

Contacts User Guide



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Contacts Overview

The *Contacts* module is available to all users and provides tools for managing internal and external contact information. Users are able to create contact records for organizations and individuals, and relationships can track connections between organizations and individuals. Staff records also can be created in *Contacts*. Staff can be assigned responsibilities for various grant-related items in AmpliFund.



Organizations

Organizations are external groups that can be categorized as Federal Government, State Government, Local Government, Foundations, Corporations, Vendors, or Other. The Organizations list shows all organization records. The Federal Government, State Government, Local Government, Foundation, Corporation, and Vendors lists are filtered views of the Organizations list by organization type.



Print
Help
Save Current View
Create
Import
Export
Favorite
Edit
Сору
Delete

Organizations

The Organizations list shows all organizations records created in AmpliFund.

The Organizations list shows the Name, Primary Email Address, Primary Phone Number, and Status columns by default. In addition, the following columns are available: Organization Type, DBA Name, Primary Address, Description, DUNS Number, Funding Cycle, Funding Cycle Description, Primary Individual, Submission Website, Submission Website Password, Submission Website Username, Unique Identifier, Created By, Modified By, Last Verified, Created Date, Modified Date, and Website. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View an Organization

- 1. Open Contacts>Organizations.
- 2. Click an organization name.

How To Add an Organization

- 1. Open Contacts>Organizations.
- 2. Click the + (Create icon) in the Icon Bar.

Organization Information

- 3. Add the organization Name.
- 4. Add the organization's **DBA Name** (optional). This is another name that the organization does business under.
- 5. Select the Organization Type.
- 6. Add a primary address (optional).
- 7. Add a primary email address.
- 8. Add a primary phone number (optional).
- 9. Add a **DUNS Number** (optional). This is a Data Universal Numbering System number.
- 10. Add an organization's Website (optional).
- 11. Add an organization's **Submission Website** for online submission (optional).



- 12. Add a **Submission Website Username** and **Submission Website Password** for your organization (optional).
- 13. Select a Funding Cycle.
- 14. Add a Funding Cycle Description (optional).

Description

15. Add an organization **Description** (optional).

Record Information

- 16. Add a Unique Identifier (optional).
- 17. Select the record *Status* as **Enabled**. If the record *Disabled*, it will not appear in the Organizations list or any reports.
- 18. Click Create.

How To Edit an Organization

- 1. Open Contacts>Organizations.
- 2. Click the (Edit icon) next to an organization name.



- 3. Update the information as necessary.
- 4. Click Update.

How To Copy an Organization

- 1. Open Contacts>Organizations.
- 2. Click the 🗘 (Copy icon) next to an organization name.

Name	~	Primary Email Address
American Red Cross	120	noemail@redcross.org

- 3. Update the information as necessary.
- 4. Click Copy.

How To Delete an Organization

1. Open Contacts>Organizations.



2. Click the **(Delete icon)** next to an organization name.



3. In the confirmation pop-up window, click **Delete**.

How To Import Organizations

Organizational Admin can import multiple organizations using the <u>Organizations Import Template</u> (recommended) or their own Excel file. The Organizations Import Template includes the Name^{*}, DBA Name, Organization Type^{*}, Address Line 1, Address Line 2, City, State, Zip Code, Country, Email Address, Phone Number, Extension, DUNS Number, Website, Submission Website, Submission Website Username, Submission Website Password, Funding Cycle, Funding Cycle Description, Description, and Unique Identifier fields. Required fields have asterisks (*) next to their names.

- 1. Open Contacts>Organizations.
- 2. Click the 🗹 (Import icon) in the Icon Bar.
- 3. Click Select Files... to select a file from your computer.
- 4. Click Next.
- 5. Select the **Destination** field for each *Source* column. If you are using the <u>Organizations Import Template</u> (recommended), the source and destination fields should match.
- 6. Click Create.



8	Print
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	Mark as Primary

Contact Info

Each organization record contains contact information for mailing addresses, email addresses, and phone numbers.

The contact information lists show the *Details, Status,* and *Primary* columns by default. There are no additional columns. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View Organization Contact Info

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.

How To Add an Organization Address

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Addresses.
- 4. Click the + (Create icon) in the Icon Bar.
- 5. Add Address Line 1, Address Line 2, City, State, and Zip Code (optional).
- 6. Select a Country.
- 7. Click Create.

