



## 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.

## Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Import
-  Export
-  Favorite
-  Edit
-  Copy
-  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 [AmpliFund User Interface Navigation Guide](#) 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.

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

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   	noemail@redcross.org



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

## How To Delete an Organization

1. Open **Contacts>Organizations**.




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

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







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

## How To Import Organizations

Organizational Admin can import multiple organizations using the [Organizations Import Template](#) (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.

- Open **Contacts>Organizations**.
- Click the  (**Import icon**) in the *Icon Bar*.
- Click **Select Files...** to select a file from your computer.
- Click **Next**.
- Select the **Destination** field for each *Source* column. If you are using the [Organizations Import Template](#) (recommended), the source and destination fields should match.
- Click **Create**.

## Icons

	Print
	Help
	Create
	Edit
	Delete
	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 [AmpliFund User Interface Navigation Guide](#) 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**.

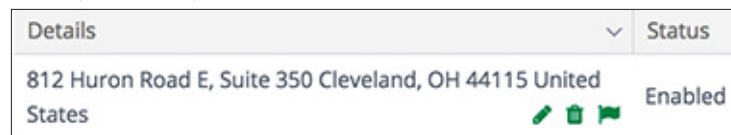
6. Click **Create**.

## 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 *Icon Bar*.
5. Add **Country Code**, **Phone Number**, and **Extension** (optional).
6. Click **Create**.

## How To Edit Organization Contact Info

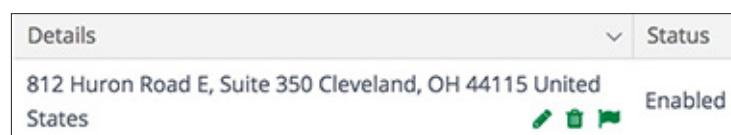
1. Open **Contacts>Organizations**.
2. Click an **organization name**.
3. Open the **Contact Info tab>Addresses, >Email Addresses, or >Phone Numbers**.
4. Click the **(Edit icon)** next to contact details.



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**.

 **Note**

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

## How To Mark Organization Contact Info as Primary

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**.

### Icons

- Print
- Help
- Create
- Edit
- Delete
- 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 [AmpliFund User Interface Navigation Guide](#) 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**.

### Note

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

## 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*.

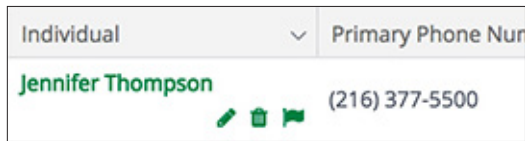
▼	Display Name	▼	Primary Email Address
<input type="checkbox"/>	W. Craig Fugate		noemail@fema.gov

7. Click **Add**.

## How To Edit an Organization Relationship


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

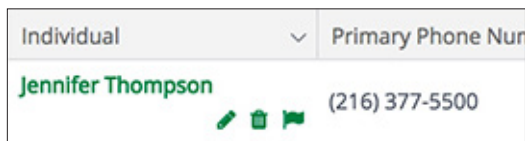
- Open the **Relationships tab>Individuals**.
- Click the  (**Edit icon**) next to an individual name.



- Update the information as necessary.
- Click **Update**.


## How To Delete an Organization Relationship

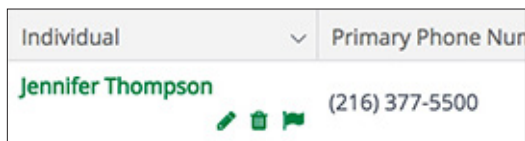
- Open **Contacts>Organizations**.
- Click an **organization name**.
- Open the **Relationships tab>Individuals**.
- Click the  (**Delete icon**) next to an individual name.



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

## How To Mark an Organization Relationship as Primary

- Open **Contacts>Organizations**.
- Click an **organization name**.
- Open the **Relationships tab>Individuals**.
- Click the  (**Mark as Primary icon**) next to an individual name.



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

### Note













Only one individual can be marked as primary for a record.

## *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.

### Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Import
-  Export
-  Favorite
-  Edit
-  Copy
-  Delete
-  Export vCard
-  Convert to Staff

# 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 [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

## How To View an Individual

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

### Note

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

## How To Add an Individual

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

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

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

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

## How To Delete an Individual


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

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

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


## How To Import Individuals

Organizational Admin can import multiple individuals using the [Individuals Import Template](#) (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 [Individuals Import Template](#) (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  (**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**.

## Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete
-  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 [AmpliFund User Interface Navigation Guide](#) 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 *Icon 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 *Icon 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.

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

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.


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

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

 **Note**

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






## How To Mark Individual Contact Info as 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.

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

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

### Icons

-  Print
-  Help
-  Create
-  Edit
-  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 [AmpliFund User Interface Navigation Guide](#) 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**.

### Note

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

## 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 *Icon 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.

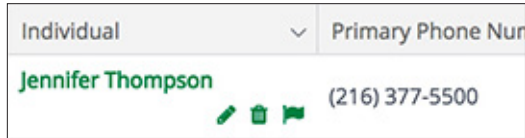
▼	Display Name	▼	Primary Email Address
<input type="checkbox"/>	W. Craig Fugate	  	noemail@fema.gov

7. Click **Add**.

## How To Edit an Individual Relationship


1. Open **Contacts>Individuals**.

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.



### Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Import
-  Export
-  Favorite
-  Edit
-  Copy
-  Delete
-  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 [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

## How To View a Staff

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

### Note

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

## How To Add a Staff

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

12. Click **Create**.


## How To Edit a Staff




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

Display Name	Print
Barbara Wangeletti	  

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.

Display Name	Print
Barbara Wangeletti	  

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

## How To Delete a Staff

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


Display Name	Print
Barbara Wangeletti	  

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

## How To Import Staff

Organizational Admin can import multiple staff records using the [Staff Import Template](#) (recommended) or their own Excel file. The Staff Import Template includes the First Name\*, Last Name\*, Title, Supervisor, 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 [Staff Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

## How To Create a User from Staff

### Note

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

Staff can be converted AmpliFund users. For more information on inviting users to AmpliFund, see the [AmpliFund Administration Guide](#).

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

### User Information

4. 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).
  - **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).

### 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 [amplifund.zendesk.com](https://amplifund.zendesk.com).




## Description

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

## Record Information

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

### Icons

-  Print
-  Help
-  Create

# 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 *Icon 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
FICA Rate Benefit	0.00000000 %	<input type="radio"/> Dollar <input checked="" type="radio"/> Percentage	\$0.00 

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  (**Edit icon**) next to a compensation type name.

Compensa...	Start Dat
Salary  	1/1/2012

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  (**Delete icon**) next to a compensation type name.

Compensa...	Start Dat
Salary  	1/1/2012

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

## Icons

Print  
Help

# 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**.

### Icons

- Print
- Help
- Create
- Edit
- Delete

# 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 [AmpliFund User Interface Navigation Guide](#) 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**.

### Note

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

## 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 *Icon 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
<input type="checkbox"/>	W. Craig Fugate		noemail@fema.gov

7. Click **Add**.

## How To Edit a Staff Relationship

1. Open **Contacts>Staff**.




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 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.







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

# ***Sub-Recipients***

*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.

## Icons

-  Print
-  Help
-  Favorite
-  Export vCard

# 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 [AmpliFund Administration Guide](#).

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 [AmpliFund User Interface Navigation Guide](#) 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.

## Icons

-  Print
-  Help
-  Favorite
-  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 [AmpliFund Administration Guide](#).

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 [AmpliFund User Interface Navigation Guide](#) 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.

### Icons

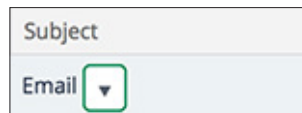
-  Print
-  Help
-  Create

# 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.



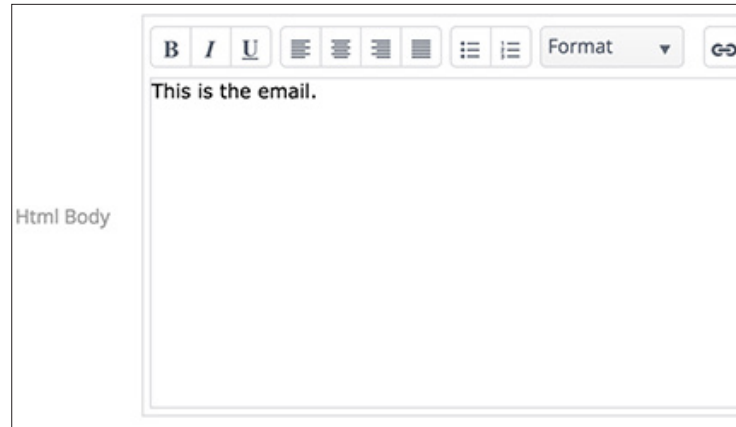
6. Click the **dropdown arrow**.
7. Select **View**.

