

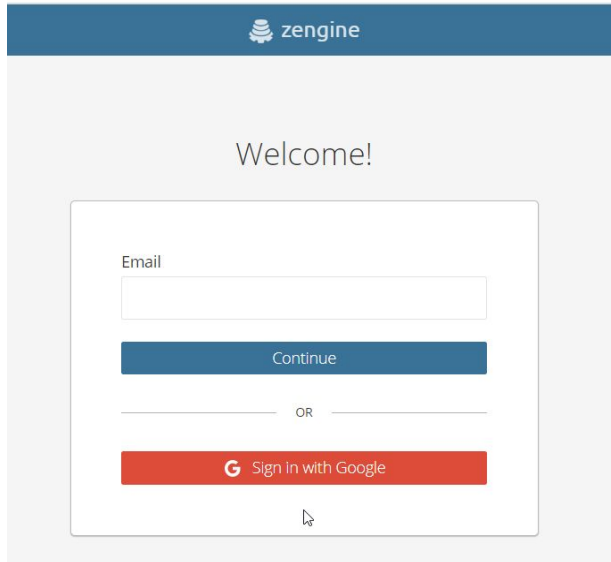
# Zengine Overview Guide

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



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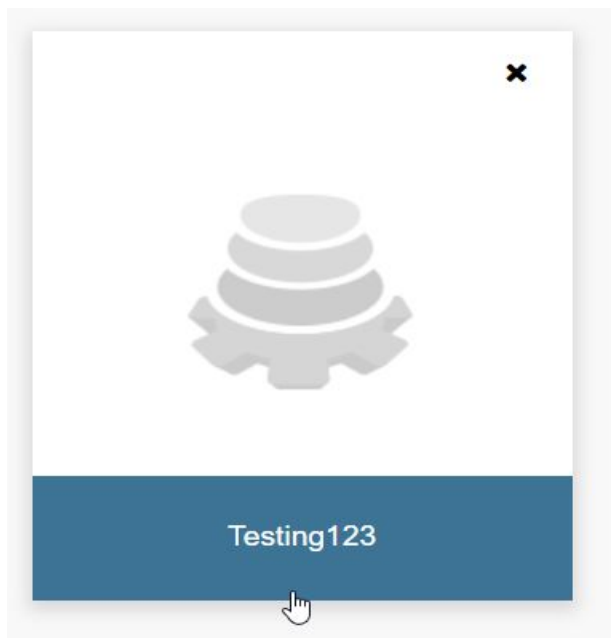
# Login



The image shows the Zengine login interface. At the top, there is a dark blue header with the Zengine logo and the word "zengine". Below the header, the text "Welcome!" is centered. The main login area is a white box with a light gray border. It contains an "Email" label above a text input field. Below the input field is a blue "Continue" button. Underneath the button is a horizontal line with "OR" centered between two short dashes. Below this is a red "Sign in with Google" button with a white "G" icon. A mouse cursor is positioned over the bottom of the "Sign in with Google" button.

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

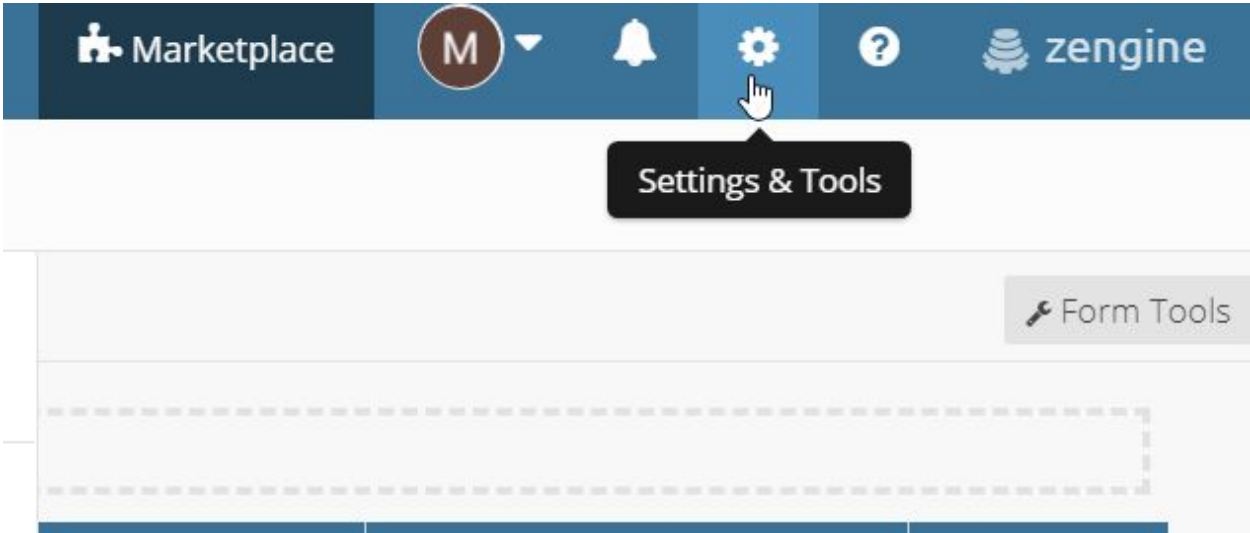
Enter your email address and select Continue to enter your password -or- Sign in with Google



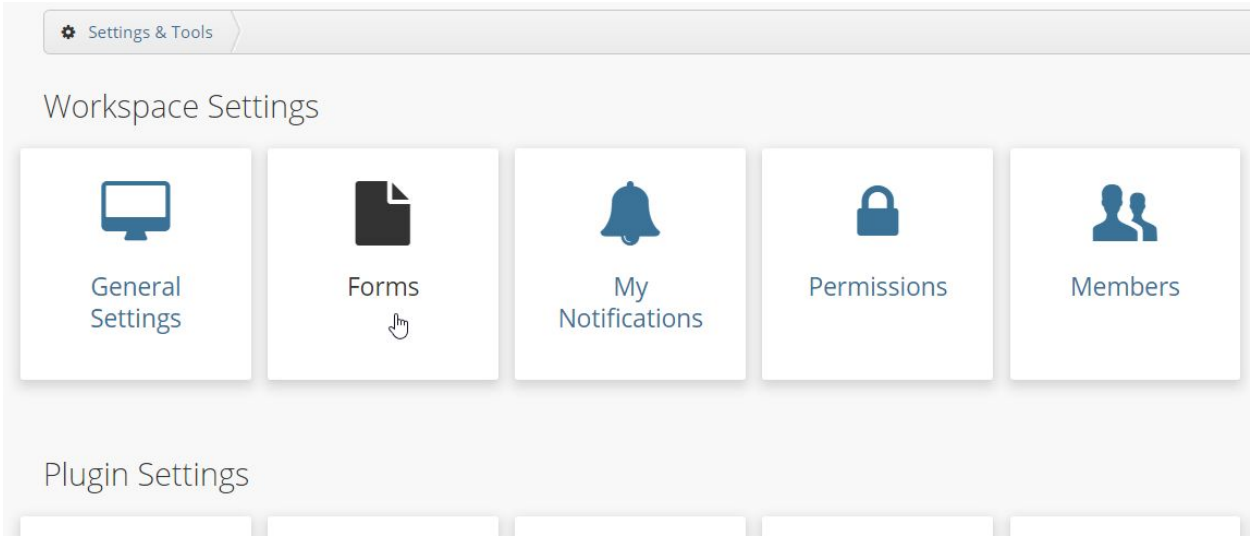
Once logged in, you will be directed to the Zengine Home screen. Select the workspace you want to access. After accessing the workspace, you will be taken to the "Data View".

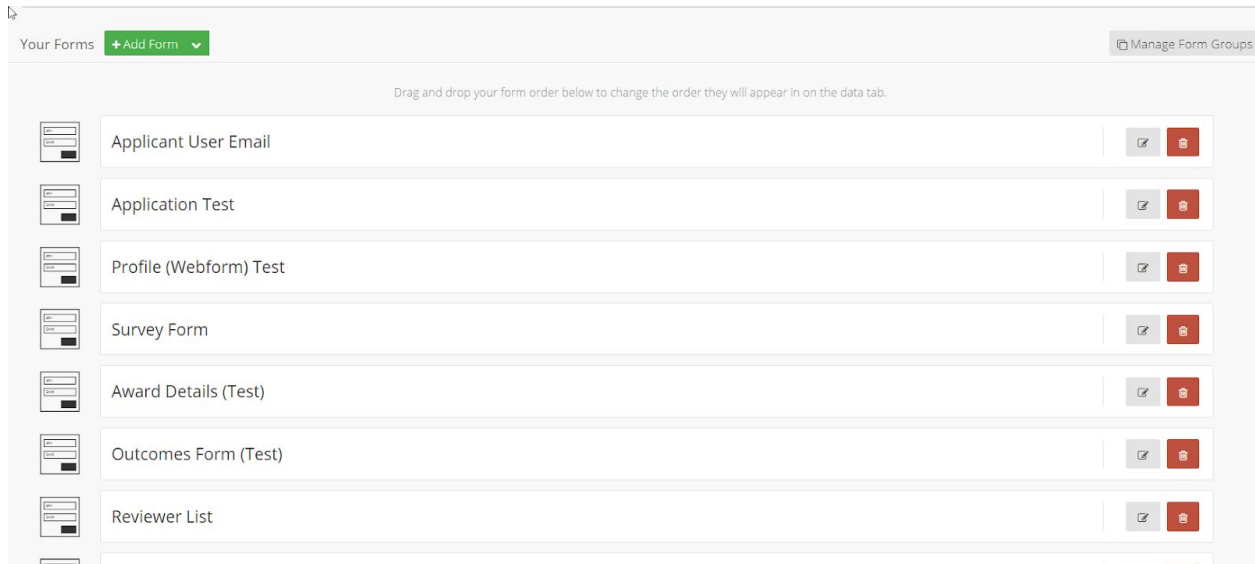
# Forms

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:



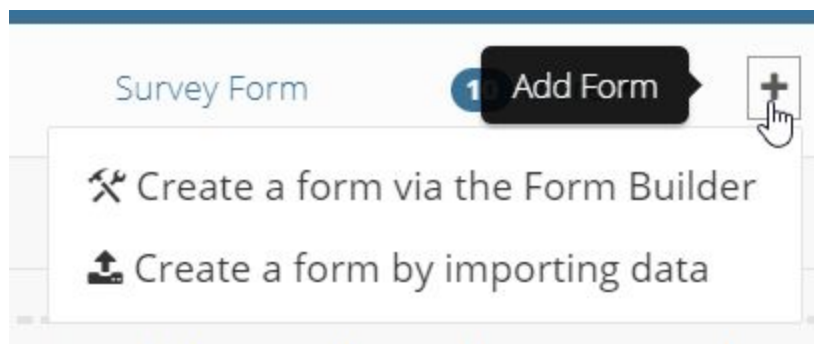


Here, you can also do the following:

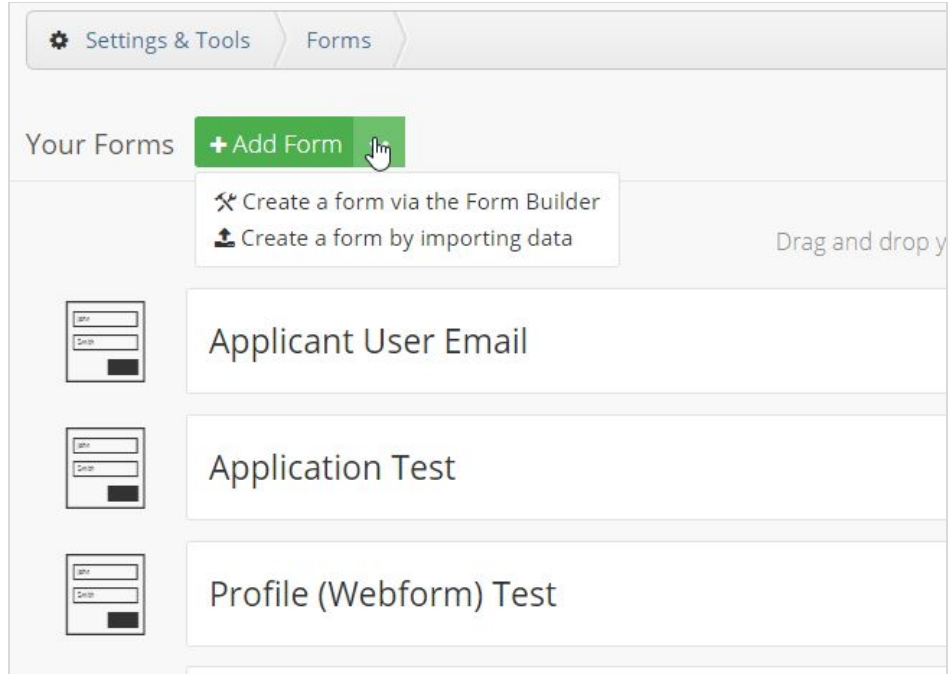
- [Manage Form Groups](#)
- [Create a new form](#)
- [Edit an existing form](#)
- [Delete a form](#)

## 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**:



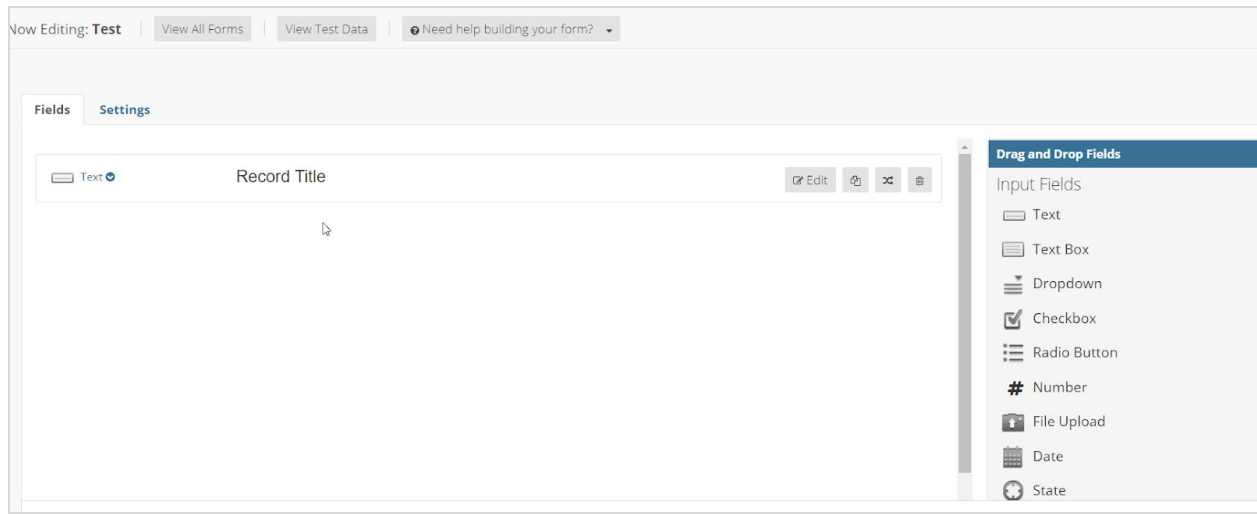
There is an option to create a form by importing data. To learn more about this, click here: [Building a Form via Import - Zengine](#)

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

The image shows a dialog box titled 'Creating a Form'. The main heading is 'Creating a Form'. Below the heading, there is a prompt: 'Give this form a name that describes your data, like "Contacts" or "Projects".'. Below the prompt is a text input field with the placeholder text 'Form name'. Underneath the input field, there is a note: 'Keep it under 24 characters and make it plural.'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save'.

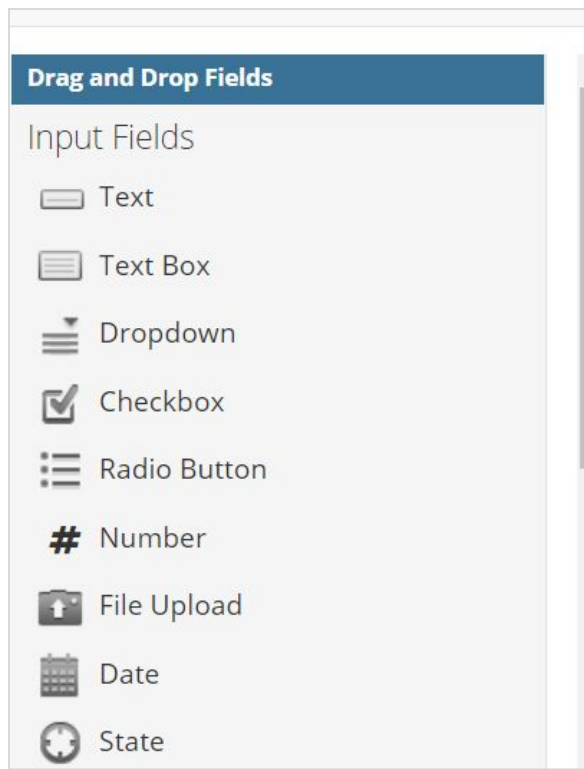
**Note:** if you need to change the name, you can at a later time!

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.

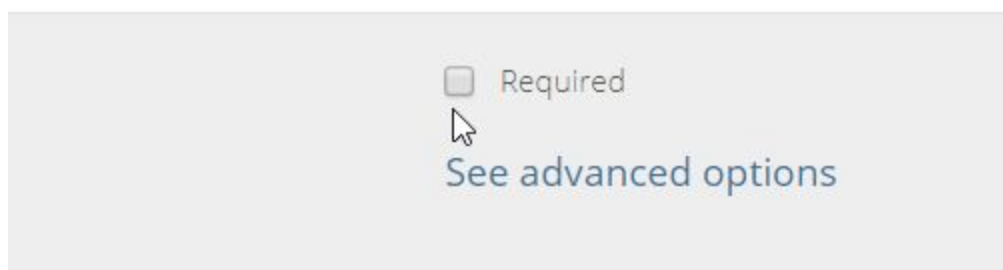
# Drag-and-Drop Fields



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:



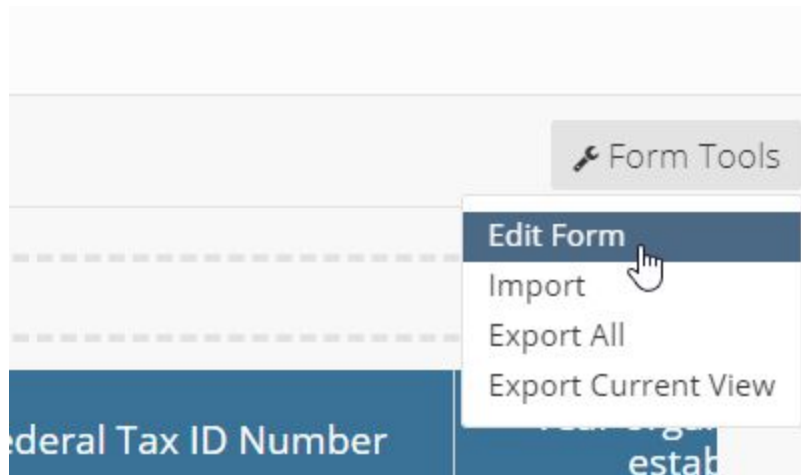
**\*Please note: There is a limit to the number of fields you can add to the form. To review the current workspace limits, click here:**



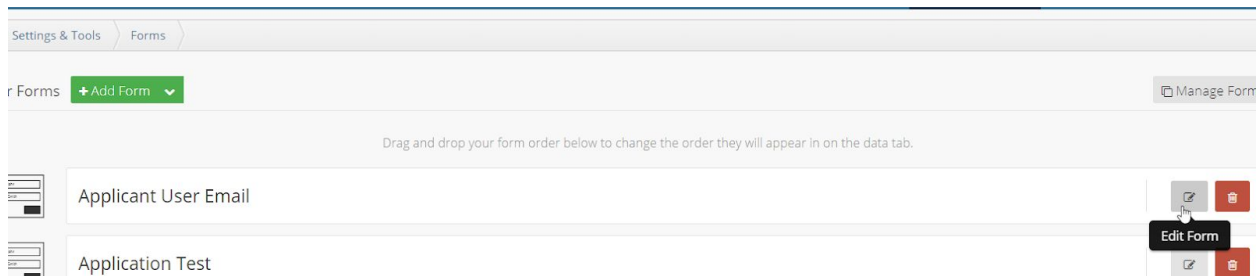
## [What are the current workspace limits?](#)

# 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**:



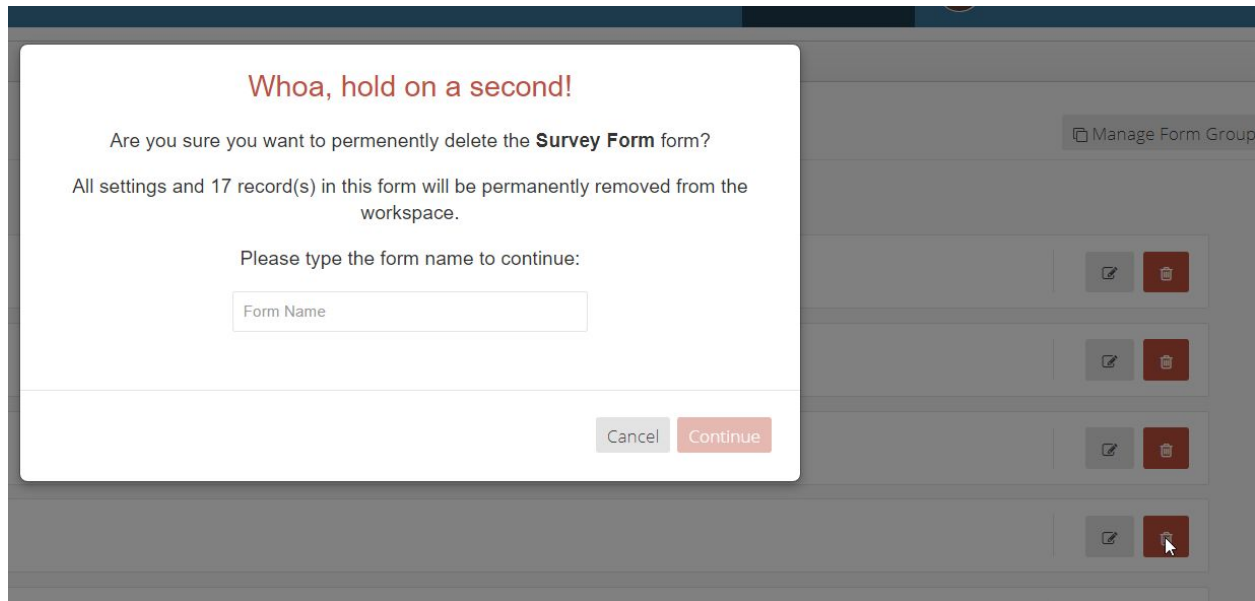
You can also access the Form builder if you are within **Forms** in **Settings & Tools** by clicking the gray Edit box next to the form:



# Delete a Form

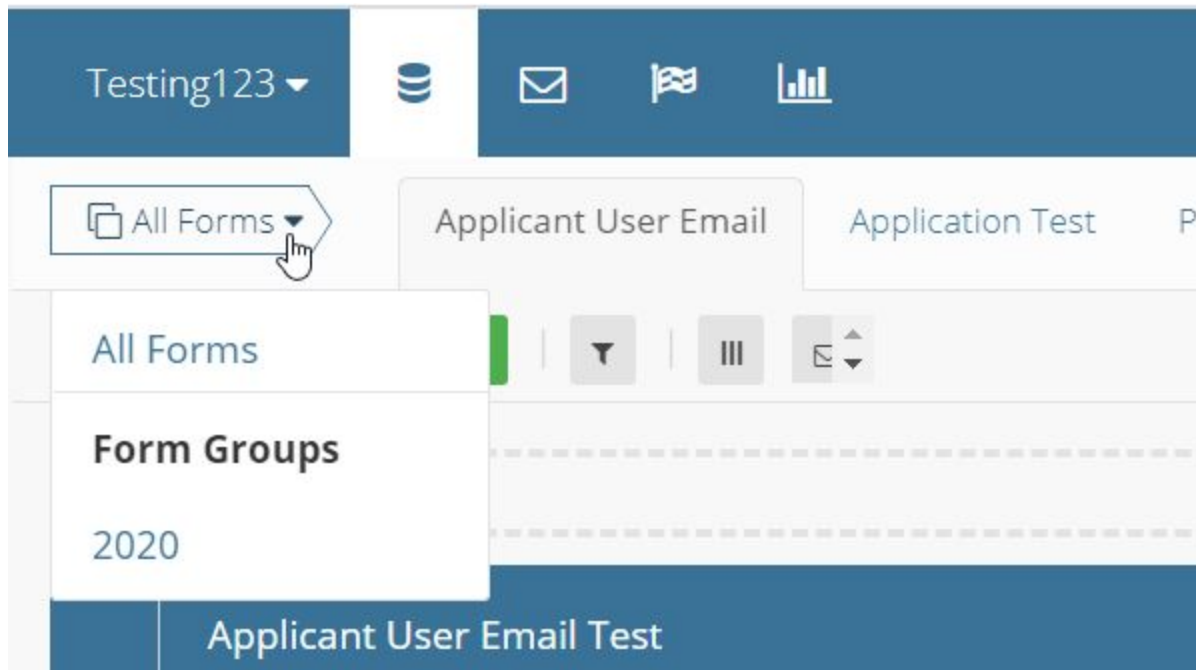
If you ever need to delete a form, you will need to go to **Settings & Tools** > **Forms** and click on the red trash icon.

**\*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.**

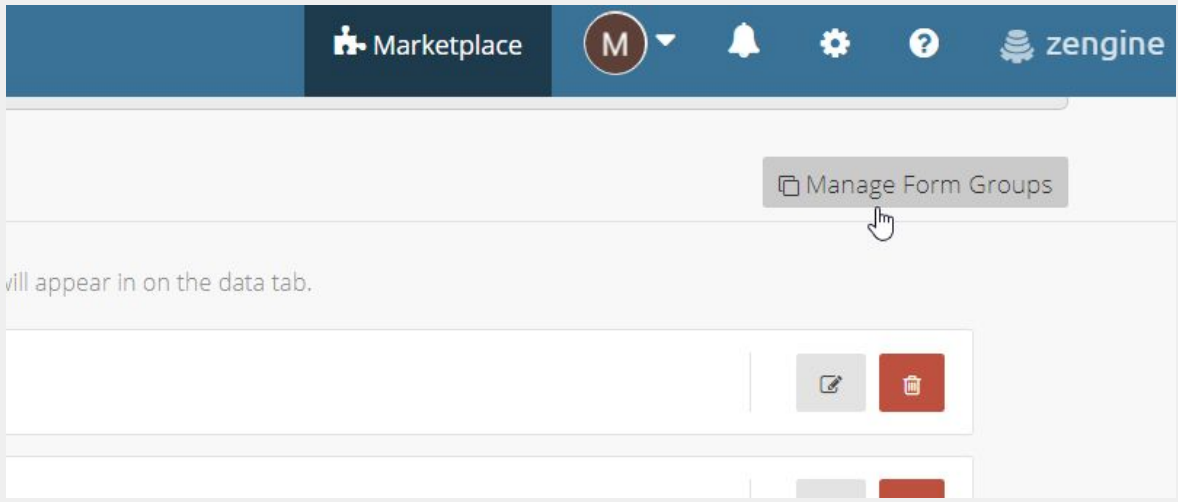


## Form Groups

**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:

Form Groups allow you to organize related forms into a single set or group. This helps users easily focus on specific forms when they have large volumes within their workspace.

You need a name for your Form Group. Give it a name that describes the types or categories of forms that will belong to this set.

Please keep it under 24 characters and plural.

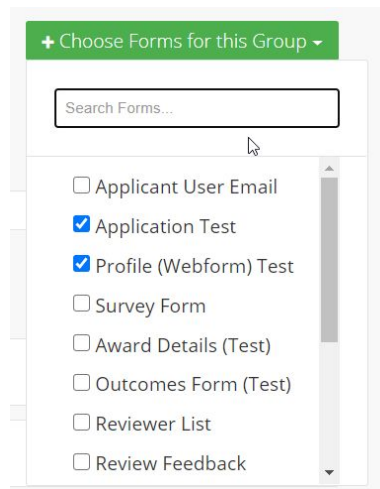
Cancel Save

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**:

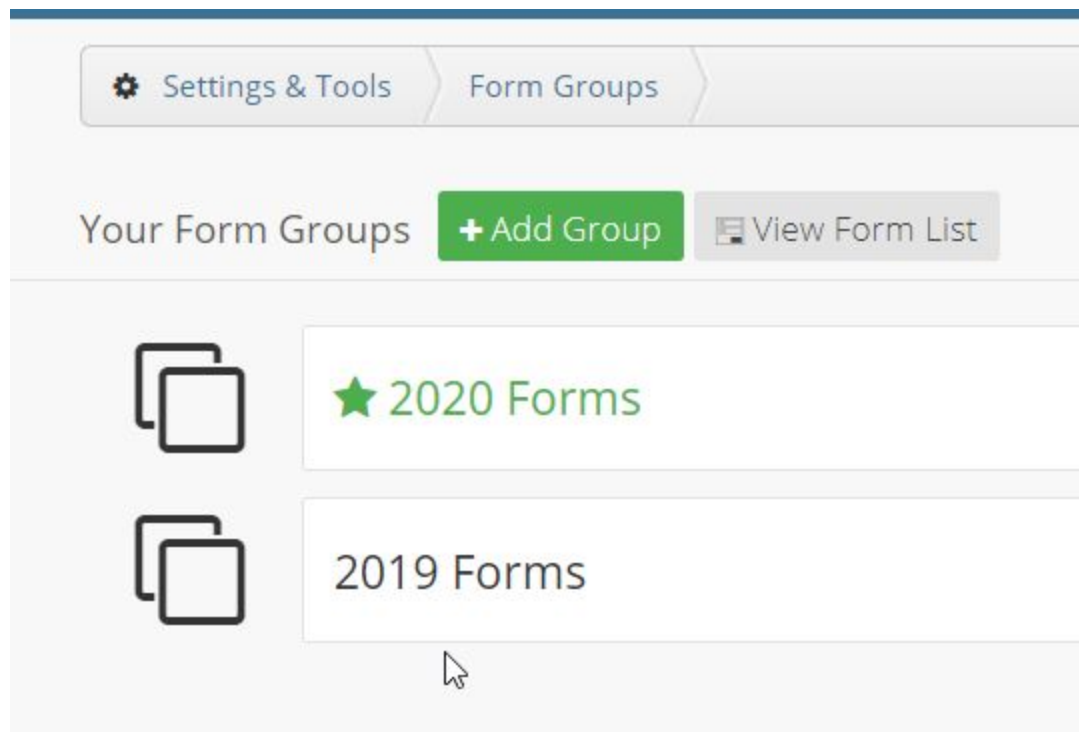


Then add the forms you want to include in the **Group** by selecting the **Choose Forms for this Group** button:

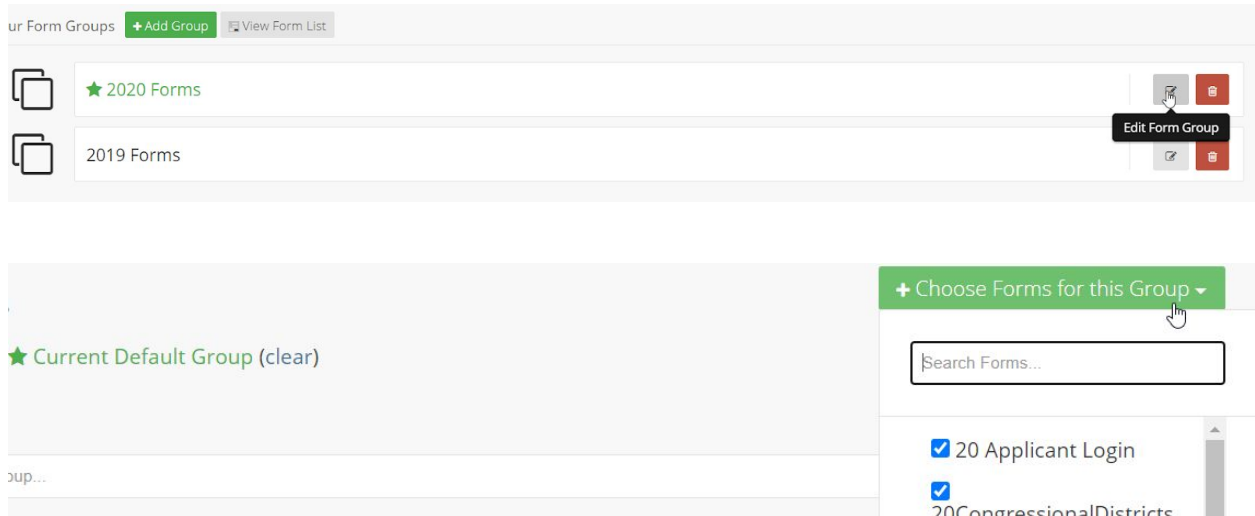


Now you have successfully created a form group.

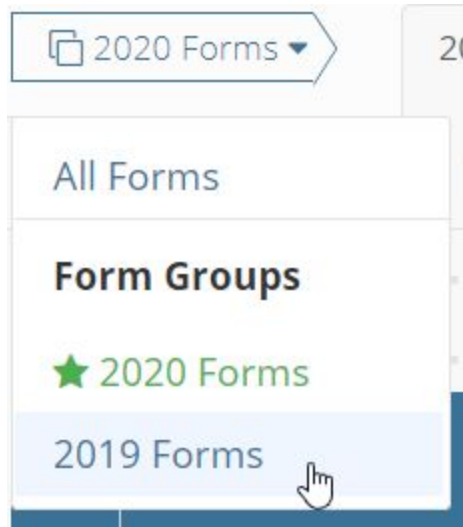
You can have multiple Form Groups to organize your data as seen below:



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:

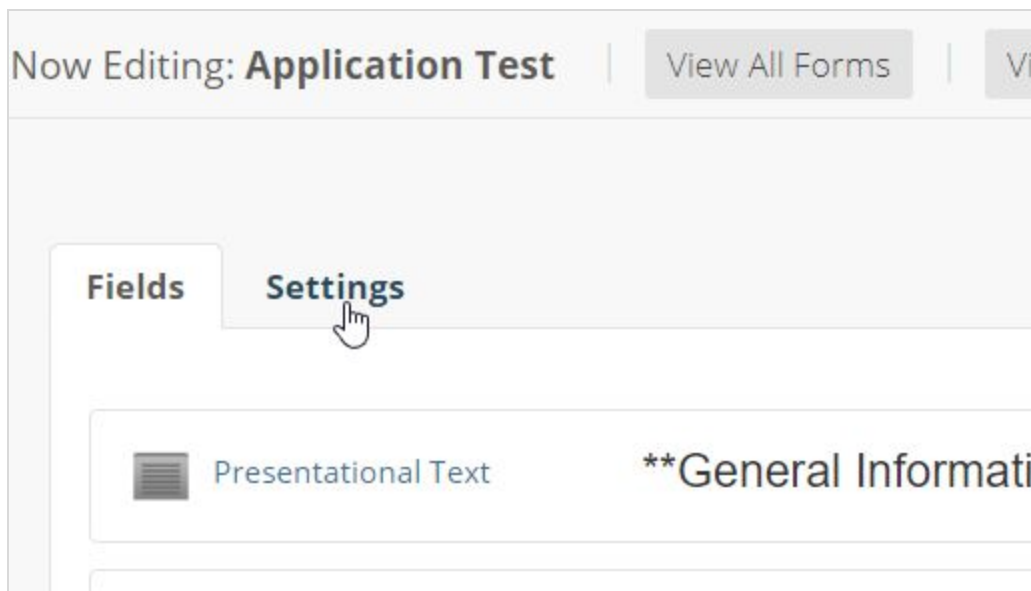


This is very helpful if you have many forms in your workspace and gives you the ability to quickly navigate to the data you need to see.

## 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:

**Fields** **Settings**

**GENERAL FORM SETTINGS**

Name: Application Test  
Name the form so it describes your data, like "Col"

Application Test Record Identifier: Organization Name  
Choose one or two fields you would like to use to

Form Purpose (Optional):  
Sometimes deleting certain forms can negatively

**FOLDER SETTINGS**

Default Folder: Drafts  
All records created by this form will appear in the

Manage folders

Save all settings Cancel

Here is where you can make changes to your folders.

+ Add Folder

Submission

Drafts

Uncategorized

Close

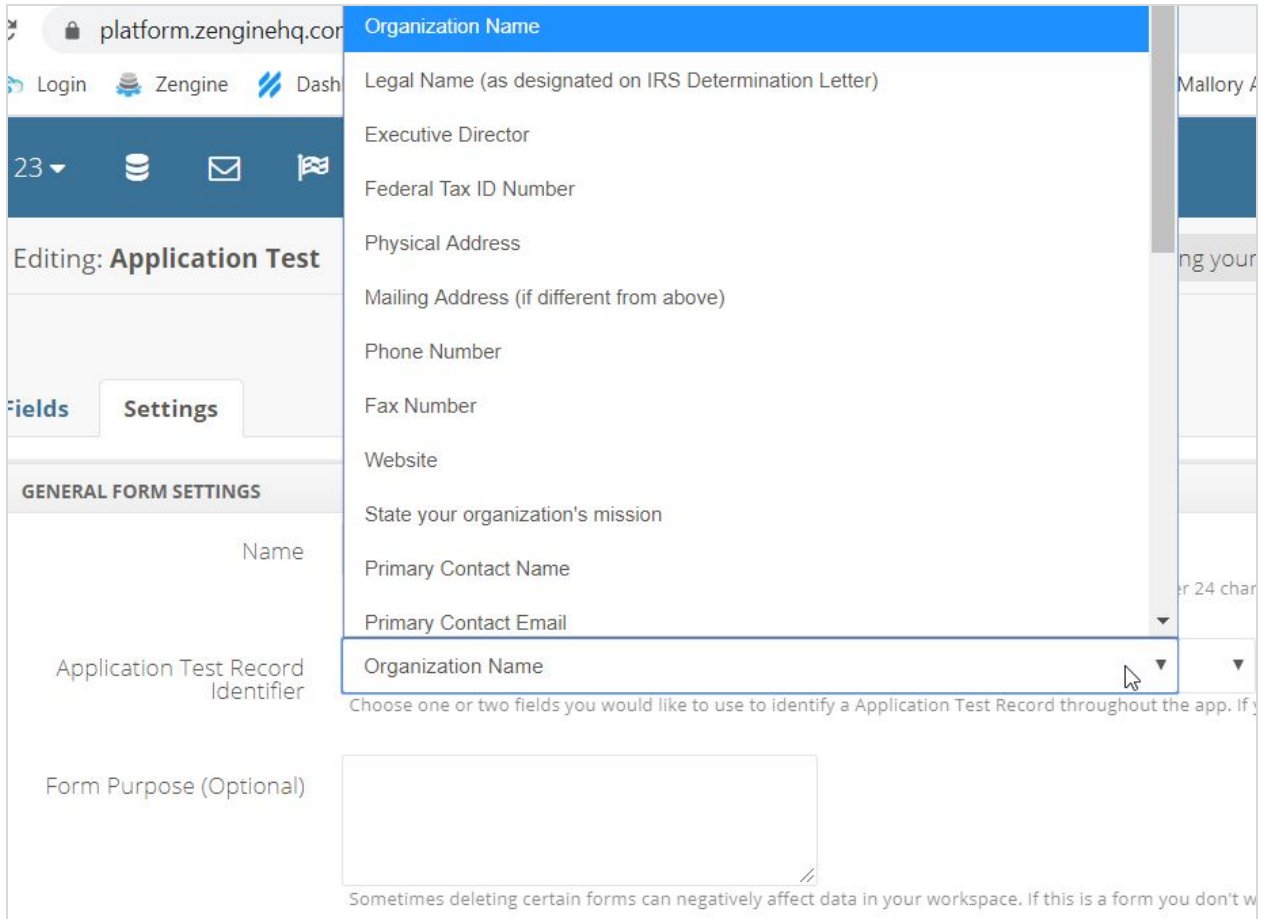
You can also update the default folder. When records in the form are created, they are placed into a default folder to start.

**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.

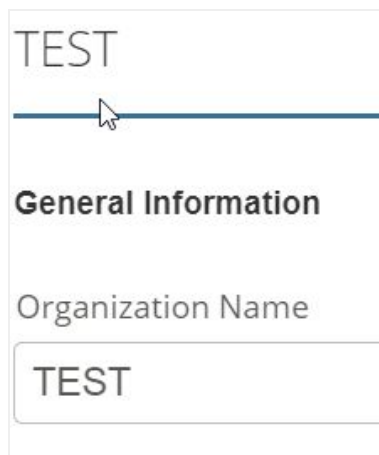
The screenshot shows a web interface with two tabs: 'Fields' and 'Settings'. The 'Settings' tab is active. Under 'GENERAL FORM SETTINGS', there are three rows: 'Name' with the value 'Application Test', 'Application Test Record Identifier' with the value 'Organization Name', and 'Form Purpose (Optional)' which is empty. Below this is the 'FOLDER SETTINGS' section, which contains a 'Default Folder' dropdown menu. The dropdown is open, showing options: 'Drafts', 'Submission', 'Drafts', and 'Uncategorized'. To the right of the dropdown is a 'Manage folders' button. Below the dropdown is a 'Cancel' button.

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.

The screenshot shows a data view interface. At the top, there are tabs for 'All Forms', 'Applicant User Email', 'Application Test', 'Profile (Webform) Test', 'Survey Form', and 'Review Feedback'. Below the tabs is a toolbar with '+Add Review Feedback', a dropdown arrow, a list icon, and an email icon. A search bar labeled 'Search Forms...' is on the right. Below the toolbar is a table with columns: 'Significance Score', 'Approach Score', 'Environment Score', and an unlabeled column. The table contains four rows of data. A red arrow points to the 'Profile (Webform) Test' tab, and another red arrow points to the 'Environment Score' column header. To the right of the table is a dropdown menu with the following items: 'Award Details (Test)', 'Outcomes Form (Test)', 'Reviewer List', 'Report Names', 'Monthly Report', 'Quarterly Report', and 'Final Reports'.