How To Add an Organization Email Address

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Email Addresses.
- 4. Click the + (Create icon) in the Icon Bar.
- 5. Add Email Address.



6. Click Create.

How To Add an Organization Phone Number

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Phone Numbers.
- 4. Click the + (Create icon) in the *lcon Bar*.
- 5. Add Country Code, Phone Number, and Extension (optional).
- 6. Click Create.

How To Edit Organization Contact Info

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the (Edit icon) next to contact details.



- 5. Update the information as necessary.
- 6. Click Update.

How To Delete Organization Contact Info

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the **(Delete icon)** next to contact details.





5. In the confirmation pop-up window, click **Remove**.

• Mote

Only one address, email address, and phone number can be marked as primary for a record.

How To Mark Organization Contact Info

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the 📁 (Mark as Primary icon) next to contact details.

Details	 Status
812 Huron Road E, Suite 350 Cleveland, OH 44115 United States	Enabled

5. In the confirmation pop-up window, click Mark.



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	Mark as Primary

Relationships

Organizations can be linked to individuals (external to your organization) through relationships. You can also view relationships by organization with the Relationship Report (by organization) in *Reports*>*Pre-Award*.

The Relationships list show the *Individual*, *Primary Phone Number*, *Primary Email Address*, *Relationship*, *Primary*, and *Status* columns by default. There are no additional columns. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View Organization Relationships

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Relationships tab>Individuals.

How To Add an Organization Relationship

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Relationships tab>Individuals.
- 4. Click the + (Create icon) in the Icon Bar.
- 5. Add the individual's Relationship to the organization (optional).
- 6. Check the checkboxes to select the **individual(s)** to add. This list pulls from *Contacts>Individuals*.

	W. Craig Fugate	10 m	noemail@fema.gov
~	Display Name	~	Primary Email Address

7. Click Add.

How To Edit an Organization Relationship

- 1. Open Contacts>Organizations.
- 2. Click an organization name.

The individual contact record can be viewed by clicking the individual name.



- 3. Open the Relationships tab>Individuals.
- 4. Click the *(Edit icon)* next to an individual name.



- 5. Update the information as necessary.
- 6. Click Update.

How To Delete an Organization Relationship

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Relationships tab>Individuals.
- 4. Click the **(Delete icon)** next to an individual name.



5. In the confirmation pop-up window, click **Remove**.

How To Mark an Organization Relationship as Primary

- 1. Open Contacts>Organizations.
- 2. Click an organization name.
- 3. Open the Relationships tab>Individuals.





~	Primary Phone Nur
-	(216) 377-5500
	~

5. In the confirmation pop-up window, click Mark.



Individuals

Individuals are individual contacts that are external to your organization. Internal contacts should be listed as staff. Individuals can be converted to staff if necessary.



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Ō	Delete
=	Export vCard
* +	Convert to Staff

Depending on your account

additional custom fields

or sections.

settings, this record type may have

Individuals

The Individuals list displays all external individual contact records. Internal contacts should be listed as Staff.

The Individuals list shows the Display Name, Primary Email Address, Primary Phone Number, and Status columns by default. In addition, the following columns are available: Id, First Name, Last Name, Primary Address, Primary Organization, Title, User, Description, Unique Identifier, Created By, Modified By, Last Contacted, Last Verified, Created Date, and Modified Date.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View an Individual

- 1. Open Contacts>Individuals.
- 2. Click an individual name.

Note | How To Add an Individual

- 1. Open Contacts>Individuals.
- 2. Click the + (Create icon) in the *lcon Bar*.

Individual Information

- 3. Add the individual's First Name and Last Name.
- 4. Add the individual's job Title (optional).
- 5. Add a primary address (optional).
- 6. Add an Email Address.
- 7. Add a **phone number** (optional).

Description

8. Add a **Description** (optional).

Record Information

- 9. Select the Last Contacted and Last Verified dates (optional).
- 10. Add a Unique Identifier (optional).
- 11. Select the record *Status* as **Enabled**. If the record *Disabled*, it will not appear in the Individuals list or any reports.
- 12. Click Create.



How To Edit an Individual

- 1. Open Contacts>Individuals.
- 2. Click the (Edit icon) next to an individual name.

W. Craig Fugate	4 (h #	
w. Craig Fugate	· · · · · ·	noemail@rema.gov

- 3. Update the information as necessary.
- 4. Click Update.

