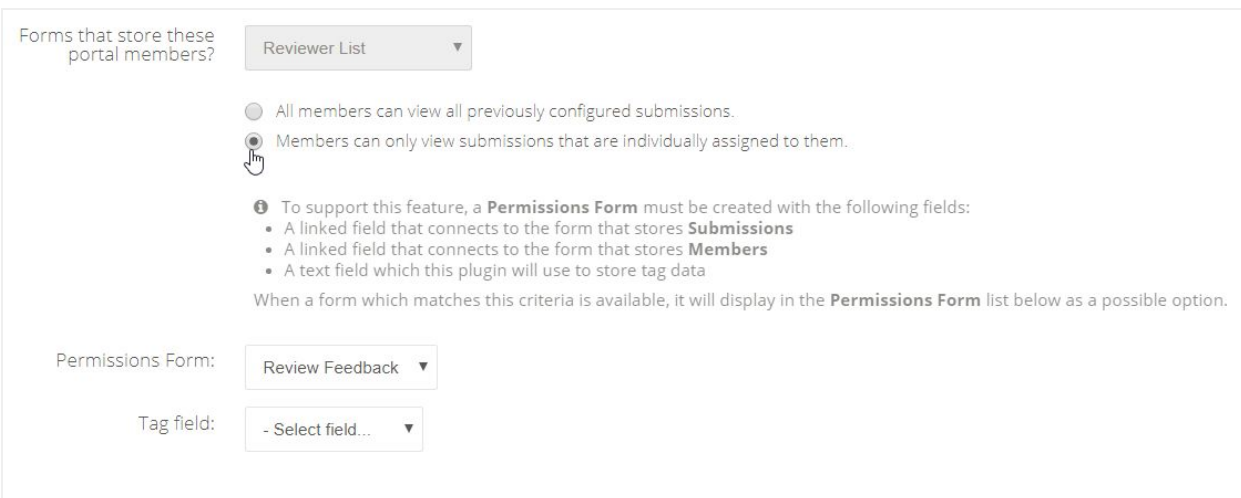
Note the **Submission Group** checkbox. If you added any new **Submission Groups**, make sure to checkbox them to include them in the **Process**.

You can also limit the process to one or more **Stages** such as you would like only the Submitted application to be viewable, not any of the records currently in the drafts folder, or you can keep all submissions to be involved.

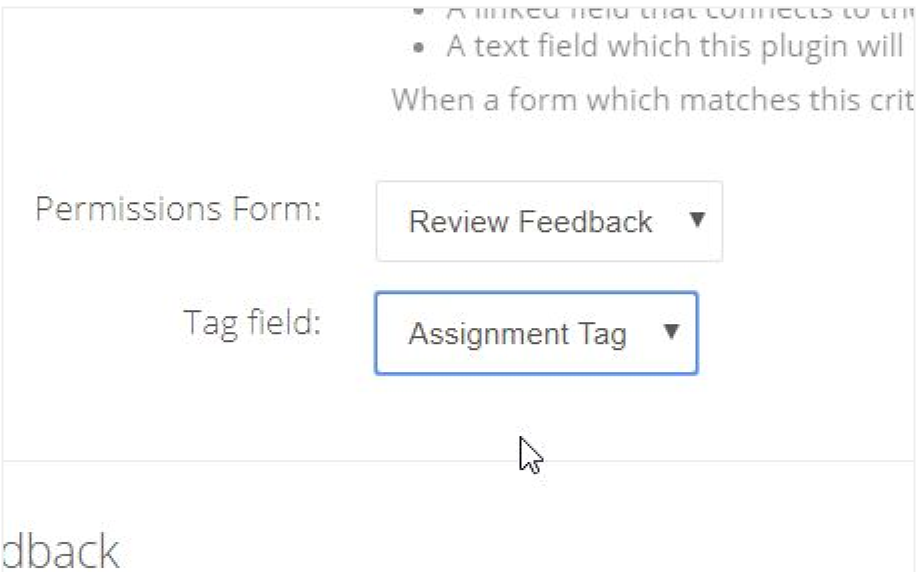
Next, you will want to select the **Permissions**. If you are using your set of **Reviewers**, click the **Only a specific set of portal members** option:



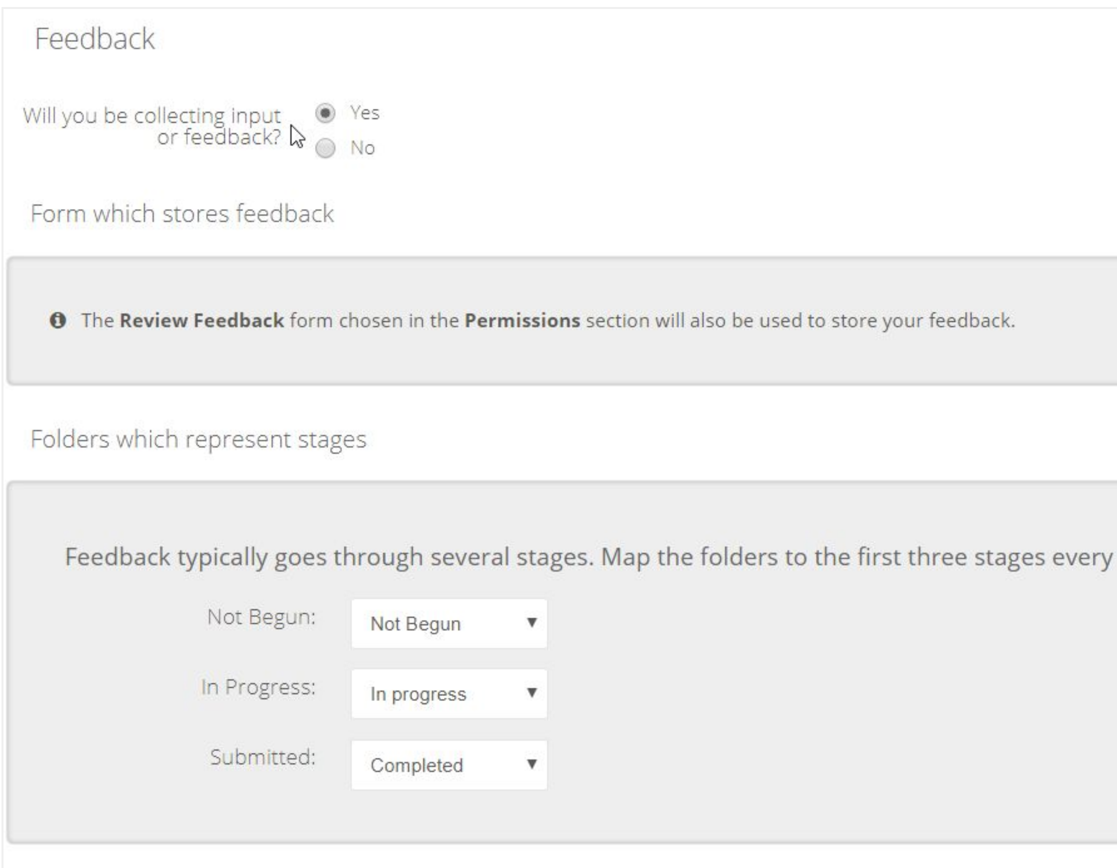
You can also set that the **Reviewers** can only see the submissions that are assigned to them by selecting it here:

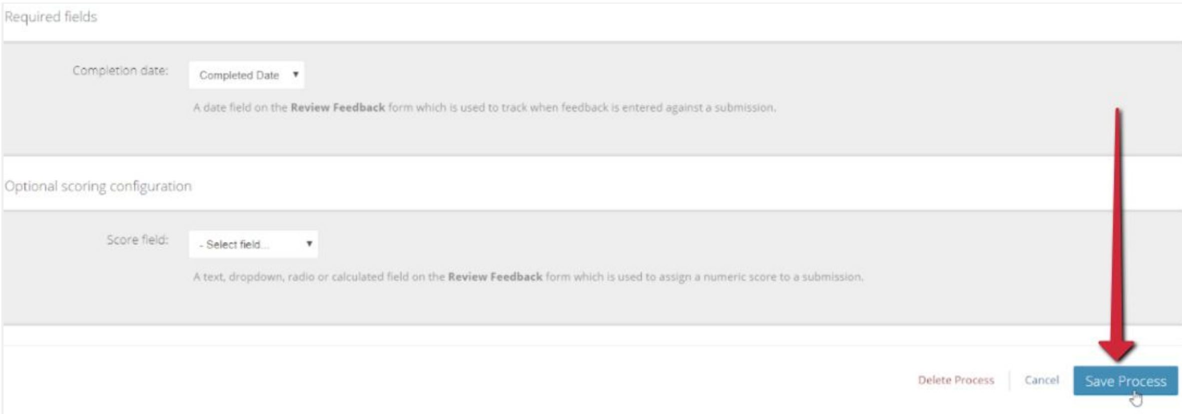


Then select the **Permissions** form the reviewers will be leaving their feedback on and the **Tag field**:



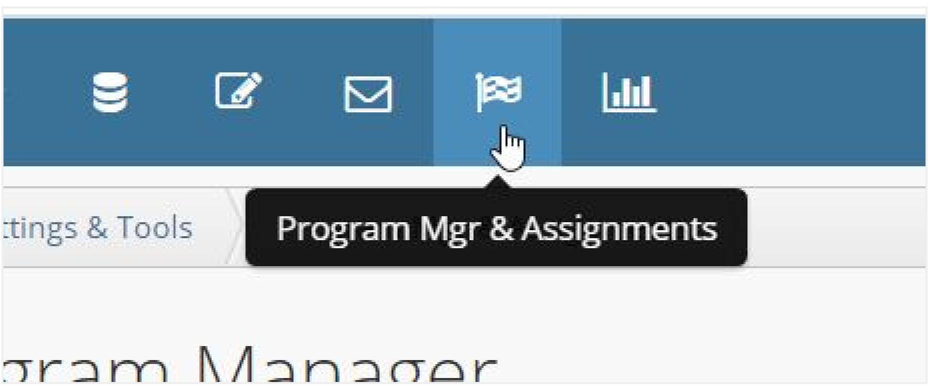
Next, select if you are collecting **Feedback** and set the folder stages:



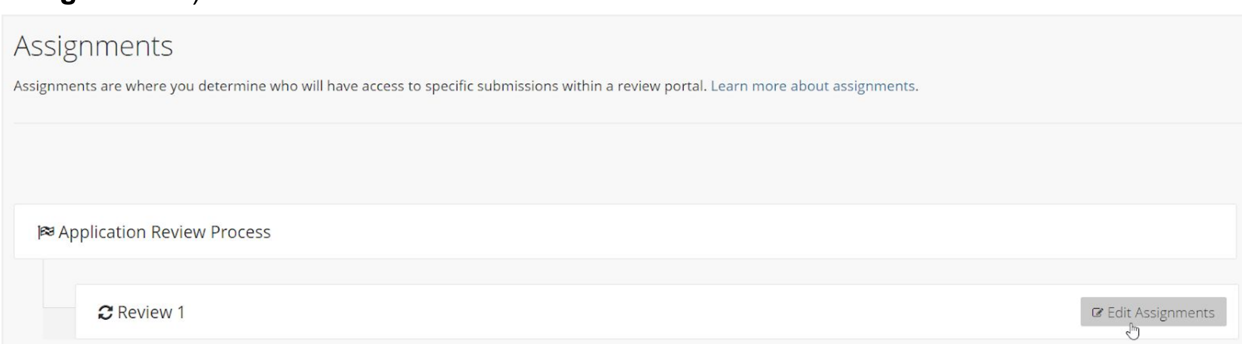


Once complete, select the Save **Process** button.

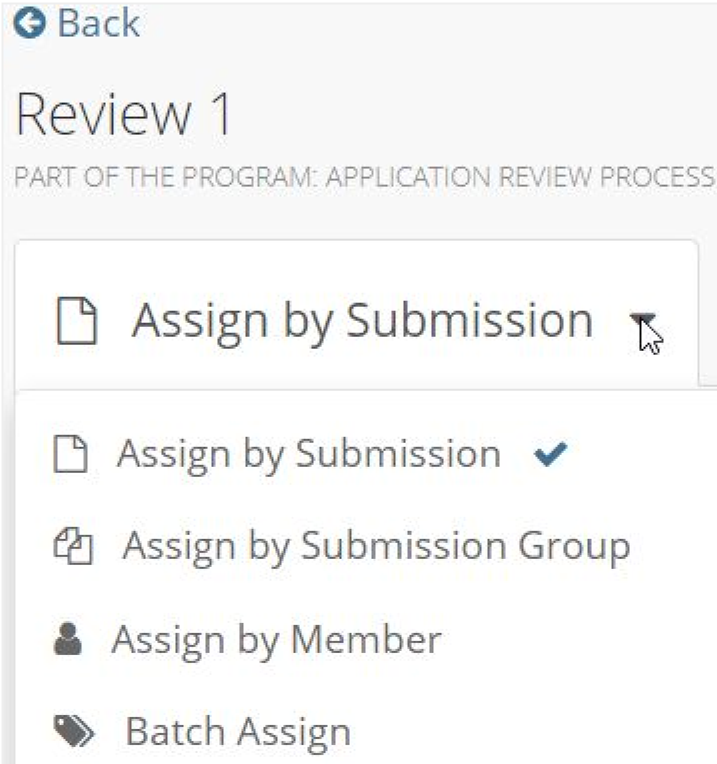
Then you will go to the **Program Manager & Assignments** icon in the navigation bar:



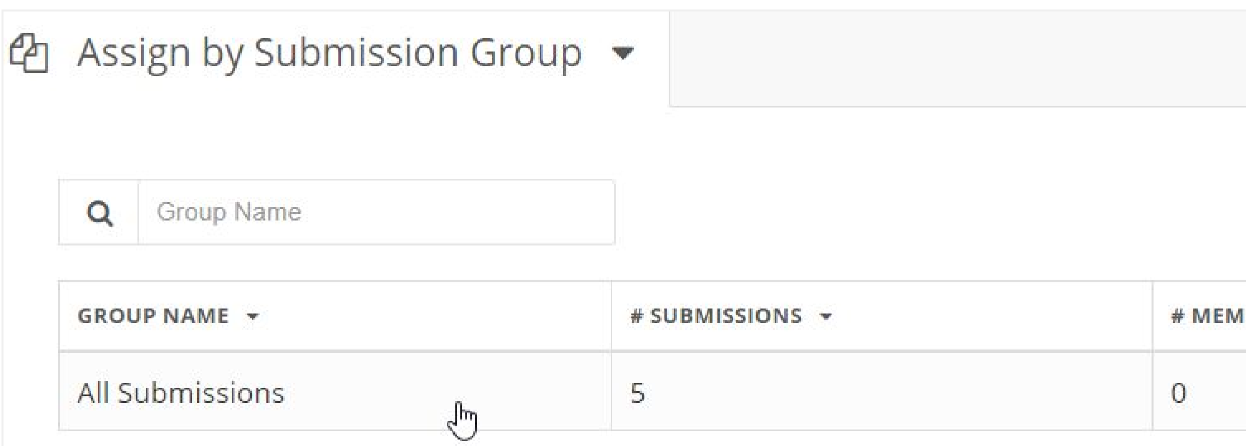
Click on the **Edit Assignments** button (If this is your first time, it was be displayed as “**Create Assignments**”)



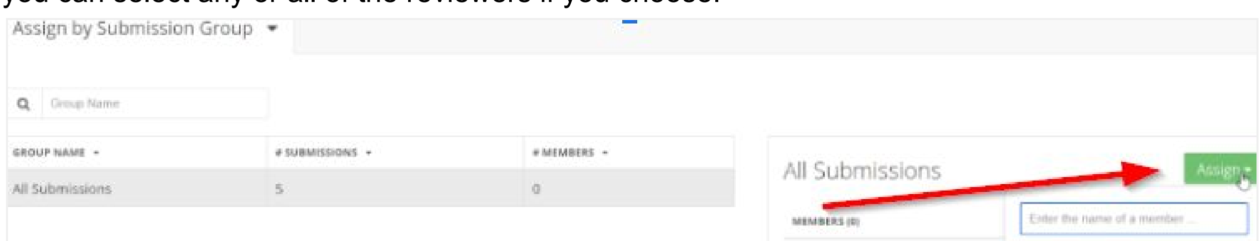
There is a few different ways you can assign your assignments to the **Reviewers**:



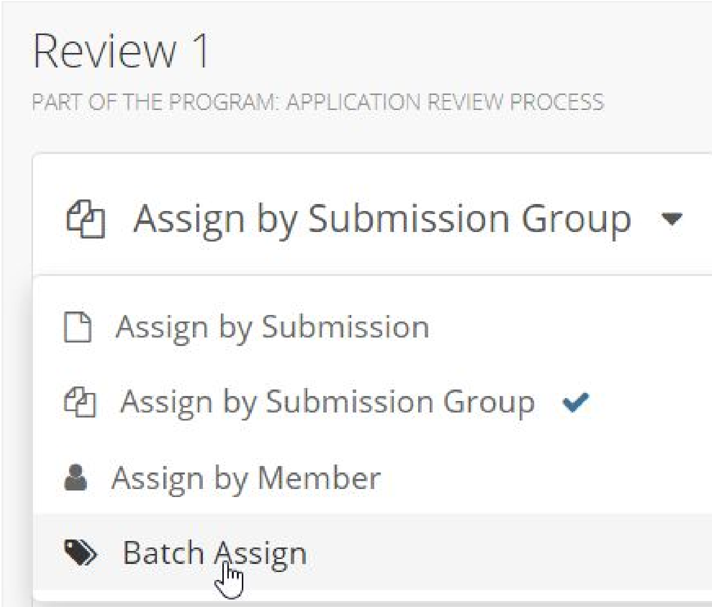
If you used **Submission Groups**, you can select the **Assign by Submission Group** option:



Click on the group. Then click on the **Assign** button. The **Reviewers** will then be listed in which you can select any or all of the reviewers if you choose:

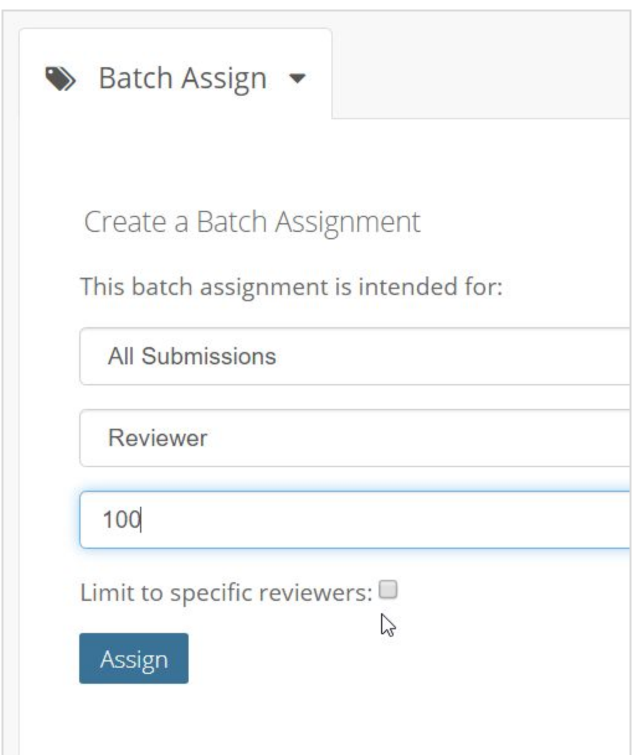


The **Assign by Member** or **Assign by Submission** options will work similarly to the **Assign by Submission Group**. You can also **Batch Assign**:



This is particularly a good idea if you have:

- A lot of assignments to assign out to your **Reviewers**.
- If you want the system to randomly make assignments.

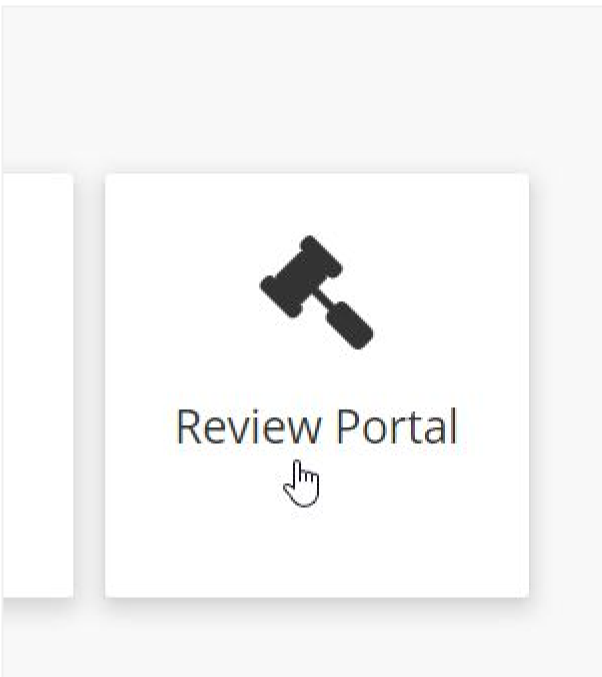


You can also select the checkbox to **Limit to specific reviewers** instead of assigning to every **Reviewer**.

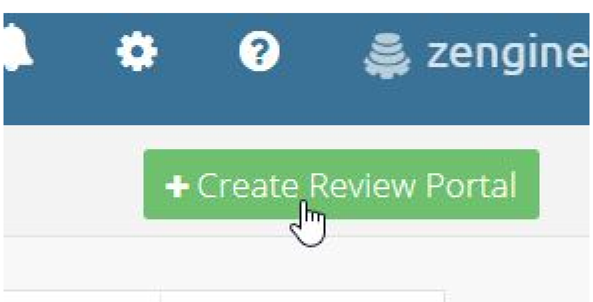
Next you will need to set up your **Review portal** in order to share the **Portal's URL** to your reviewers!

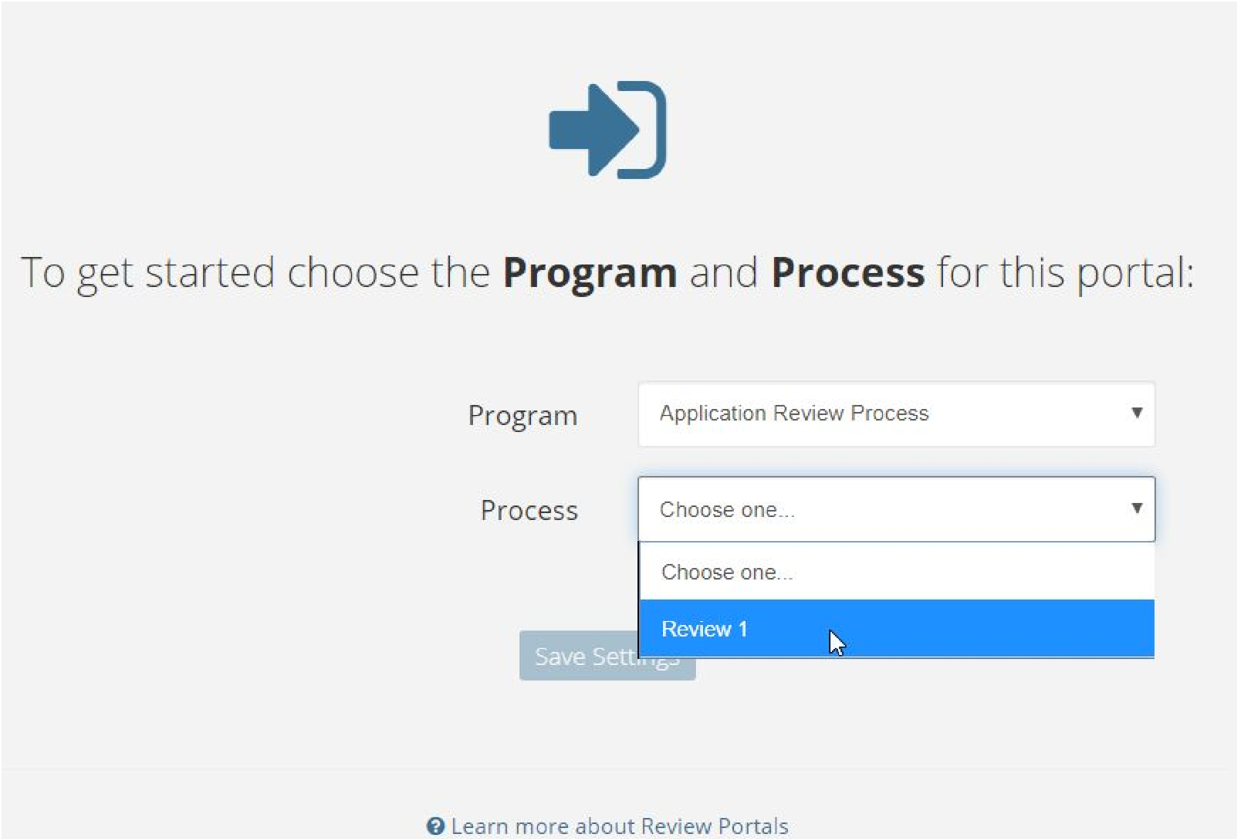
Review Portal

To set up the **Review Portal**, go to **Settings & Tools**:



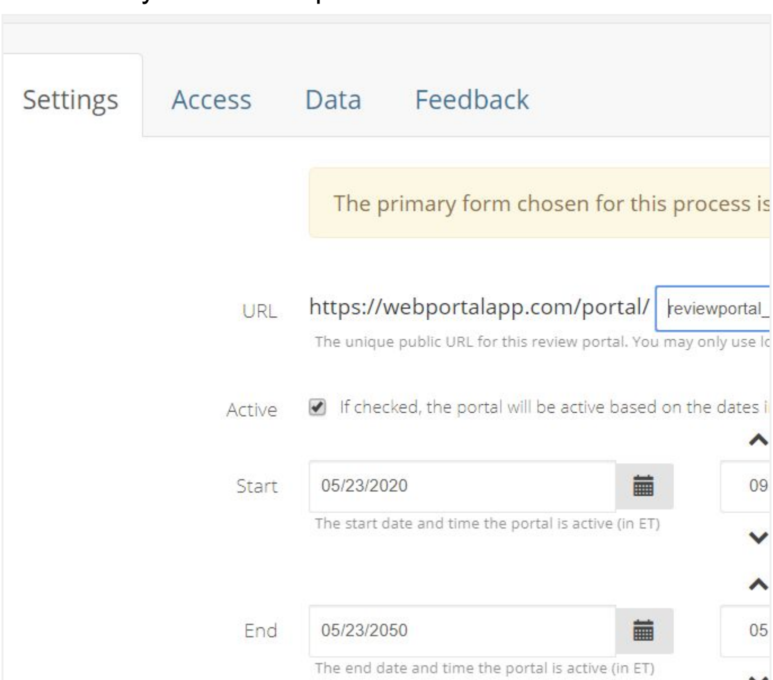
Click on the **Create Review Portal** button:





To get started you will choose the **Program** and **Process** you had created in the **Program Manager & Assignments** plugin. Select **Save Settings** to continue.