	Significance Score	Approach Score	Environment Score	
1	1	1	2	1
2	2	2	2	2
1	3	2	2	2
1	2	4	3	3

# Setting up Views

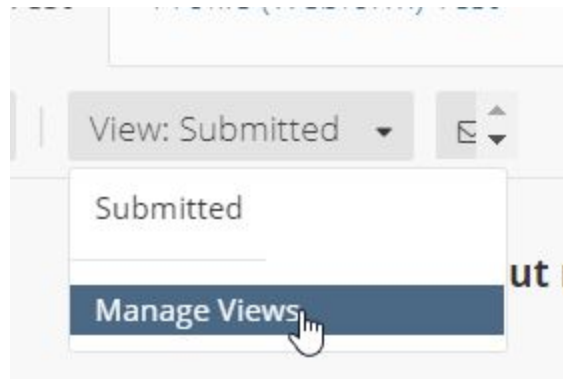
When you are looking at your data, you may want to filter and adjust your columns to see a particular set of data. You can save the order of the columns, filter, and display certain data points by setting up what is called a **View**. Once you have your view set, a yellow banner will appear indicating 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**:



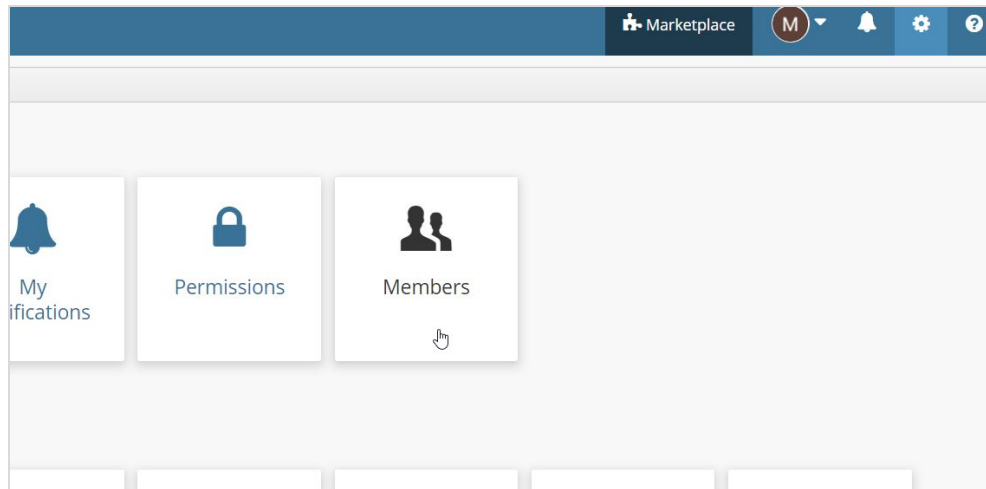
You can **edit** a current view, delete or mark a view as default.



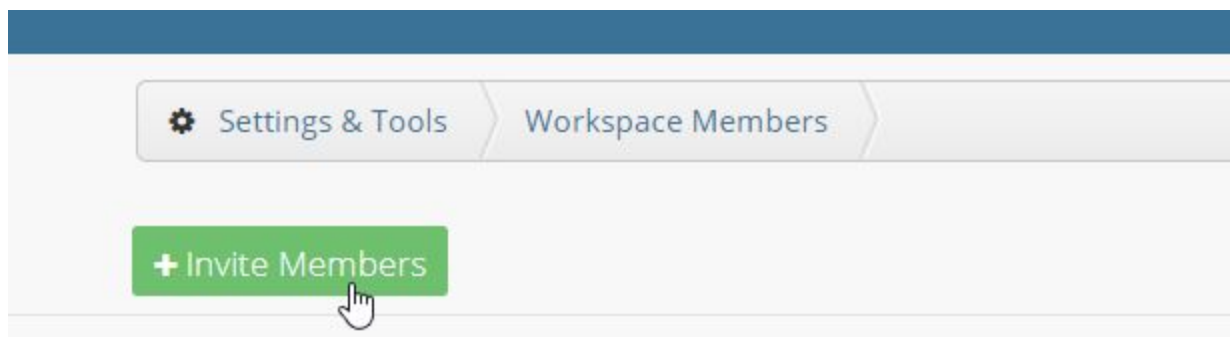
**\*Please note that data views are shared with all workspace members. To review the current view limits, click here: [What are the current workspace limits?](#)**

# 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:



**Invite New Members to this Workspace**

Email

Enter an email address for each person you would like to invite to this workspace.

Separate each person you would like to invite by a comma or a new line.  
You can invite 49 more members to this workspace.

Message

If you'd like, you can add a personal message to your invitation.

Pick the Role for the Person(s) being Invited

You can choose from a variety of **standard roles** for invitees that give them different permissions to view, edit, or delete workspace data. Once members accept your invitation, you can **customize their roles**.

Choose one...  
Choose one...  
Administrator  
Full Member  
Editor

Cancel Send Invite

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.

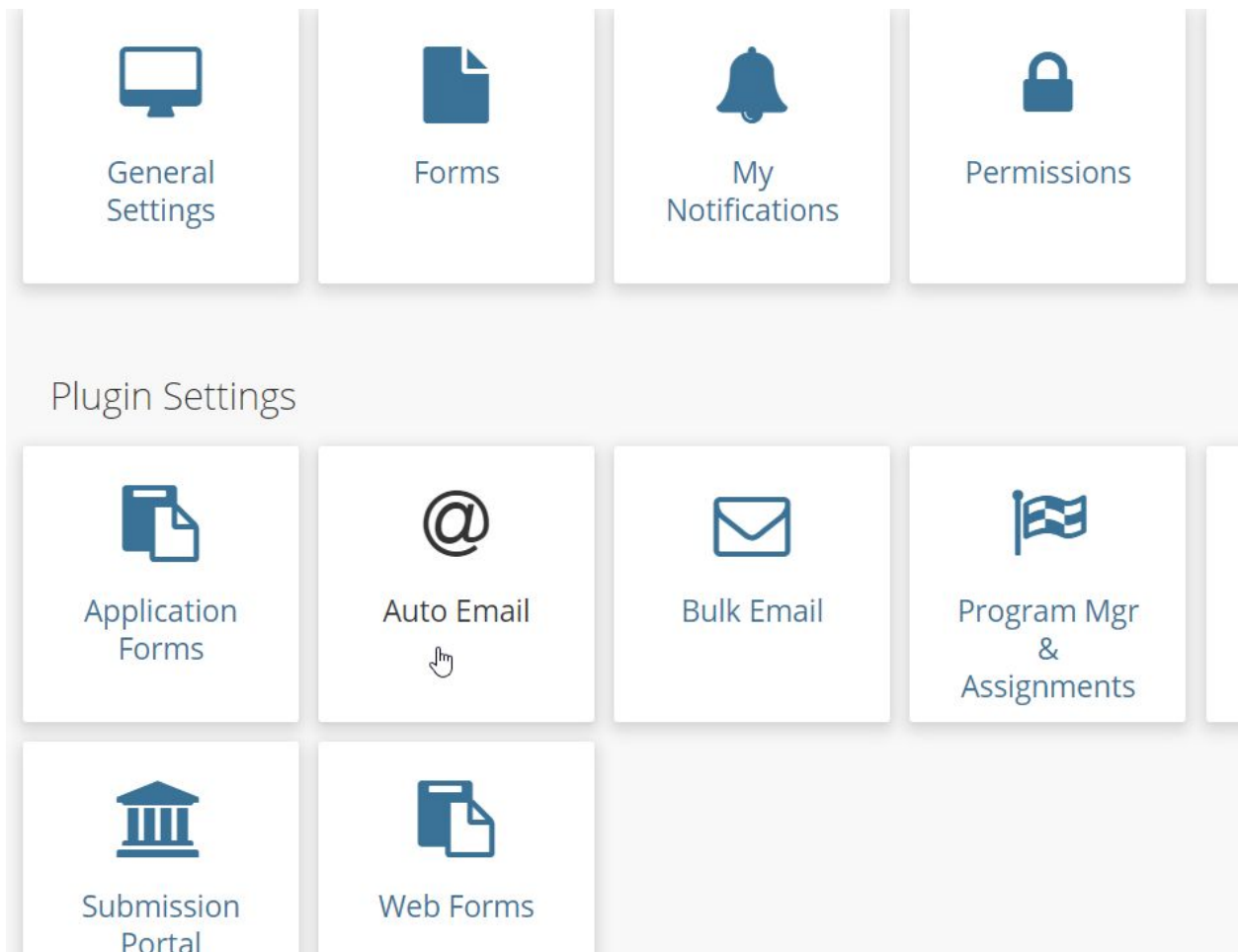
You can learn more about each role available to your team members here: [Standard Roles](#)

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.

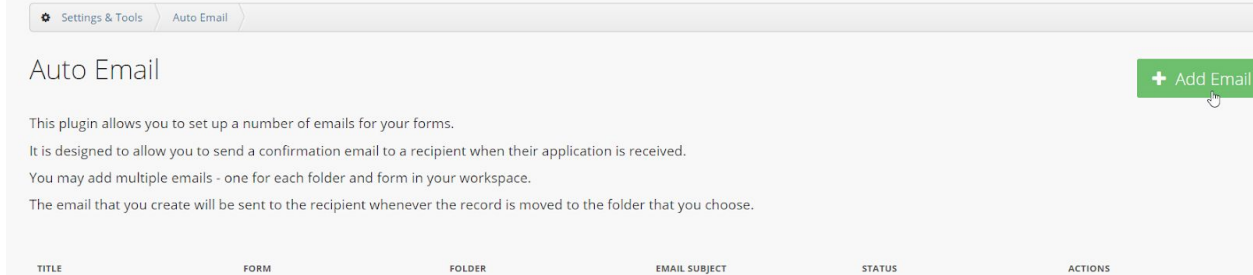
If you would like to learn more about the Custom roles, you can read about it here: [Custom Roles](#)

## 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](#)

Form Settings

Title: Thank you for submitting!

Recipients Form: Application Test

Email Field: Applicant User Email Test - from related form Applicant User Email

Trigger Folder: Submission

Activation: Activate Email

Email Settings

From Name: My Company's Name

Reply To: thankyou@forapplying.com

Subject: Thank you for submitting!

Copy to Recipients: + Add CC + Add BCC Enter a comma separated list of emails

Email Body: Insert values from your forms

- + This Form
- + Parent Forms

You can then create the body of your email:

Copy to Recipients: + Add CC + Add BCC Enter a comma separated list of emails

Email Body: Insert values from your forms

- This Form

- Today's Date
- Record ID
- Folder
- \*\*General Informatio
- Organization Name
- Thank you for taking
- Legal Name (as desig
- Executive Director
- IRS 501 ( c ) (3) No
- File Upload
- Federal Tax ID Numbe
- Year organization wa
- Physical Address
- Mailing Address (if
- Phone Number
- Fax Number
- Website
- State your organizat
- \*\*Contact Informatio
- Primary Contact Name
- Primary Contact Emal
- Primary Contact Phon
- Financial Director N
- Current Board Presid
- Number of Board Memb
- \*\*Grant Information\*
- Type of Grant Reques
- Program Category
- Amount of Grant Bein
- Duration of Grant Re
- How many years?
- Name of Program/Proj
- Summarize your propo
- Who will be impacted
- Geographic Area Serv
- Expected outcomes du
- Total Program/Projec
- Total Funds Raised T
- List other funders f
- Long Term Plan for F
- Challenges in Achiev
- Please list possible
- Have you previously
- When, what was the r
- \*\*Organization Finan
- Total Organizational
- Fiscal Year End
- Please attach your I
- \*\*Notes\*\*
- What School Dropdown
- Text
- Required
- Submission Date

- Parent Forms

- Applicant User Email
- Record ID
- Folder
- Applicant User Email

Formats: Verdana 8pt

B I A A

Dear {{field111202}}

Type here your message you would like to say, such as "Thanks for applying! We will review your application and be in touch soon!"

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.

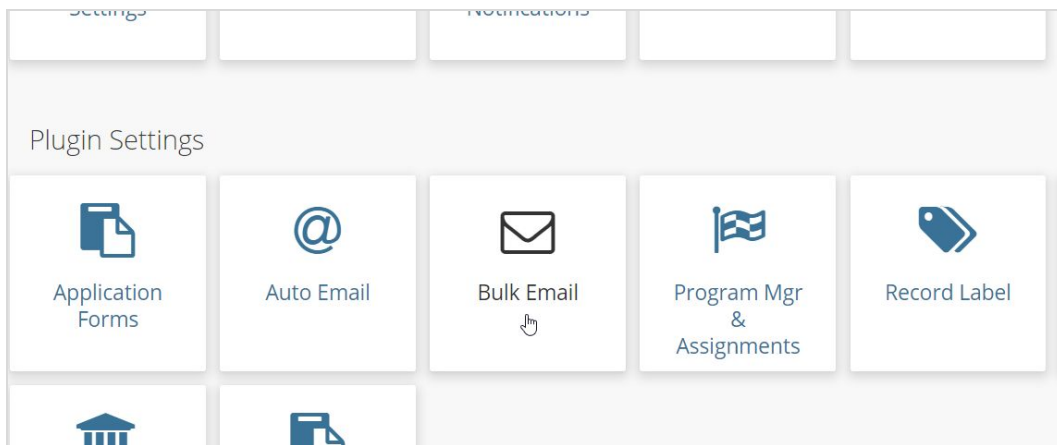
Once complete, remember to hit **Save** and **Activate Email**:

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!

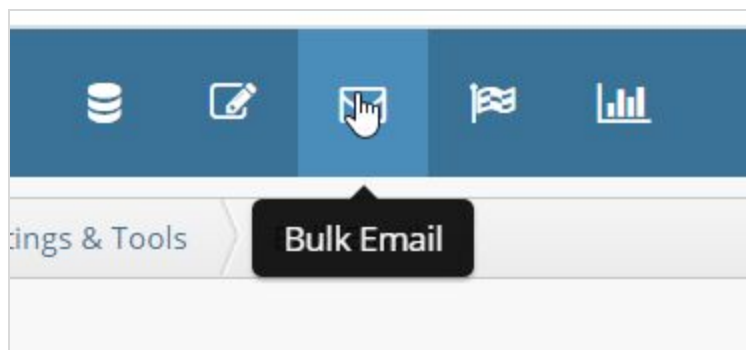
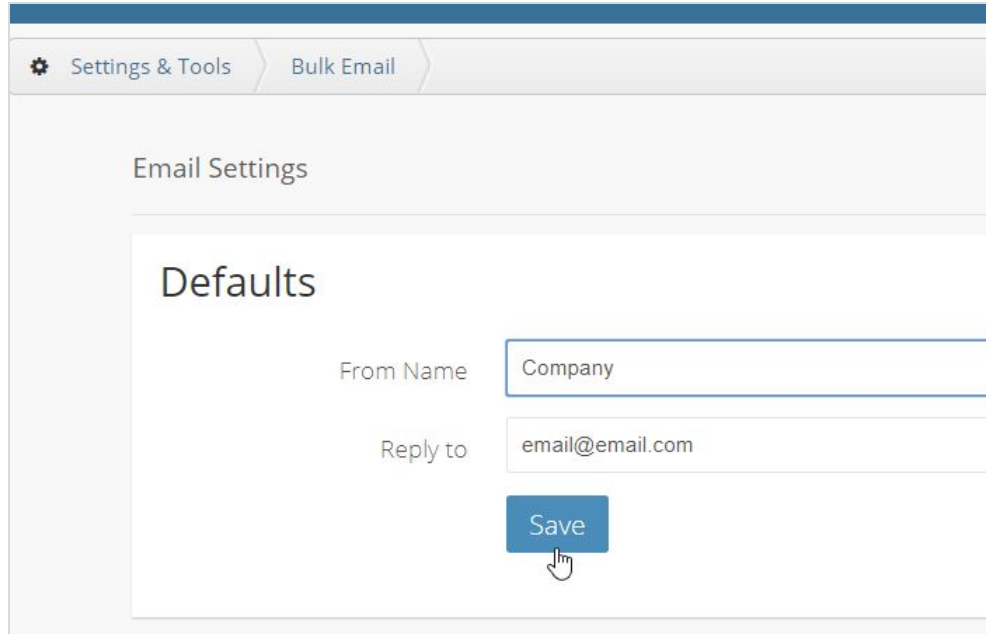
## Bulk Email

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:



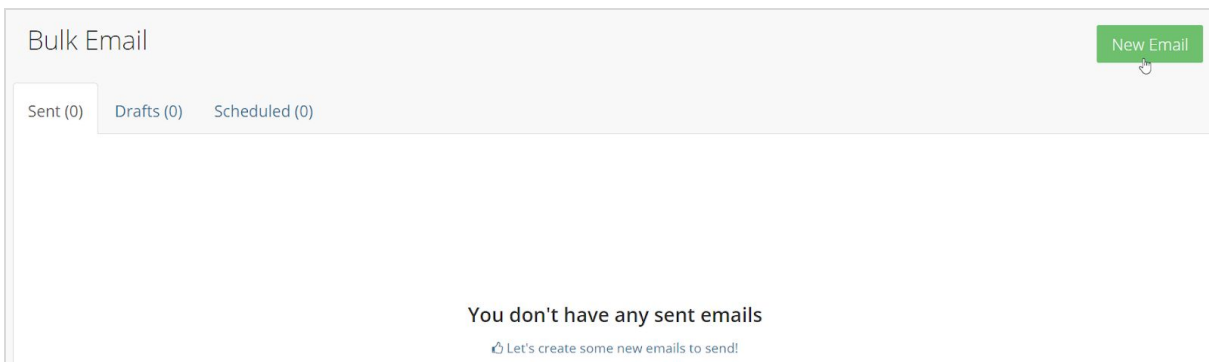
And enter in the two fields here to establish some defaults. You will not need to do this step again.





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](#).

Who should receive this email?

Recipients Form: Application Test  This is the form that contains the recipients you want to email.

Email Field: Applicant User Email: Applicant Us  This is the field you're using for the email address.

---

From Name: Company

Reply To: email@email.com

Send To: 2 Recipients

CC Field:   Include CC recipients.

BCC Field:   Include BCC recipients.

Subject: Please complete your application before the Deadline!

Body:

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:

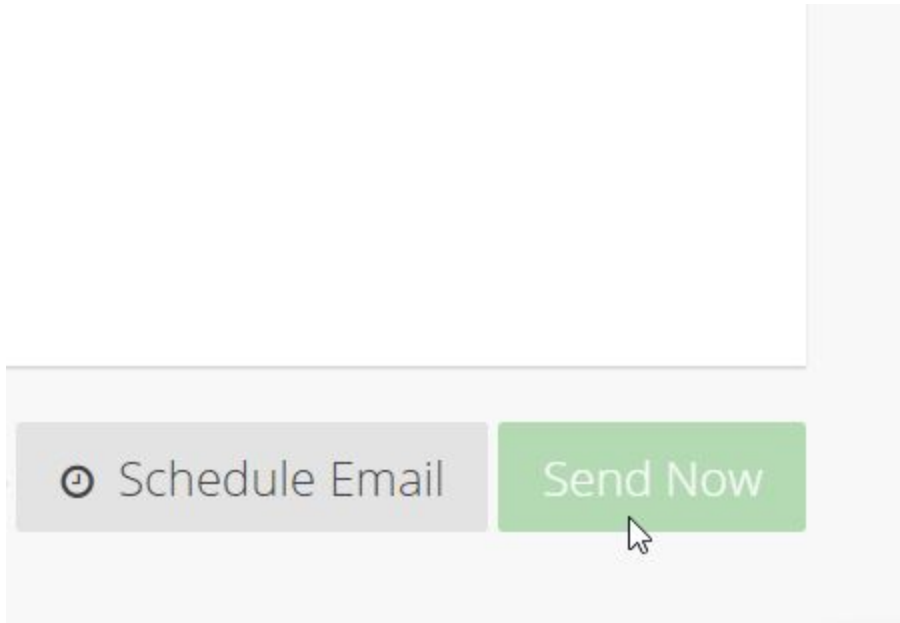
All  of the criteria below

And

Field:	Condition:	Value:
Folder <input type="button" value="v"/>	is <input type="button" value="v"/>	<input type="button" value="v"/> <input type="button" value="x"/>
<input type="button" value="+ Add a Filter"/>		

- Submission
- In progress**
- Uncategorized


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:

### Schedule Email

Scheduled emails are sent within a 2-hour window starting at the date + time set below. Depending on the volume of emails being sent, their delivery will occur at some point within that window. When would you like to send this email?

07/01/2020 

11 : 55 AM

All times are in Eastern Time (ET)

Once you have set a date and time, your email will appear in the **Scheduled** tab until the date specified arrives. It will then move to the **Sent** tab while the emails are being transmitted. This scheduled email will not be sent if the filter results exceed 25,000 emails. Are you sure you want to continue?

[Save + Continue](#) [Cancel](#)

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.