How To Copy an Individual

- 1. Open Contacts>Individuals.
- 2. Click the (Copy icon) next to an individual name.

W. Craig Fugate	1 2 1	noemail@fema.gov
Display Name	~	Primary Email Address

- 3. Update the information as necessary.
- 4. Click Copy.

How To Delete an Individual

- 1. Open Contacts>Individuals.
- 2. Click the **iii** (Delete icon) next to an individual name.



3. In the confirmation pop-up window, click **Delete**.

How To Import Individuals

Organizational Admin can import multiple individuals using the <u>Individuals</u> <u>Import Template</u> (recommended) or their own Excel file. The Individuals Import Template includes the First Name^{*}, Last Name^{*}, Title, Address Line 1, Address Line 2, City, State, Zip Code, Country, Email Address^{*}, Phone Number, Extension, Description, and Unique Identifier fields. Required fields have asterisks (*) next to their names.



- 1. Open Contacts>Individuals.
- 2. Click the 🗹 (Import icon) in the Icon Bar.
- 3. Click Select Files... to select a file from your computer.
- 4. Click Next.
- 5. Select the **Destination** field for each *Source* column. If you are using the <u>Individuals Import Template</u> (recommended), the source and destination fields should match.
- 6. Click Create.

How To Convert an Individual to Staff

An Individual record (external to your organization) can be converted to a Staff record (internal to your organization). Staff can be assigned tasks and other grant-related responsibilities.

- 1. Open Contacts>Individuals.
- 2. Click an individual name.
- 3. Click the **L**+ (Convert to Staff icon) in the Icon Bar.
- 4. In the confirmation pop-up window, click **Update**.
- 5. Open Contacts>Staff.
- 6. Click the **staff name**.
- 7. Update the information as necessary.
- 8. Click Update.



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	Mark as Primary

Contact Info

Each individual record contains contact information for mailing addresses, email addresses, and phone numbers.

The contact information lists show the *Details, Status,* and *Primary* columns by default. There are no additional columns. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View Individual Contact Info

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.

How To Add an Individual Address

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Addresses.
- 4. Click the + (Create icon) in the Icon Bar.
- 5. Add Address Line 1, Address Line 2, City, State, and Zip Code (optional).
- 6. Select a **Country**.
- 7. Click Create.

How To Add an Individual Email Address

- 1. Open Contacts>Organizations.
- 2. Click a display name.
- 3. Open the Contact Info tab>Email Addresses.
- 4. Click the + (Create icon) in the *lcon Bar*.
- 5. Add Email Address.
- 6. Click Create.



How To Add an Individual Phone Number

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Phone Numbers.
- 4. Click the + (Create icon) in the *lcon Bar*.
- 5. Add Country Code, Phone Number, and Extension (optional).
- 6. Click Create.

How To Edit Individual Contact Info

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the *(Edit icon)* next to contact details.



- 5. Update the information as necessary.
- 6. Click Update.

How To Delete Individual Contact Info

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the **(Delete icon)** next to contact details.



5. In the confirmation pop-up window, click **Remove**.



Only one address, email address, and phone number can be marked as primary for a record.

Note | How To Mark Individual Contact Info as email address, can be marked | Primary

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers.
- 4. Click the 📁 (Mark as Primary icon) next to contact details.



5. In the confirmation pop-up window, click Mark.



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A	Edit
Ō	Delete

Relationships

Individuals can be linked to organizations and other individuals (external to your organization) through relationships. You can also view relationships by organization with the Relationship Report (by organization) in *Reports*>*Pre-Award*.

The Relationships list show the *Individual*, *Primary Phone Number*, *Primary Email Address*, *Relationship*, *Primary*, and *Status* columns by default. There are no additional columns. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View Individual Relationships

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.

How To Add an Individual Relationship

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the + (Create icon) in the *lcon Bar*.
- 5. Add the entity's Relationship to the individual (optional).
- 6. Check the checkboxes to select the **organization(s)** or **individual(s)** to add. This list pulls from *Contacts>Organizations* or *Contacts>Individuals*, respectively.

~	Display Name	~	Primary Email Address
\cup	W. Craig Fugate	100	noemail@fema.gov

7. Click Add.

How To Edit an Individual Relationship

1. Open Contacts>Individuals.

Note

The organization or individual contact record can be viewed by clicking the **organization or individual name**.



- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the *(Edit icon)* next to an organization or individual name.



- 5. Update the information as necessary.
- 6. Click Update.

How To Delete an Individual Relationship

- 1. Open Contacts>Individuals.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the **(Delete icon)** next to an organization or individual name.



5. In the confirmation pop-up window, click **Remove**.



Staff

Staff are individuals internal to your organization. Staff records include compensation and benefit history and funding details. Staff can be added as AmpliFund users.



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	Save Current View
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	Import
▶	Export
☆	Favorite
A	Edit
ſĴ	Сору
Ō	Delete
ⅲ	Export vCard
* +	Create User

Staff

The Staff list displays all internal staff contact records. External individual contacts should be listed as Individuals.

The Staff list shows the Display Name, Primary Email Address, Primary Phone Number, and Status columns by default. In addition, the following columns are available: Id, Last Verified Date, First Name, Description, Last Contacted Date, Last Name, Middle Name, Primary Address, Primary Organization, Suffix, Title, User, User Identifier, Created By, Created Date, Modified By, Modified Date, and Supervisor. Each of these columns may be shown, hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View a Staff

- 1. Open Contacts>Staff.
- 2. Click a staff name.

| How To Add a Staff

- 1. Open Contacts>Staff.
- 2. Click the **+** (Create icon) in the *lcon Bar*.

Staff Information

- 3. Add the staff's First Name and Last Name.
- 4. Add the staff's job Title (optional).
- 5. Add a **primary address** (optional).
- 6. Add an Email Address.
- 7. Add a **phone number** (optional).

Description

8. Add a **Description** (optional).

Record Information

- 9. Select the Last Contacted and Last Verified dates (optional).
- 10. Add a Unique Identifier (optional).
- 11. Select the record *Status* as **Enabled**. If the record *Disabled*, it will not appear in the Staff list or any reports.

Depending on your account settings, this record type may have additional custom fields

or sections.



12. Click Create.

How To Edit a Staff

- 1. Open Contacts>Staff.
- 2. Click the *(Edit icon)* next to a staff name.



- 3. Update the information as necessary.
- 4. Click Update.

How To Copy a Staff

- 1. Open Contacts>Staff.
- 2. Click the (Copy icon) next to a staff name.



- 3. Update the information as necessary.
- 4. Click Copy.

How To Delete a Staff

- 1. Open Contacts>Staff.
- 2. Click the **m** (Delete icon) next to a staff name.

Barbara Wangeletti	1 C 1	
Display Name	~	Prin

3. In the confirmation pop-up window, click **Delete**.

How To Import Staff

Organizational Admin can import multiple staff records using the <u>Staff Import</u>. <u>Template</u> (recommended) or their own Excel file. The Staff Import Template includes the First Name^{*}, Last Name^{*}, Title, Supervisor First Name, Supervisor Last Name, Time Tracking^{*}, Address Line 1, Address Line 2, City, State, Zip Code, Country, Email Address^{*}, Phone Number, Extension, Description,



Unique Identifier, and Status* fields. Required fields have asterisks (*) next to their names.

- 1. Open Contacts>Staff.
- 2. Click the 🗹 (Import icon) in the Icon Bar.
- 3. In the pop-up window, select **Staff Import** from the *Choose Import* dropdown.
- 4. Click **Choose a file** to select a file from your computer.
- 5. Select the **Destination** field for each *Source* column. If you are using the <u>Staff Import Template</u> (recommended), the source and destination fields should match.
- 6. Click Create.

Note

How To Create a User from Staff

Staff can be converted AmpliFund users. For more information on inviting users to AmpliFund, see the <u>AmpliFund Administration Guide</u>.

- 1. Open Contacts>Staff.
- 2. Click a staff name.
- 3. Click the **L**+ (Create User icon) in the *lcon Bar*.

User Information

- Select if the user will Subscribe to Daily Emails or Subscribe to Weekly Emails. Once the user activates their account, they can update their email subscription preferences.
- 5. For clients with the *Grant Research* module, select if the user will have **Research Module Access**.
- 6. For clients with the *Competitive Award Management* module, select if the user will have **Applicant Portal Access**.
- 7. Select the user security Role. For more details, see Security Roles.
 - **Organizational Admin:** Can create, view, and edit all records in the account.
 - Executive: Can view all records in the account.
 - **Department Admin:** Can create, view, and edit all grant and project records linked to their department(s).
 - **Department User (Salary):** Can view all grant and project records linked to their department(s).