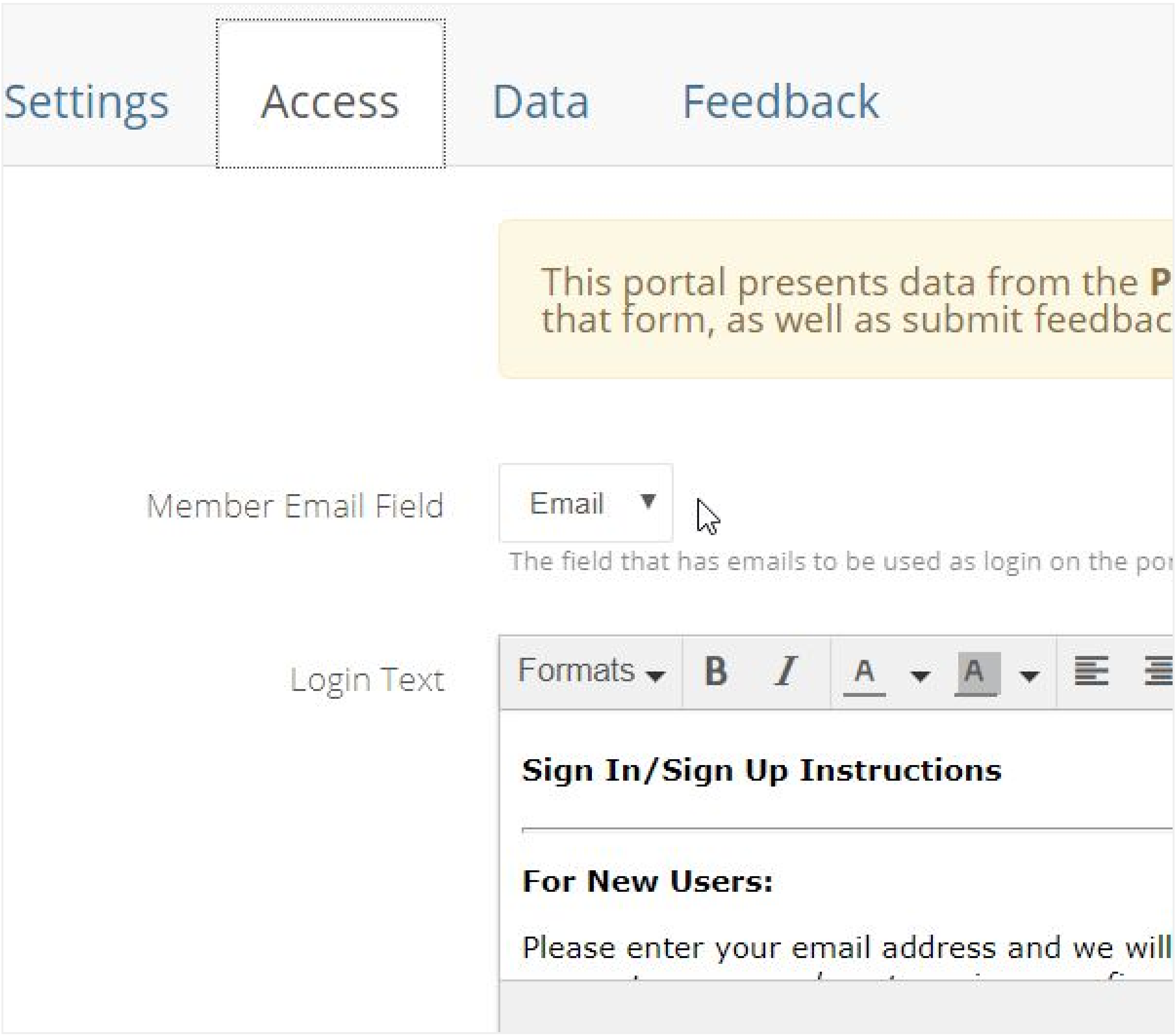
From here you can set up the **Review Portal**:



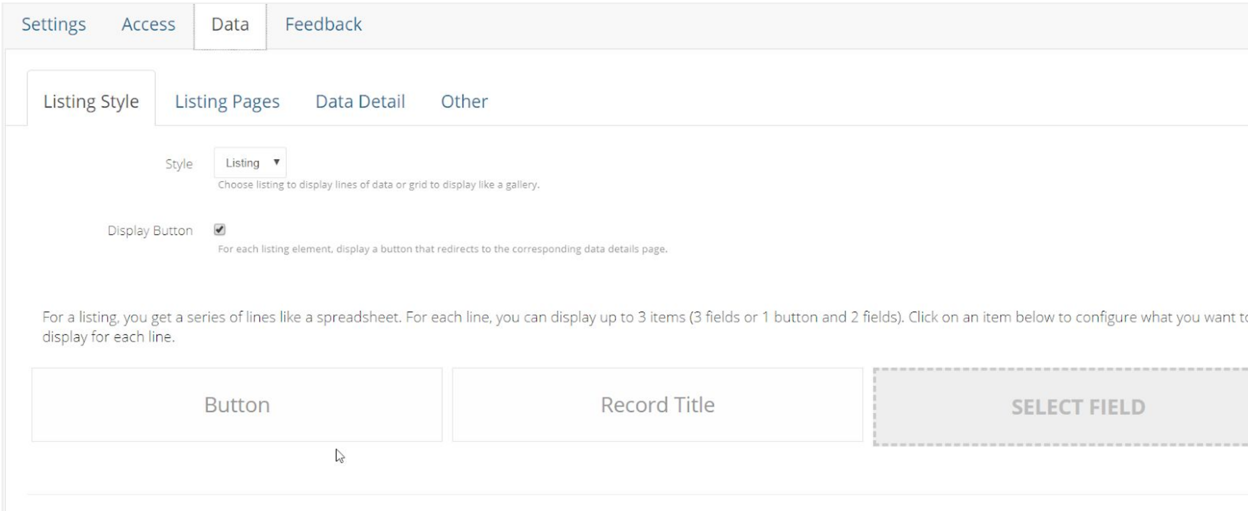
You can change the name of the URL and check the **Active** checkbox to make the portal active only on the dates selected.

Click on **Save** at the bottom of the page and continue editing the settings for each tab: **Access**, **Data**, and **Feedback**.

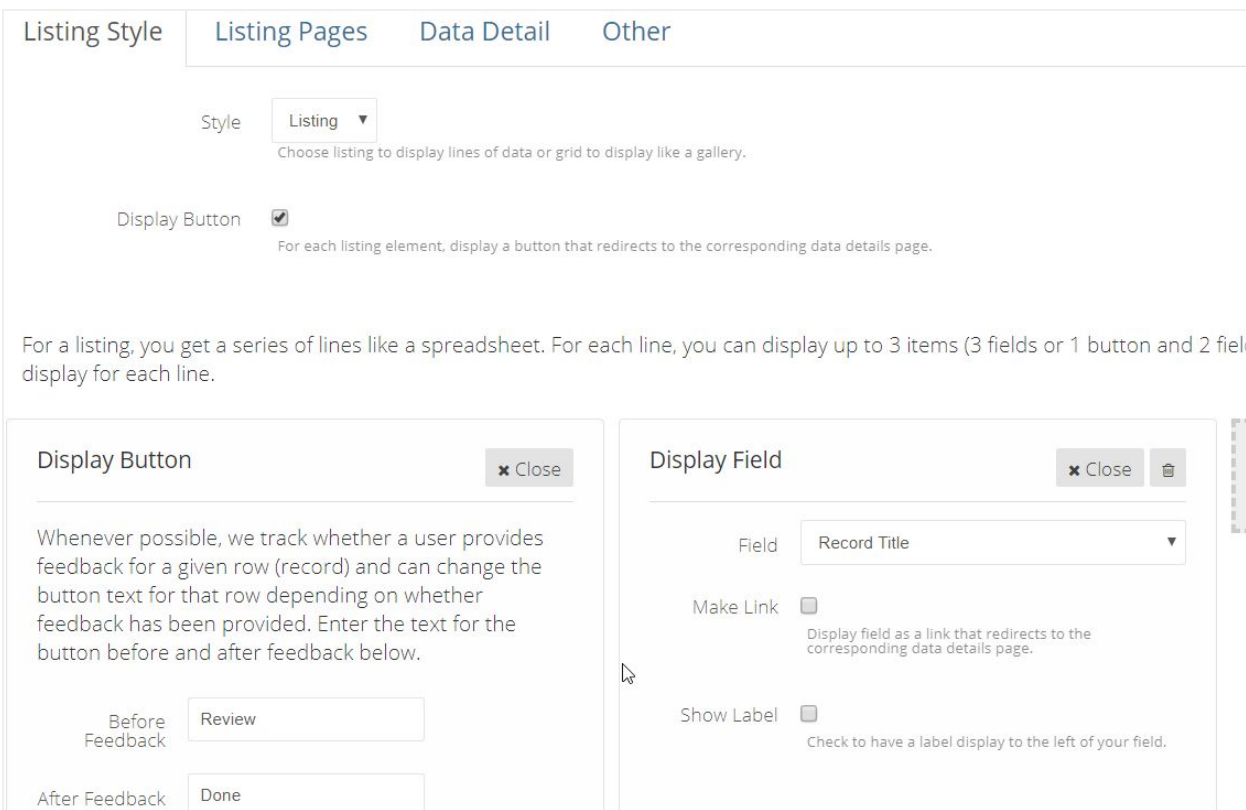
The **Access** tab, you can edit the **Login Text** for the **Reviewers** when they login to the **Review Portal** as well as make sure the **Member Email Field** is set to **Email** (This should automatically be set).