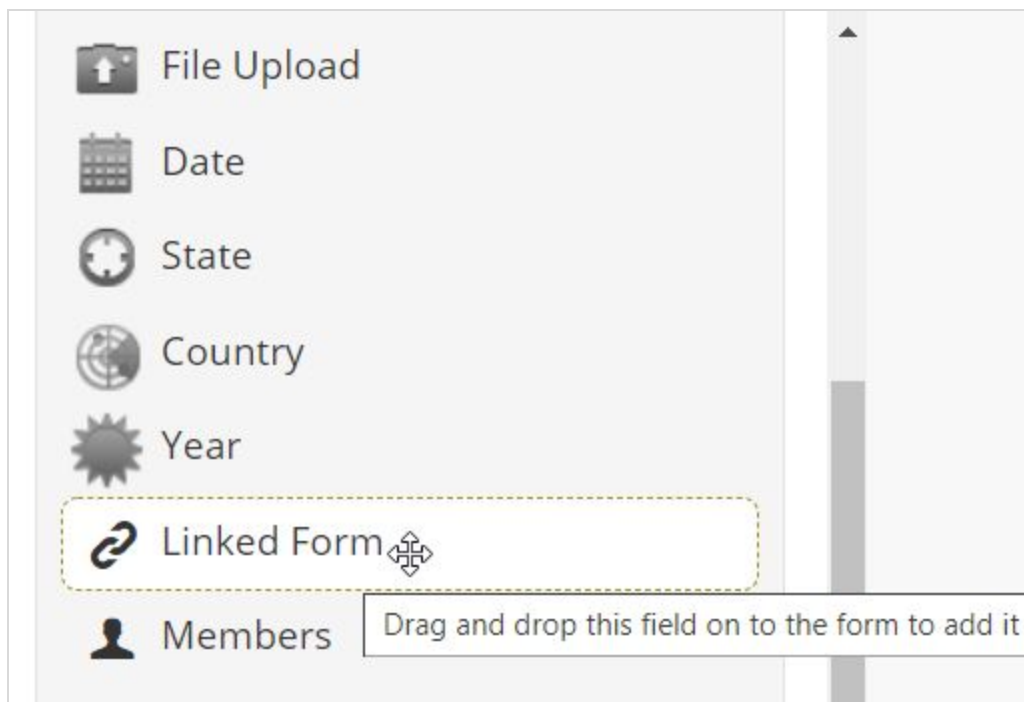
In order to set up a **Submission Portal**, you will need to make sure you have these 3 forms in your workspace:

**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.



Now Editing: **Profile (Webform) Test** | [View All Forms](#) | [View Profile](#)

**Fields** | **Settings**

 Text Box **Required**

 Linked Form **Linked User Form**

Linked record fields allow a user to select a record from a different

Linked Form

**Applicant User Email**

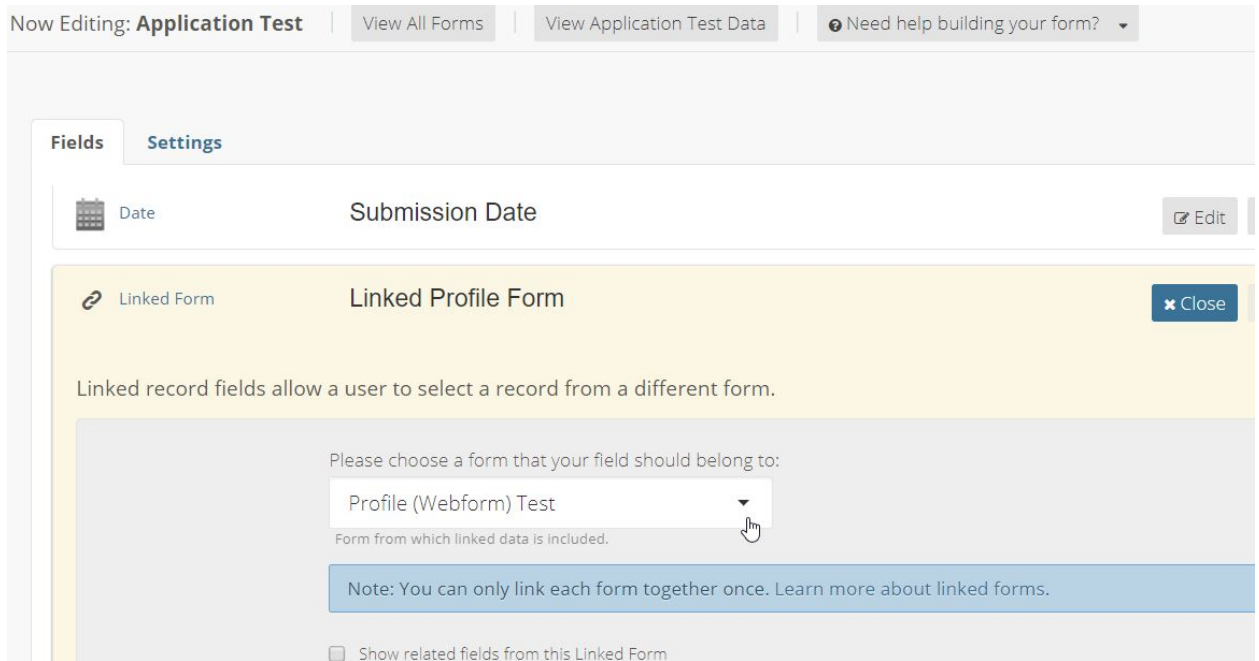
Form from which linked data is included.

Show related fields from this Linked Form

A max of 10 fields can be chosen. Fields chosen will disp

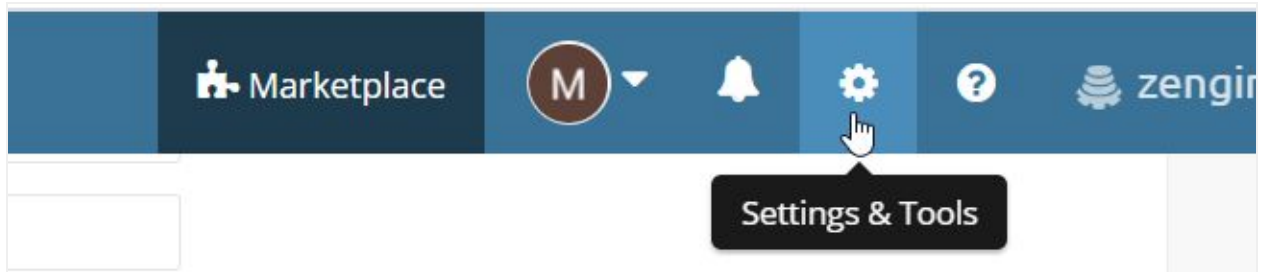
**A Primary Form:** This is the main form you wish the constituent to fill out.

- 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.

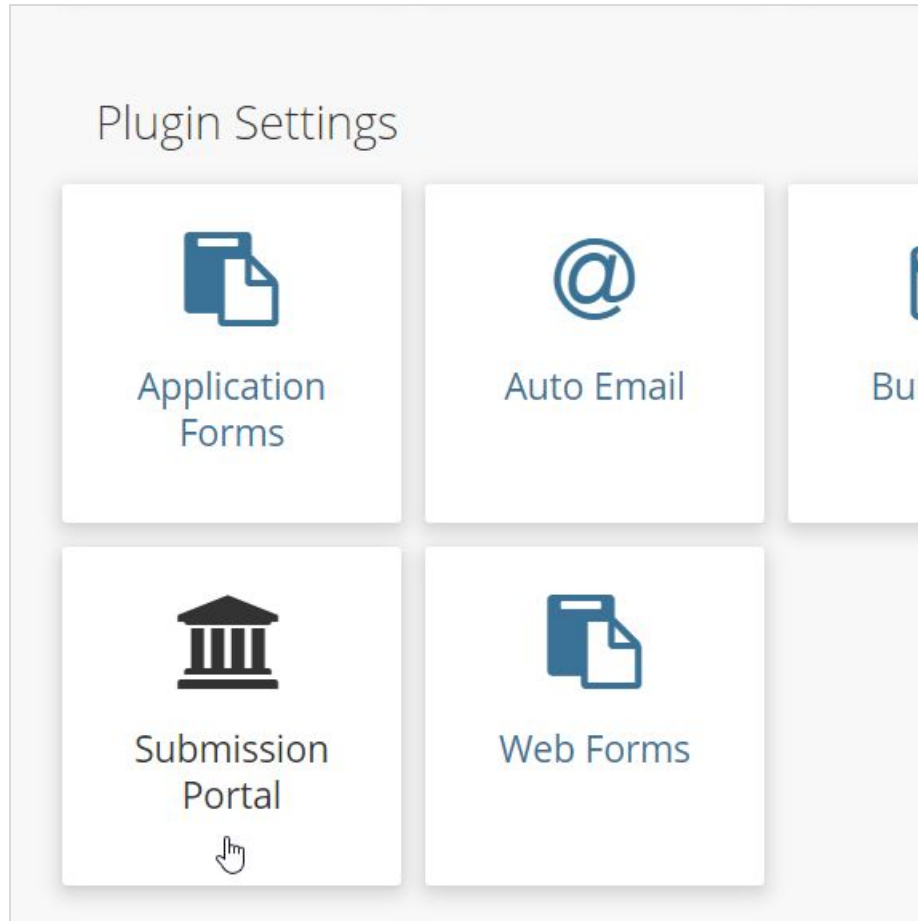


Once these three forms have been created and linked properly, you can begin creating your Submission Portal!

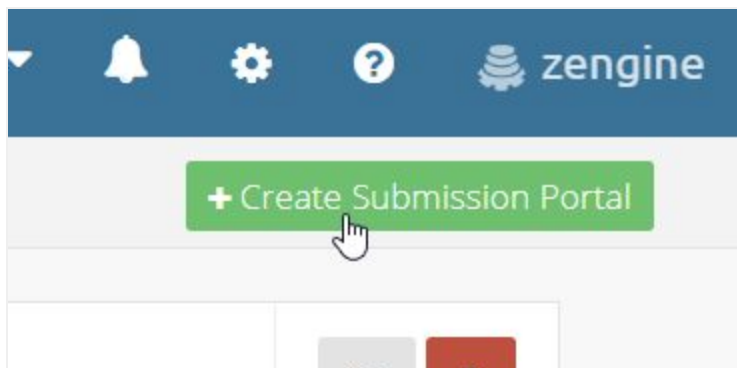
To start, we will go to **Settings & Tools**:



Locate the **Submission Portal** Plugin:

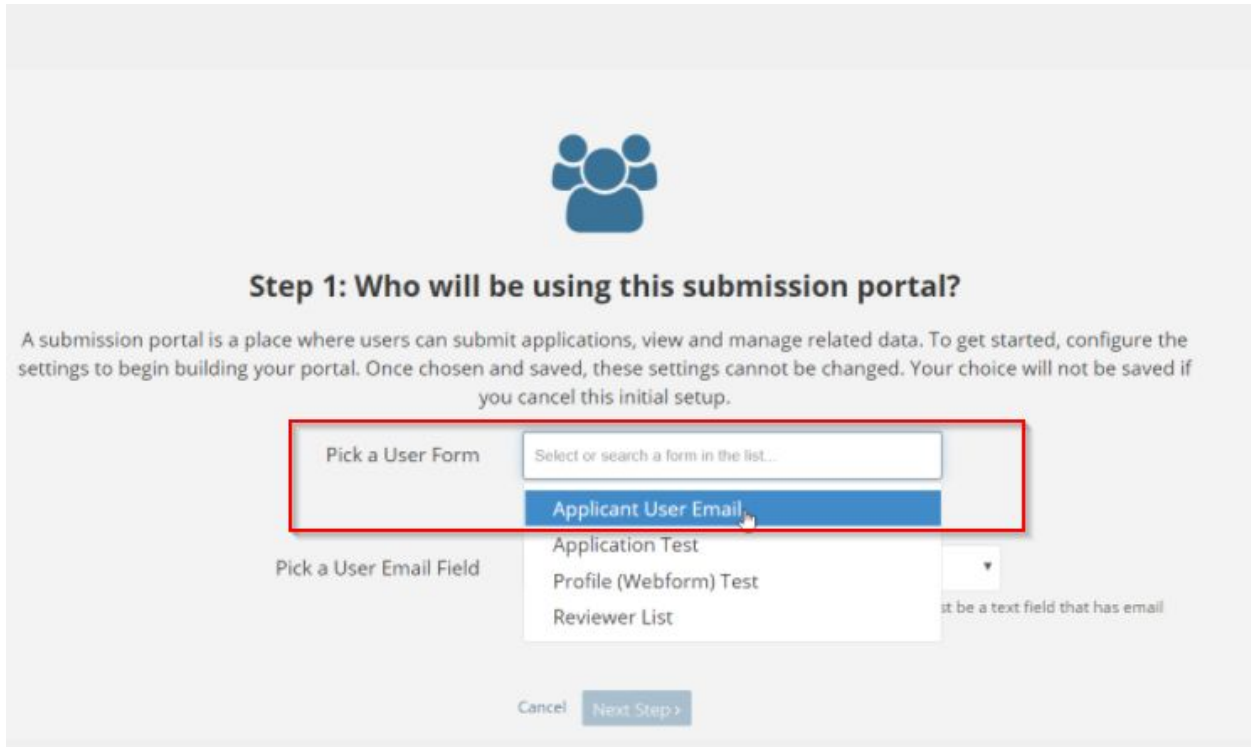


## Create Submission Portal



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.



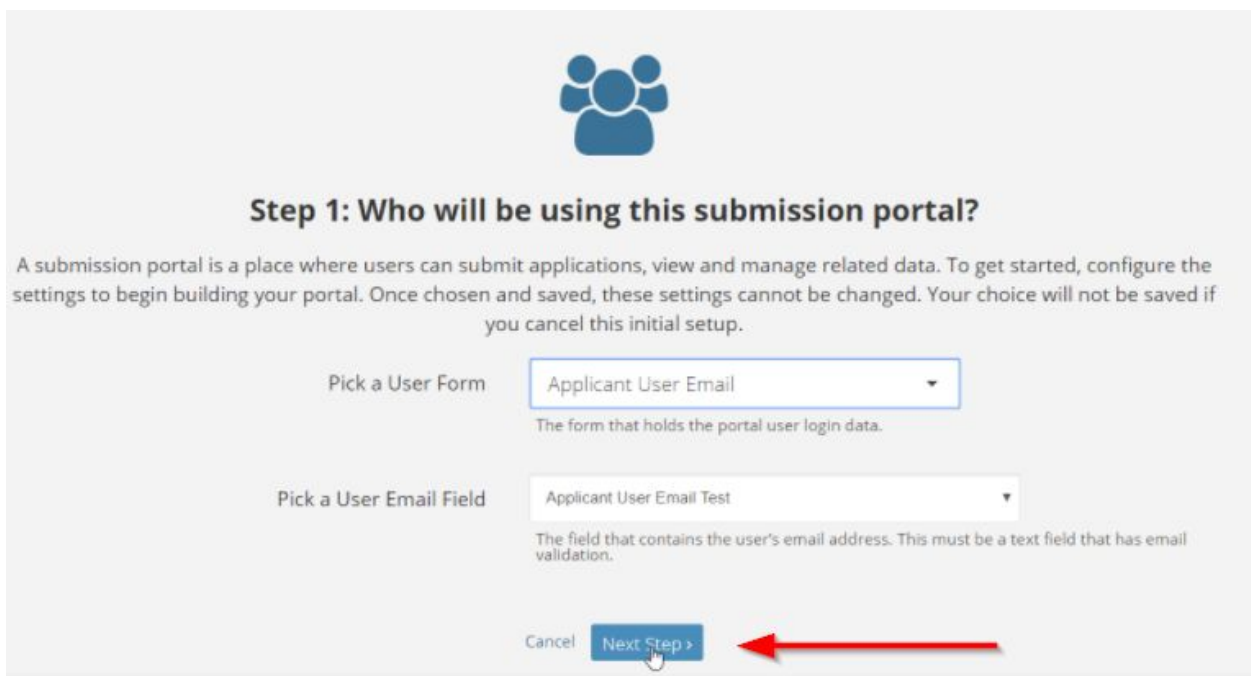
**Step 1: Who will be using this submission portal?**

A submission portal is a place where users can submit applications, view and manage related data. To get started, configure the settings to begin building your portal. Once chosen and saved, these settings cannot be changed. Your choice will not be saved if you cancel this initial setup.

Pick a User Form: Select or search a form in the list...  
Applicant User Email  
Application Test  
Profile (Webform) Test  
Reviewer List

Pick a User Email Field: [Empty dropdown]  
Must be a text field that has email

Cancel Next Step >



**Step 1: Who will be using this submission portal?**

A submission portal is a place where users can submit applications, view and manage related data. To get started, configure the settings to begin building your portal. Once chosen and saved, these settings cannot be changed. Your choice will not be saved if you cancel this initial setup.

Pick a User Form: Applicant User Email  
The form that holds the portal user login data.

Pick a User Email Field: Applicant User Email Test  
The field that contains the user's email address. This must be a text field that has email validation.

Cancel Next Step >

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





## Step 2: Where will the portal data come from and how will it be used?

A submission portal is a place where users can submit applications, view and manage related data. To get started, configure settings to begin building your portal. Once chosen and saved, these settings cannot be changed. Your choice will not be saved if you cancel this initial setup.

Pick a Profile Form

The form that holds the portal user profile data. This form must be linked to the user profile.

Pick a Primary Form

**Application Test**

Award Details (Test)

Draft Folder for the Primary Form

Outcomes Form (Test)

Review Feedback

Pick a Submitted Folder for the Primary Form

The folder where the Primary Form goes when completed and submitted.

Cancel < Back Save Settings

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](#).

The form that holds the portal user profile data. This form must be linked to the user

Pick a Primary Form

The form that holds the primary data used in the portal submissions.

Draft Folder for the Primary Form

The folder where the Primary Form is initially stored.

Pick a Submitted Folder for the Primary Form

submitted.

Cancel

## Portal Settings

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

Submission Portal: **2ww016bo4xj** Portal Settings | View All Submission Portals | Test Submission

Portal Sections

Homepage

Profile

Submissions

First Stage

Application Test

Completed Process

Requests

Reports

Let's Start Building Your Portal!

Configure the portal's **Homepage**. Go to the **Homepage** under **Portal Sections** in the left rail to get started.

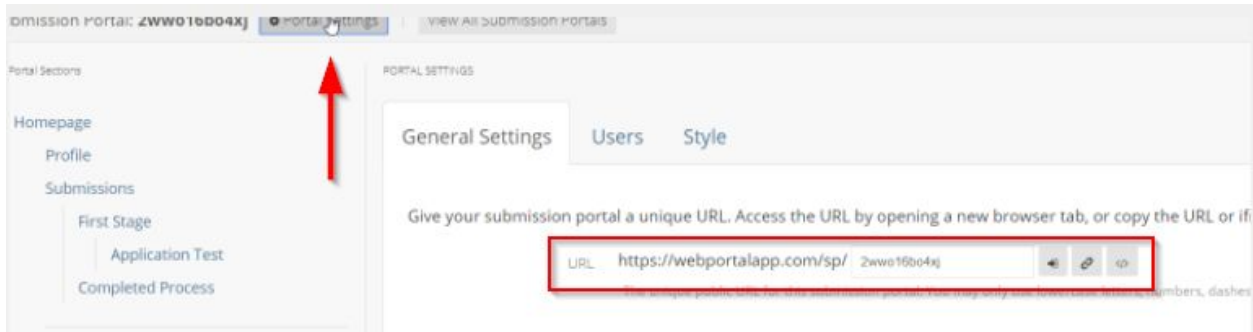
**Building Tip:** Throughout these configurations you will see the icon next to certain sections. Hovering over the icon will show you exactly where in the portal this section exists, to make building easier. Learn more about Submission Portals.

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

Submission Portal: **2ww016bo4xj** Portal Settings | View All Submission Portals

Portal Sections

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:



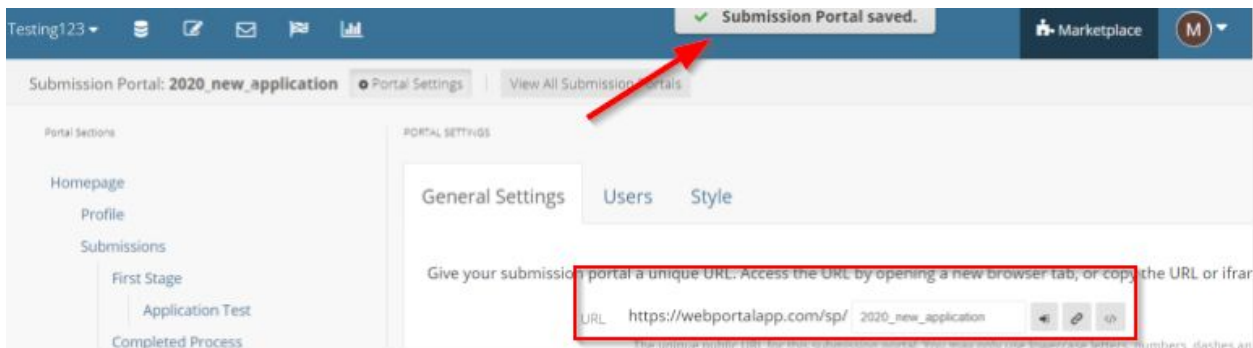
For example, here's an updated URL below...

our submission portal a unique URL. Access the URL by opening a new browser tab, or copy the URL or ifram

URL [https://webportalapp.com/sp/2020\\_new\\_application](https://webportalapp.com/sp/2020_new_application)

The unique public URL for this submission portal. You may only use lowercase letters, numbers, dashes and

Now the URL has been changed!



Email Display Name   
 You can change this name to something that is more recog

---

Provide a start date for the submission portal. Applicants will see a message to access any part of the application.

Portal Start Date  Portal does not need a start date


**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.

Provide a start date for the submission portal. Applicants will see a message with the dates of the application to access any part of the application.

Portal Start Date  Portal does not need a start date

05/23/2020  01 : 15 PM

All times for this stage are in ET

Closed Portal Text 

Formats

**Thank you for your interest.**

Sign up will open on `{{startDate}}` at `{{startTime}}` Eastern Time.

Note: `{{startDate}}` and `{{startTime}}` will be replaced with the selected date and time.

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

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

PORTAL SETTINGS


General Settings **Users** Style

This tab describes the logged-in user information and allows for descriptive text to be displayed on the login screen.

User Form The user form chosen for this is **Applicant User Email**. This form is where user information is collected.

Email Field The email field chosen for this is **Applicant User Email Test**. This field contains the email used as the login to the portal, and was captured when you created this Portal.

Password Users create a password upon signing up.