Once converted, users will not have access to AmpliFund until invited from Administration>System Security>Users.



- **Department User (No Salary)**: Can view all grant and project records linked to their department(s), excluding budget personnel line items.
- Project Admin: Can create, view, and edit all project records.
- **Project User (Salary):** Can view and edit all projects assigned to them and view any grants linked to their projects.
- **Project User (No Salary):** Can view and edit all projects assigned to them and view any grants linked to their projects, excluding budget personnel line items.
- Fund Admin: Can create, view, and edit all fund, opportunity, and award records.
- Fund User (Salary): Can create, view, and edit all opportunity and award records and assigned fund records.
- Fund User (No Salary): Can create, view, and edit all opportunity and award records and assigned fund records, excluding budget personnel line items.
- **Researcher:** Can only access the *Research* module; cannot apply for or manage grants.

Staff Information

- 8. Add the user's **First Name** and **Last Name**.
- 9. Add the user's job Title (optional).
- 10. Select the user's **Supervisor** (optional). This list pulls from Contacts>Staff.
- 11. In the *Track Time* dropdown, select how frequently the user will **track their time** for timesheets.
- 12. Add the user's **primary address** (optional).
- 13. Add the user's primary email address.
- 14. Add the user's primary phone number (optional).

Description

15. Add a **Description** (optional).

Record Information

- 16. Add a User Identifier (optional).
- 17. In the *Status* dropdown, select **Enabled**.
- 18. Click Create.

Note

AmpliFund login usernames (i.e., the user's email address) cannot be edited in the system. However, you can update a user's primary email address as necessary. If you need to change the AmpliFund username, you can submit a ticket to our help desk at <u>amplifund.zendesk.com</u>.



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Compensation

The Compensation Records page establishes baseline compensation and benefits information for each staff person. Compensation history is required for the *Time & Effort Certification* module, and is highly recommended for any grant-funded staff. This calculates each staff person's designation to awarded and pending grants and prevents staff compensation from being allocated over 100%.

Compensation history can include past salary rates and projected future compensation. Compensation history records cannot overlap.

We recommend that users add lines of future compensation if known to more accurately reflect the compensation amount budgeted for multi-year grants.

Benefit History

Benefits can be planned by employee or as a category amount. If benefits are planned by employee, their default benefit details will be added to their personnel budget line items. Each benefit type may be planned in dollars or percentage of compensation.

How To View Staff Compensation

- 1. Open Contacts>Staff.
- 2. Click a staff name.
- 3. Open the Compensation tab>Records.
- 4. Click a compensation type.

How To Add Compensation

- 1. Open Contacts>Staff.
- 2. Click a staff name.
- 3. Open the Compensation tab>Records.
- 4. Click the **+** (Create icon) in the *lcon Bar*.
- 5. Select the compensation Start Date.
- 6. Select the compensation End Date (optional).
- 7. In the Position Type dropdown, select Full Time or Part Time.
- 8. In the Compensation Type dropdown, select Salary or Hourly.

Note

Compensation history records cannot overlap start and end dates.



- a. If Salary, add Annual Salary.
- b. If Hourly, add Hourly Rate.
- 9. Add Hours Per Week. This defaults to 40.
- 10. Select a **Benefit Type** and click **Add** (optional). This list pulls from *Administration>Lists>Benefit Types*. Add benefit **Amount** in dollars or percentage (in decimal format).

Benefit Type Amount			Benefit Amount	
		Dollar		
FICA Rate Benefit	0.0000000 %	Percentage	\$0.00	Û

11. Click Create.

How To Edit Compensation History

- 1. Open Contacts>Staff.
- 2. Click a staff name.
- 3. Open the Compensation tab>Records.
- 4. Click the *A* (Edit icon) next to a compensation type name.

Salary	,	Û	1/1/2012
Compensa		~	Start Dat

- 5. Update the information as necessary.
- 6. Click Update.

How To Delete Compensation History

- 1. Open Contacts>Staff.
- 2. Click a staff name.
- 3. Open the Compensation tab>Records.
- 4. Click the **m** (Delete icon) next to a compensation type name.