## 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*.



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).



12. Click **Send**.



## Icons

	Print
	Help
	Create
	Edit
	Copy
	Delete
	Mark as Complete

# 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

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

## 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**.


## 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.

Name	Responsible Delegation
Task	   Jennifer Thompson

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.

Name	Responsible Delegation
Task	   Jennifer Thompson

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.

Name	Responsible Delegation
Task	   Jennifer Thompson

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

### Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete

# 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

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

## How To Add a Note

1. Open an **object record**.
2. Open the **Tools tab>Notes**.
3. Click the **+** (**Create icon**) in the *Icon 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.

Title	Created Date
Note	08/14/2017

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  (**Delete icon**) next to a note title.

Title	Created Date
Note  	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 [Advanced Data Collection Guide](#).

### Icons

-  Print
-  Help
-  Add
-  Import
-  Export

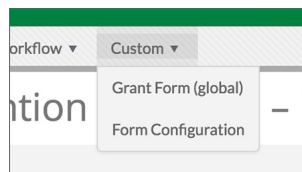
# Custom Forms and Form Extensions

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 [Advanced Data Collection Guide](#).

## 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**.

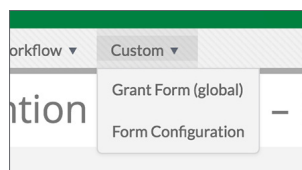


3. Click the **+** (**Add icon**) in the *Icon Bar*.
4. Add information as necessary.
5. Click **Create**.

## How To Add Custom Forms and Form Extensions to an Object

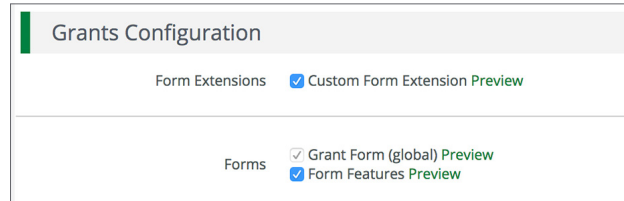
**Prerequisite:** Must be Organizational Administrator, object Administrator (such as a Fund Administrator), or object Manager (such as Grant Manager)

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



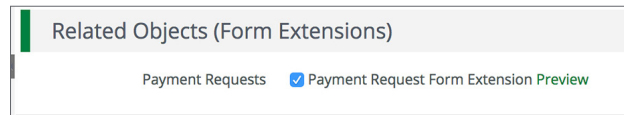
### Object Configuration

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.



### 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**.

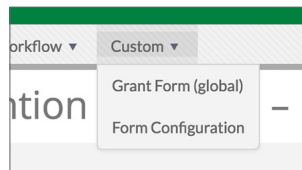
#### Note

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

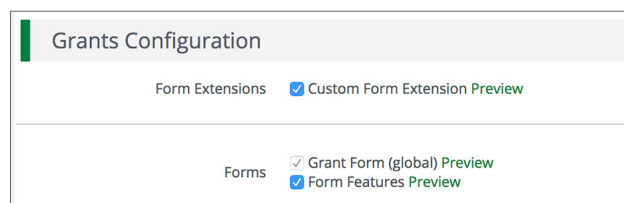
Prerequisite: Data cannot have been added to the form extension.

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



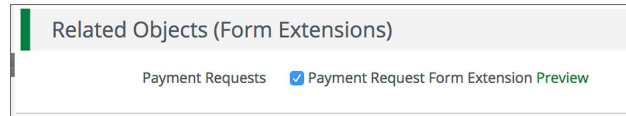
### Object Configuration

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.



## Related Objects (Form Extensions)

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



5. Click **Save**.



# *Appendix*

# 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 <i>Administration</i> module. The <i>Administration</i> 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 <i>Administration</i> 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.