**Adding Users to Recipient Account**

|  |
| --- |
| Script |
| Welcome to the AmpliFund recipient series video focused on adding users to your recipient account. |
| Once your application becomes an award, additional users must be added via this process rather than in the applicant portal. You able to add additional users from your organization to provide them access to AmpliFund. We’ll go through the basic steps and user options and then will demonstrate adding a user in AmpliFund. You will access User Set up under Administrations> System Security then Users. To add a user click on the plus icon in the upper right hand corner then complete the User information and click create. |
| In the users profile set up, you’ll have a variety of options including subscribing the user to daily or weekly emails that contain their tasks and reminders from AmpliFund, providing them with access to the AmpliFund applicant portal where applications may be submitted to your funder and setting their user role. There are 4 user role options available to you. The first is an organizational administrator, who would have access to your full account and can view and edit all areas of the account. Next is an executive. An executive can view all grants and associated information in your account but cannot edit anything. Then the are 2 department user options. Department users can be assigned to specific grants as a grant manager then would only have access to that grant, if they are listed as no salary they would not have access to personnel line items on a budget. |
| After you create a user, you also need to send them an invitation to invite them to AmpliFund. On the user record you can click on the mail icon to invite the user to AmpliFund, this will send them an email with a link to log in which will be active for 72 hours. |
| Now let’s jump into AmpliFund and add a user together. After you log in select Administration, then click the System Security drop down then Users. |
| This will take you to a list of any users to your account.  Click the plus icon in the upper right hand corner. |
| This will take you to a page to add a new user.  Users profiles are able to be edited at any time.  Enter the users email preferences, and if they should have access to the applicant portal.  Select the users role and then enter the users personal information including their first name, last name and email address.  Other fields may be filled in as you desire.  Once you’ve completed entering information click create. |
| After you’ve created the user, remember to click on the mail icon next to their name to invite them to AmpliFund.  If you have multiple users in your account to invite to AmpliFund, you can click on Administration>System Security> Users from the main user list click on the mail icon in the upper right hand corner and then you can send invitations to multiple users at once. Users will not have access to AmpliFund until they are invited. |
| Through this recipient series video, you’ve learned how to add users to your recipient account in AmpliFund. Should you have additional questions, please reference our support site. Thank you! |