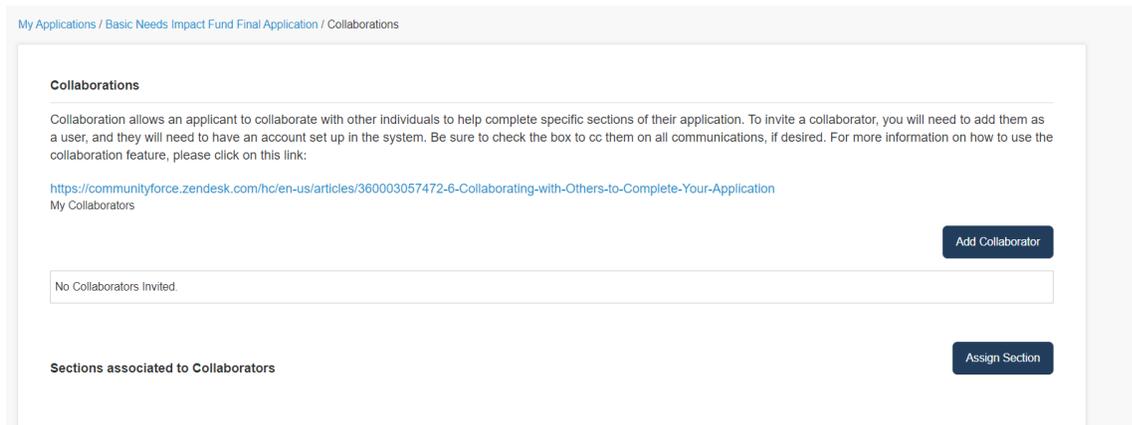


# Collaborating with Others to Complete Your Application

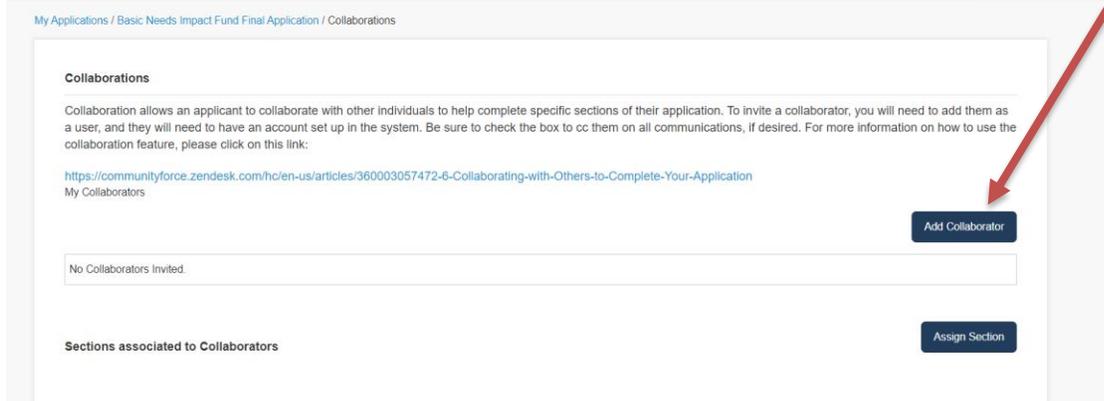
**Step 1:** When you log in and select an application to apply to, once you are on the dashboard for that application you will click the **Choose Action** button, then select the **Add Collaborators** option that is located in the top right of the dashboard.



**Step 2:** Once you click on that option, the "Collaborations" screen will appear. If you have not added any collaborators the listing should be blank.



**Step 3:** You will first need to add the collaborators by clicking on the **Add Collaborator**



**Step 4:** A search box will appear where you will need to search to see if the collaborator already has a user account.

My Applications / Basic Needs Impact Fund Final Application / Collaborations

### Collaborations

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. To invite a collaborator, you will need to add them as a user, and they will need to have an account set up in the system. Be sure to check the box to cc them on all communications, if desired. For more information on how to use the collaboration feature, please click on this link:

<https://communityforce.zendesk.com/hc/en-us/articles/360003057472-6-Collaborating-with-Others-to-Complete-Your-Application>

Search By:

Last Name	First Name:	Email:	Organization Name:	<input type="button" value="Search"/>	<input type="button" value="Cancel"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

**Step 5:** Enter the collaborators information and click enter. You can search on all fields or just one.

**Step 6 a:** **If there is an account** for the individual, you will see the name listed in the box below and will click the **ADD** next to that user's name.

