



Instructions for Transferring Ownership of an In Progress Submission

Only one person can own an application at once, which prevents users from accidentally overriding someone else's work. Owners of an application have exclusive rights to edit, save or submit an application, but owners may transfer applications to a new owner.

1. "In Progress Applications" should be selected in the Show drop-down on the Applications screen.
2. To transfer the submission to a new owner, click the Transfer icon under actions (it looks like a person with arrows).

Applications

To view **In Progress** or **Submitted** applications, click the drop down menu on the right next to **Show**.

If you were invited to complete the Invest in Others Award Application (Part 2), it will be under the **NEW** header.

Please reach out to us at info@investinothers.org if you have questions.

To transfer the submission to a new owner, click the Transfer icon under actions

Show **In Progress Applications** ▾

Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Invest in Others Award Nomination (Part 1)			23529	4/3/2020	Owner	   

3. A screen will pop up to generate an email to send to the new owner.

Transfer to new owner

*Your Name

Your E-mail

*E-mail

*Subject

Memo to New Owner

Hello:

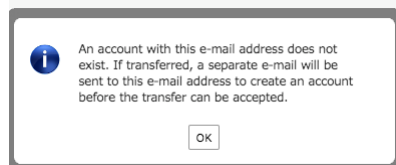
This message is to notify you that ownership of Invest in Others Award Nomination (Part 1) has been transferred to you by «Your_Name». You must accept transfer of ownership in order to complete this process.

To accept ownership, please log in to your account at: «Account_Login_URL»

NOTE: If you are a new user, a separate email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.

Maximum (5000) characters
* Required

4. Enter your name and the new owner's email address.
 - a. Note the "Check Email" button. This will check our system to see if the new owner already has an account with a username and password.
 - b. If they do not, you do not need to take any additional action. The system will do the following:



- c. You may change the subject line but please do not edit the email message. We don't want to lose key instructions or merge fields.
- d. Click Transfer and it will send to the new owner.

The new owner will receive the email from mail@grantapplication.com.

1. The new owner must accept the transfer by clicking the login link in the email and signing in to their account.
2. They will see the transferred application and need to click the red check mark to accept.

Applications

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Click red check mark to accept transfer

Show In Progress Applications ▾

Hide Viewer Only Applications

Accept All Transfers Decline All Transfers

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
Invest in Others Award Nomination (Part 1)			23457	4/3/2020	Viewer (Pending Transfer)	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Once they have accepted, they can work on the application. They can then transfer it back if needed following these instructions.