5. In the confirmation pop-up window, click **Delete**.



PrintHelp

Funding Details

The Funding Details page displays how the staff person is funded throughout AmpliFund. The page includes total annual compensation, annual compensation allocation by month, and grant allocation details.

How To View Funding Details

- 1. Open Contacts>Staff.
- 2. Click a **staff name**.
- 3. Open the **Compensation tab>Funding Details**.
- 4. In the View Settings section, select a Year.
- 5. Click Go.



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Relationships

Staff can be linked to organizations and individuals (external to your organization) through relationships. You can also view relationships by organization with the Relationship Report (by organization) or the Relationship Report (by staff) in *Reports>Pre-Award*.

The Relationships list show the *Individual, Primary Phone Number, Primary Email Address, Relationship, Primary,* and *Status* columns by default. There are no additional columns. Each of these columns may be shown or hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View Staff Relationships

- 1. Open Contacts>Staff.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.

How To Add a Staff Relationship

- 1. Open Contacts>Staff.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the + (Create icon) in the *lcon Bar*.
- 5. Add the entity's Relationship to the staff member (optional).
- 6. Check the checkboxes to select the **organization(s)** or **individual(s)** to add. This list pulls from *Contacts>Organizations* or *Contacts>Individuals*, respectively.

~	Display Name	~	Primary Email Address
	W. Craig Fugate	120	noemail@fema.gov

7. Click Add.

How To Edit a Staff Relationship

1. Open Contacts>Staff.

The organization or individual

contact record can be viewed by clicking the **organization or individual name**.



- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the *(Edit icon)* next to an organization or individual name.

Nicki Andrews	/ 0	Amp
Contact	~	Org

- 5. Update the information as necessary.
- 6. Click Update.

How To Delete a Staff Relationship

- 1. Open Contacts>Staff.
- 2. Click a display name.
- 3. Open the Relationships tab>Organizations or >Individuals.
- 4. Click the **(Delete icon)** next to an organization or individual name.

Nicki Andrews	/ 1	Amp
Contact	~	Org

5. In the confirmation pop-up window, click **Remove**.





For clients with Sub-Recipient Licenses

Sub-recipients are recipients of grant sub-awards. To add sub-recipient licenses to your AmpliFund account, contact your customer success representative.



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Sub-Recipients

For clients with Sub-Recipient Licenses

The Sub-Recipients list displays all activated sub-recipient contact records. The sub-recipient accounts must be added in the *Administration* module to appear on the Sub-Recipients list. To learn more about adding sub-recipients, see the <u>AmpliFund Administration Guide</u>.

The Sub-Recipients list shows the *Organization*, *Primary Email Address*, and *Primary Phone Number* columns by default. There are no other columns available. Each of these columns may be shown, hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View a Sub-Recipient

- 1. Open Contacts>Sub-Recipients.
- 2. Click an organization name.



Lead Recipients

For clients with Lead Recipient Licenses

Lead recipients are recipients of awards through the *Fund Management* or the *Competitive Award Management* modules. To add lead recipient licenses to your AmpliFund account, contact your customer success representative.



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∷	Export vCard

Lead Recipients

For clients with Lead Recipient Licenses

The Lead Recipients list displays all activated lead recipient contact records. The lead recipient accounts must be added in the *Administration* module to appear on the Lead Recipients list. To learn more about adding lead recipients, see the <u>AmpliFund Administration Guide</u>.

The Lead Recipients list shows the Organization, Primary Email Address, Primary Phone Number, and Status columns by default. There are no other columns available. Each of these columns may be shown, hidden, sorted, or filtered.

See the <u>AmpliFund User Interface Navigation Guide</u> to learn more about sorting and filtering list views.

How To View a Sub-Recipient

- 1. Open Contacts>Lead Recipients.
- 2. Click an organization name.



Contact Tools

The *Tools tab* allows users to create and send email messages, create and assign tasks, add documents, and create notes attached to the contact record. The *Tools tab* is available on all contact record types, except for sub-recipients and lead recipients.



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Email Manager

From the Email Manager, users may create and send emails that will be connected to the contact record. The emails will be sent to the recipients' primary email addresses and will also appear in *Activity*>*Message Center*.

How To View an Email

- 1. Open the **Contacts** module.
- 2. Select a **contact type** in the *Left Navigation Panel*.
- 3. Click a contact name.
- 4. Open the Tools tab>Email Manager.
- 5. Hover over a subject name to show the dropdown menu arrow.