Login Text 

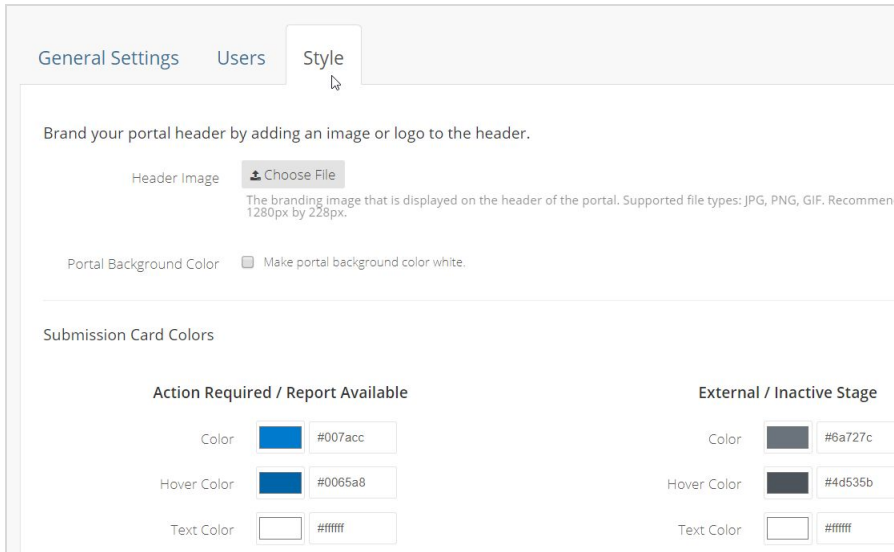
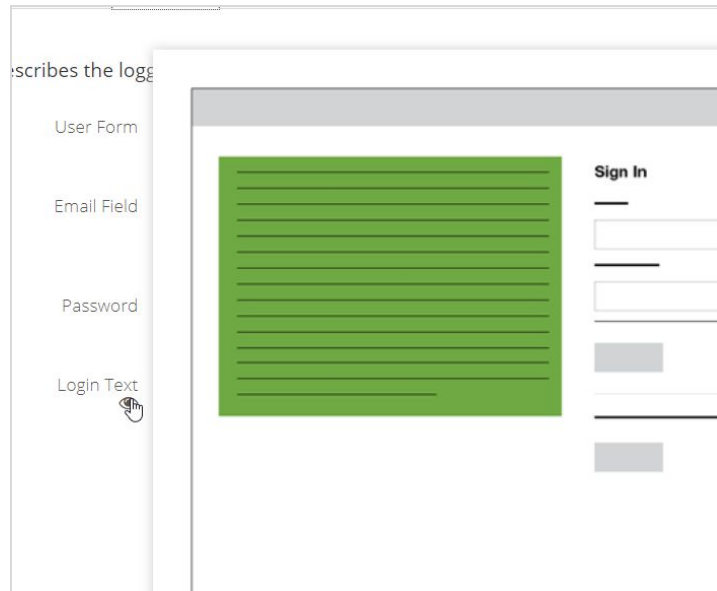
Formats

**Sign In/Sign Up Instructions**

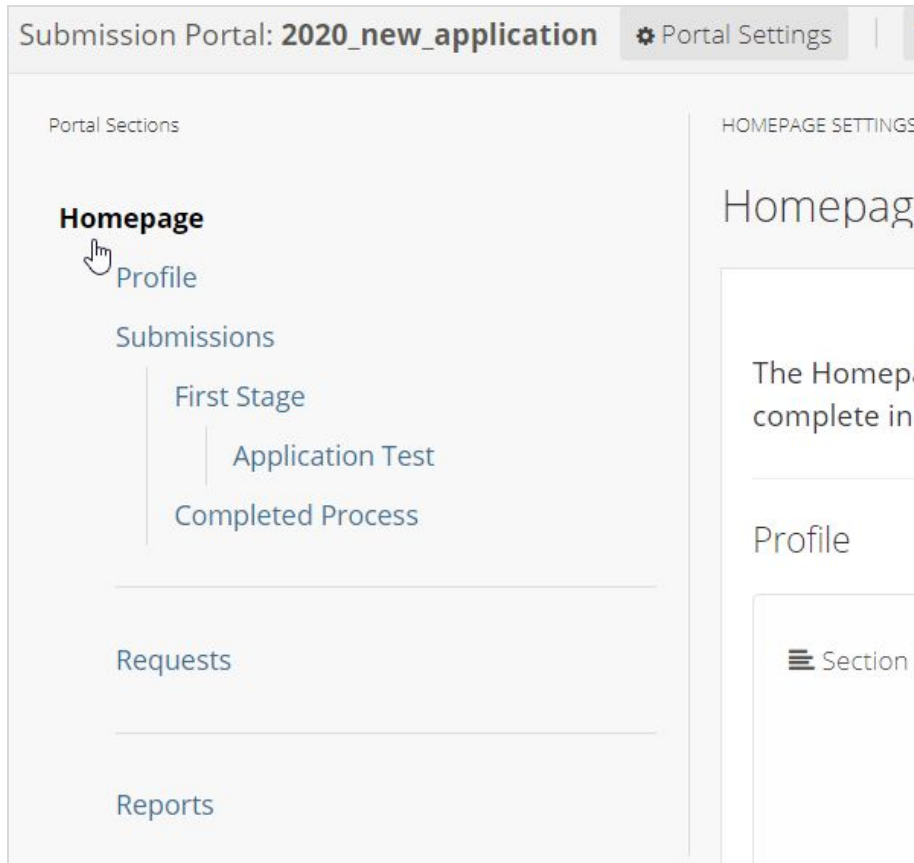
**For New Users:**

By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you click **Sign Up**, your account will be created and you will gain access to the portal.

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

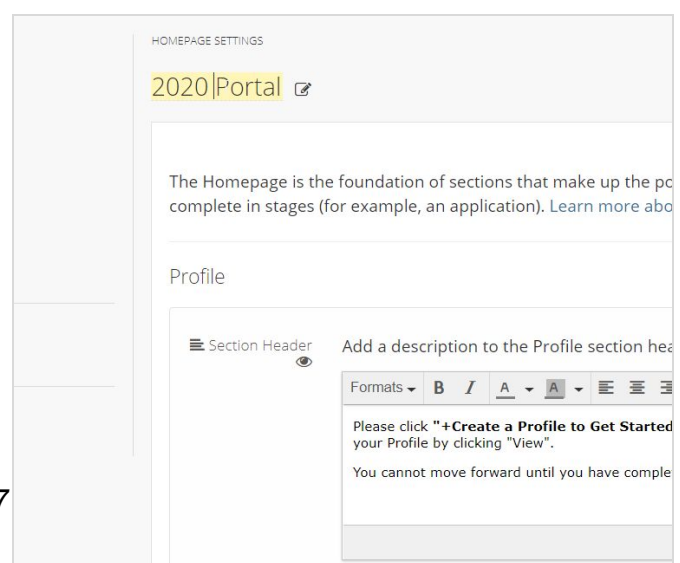
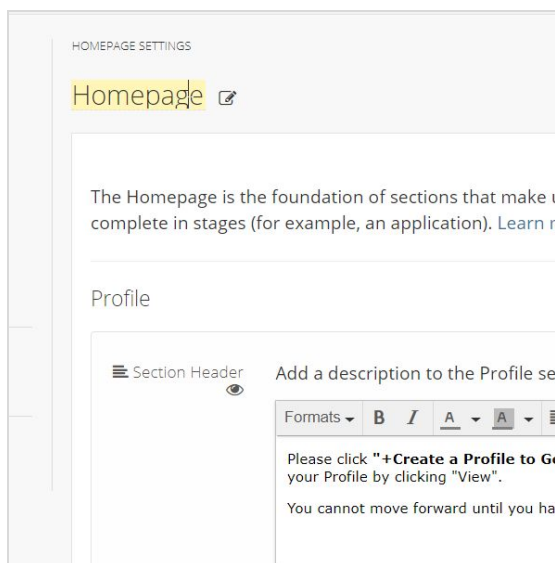


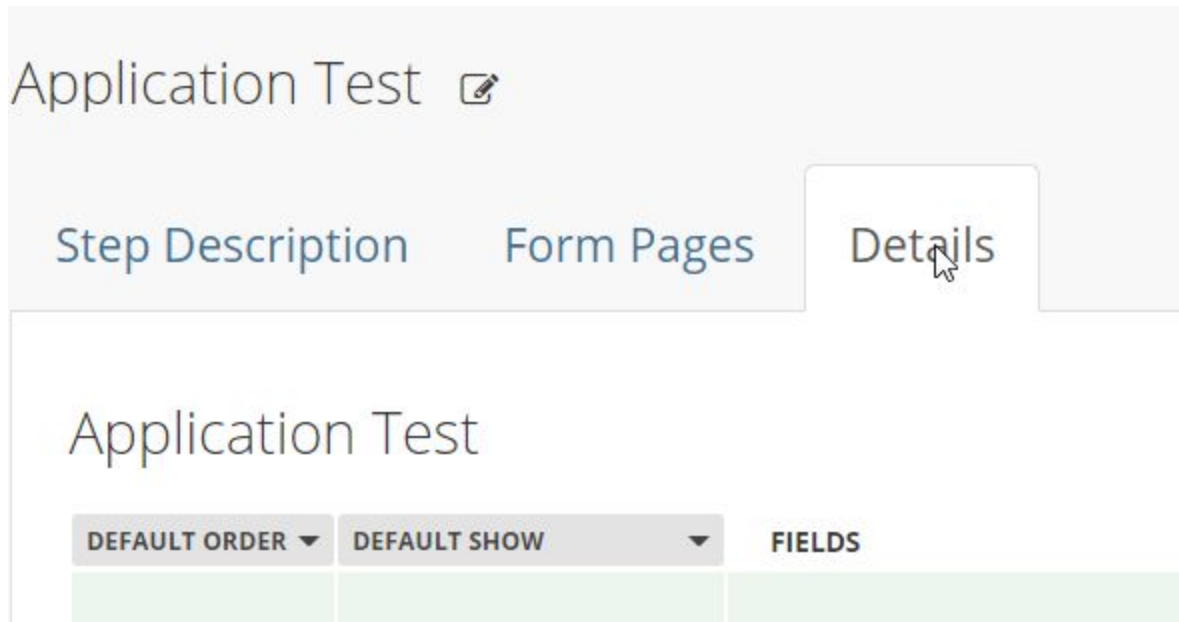
Under the **Style** tab, you can upload your logo and change the submission card colors .



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.

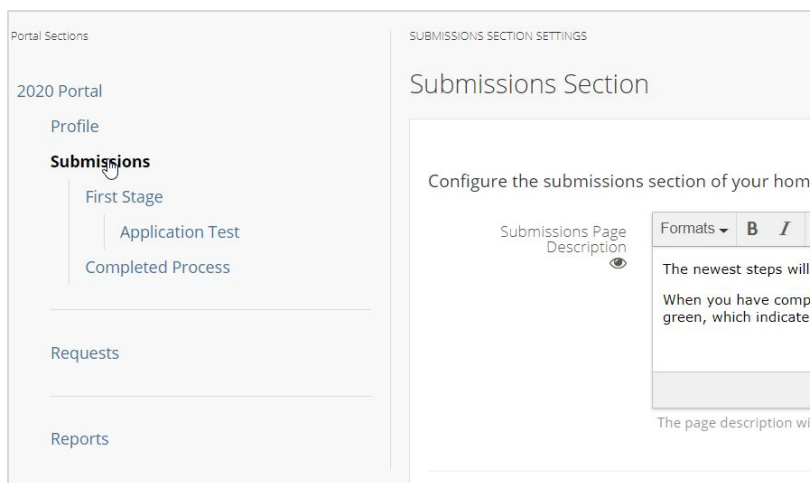
You can change the name of these Stages and Steps by clicking on the text :



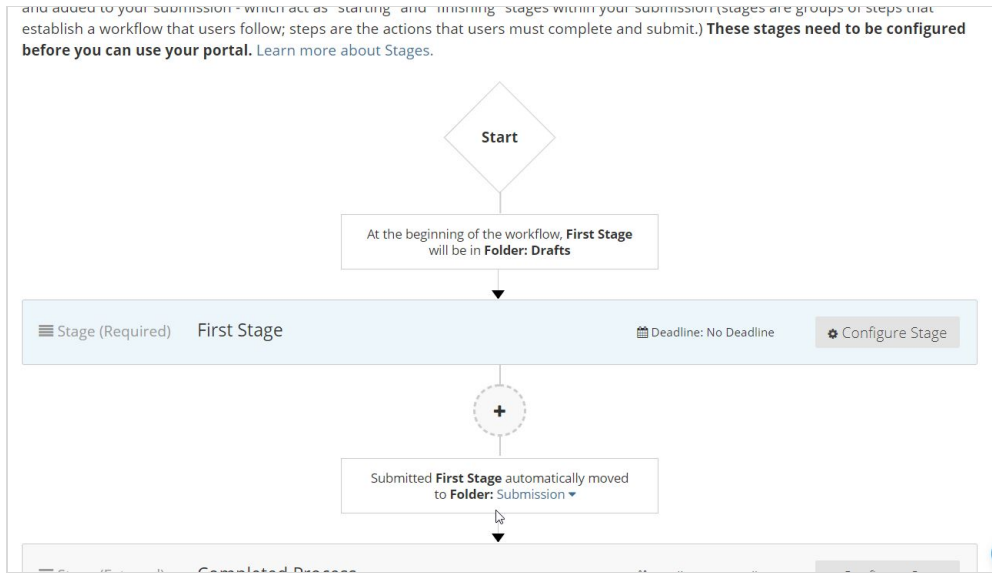


When you get to a **Stage** that has the **Details** tab, you can customize the **Details** of the form displayed. As seen in the image above, for this example: this form is the **Profile** form.

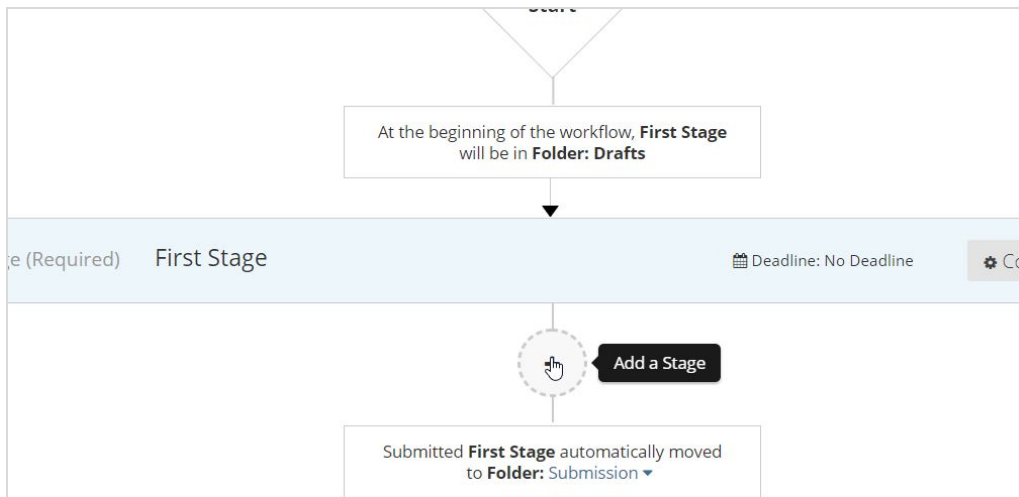
## Stages & Steps



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:



General Settings | Steps

Add Steps to create your workflow. Steps are the actions that need to be completed within the Stage. The portal has a total limit of 20 Steps across all Stages, and 7 Steps per Stage. Learn more about Steps.

Step Application Test Configure Step

+ ADD STEP

Delete First Stage Save all settings

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**:

# Application Test

Step Description

Form Pages

Details

## Application Test

DEFAULT ORDER ▼	DEFAULT SHOW ▼	FIELDS
	<b>DEFAULT SHOW</b> <b>CUSTOM SHOW</b> 	**General Information**
	 Input + View	Record ID-DO NOT DELETE

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.

General Settings   Details   Form Extensions

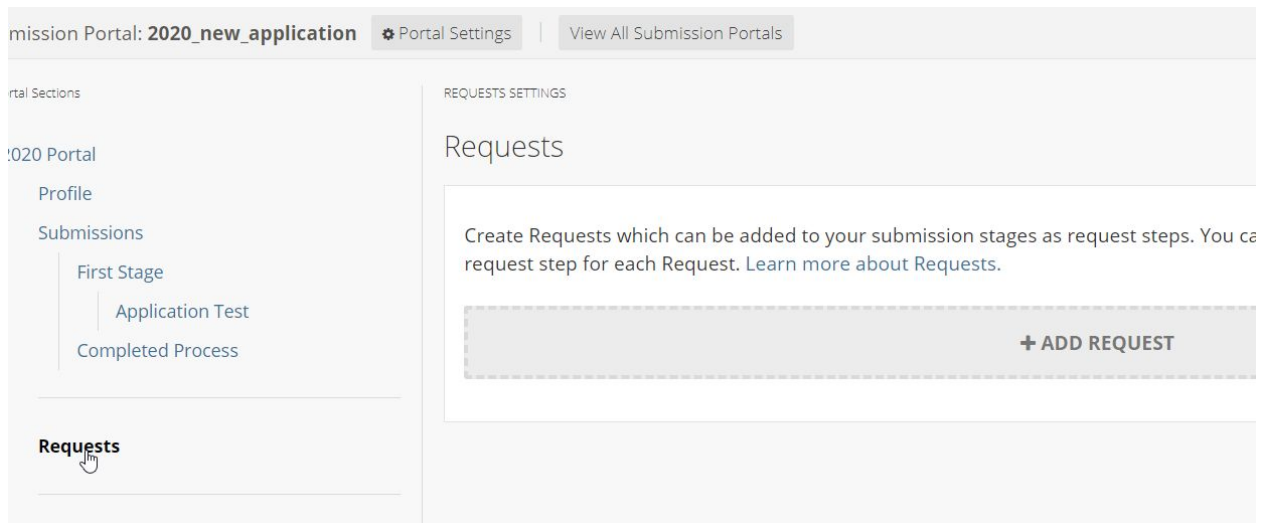
### Profile (Webform) Test

+	View Only	**General Information?
+	Input + View <b>Hide</b>	Organization Name
+	Input + View View Only	Legal Name (as designation on IRS Determination Letter)
+	Input + View	Executive Director
+	Input + View	IRS 501 ( c ) (3) Nonprof

\*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!

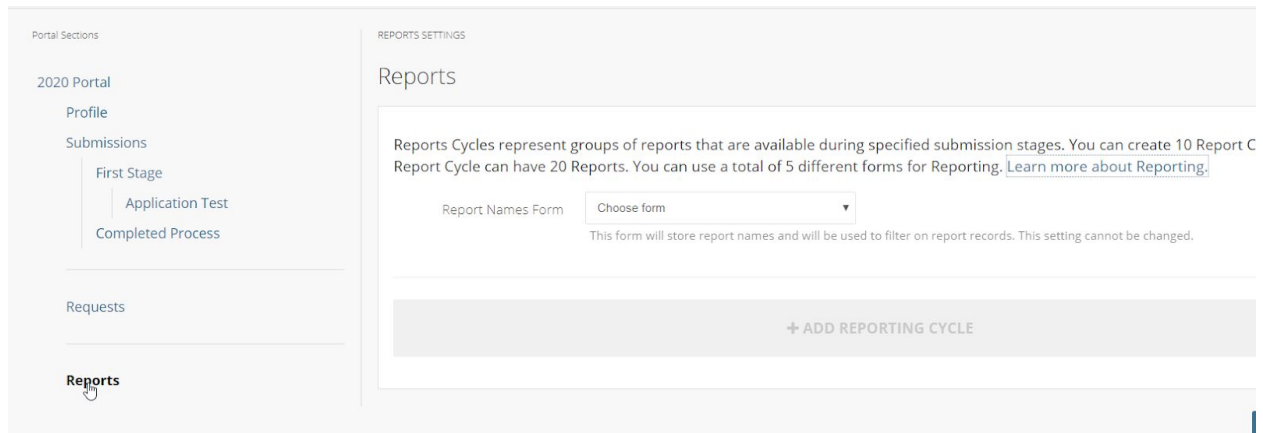
# Requests



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.

Users    Style

---

portal a unique URL. Access the URL by opening a new tab and pasting the URL or iframe code.

URL    

The unique public URL for this submission portal. You may only use lowercase letters, numbers, dashes and underscore

---




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

The Link icon will copy the URL:

rs    Style

---

a unique URL. Access the URL by opening a new tab and pasting the URL or iframe code.

The unique public URL for this submission portal. You may only use lowercase letters, numbers, dashes and underscore

---

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

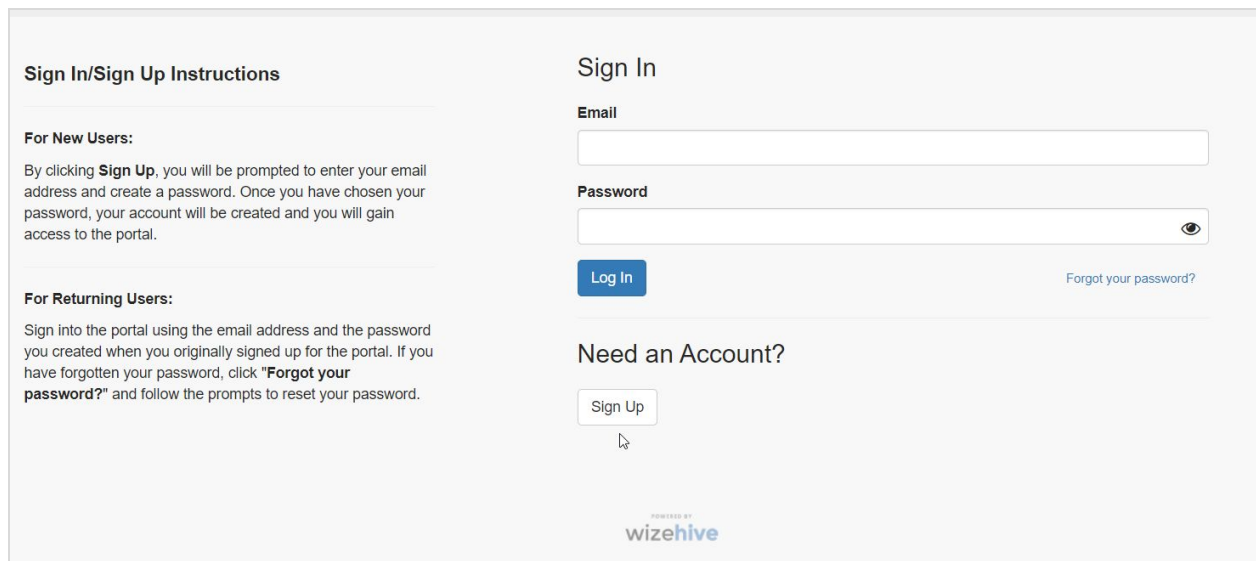
portal a unique URL. Access the URL by opening a new browser window and pasting the URL or iframe

URL `https://webportalapp.com/sp/2020_new_application`   

Copy iframe code

The unique public URL for this submission portal. You may only use lowercase letters, numbers, dashes and

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



**Sign In/Sign Up Instructions**

**For New Users:**


By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

**For Returning Users:**

Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

**Sign In**

Email

Password  

[Log In](#) [Forgot your password?](#)

**Need an Account?**

[Sign Up](#)

POWERED BY **wizehive**

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

## Sign In/Sign Up Instructions

### For New Users:

By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

### For Returning Users:

Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

## Sign Up

Enter an email address and choose a password to create a new account.