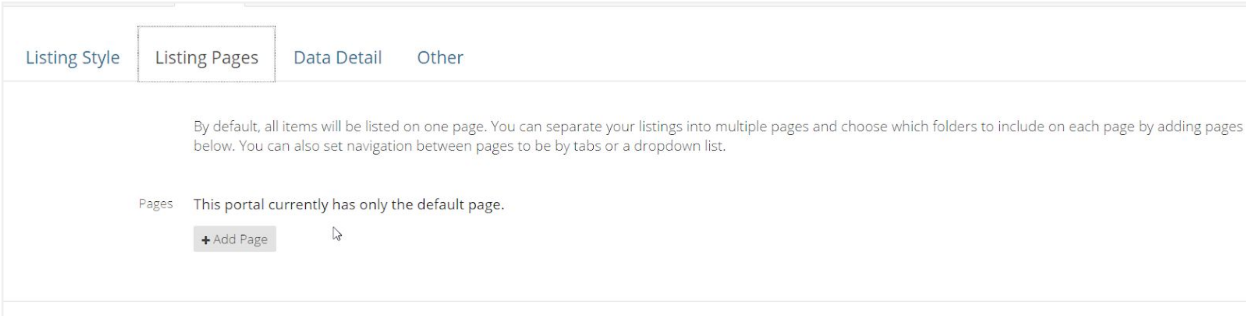
Next, the **Data** tab is where you will see additional settings that you can adjust to your needs. Such as the **Listing Style** (What the Listing will look like):



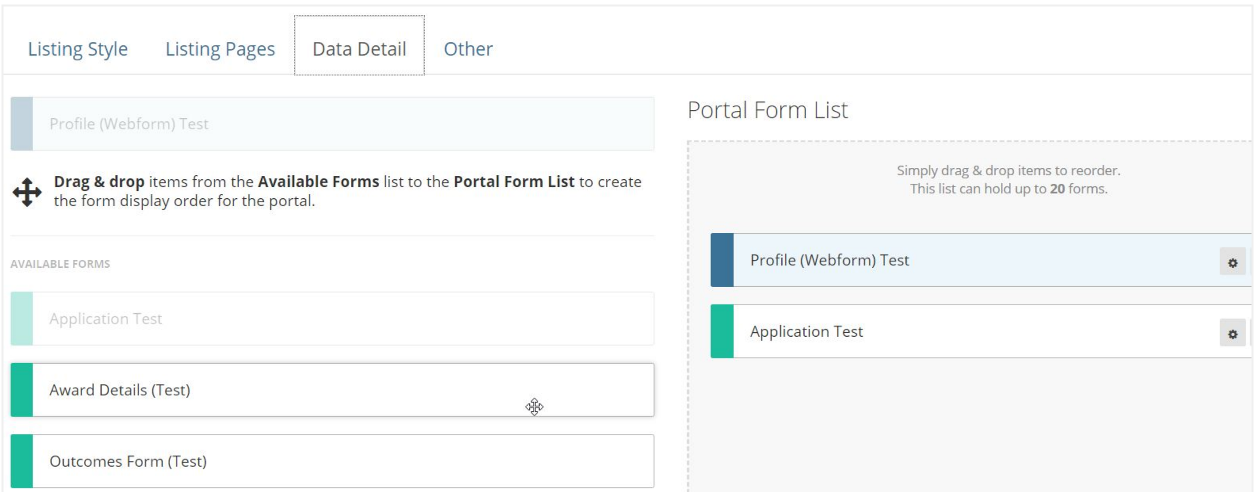
The **Listing Style** tab contains the **Display button** and **Display Field** that will both be viewable within the Review Portal. The **Record Title** is shown by default on the Listing Style page and can be configured in the Form Builder settings.



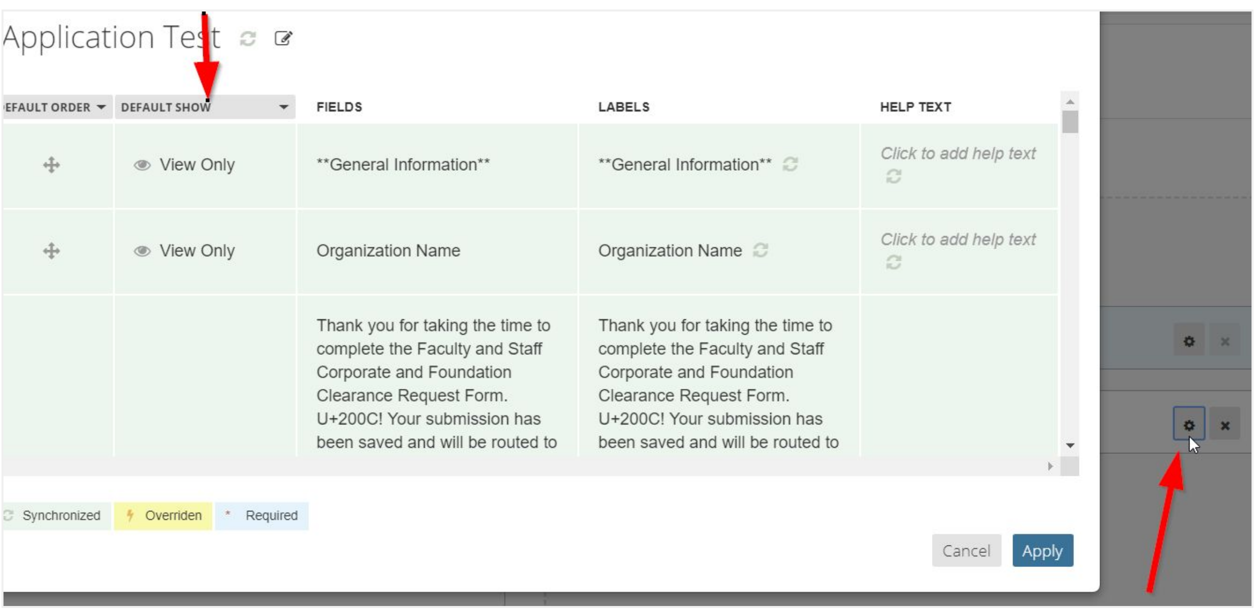
Listing Pages (where you can separate your listings into multiple pages)



Data Detail (where you can add additional forms to be reviewed by selecting and dragging to the right hand side titled **Portal Form List**):

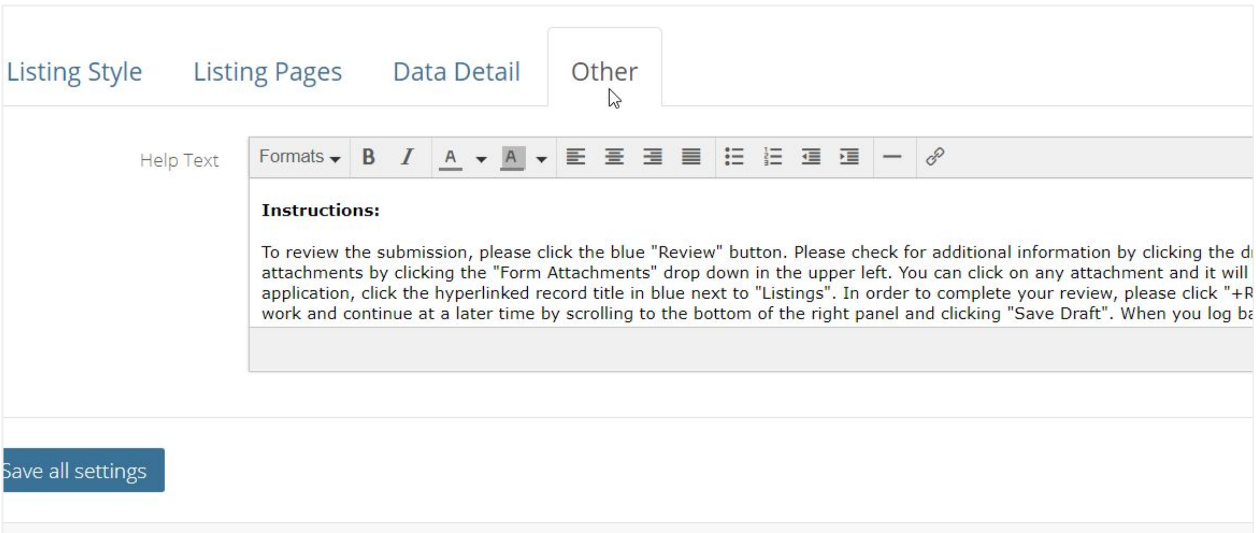


You can also click on the settings icon to open the form and custom show certain fields:

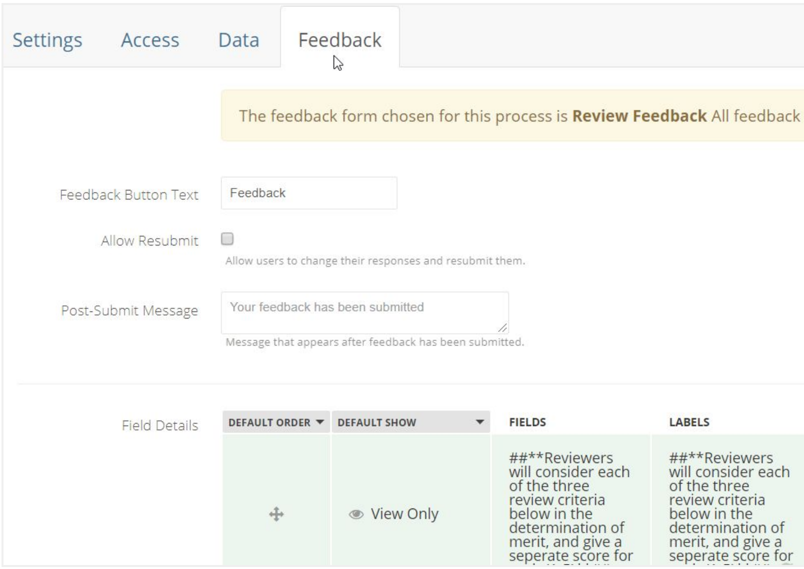


This can also be an important tool if you would like to [**Hide** specific fields from the **Reviewers**](#) that have sensitive material, such as an constituent’s address or social security number.

The **Other** tab (the help text instructions for the reviewers in the **Review Portal**):



Once you have gone through this set of tabs, make sure you click on the **Save all settings** icon on the bottom before proceeding.



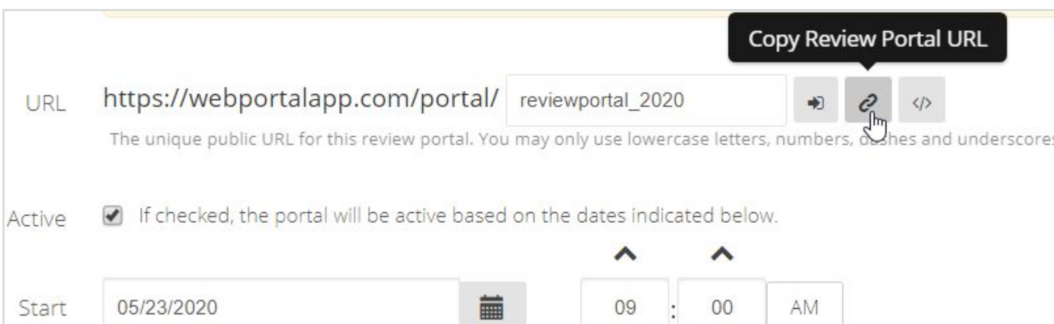
Then the last tab is **Feedback**:

You can rename the **Feedback Button Text** as well as allow users to **Allow Resubmit** their reviews. (Meaning, the reviewers can change their responses and resubmit them).

You can also edit the **Post-Submit Message** and Default/Custom show the **Field Details** of the feedback form under the **Default Show** dropdown tab.

Once complete, **Save all Settings** and your **Review Portal** is all set up!

It is best to add yourself to the **Reviewers Form** so you are able to test the **Review Portal**.



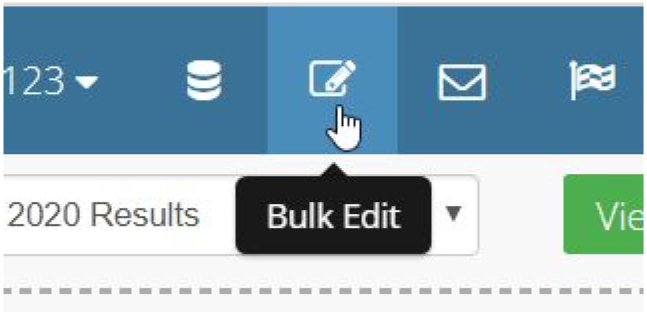
When you are ready to share the **Review Portal** out with your **Reviewers**, kindly select copy Review Portal **URL** and email out to your Reviewers:

The **Reviewers** then will go to the URL, signing up with their email address.

They will be prompted to create a password upon login and then be redirected to the landing page where they will begin their assignments that you had created in the **Program Manager**.

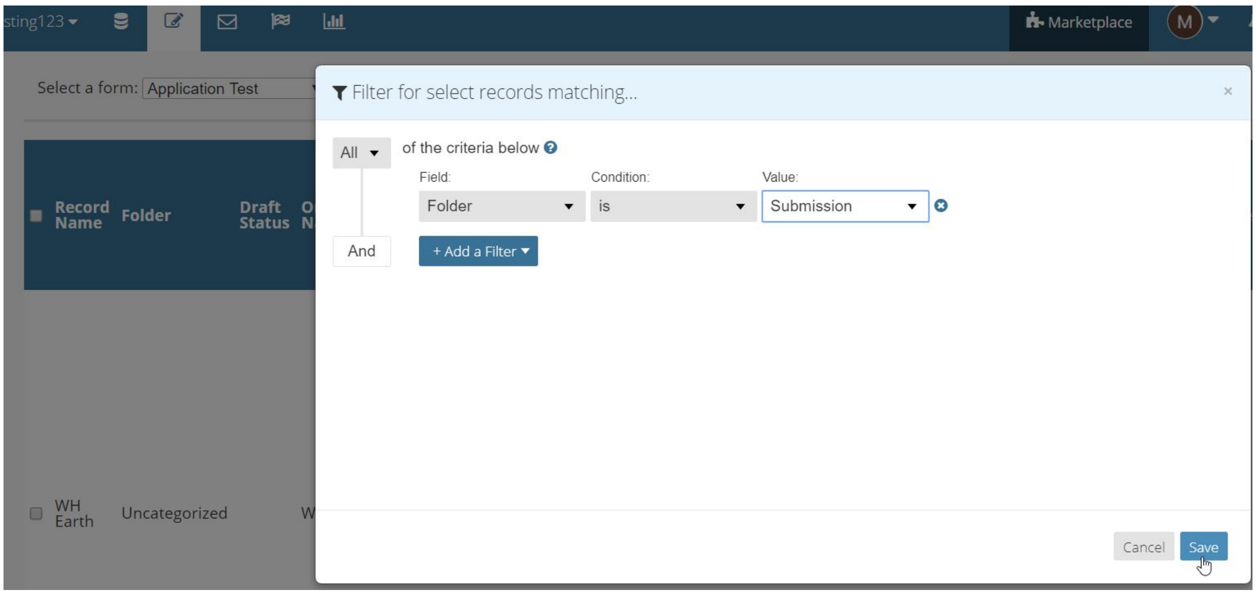
Bulk Edit

The **Bulk Edit** feature is easy to use and super helpful if you have many records that you need to update at once, instead of going through each record manually.



For example, if you need to move a handful of records from one folder to another, such as from the *Submitted folder* to the *Awarded folder*.

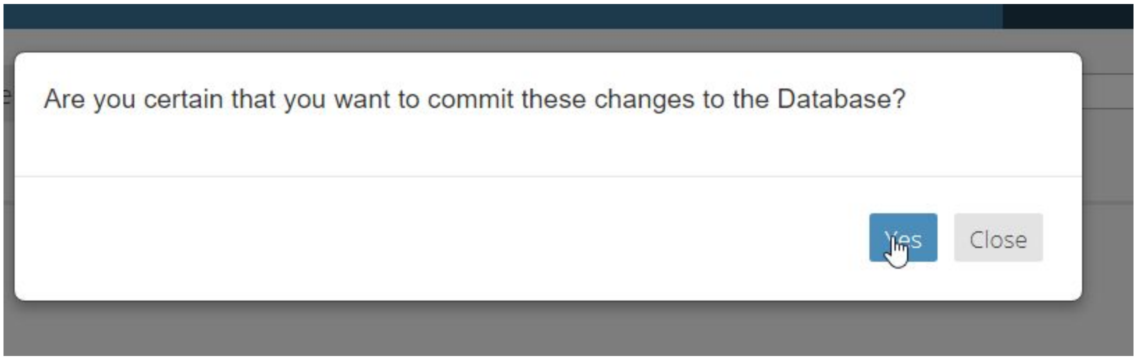
You would select the **Primary form**, then filter the records that are stored in the *submitted folder* as seen here:



Then select the **Item to change**: Folder: *Awarded*

Next, click **Save**.

Lastly, select **Yes** to commit to these changes:



The records will begin to update and move to the *Awarded* folder.

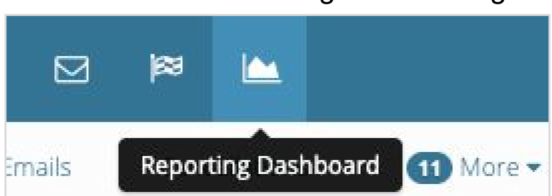
***Please Note:** Sometimes this change can take some time, depending on how many records are being updated.*

Once complete, you can confirm the changes have been made by going to the **Data View** and checking the records for the update.