Subject	
Email	

- 6. Click the dropdown arrow.
- 7. Select View.

How To Create an Email

- 1. Open the **Contacts** module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a contact name.
- 4. Open the **Tools tab>Email Manager**.
- 5. Click the + (Create icon) in the Icon Bar.
- 6. In the *To* field, select the email recipient. This list pulls from *Contacts>Individuals* and *Contacts>Staff*.

То	Jennifer Thompson x	
10	Jennier mompson x	-

- 7. In the CC and BCC fields, select **additional recipients** (optional). These lists pull from *Contacts>Individuals* and *Contacts>Staff*.
- 8. Add the message **Subject**.
- 9. In the *Html Body* field, add the **email message**.





- 10. Click **Select files...** to add a file from your computer (optional).
- 11. In the *Attachments* dropdown, select files from the *Documents* module to attach (optional).

Attachments	Jennifer Thompson	*

12. Click Send.



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Mark as

Complete

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Tasks

From the Tasks list, users can create and assign tasks to other staff that will be connected to the contact record. Once created, tasks will appear on that staff's AmpliFund calendar, and they will receive email reminders related to that task.

How To View a Task

- 1. Open the Contacts module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a **contact name**.
- 4. Open the Tools tab>Tasks.
- 5. Click a task name.

Note

How To Add a Task

- 1. Open the Contacts module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a **contact name**.
- 4. Open the Tools tab>Tasks.
- 5. Click the + (Create icon) in the Icon Bar.
- 6. Add the task Name.
- 7. Select the Task Type.
- 8. Add the task **Description** (optional).
- 9. Select the Task Status.
- 10. Select the Responsible Individual. This list pulls from Contacts>Staff.
- 11. Select Additional Individuals (optional). This list pulls from Contacts>Staff. Additional Individuals will receive email reminders and can view the task in Activity>Tasks. They can also mark the task as complete.
- 12. Select a Due Date.
- 13. Select the Task Reminders. These reminders will schedule emails to the Responsible Individual and Additional Recipients about the task. Staff will not receive reminders once the task is marked complete.
- 14. Click Save.

Depending on your account settings, this record type may have additional custom fields or sections.



How To Edit a Task

- 1. Open the **Contacts** module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a contact name.
- 4. Open the Tools tab>Tasks.
- 5. Click the *(Edit icon)* next to a task name.

Task	/ 8 3	Jennifer Thompson
Name	~	Responsible Delegation

- 6. Update the information as necessary.
- 7. Click Save.

How To Delete a Task

- 1. Open the **Contacts** module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a contact name.
- 4. Open the Tools tab>Tasks.
- 5. Click the **(Delete icon)** next to a task name.

Task	/ 8 3	Jennifer Thompson
Name	~	Responsible Delegation

6. In the confirmation pop-up window, click **Delete**.

How To Mark a Task as Complete

- 1. Open the **Contacts** module.
- 2. Select a contact type in the Left Navigation Panel.
- 3. Click a **contact name**.
- 4. Open the Tools tab>Tasks.
- 5. Click the 🗹 (Mark as Complete icon) next to a task name.

Task	/ 🕯 🗹	Jennifer Thompson
Name	~	Responsible Delegation

6. In the confirmation pop-up window, click Mark as Complete.



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Notes

Additional information related to the object record may be stored as a Note. Each note may include a title, note date, text, and an attachment.

How To View a Note

- 1. Open an object record.
- 2. Open the Tools tab>Notes.
- 3. Click a note title.

Note | How To Add a Note

- Depending on your account settings, this record type may have additional custom fields or sections.
- 1. Open an object record.
- 2. Open the Tools tab>Notes.
- 3. Click the **+** (Create icon) in the *lcon Bar*.
- 4. Add a Title.
- 5. Select a Note Date (optional).
- 6. Select a **Note Type** (optional). This list pulls from *Administration>Lists>Note Types*.
- 7. Add the note **Body**.
- 8. Click Select files... to upload a file from your computer (optional).
- 9. Click Create.

How To Edit a Note

- 1. Open an object record.
- 2. Open the Tools tab>Notes.
- 3. Click the *(Edit icon)* next to a note title.