Email

Password

- ⊕ Must contain at least one lowercase letter
- ⊕ Must contain at least one uppercase letter
- ⊕ Must contain one number
- ⊕ Must be between 8 and 32 characters
- ⊕ Must not be an email address

Confirm password

- ⊕ Passwords must match

Sign Up

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

## 2020 Portal

Please click "**+Create a Profile to Get Started**" to begin. You can always edit your Profile by clicking "Edit". You can always view your Profile by clicking "View".

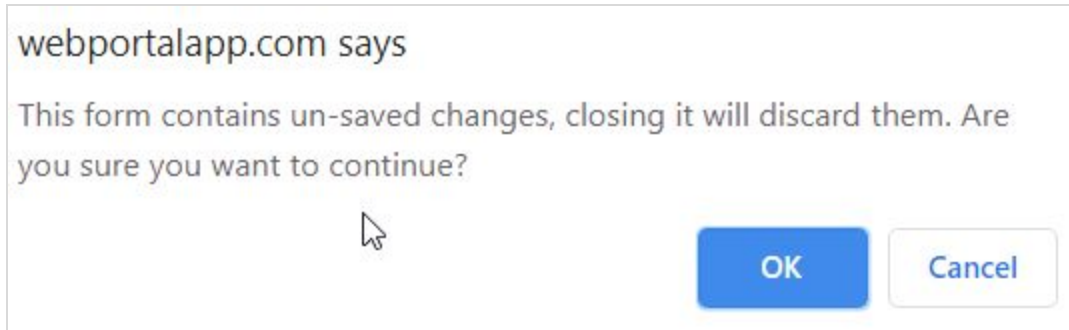
You cannot move forward until you have completed your Profile.

[+ Create a Profile to Get Started](#)

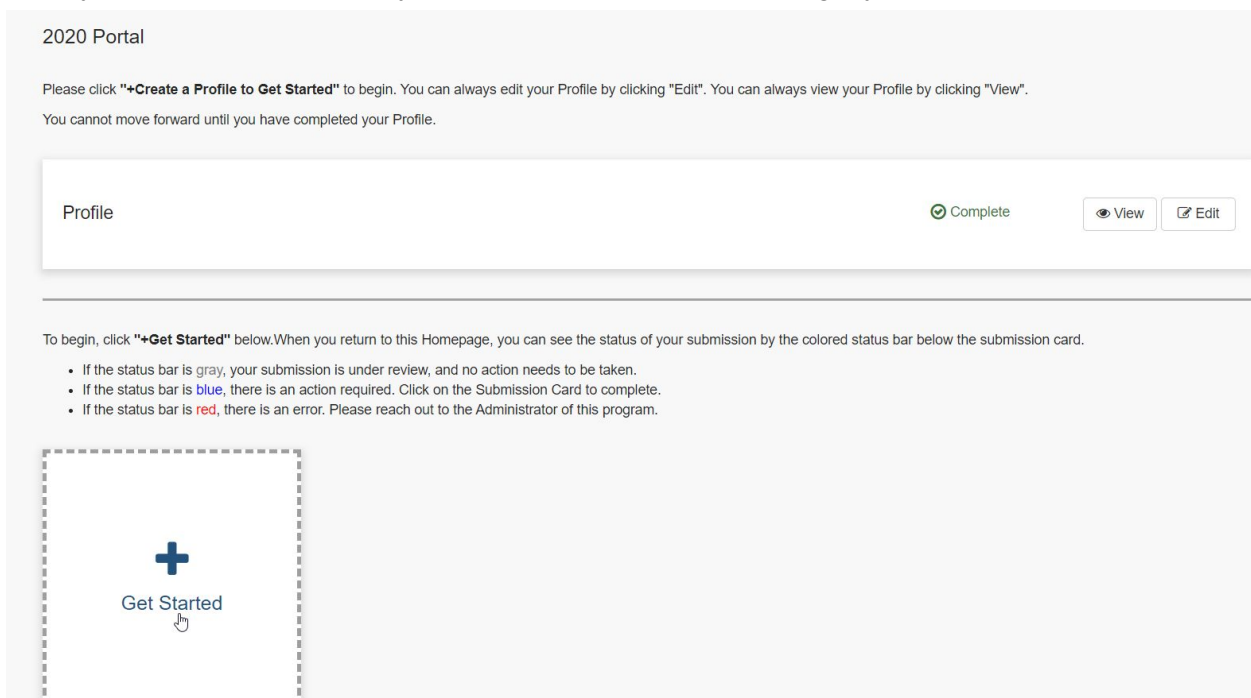
Complete the Form and choose either the Save Draft or Save icon on the bottom:

The image shows a dialog box with a white background and a thin border. At the top, there is a large empty rectangular box. Below it, there are three buttons arranged horizontally. The first button on the left is labeled "Save Draft" in blue text. The middle button is labeled "Mark Complete" in white text on a blue background. The third button on the right is labeled "Close" in grey text on a light grey background. A mouse cursor is pointing at the "Mark Complete" button.

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.

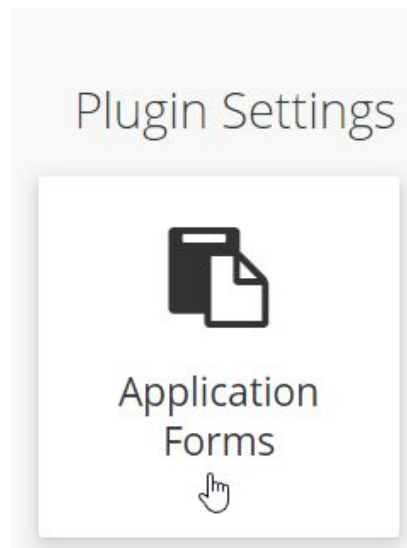


# Application Forms

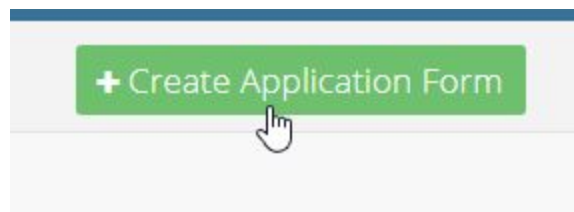
Application Forms are similar to the Submission Portal, however there are no stages or steps. This plugin allows for one (1) form submission per user.

**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 screenshot shows the 'General Settings' tab of the application form settings. At the top, there are navigation tabs: 'New Application Form', 'Portal Settings', 'View All Application Forms', and 'Test Application Form'. Below this, the 'Settings' section is divided into three sub-tabs: 'General Settings', 'Access', and 'Style'. The 'General Settings' sub-tab is active. It contains a 'URL' field with the value 'https://webportalapp.com/appform/' and a note: 'The unique public URL for this form. You may only use lowercase letters, numbers, dashes and underscores.' Below the URL field is a section for email settings: 'Customize the sender display name for outgoing emails from this portal. Emails will go out from no-reply@webportalapp.com'. There is an 'Email Display Name' field with the value 'Web Portal App' and a note: 'You can change this name to something that is more recognizable to the email recipients and better relates to the portal.' At the bottom right of the settings area is a 'Save all settings' button.

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):

The screenshot shows the 'Access' tab of the application form settings. At the top, there are navigation tabs: 'General Settings', 'Access', and 'Style'. The 'Access' sub-tab is active. It contains an 'Active' checkbox with the label 'Display this form on the web so anyone can fill it in', which is checked. Below this are 'Start' and 'End' date and time pickers. The 'Start' picker shows the date '05/23/2020' and the time '09:00 AM'. The 'End' picker shows the date '05/23/2050' and the time '05:00 PM'. Below the date and time pickers is a note: 'Assign the form that receives the applicant data and the field that receives the emails to be. Also include help/directional message for users during login.'

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

Assign the form that receives the applicant data and the field that receives the emails to be used as login on the application form. Also include help/directional message for users during login.

Applicant Data Form: Applicant User Email  
The form that receives the applicants data.

Applicant Email Field: [Dropdown]  
be used as login on the application form. This must be a text field with email validation.

Login Text: Applicant User Email Test

**Sign In/Sign Up Instructions**

**For New Users:**  
 Sign up by entering your email address and creating a password. Once you have chosen your password, your account will be created and you will be redirected to the application form.

Select **Save** to continue.

Application Form: **testingapplication** | Portal Settings | View All Application Form

Application Form Pages

- Application

Settings

- General Settings

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

Application

Choose the primary form that contains the data that the application will use.

Form: [Dropdown]

- Applicant User Email
- Application Test
- Profile (Webform) Test
- Survey Form
- Award Details (Test)
- Outcomes Form (Test)
- Reviewer List
- Review Feedback

This is the structure of cc [Diagram]

Application Section Menu

EDIT THE

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.

The screenshot shows a settings page titled "Input" with three tabs: "General Settings", "Details", and "Confirmation". Under "General Settings", there are two dropdown menus. The first is "Submission Folder" with "Submission" selected. The second is "Draft Folder" with "Uncategorized" selected, and a dropdown menu is open showing options: "Uncategorized", "Submission", and "Drafts". A "Save all settings" button is located at the bottom right.

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:

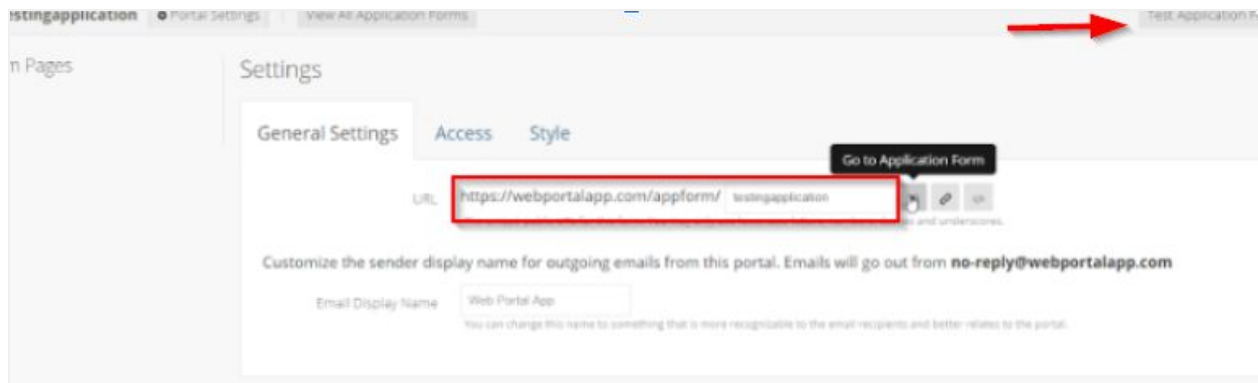
DEFAULT ORDER ▼	DEFAULT SHOW ▼	FIELDS
⬆️	DEFAULT SHOW <b>CUSTOM SHOW</b>	**General Information**
⬆️	✎ Input + View	Organization Name
⬆️	✎ Input + View	Legal Name (as designated on IRS Determination)

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:



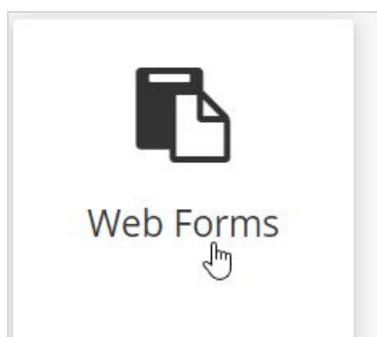
Once you have submitted your test application, make sure to go back to the Platform and review your application in the Data view!

## Webforms

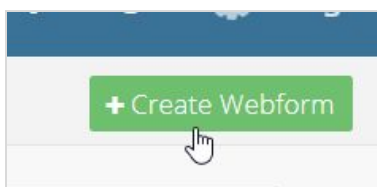
**Webforms** are also another great way to collect data similar to the **Submission Portal** or the **Application Forms**, except with **Webforms**, you do not need to log in to complete the form!

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.

The screenshot shows the 'New Webform' configuration interface. At the top, there are tabs for 'Settings', 'Confirmation', and 'Style'. The 'Settings' tab is active. Below the tabs, there are several configuration fields:

- URL:** A text input field containing 'https://webportalapp.com/webform/webform\_101'. Below it, a note states: 'The unique public URL for this webform. You may only use lowercase letters, numbers, dashes and underscores.'
- Form:** A dropdown menu is open, displaying a list of forms: 'Application Test', 'Profile (Webform) Test', 'Survey Form' (highlighted with a blue bar and a mouse cursor), 'Award Details (Test)', 'Outcomes Form (Test)', 'Reviewer List', 'Review Feedback', and 'Report Names'. To the right of the dropdown is a 'Field Details' button with a gear icon.
- Folder:** A text input field containing 'Profile (Webform) Test'. Below it, a note states: 'The folder name for this webform. You may only use lowercase letters, numbers, dashes and underscores. This folder name is used in the form settings screen.'
- Active:** A checkbox that is currently unchecked.
- Start:** A time selection interface with a dropdown for the hour (set to '00') and a dropdown for the period (set to 'AM').
- End:** A date and time selection interface. The date is '05/23/2050' and the time is '05:00 PM'. Below it, a note states: 'The end date and time this form can first be accessed (in ET)'. There are up and down arrows for adjusting the time.

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

This is a close-up view of the 'Field Details' button. The button is a grey rectangular button with a gear icon on the left and the text 'Field Details' on the right. A mouse cursor is pointing at the button. The background shows the 'Form' dropdown menu and the 'URL' field from the previous screenshot.

DEFAULT ORDER	DEFAULT SHOW	FIELDS	LABELS
+	DEFAULT SHOW <b>CUSTOM SHOW</b>	**General Information**	**General Information**
+	✎ Input + View	Organization Name	Organization Name
		Legal Name (as)	Legal Name

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

New Webform | View All Webforms

Settings | **Confirmation** | Style

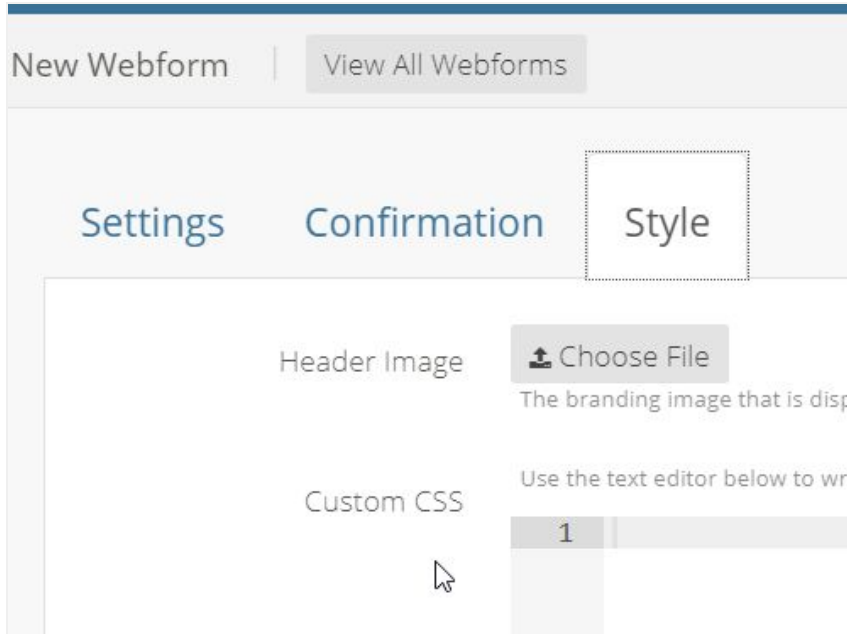
After a user submits a form, you can display a message or y

Confirmation Page: Display a custom message ▼

Message: Your submission has been saved.

Save all settings

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:

All Forms ▾
Applicant User Email
Application Test
Profile (Webform) Test
Survey Form
Reviewer List ▾
+

+Add Reviewer List
▾
|||
◀▶


Sorry, but there are currently no records in this workspace.

To add a reviewer list, click on the **+ Add Reviewer List** button in the top left corner.

New Reviewer List

---

**Reviewer List**

First Name

John

Last Name

Smith

Email

email@email.com

Save New Reviewer List **+**

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

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

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



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

Click on **Create a Program**:

A screenshot of a web page titled "Program Manager". On the right side, there is a green button with a white plus sign and the text "+ Create a Program". A hand cursor is clicking the button. Below the title, there is a paragraph of text: "Each Portal must belong to a Program and a Process. A program is used to tell the portal which application/submission form to work from. If you have one application/submission form you will likely have one Program. If you have 2 forms, and each has it's own portal, you will likely have 2 programs." Below that is another paragraph: "Each program can have one or more processes. A process holds information about who can view the portal data and whether those users can also provide feedback. You would typically have one process if you have one group of users or reviewers looking at the submissions, but you might have multiple processes for one program if you have multiple stages of review or different groups reviewing the data for different reasons. Learn more about the Program Manager."

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

[← Back](#)

## New Program

Each Portal must belong to a Program and Process. A program is used to track submissions and will likely have one Program. If you have 2 forms, and each has its own portal, you will need to create two Programs.

The program name and the primary form being viewed are entered below.

Program Name:

Form that stores submissions:

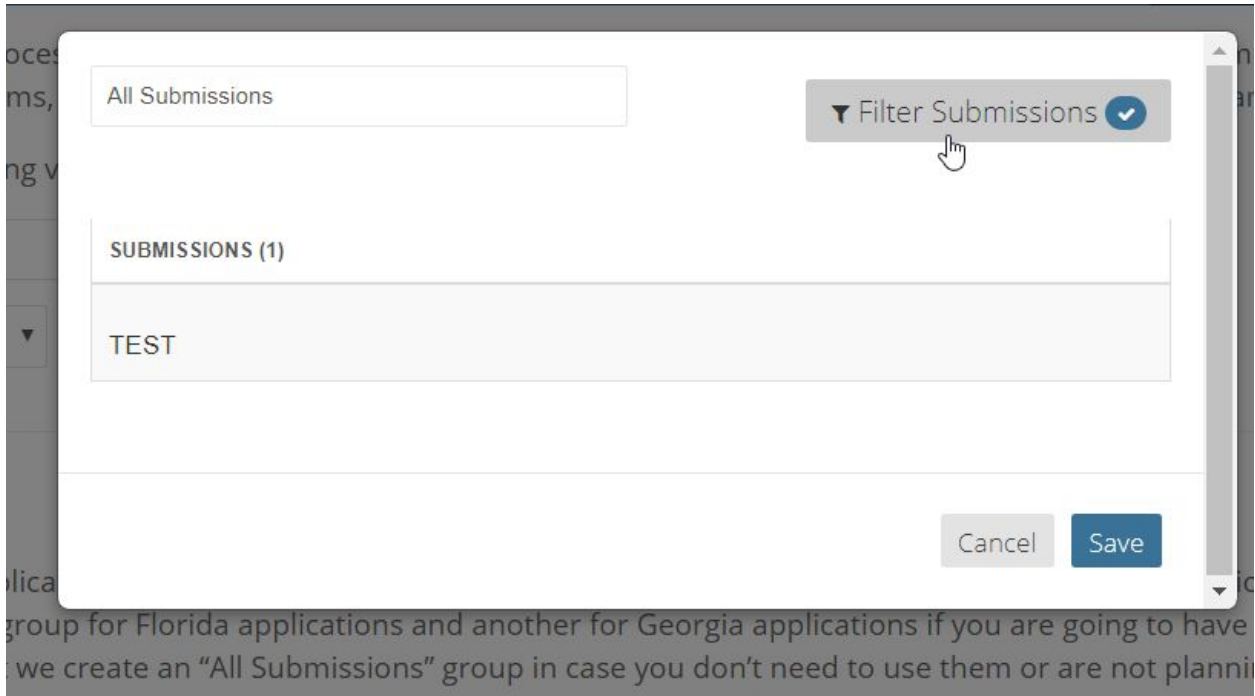
### Submission Groups

Submission Groups can be used to group applications with similar characteristics. For instance, you could create a group for Florida applications.