### Collaborations

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. To invite a collaborator, you will need to add them as a user, and they will need to have an account set up in the system. Be sure to check the box to cc them on all communications, if desired. For more information on how to use the collaboration feature, please click on this link:

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Search By:

Last Name	First Name:	Email:	Organization Name:	<input type="button" value="Search"/>	<input type="button" value="Cancel"/>
<input type="text" value="Miles"/>	<input type="text" value="Serena"/>	<input type="text" value="smiles@uwlwcountry.o"/>	<input type="text" value="United Way of the Lowc"/>		

Select	Last Name	First Name	Organization	Email	Work Phone	Department
<input type="button" value="Add"/>	Miles	Serena	United Way of the Lowcountry	smiles@uwlwcountry.org		

- Once you click the **Add**, you will receive a message notifying you that the collaborator was added successfully. Click OK. *(Then proceed to Step 7.)*

Important  
Collaborator added successfully.

My Applications / Basic Needs Impact Fund Final Application

### Collaborations

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. To invite a collaborator, you will need to add them as a user, and they will need to have an account set up in the system. Be sure to check the box to cc them on all communications, if desired. For more information on how to use the collaboration feature, please click on this link:

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Search By:

Last Name	First Name:	Email:	Organization Name:	<input type="button" value="Search"/>	<input type="button" value="Cancel"/>
<input type="text" value="Miles"/>	<input type="text" value="Serena"/>	<input type="text"/>	<input type="text" value="United Way of the Lowc"/>		

Select	Last Name	First Name	Organization	Email	Work Phone	Department
<input type="button" value="Add"/>	Miles	Serena	United Way of the Lowcountry	smiles@uwlwcountry.org		

**Step 6 b:** If there is not an account for the individual, you will see an **Add User** button that you can click on to create a user account for the individual.

My Applications / Basic Needs Impact Fund Final Application / Collaborations

### Collaborations

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. To invite a collaborator, you will need to add them as a user, and they will need to have an account set up in the system. Be sure to check the box to cc them on all communications, if desired. For more information on how to use the collaboration feature, please click on this link:

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Search By:

Last Name amber	First Name: hewitt	Email: ahewitt@uwlowcountry.c	Organization Name: United Way of the Lowc	<input type="button" value="Search"/>	<input type="button" value="Cancel"/>
--------------------	-----------------------	----------------------------------	--	---------------------------------------	---------------------------------------

No Records found.

- Once you click the **Add User** the following box will appear you will enter the information for the person you are needing to add as the collaborator. Select the **Include in Communication** box if you wish for this collaborator to receive all automatic communication sent to you from the site regarding the application form and click the **Add**.

Welcome, Amber

Food Pantry Application Status

My Applications / Basic Needs Impact Fund Final Application / Collaborations

### Collaborations

Collaboration allows an applicant to collaborate with other individuals to help complete specific sections of their application. To invite a collaborator, you will need to add them as a user, and they will need to have an account set up in the system. Be sure to check the box to cc them on all communications, if desired. For more information on how to use the collaboration feature, please click on this link:

<https://communityforce.zendesk.com/hc/en-us/articles/360003057472-6-Collaborating-with-Others-to-Complete-Your-Application>

\* Organization:

\* First Name:

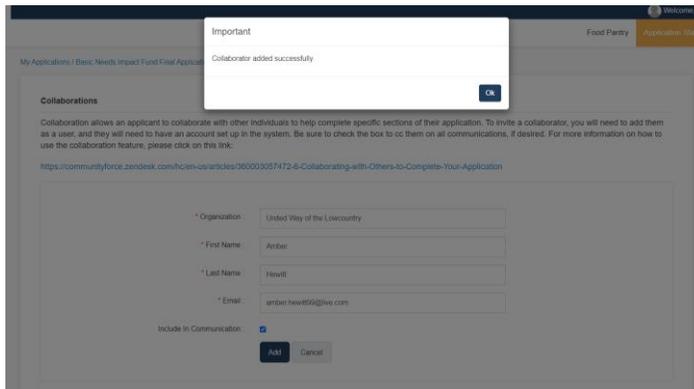
\* Last Name:

\* Email:

Include In Communication:

- This will create the collaborators login account for them.