Note	/ 0	08/14/2017	
Title	~	Created Date 🔻	

- 4. Update the information as necessary.
- 5. Click Update.



How To Delete a Note

- 1. Open an **object record**.
- 2. Open the Tools tab>Notes.
- 3. Click the **m** (Delete icon) next to a note title.

Title	~	Created Date V
Note	ø 🖞	08/14/2017

4. In the confirmation pop-up window, click **Delete**.



Custom For clients with Advanced Data Collection

The *Custom tab* allows users collect data through custom forms and to configure these custom forms and form extensions on the object record. For more information on custom data collection, see the <u>Advanced Data</u> <u>Collection Guide</u>.



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Custom Forms and Form Extensions

Custom forms and form extensions can be added to record through the record's *Custom tab*. Custom forms can be accessed by the *Custom tab>form display name*. Form extensions will appear as additional custom sections on an existing record form. For more information on custom forms and form extensions, see the <u>Advanced Data Collection Guide</u>.

How To Fill a Custom Form

The form's fields can be shown or hidden as additional columns on the form's list page, as well as form *Id*, *Created By*, *Created Date*, *Modified By*, and *Modified Date* columns.

- 1. Open a primary object's **record**, such as a grant, opportunity, project, or fund.
- 2. Open the Custom tab>form name.



- 3. Click the + (Add icon) in the Icon Bar.
- 4. Add information as necessary.
- 5. Click Create.

How To Add Custom Forms and Form Extensions to an Object

Prerequisite: Must be Organizational Administrator, object Administrator (such as a Fund Administrator), or object Manager (such as Grant Manager)

- 1. Open an object record.
- 2. Open the Custom tab>Form Configuration.

orkflow 🔻	Custom •	
ition	Grant Form (global)	
	Form Configuration	- 1



Object Configuration

3. Check the **form checkbox** to add the form to the primary object record, or check the **form extension checkbox** to add the form extension to the primary object record's detail page.

Grants Configuration	
Form Extensions	Custom Form Extension Preview
Forms	✓ Grant Form (global) Preview ✓ Form Features Preview

Related Objects (Form Extensions)

4. Check the **form extension checkbox** to add the form extension to a secondary object on the record.



5. Click Save.



If the form extension is enabled on all objects, it cannot be removed from an individual record.

How To Remove Custom Forms and Form Extensions from an Object Record

Prerequisite: Data cannot have been added to the form extension.

- 1. Open a primary object record.
- 2. Open the Custom tab>Form Configuration.

orkflow 🔻	Custom v	
ntion	Grant Form (global)	
	Form Configuration	_

Object Configuration

3. Uncheck the **form checkbox** to remove the form to the primary object record, or uncheck the **form extension checkbox** to remove the form extension to the primary object record's detail page.

Grants Configuration	
Form Extensions	Custom Form Extension Preview
Forms	 ✓ Grant Form (global) Preview ✓ Form Features Preview



Related Objects (Form Extensions)

4. Uncheck the **form extension checkbox** to remove the form extension from a secondary object on the record.

Related Objects (Form Extensions)				
Payment Requests	Payment Request Form Extension Preview			

5. Click Save.



Appendix

REVISION: 2019-01-15



Security Roles

Add-on modules are indicated with an asterisk (*). For more information on each security role's access, see the AmpliFund Security Role Matrix Guide. Organizational Admin Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Admin are the only users that can create, view, and edit records in the Administration module. The Administration module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Admin you can have per account. Executives Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the Administration module. Department Admin Department Admin can create, view, and edit all grant and project* records linked to their department(s). Department Users Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant and project* records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget. Project Admin Project Admin can create, view, and edit all project* records. In addition, Project Administrators can view all grants related to their projects. Project Users Project Users can add achievements and expenses assigned to them and can view and edit all projects* assigned to them. They can also view any grants linked to their projects. Project Users can create new projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget. Fund Admin Fund Admin can create, view, and edit all fund*, opportunity*, and award* records. Fund Users Fund Users can view and edit any assigned fund* records. Fund Users can create new fund records. They can also create, view, and edit all opportunity* and award* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.



Researcher

Researchers only have access to the *Research** module. Researchers cannot apply for or manage grants.

Implicit Security Roles

If users are designated as a record's manager (i.e. Grant Managers, Project Managers, or Fund Managers), they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record. (No Salary) users will still not be able to see the personnel line items.