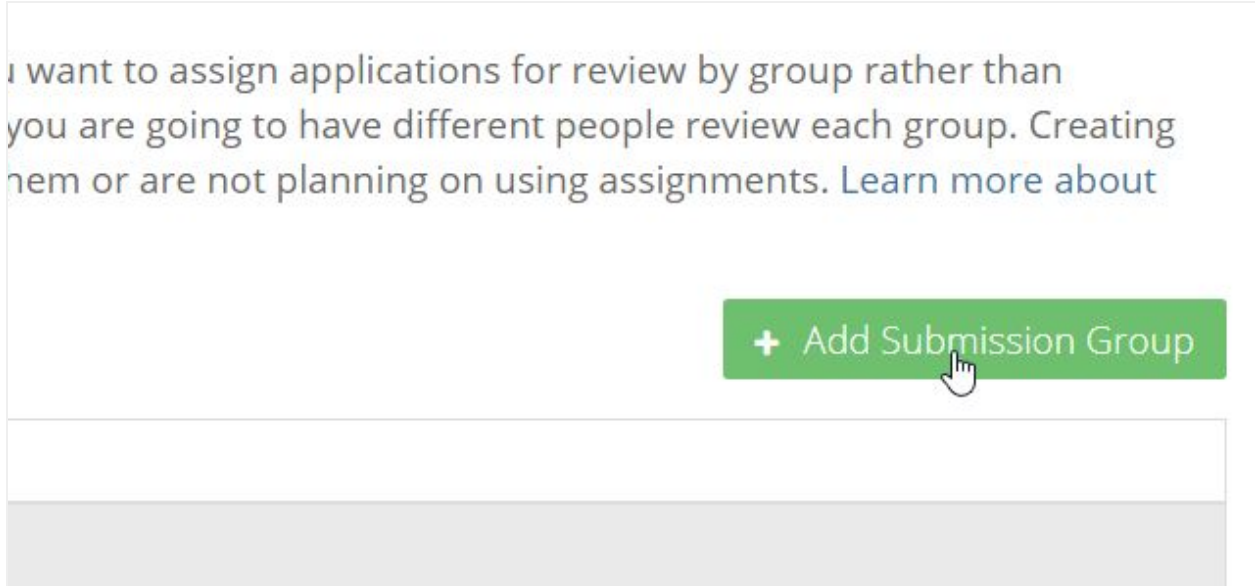
Below are **Submission Groups** that will need to be created for a specific set of groups, such as:

- 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**:

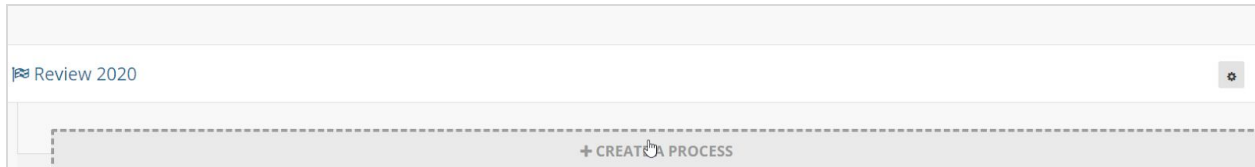
## Add a Submission Group

Please filter submissions to define this group:

Please choose a name for this group:

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:

A screenshot of a 'New Process' form. The title 'New Process' is at the top left. Below it, there is a text input field for 'Process Name' containing 'Review 1'. The next section is 'Submission Groups & Stages', which contains a question 'Which submission groups should be viewable?' with a red box around it and a radio button selected for 'All Submissions'. Below this is another question 'Is this process limited to one or more stages?' with two radio button options: 'No - all submissions are involved.' (selected) and 'Yes - limit to submissions in the following stages:'. The final section is 'Viewing/Editing Permissions', with the question 'Who can participate?' and two radio button options: 'Anyone' (selected) and 'Only a specific set of portal members'. There is a red triangle warning icon next to the 'Anyone' option.

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:

Viewing/Editing Permissions

Who can participate?  Anyone  
 Only a specific set of portal members

Forms that store these portal members? Reviewer List ▼

All members can view all previously configured submissions. ⚠  
 Members can only view submissions that are individually assigned to them.

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

Forms that store these portal members? Reviewer List ▼

All members can view all previously configured submissions.  
 Members can only view submissions that are individually assigned to them.

**i** To support this feature, a **Permissions Form** must be created with the following fields:

- A linked field that connects to the form that stores **Submissions**
- A linked field that connects to the form that stores **Members**
- A text field which this plugin will use to store tag data

When a form which matches this criteria is available, it will display in the **Permissions Form** list below as a possible option.

Permissions Form: Review Feedback ▼

Tag field: - Select field... ▼

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



• A linked field that connects to the  
 • A text field which this plugin will  
 When a form which matches this crit

Permissions Form:

Tag field:

dback

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

Feedback

Will you be collecting input or feedback?  Yes  No

Form which stores feedback

**i** The **Review Feedback** form chosen in the **Permissions** section will also be used to store your feedback.

Folders which represent stages

Feedback typically goes through several stages. Map the folders to the first three stages every

Not Begun:

In Progress:

Submitted:

Required fields

Completion date:  ▼  
A date field on the **Review Feedback** form which is used to track when feedback is entered against a submission.

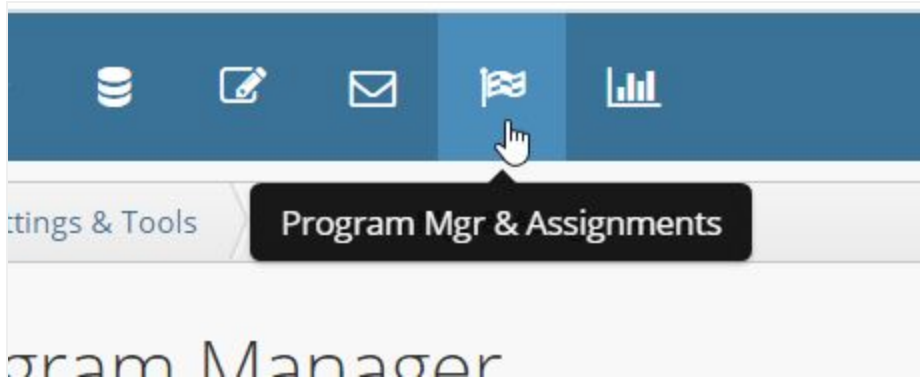
Optional scoring configuration

Score field:  ▼  
A text, dropdown, radio or calculated field on the **Review Feedback** form which is used to assign a numeric score to a submission.

Delete Process | Cancel | **Save Process**

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**”)

Assignments

Assignments are where you determine who will have access to specific submissions within a review portal. Learn more about assignments.

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

Back

# Review 1

PART OF THE PROGRAM: APPLICATION REVIEW PROCESS

- Assign by Submission
- Assign by Submission ✓
- Assign by Submission Group
- Assign by Member
- Batch Assign

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

Assign by Submission Group

Group Name

GROUP NAME	# SUBMISSIONS	# MEMBERS
All Submissions	5	0

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:

Assign by Submission Group

Group Name

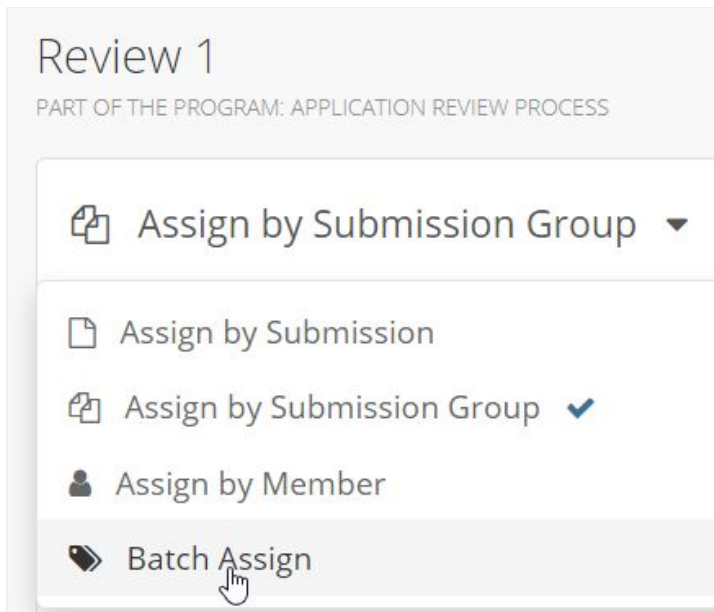
GROUP NAME	# SUBMISSIONS	# MEMBERS
All Submissions	5	0

All Submissions **Assign**

MEMBERS (0)

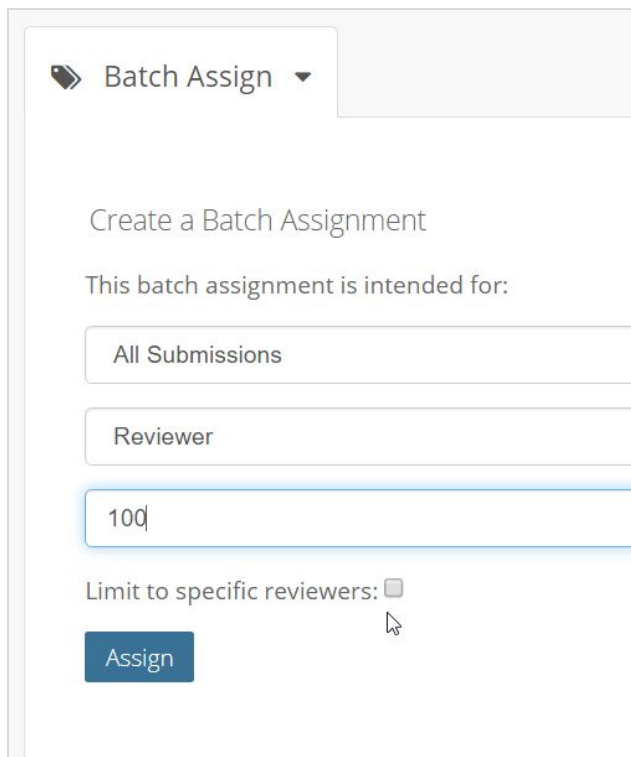
Enter the name of a member

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.

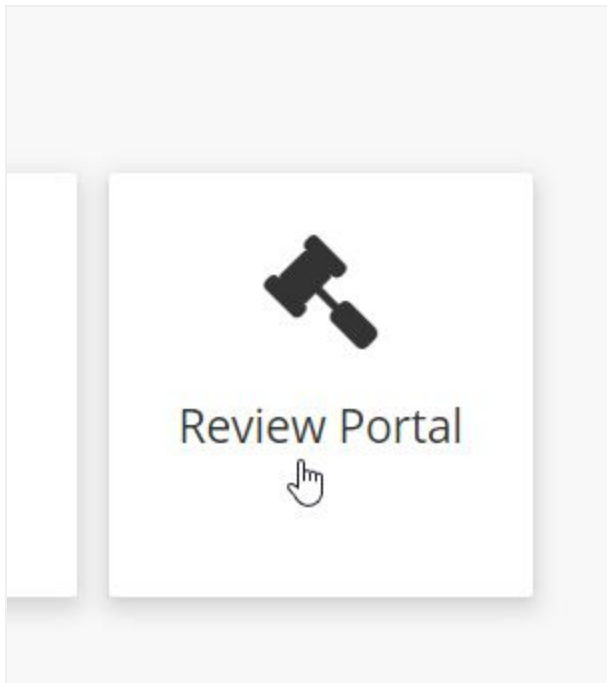
A screenshot of the "Batch Assign" configuration form. At the top, there is a "Batch Assign" dropdown menu. Below it, the text "Create a Batch Assignment" is displayed. Underneath, it says "This batch assignment is intended for:". There are three input fields: "All Submissions", "Reviewer", and "100". Below these fields, there is a checkbox labeled "Limit to specific reviewers:" which is currently unchecked. At the bottom of the form, there is a blue "Assign" button.

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

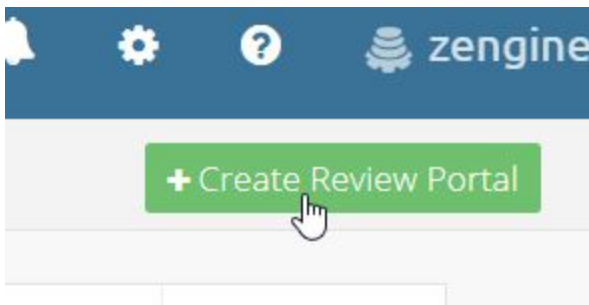
Next you will need to set up your **Review portal** in order to share the **Portal's URL** to your reviewers!

# Review Portal

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



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





To get started choose the **Program** and **Process** for this portal:

Program

Process

- Choose one...
- Review 1

Save Settings

[Learn more about Review Portals](#)

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**:

Settings | Access | Data | Feedback

The primary form chosen for this process is

URL

The unique public URL for this review portal. You may only use lo

Active  If checked, the portal will be active based on the dates i

Start

The start date and time the portal is active (in ET)

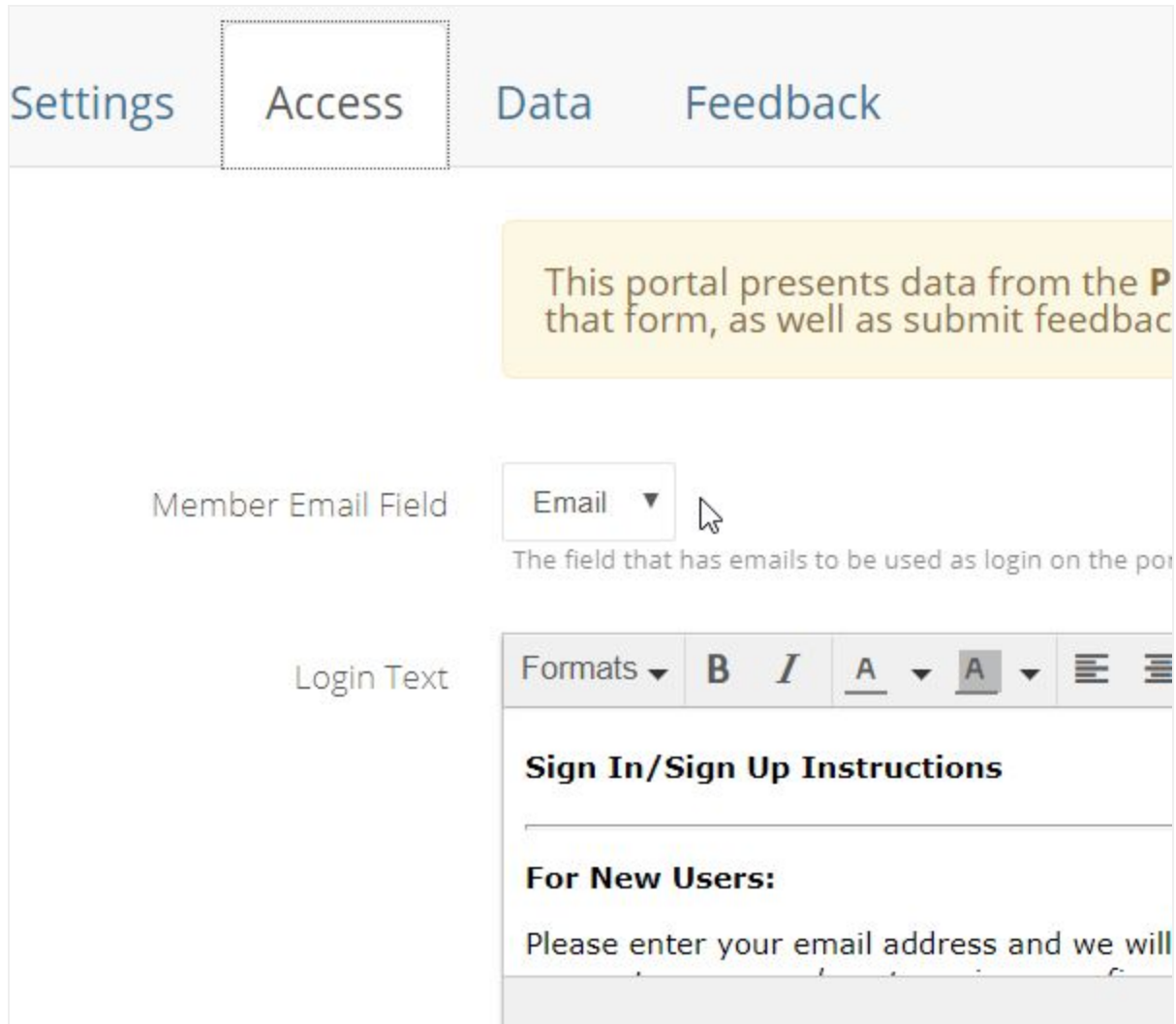
End

The end date and time the portal is active (in ET)

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):

Settings Access Data Feedback

Listing Style Listing Pages Data Detail Other

Style 
  
Choose listing to display lines of data or grid to display like a gallery.

Display Button 
  
For each listing element, display a button that redirects to the corresponding data details page.

For a listing, you get a series of lines like a spreadsheet. For each line, you can display up to 3 items (3 fields or 1 button and 2 fields). Click on an item below to configure what you want to display for each line.

Button

Record Title

SELECT FIELD

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 Style Listing Pages Data Detail Other

Style 
  
Choose listing to display lines of data or grid to display like a gallery.

Display Button 
  
For each listing element, display a button that redirects to the corresponding data details page.

For a listing, you get a series of lines like a spreadsheet. For each line, you can display up to 3 items (3 fields or 1 button and 2 fields) display for each line.

**Display Button** x Close

---

Whenever possible, we track whether a user provides feedback for a given row (record) and can change the button text for that row depending on whether feedback has been provided. Enter the text for the button before and after feedback below.

Before Feedback

After Feedback

**Display Field** x Close

---

Field

Make Link 
  
Display field as a link that redirects to the corresponding data details page.

Show Label 
  
Check to have a label display to the left of your field.

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



Listing Style | Listing Pages | Data Detail | Other

By default, all items will be listed on one page. You can separate your listings into multiple pages and choose which folders to include on each page by adding pages below. You can also set navigation between pages to be by tabs or a dropdown list.

Pages: This portal currently has only the default page.

[+ Add Page](#)

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

Listing Style | Listing Pages | Data Detail | Other

Profile (Webform) Test

**Drag & drop** items from the **Available Forms** list to the **Portal Form List** to create the form display order for the portal.

AVAILABLE FORMS

- Application Test
- Award Details (Test)
- Outcomes Form (Test)

Portal Form List

Simply drag & drop items to reorder. This list can hold up to 20 forms.

- Profile (Webform) Test
- Application Test

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

Application Test

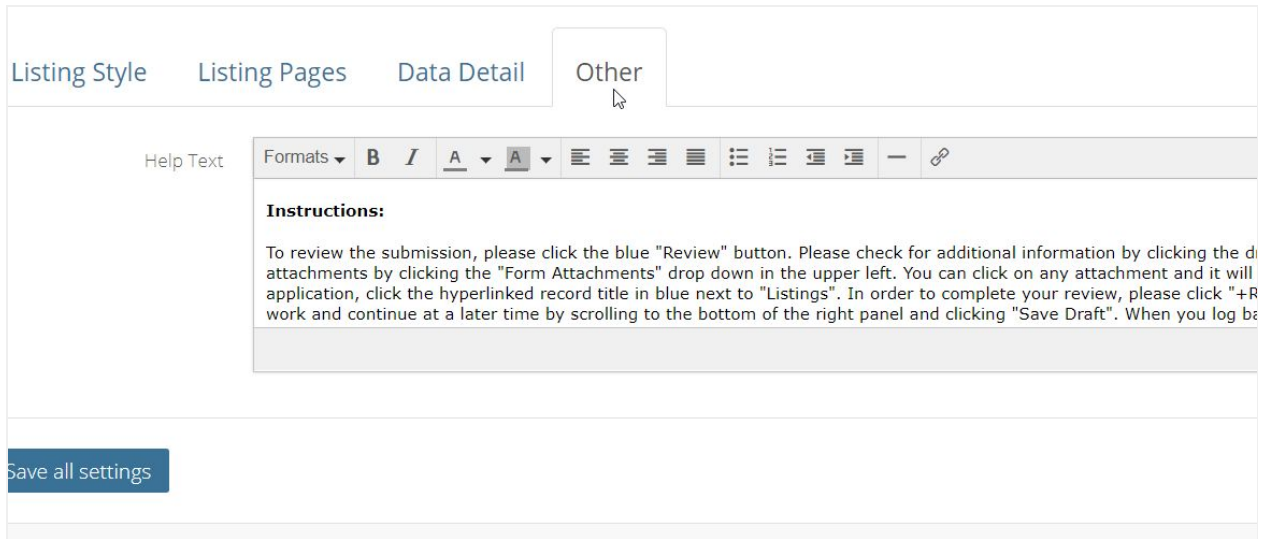
DEFAULT ORDER	DEFAULT SHOW	FIELDS	LABELS	HELP TEXT
+	View Only	**General Information**	**General Information**	Click to add help text
+	View Only	Organization Name	Organization Name	Click to add help text
		Thank you for taking the time to complete the Faculty and Staff Corporate and Foundation Clearance Request Form. U+200C! Your submission has been saved and will be routed to	Thank you for taking the time to complete the Faculty and Staff Corporate and Foundation Clearance Request Form. U+200C! Your submission has been saved and will be routed to	

Synchronized | Overriden | Required

Cancel | Apply

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**):



The screenshot shows a web interface with four tabs: "Listing Style", "Listing Pages", "Data Detail", and "Other". The "Other" tab is selected and active. Below the tabs is a rich text editor with a toolbar containing icons for bold, italic, text color, background color, bulleted list, numbered list, indent, and link. The main content area of the editor contains the following text:

**Instructions:**

To review the submission, please click the blue "Review" button. Please check for additional information by clicking the dropdown menu for attachments by clicking the "Form Attachments" drop down in the upper left. You can click on any attachment and it will open in a new application, click the hyperlinked record title in blue next to "Listings". In order to complete your review, please click "+R" to save your work and continue at a later time by scrolling to the bottom of the right panel and clicking "Save Draft". When you log back in, you will see your draft.