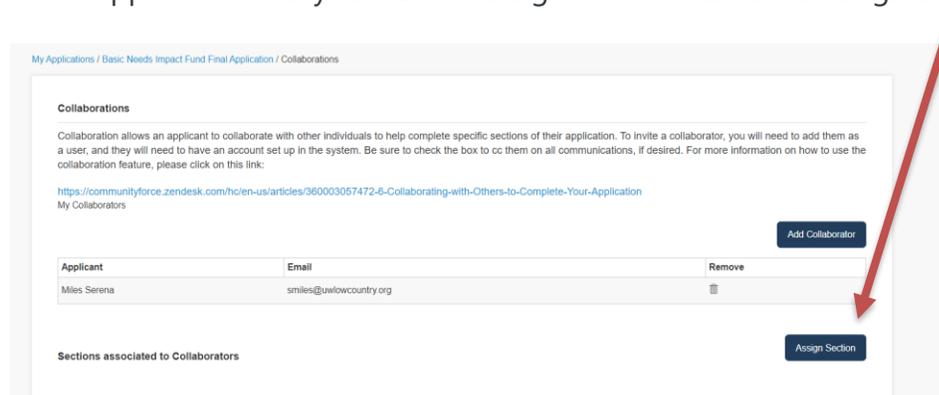
- Once you click the **Add**, you will receive a message notifying you that the collaborator was added successfully. Click OK



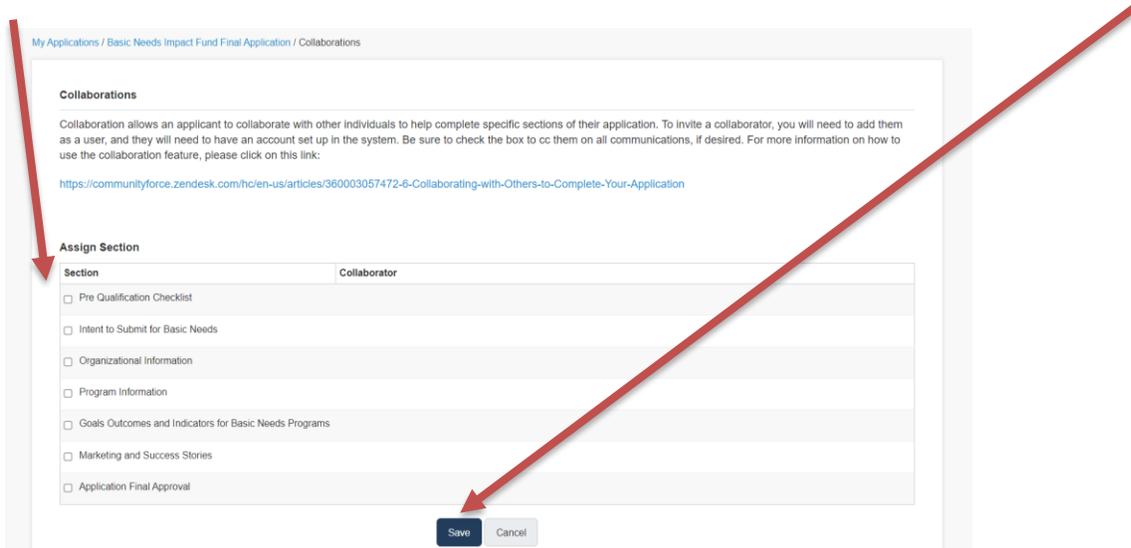
- You will then be directed to the Collaborations page again where you can then add this new individual as a collaborator by clicking on the **Add Collaborator**.

**Step 7:** Once you add the Collaborator, you will return to the Collaborations screen and the new collaborator's name will appear in the Applicant Column. You can add additional collaborators if needed. There is no a limit on how many collaborators you can add.

**Step 8:** Once the Collaborators have been added, you will then have to select the Sections in the application that you want to assign to them. Click the Assign Section button.



**Step 9:** The Assign Sections screen will appear showing all the available sections in your application form. Select the section(s) you want to assign to the collaborator by putting a check mark in that section(s) box. Don't forget to click "save" at the bottom of the page.



**Step 10:** Once you select the section, a select box will open to the right of that section under the Collaborator column. Click on the Dropdown arrow in that box and select the name of the Collaborator(s) you want to assign to that section and select **OK**.