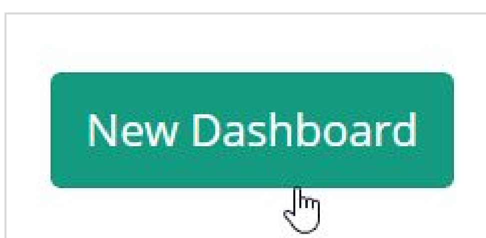
Dashboard

The **Reporting Dashboard** is another great tool if you ever want to see information quickly. You can set up different widgets or sections as **Tables**, **Graphs**, **Charts** or even a **Summary**.

Click on the **Reporting Dashboard** icon in the navigation bar to get started:

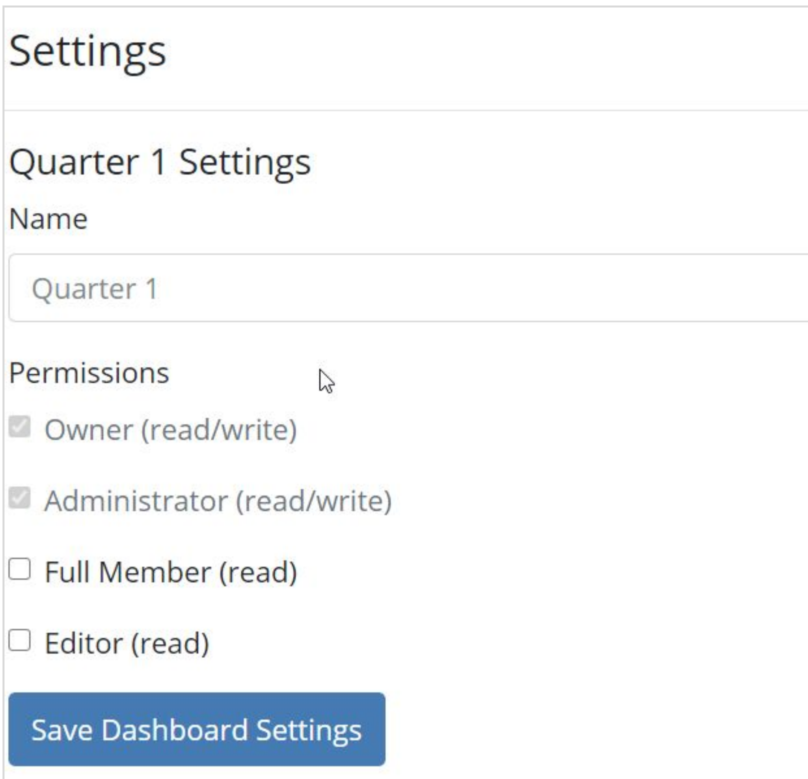


Click on **New Dashboard**

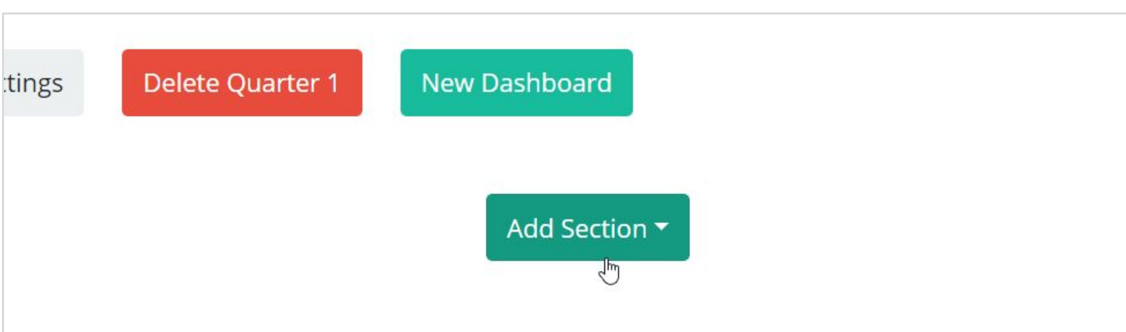


Go ahead and name the **Dashboard,** then click on **Create Dashboard**:

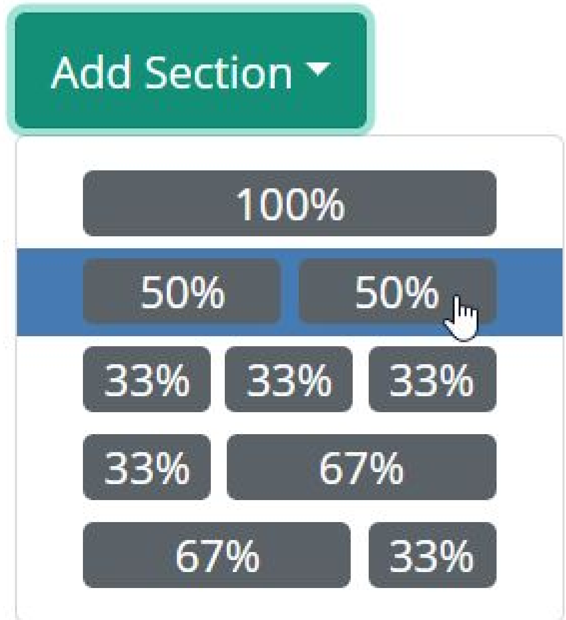
You can then adjust the settings to make this your default dashboard or to determine who will have access to the dashboard:



Then select **Add Section**:



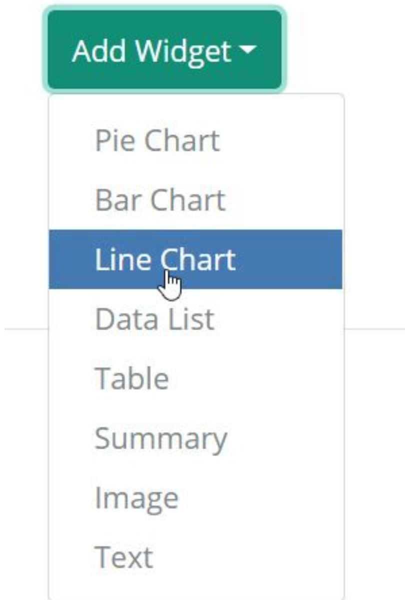
Select the layout you would like:



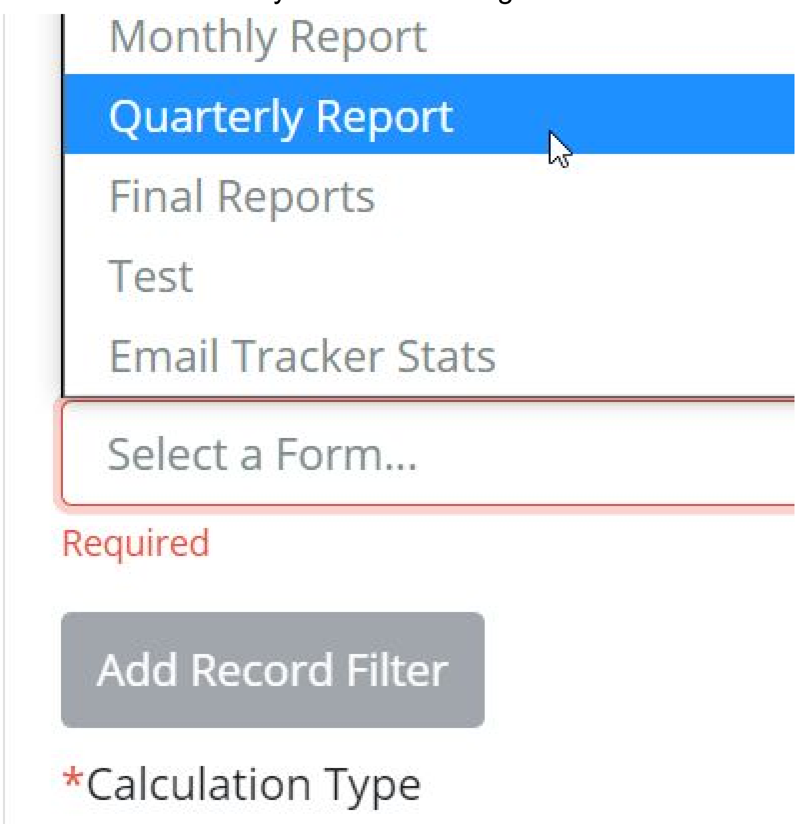
Then you will click **Add Widget**:

Choose the **Widget Type** you would like to use:

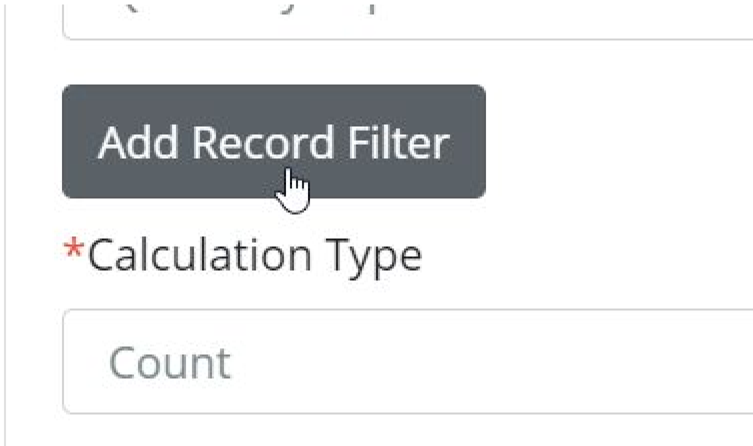
- Text
- Image
- Data List
- Summary
- Table
- Bar Chart
- Pie Chart

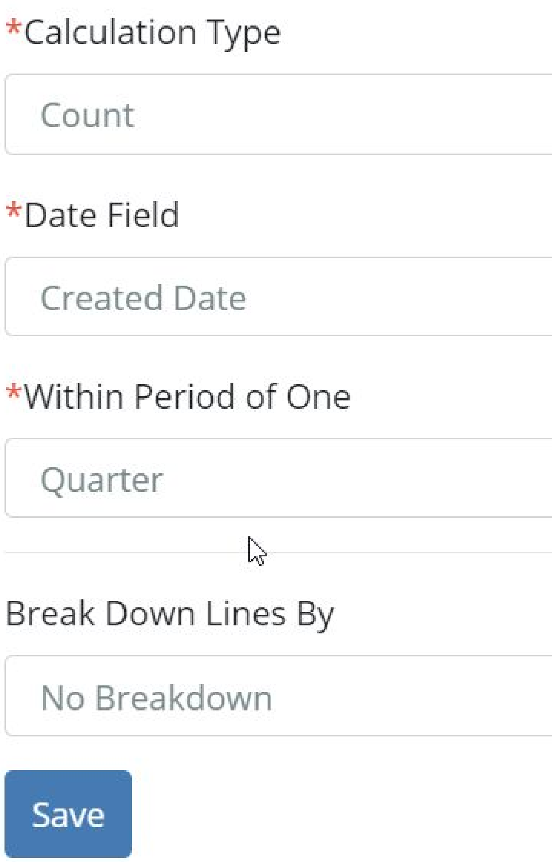


Then select the **Form** you would like to gather information from:



From here you can be very unique with filtering the information you would like to see:



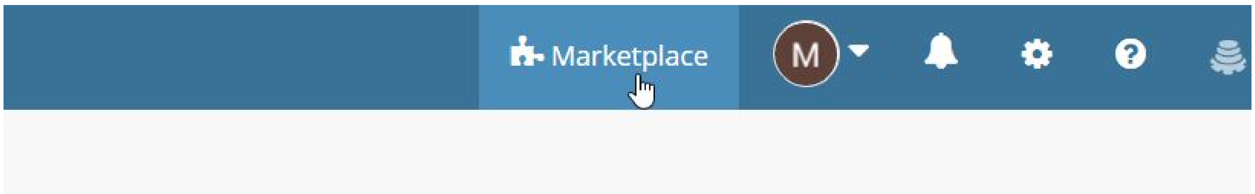


If you would like to learn more about the **Dashboard**, I would recommend playing around with the filters and different types of widgets as well as viewing our Knowledge Base article: [Reporting Dashboard]

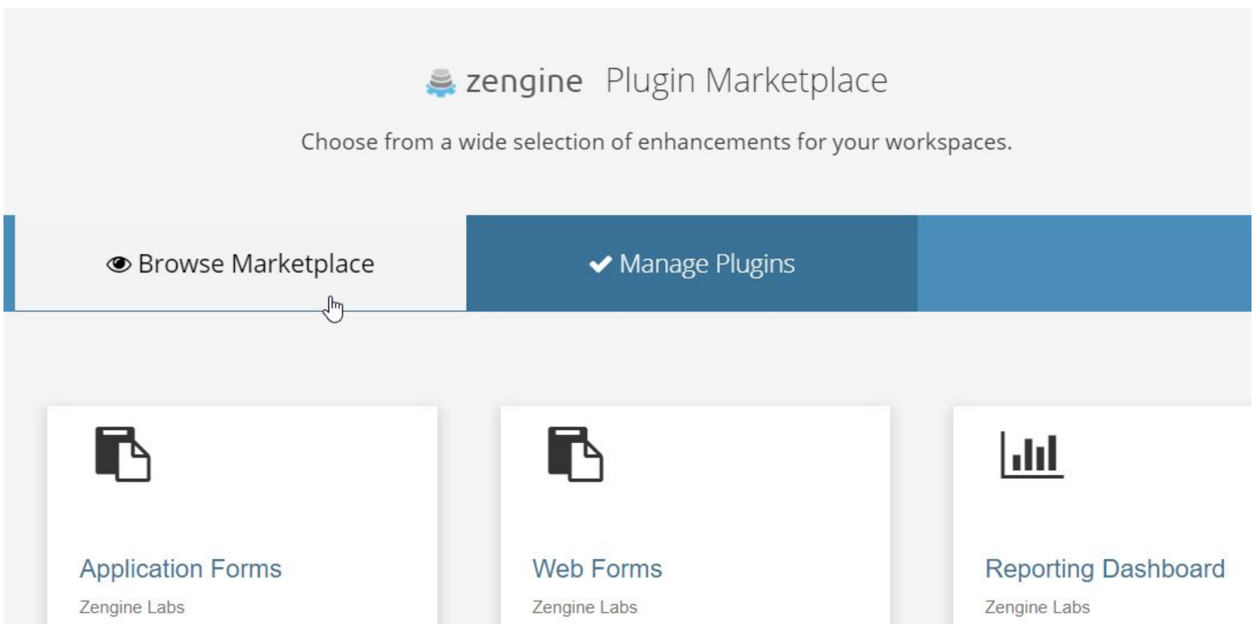
Marketplace

The **Marketplace** is where you can view all of the plugins currently in your workspace and also add other plugins the platform offers.

To take a look, head over to **Marketplace** (top navigation bar):



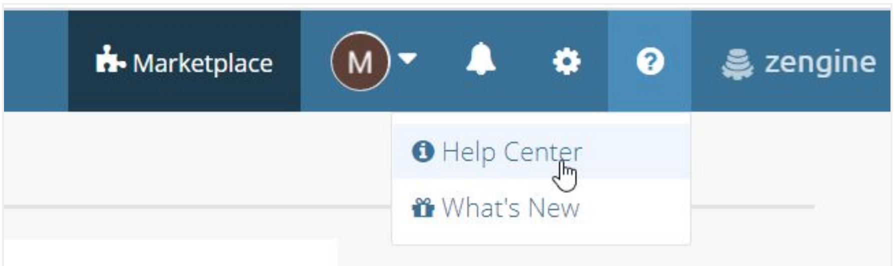
Here you can **Browse the Marketplace** for new plugins, or **Manage Plugins** that you currently have:



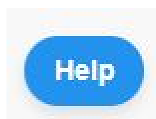
Looking for a more customized solution? Reach out to our Support Team to inquire.

Help Center

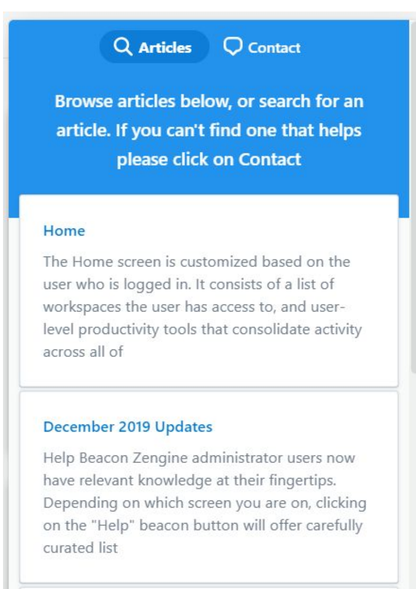
And lastly, it is strongly suggested that you check out our **Help Center** to learn more about Zengine and further your knowledge:

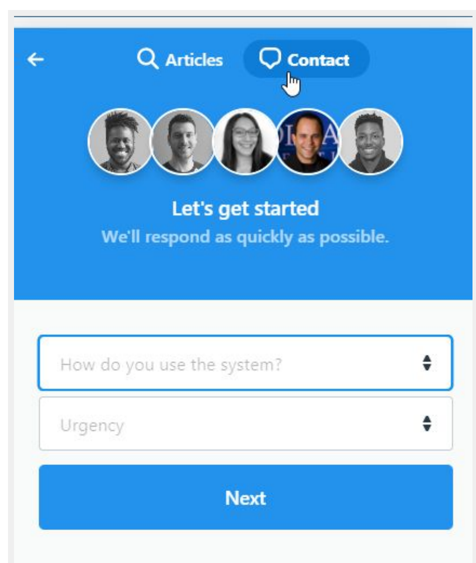


If you are looking for in-product help that will surface related information based on the screen you are on or need to contact our Support Team, use the Help button in the lower-right-corner.



This **Help Beacon** will display related articles from the Help Center. If you do not find the information you are looking for, you can use the Contact option to reach our Support Team.





Feel free to sign up for one of our [upcoming webinars]() or check out any of our helpful knowledge base articles!