At the bottom left of the editor area, there is a blue button labeled "Save all settings".

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**.

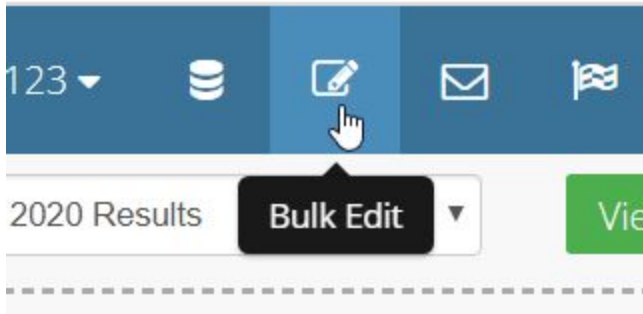
When you are ready to share the **Review Portal** out with your **Reviewers**, kindly select copy Review Portal **URL** and email out to your Reviewers:

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**.

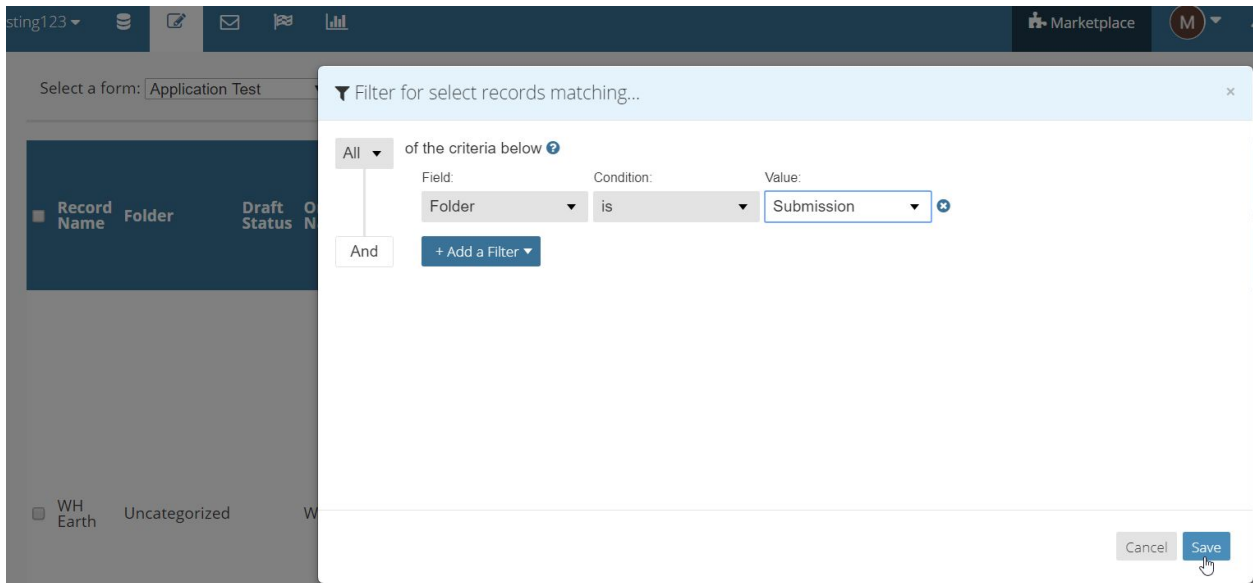
# Bulk Edit

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.

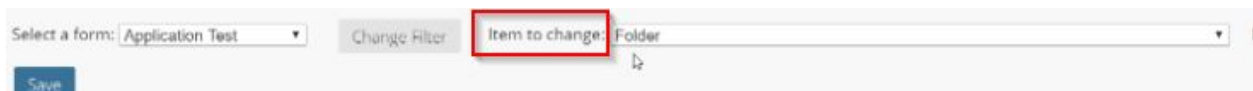


For example, if you need to move a handful of records from one folder to another, such as from the *Submitted* folder to the *Awarded* folder.

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

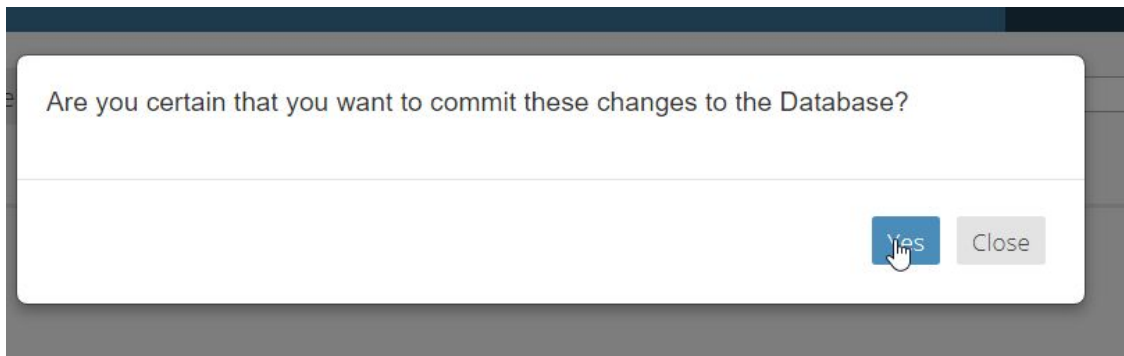


Then select the **Item to change**: Folder: *Awarded*



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.

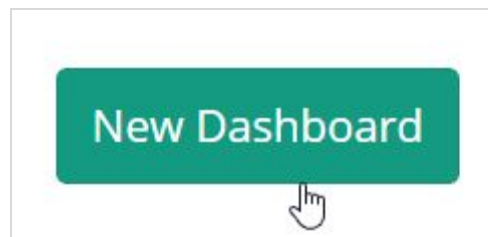
## Dashboard

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**.

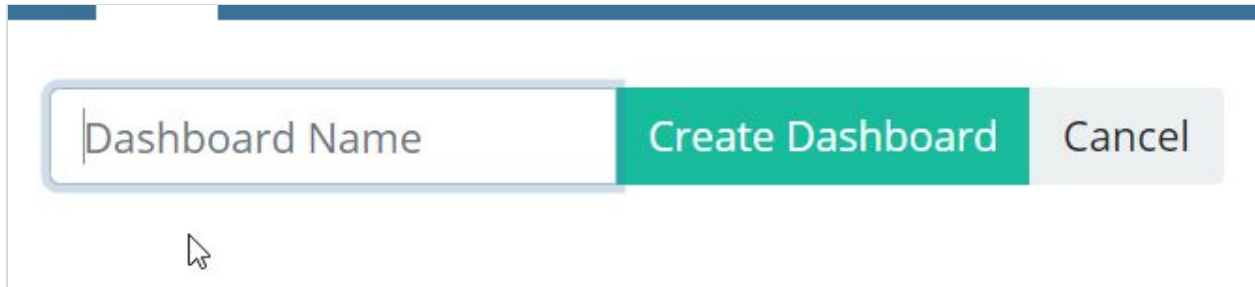
Click on the **Reporting Dashboard** icon in the navigation bar to get started:



Click on **New Dashboard**

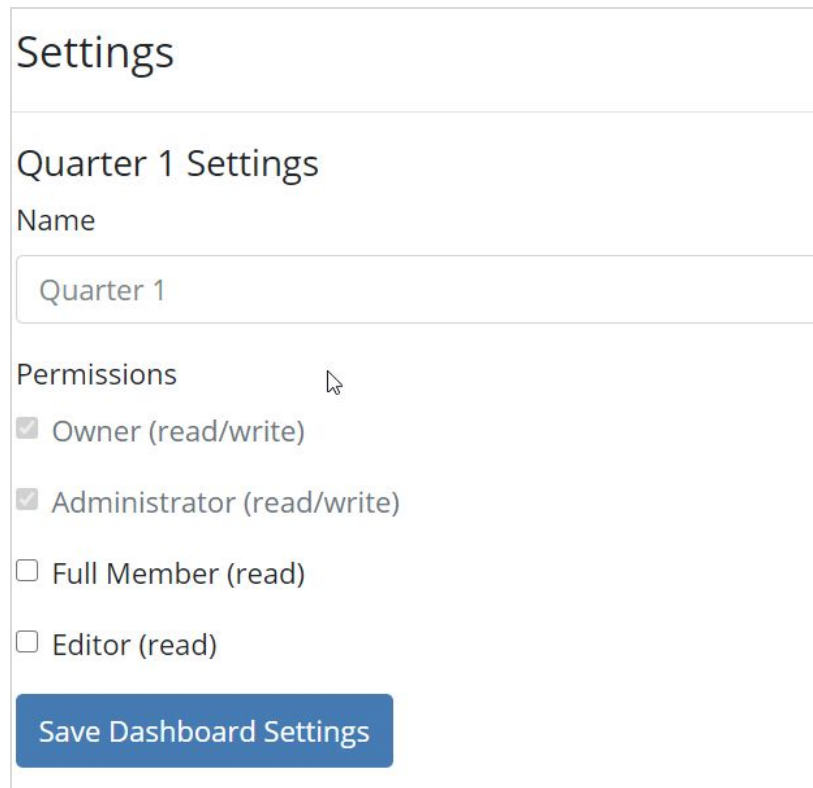


Go ahead and name the **Dashboard**, then click on **Create Dashboard**:



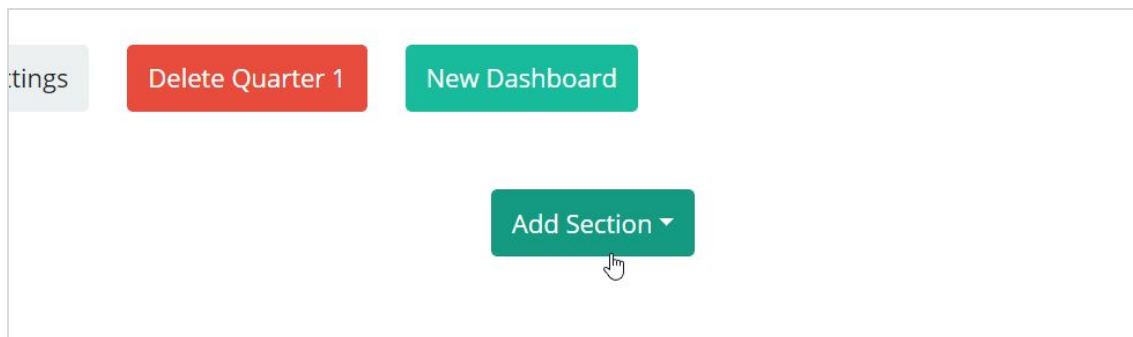
A dialog box for creating a dashboard. It features a text input field containing the placeholder text "Dashboard Name". To the right of the input field are two buttons: a green button labeled "Create Dashboard" and a grey button labeled "Cancel". A mouse cursor is positioned over the text input field.

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



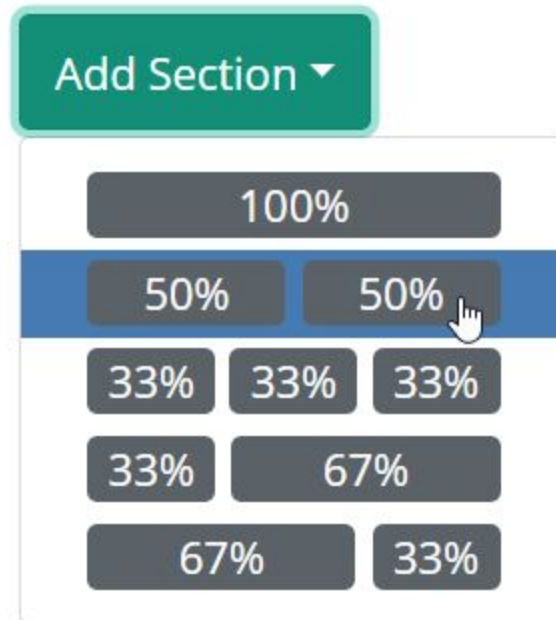
A settings page titled "Settings". Under the heading "Quarter 1 Settings", there is a "Name" field with the value "Quarter 1". Below this is a "Permissions" section with four checkboxes: "Owner (read/write)" (checked), "Administrator (read/write)" (checked), "Full Member (read)" (unchecked), and "Editor (read)" (unchecked). At the bottom of the settings area is a blue button labeled "Save Dashboard Settings". A mouse cursor is visible over the "Permissions" section.

Then select **Add Section**:



A set of dashboard management buttons. From left to right, there is a grey button labeled "Settings", a red button labeled "Delete Quarter 1", and a green button labeled "New Dashboard". Below these buttons is a green button labeled "Add Section" with a downward-pointing arrow. A mouse cursor is positioned over the "Add Section" button.

Select the **layout** you would like:

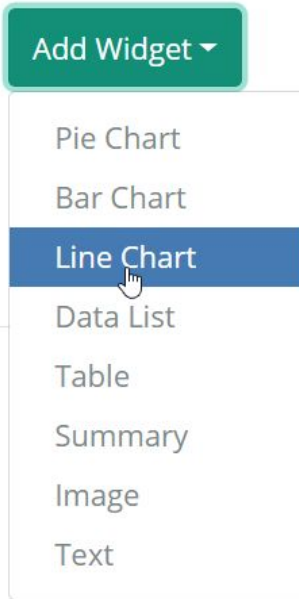


Then you will click **Add Widget**:

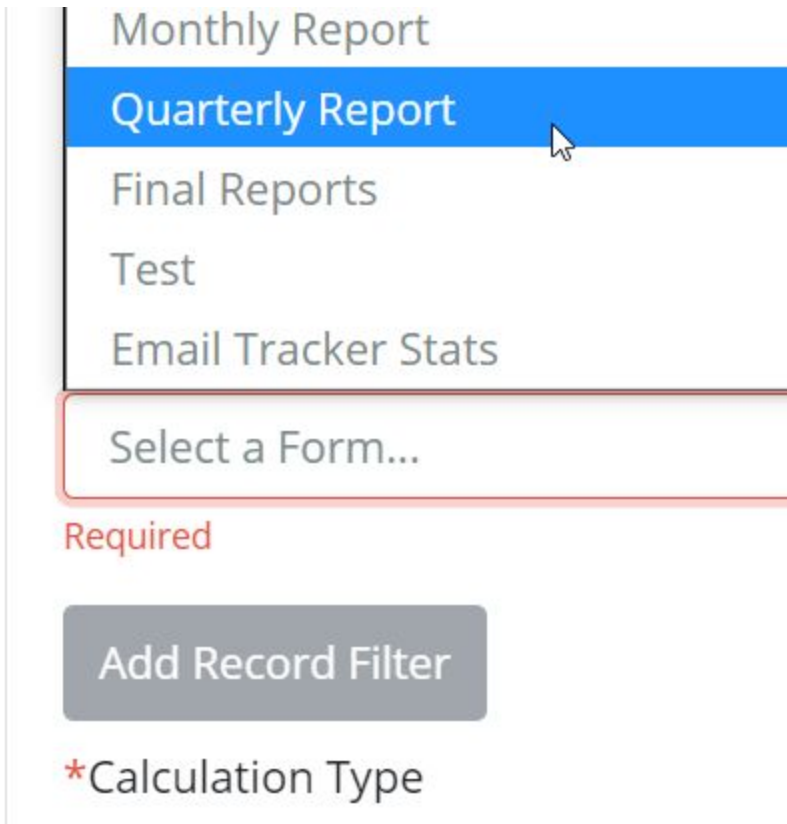


Choose the **Widget Type** you would like to use:

- 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:



  
\*Calculation Type

\*Calculation Type

\*Date Field

\*Within Period of One

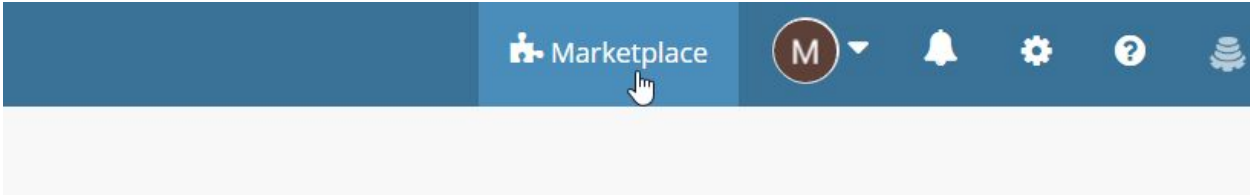
Break Down Lines By

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](#)

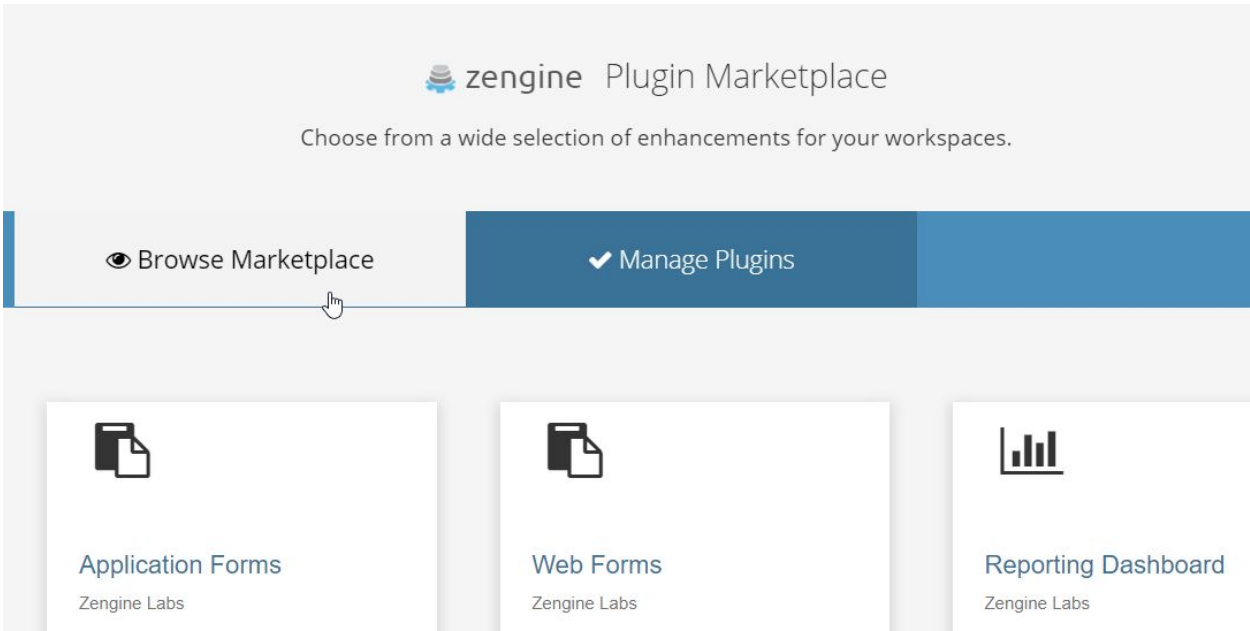
# Marketplace

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):



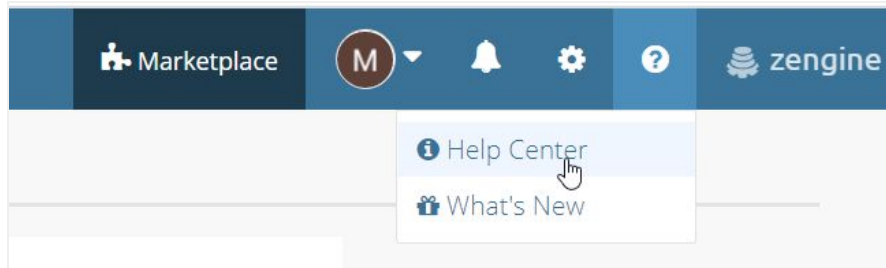
Here you can **Browse the Marketplace** for new plugins, or **Manage Plugins** that you currently have:



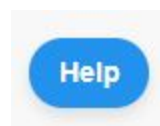
Looking for a more customized solution? Reach out to our Support Team to inquire.

# Help Center

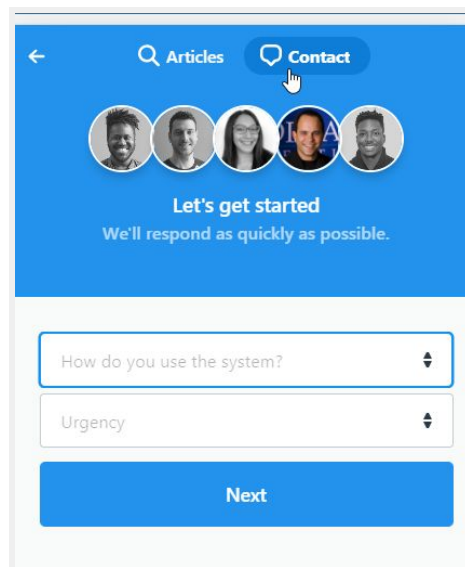
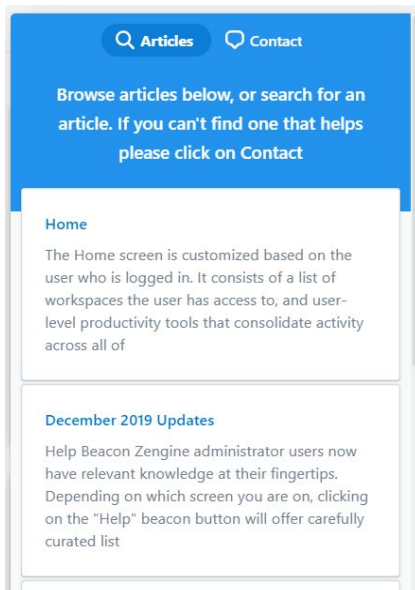
And lastly, it is strongly suggested that you check out our **Help Center** to learn more about Zengine and further your knowledge:



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!