**Assign Section**

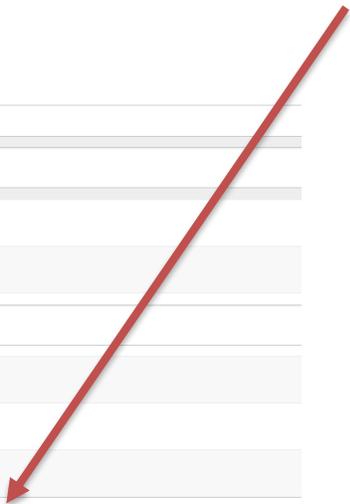
Section	Collaborator
<input checked="" type="checkbox"/> Pre Qualification Checklist	<div style="border: 1px solid #ccc; padding: 5px;"><p>Select</p><p><input type="checkbox"/> Miles Serena</p><p>Select: <input type="button" value="All"/> <input type="button" value="None"/></p><p style="text-align: right;"><input type="button" value="OK"/></p></div>
<input type="checkbox"/> Intent to Submit for Basic Needs	
<input type="checkbox"/> Organizational Information	
<input type="checkbox"/> Program Information	
<input type="checkbox"/> Goals Outcomes and Indicators for Basic Needs Programs	
<input type="checkbox"/> Marketing and Success Stories	
<input type="checkbox"/> Application Final Approval	

A red arrow points from the top right towards the 'OK' button in the dropdown menu for the 'Pre Qualification Checklist' section.

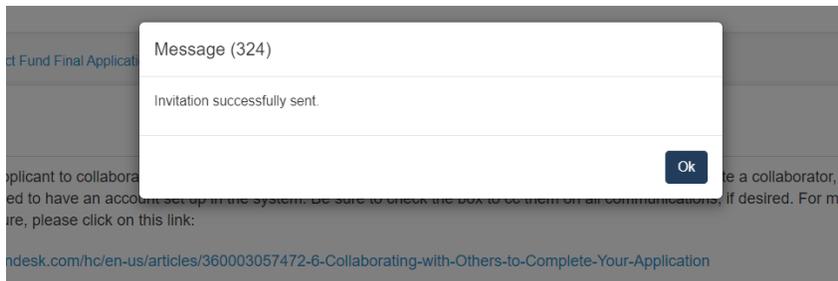
**Step 11:** After you have assigned all the applicable sections. Click on **Save** to save the assignment.

**Assign Section**

Section	Collaborator
<input checked="" type="checkbox"/> Pre Qualification Checklist	Miles Serena
<input type="checkbox"/> Intent to Submit for Basic Needs	
<input type="checkbox"/> Organizational Information	
<input checked="" type="checkbox"/> Program Information	Miles Serena
<input type="checkbox"/> Goals Outcomes and Indicators for Basic Needs Programs	
<input type="checkbox"/> Marketing and Success Stories	
<input type="checkbox"/> Application Final Approval	



The pop up screen will show the invitation was sent successfully.



**Step 12:** An email will go out to their email address, notifying the individual that they have been invited by you to assist in filling out the application and the link to click on to access it.

**Step 13:** Once you return to the Collaborations page the **Section assignment** will show at the bottom in the Sections associated to Collaborators section.

**Collaborations**

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My Collaborators Add Collaborator

Applicant	Email	Remove
Miles Serena	smiles@uwlowcountry.org	

**Sections associated to Collaborators** Assign Section

Section Name	Collaborator Name	Deadline	Remove
Program Information	Miles Serena	8/06/2021 4:00 PM	
Pre Qualification Checklist	Miles Serena	5/28/2021 4:00 PM	

**Step 14:** Once you have completed assigning all the sections, you can click on the application name in the breadcrumb navigation at the top of the page.

The screenshot shows the top navigation bar with the United Way logo on the left and user information 'Welcome, Amber Hewitt' on the right. Below the navigation bar is a breadcrumb trail: 'My Applications / Basic Needs Impact Fund Final Application / Collaborations'. The main content area is titled 'Collaborations' and contains the same introductory text as seen in the previous screenshot.

- **Important:** You will not be able to submit your application until all sections are completed. You will be responsible for communicating with the collaborator in regard to completing their assigned section(s).
- You will still have access to the assigned section and be able to review those for completeness, as well as answer any questions you would like to reply to within that same section. However, if you answer a question in that section, the collaborator can still go in and change your replies.