AmpliFund®

Fund Management User Guide

Contents

Fund Management Overview

With *Fund Management*, users can follow the cash flow from the fund's income source to the award and view available and actual amounts for the fund and income sources.

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Creating Funds

Funds are pools of pledged income with a shared purpose. *Fund Management* allows funders to track their planned (committed) and received income, as well as obligated awards and payments, over the life of the fund as it supports awards and opportunities.

The Funds list shows the *Name, Fund Manager, Target Amount, Total Funding Committed, Total Income Received, Current Cash Balance*, and *Status* columns by default. The *Categories, Fund Open Date, Fund Close Date, Additional Staff, Total Disbursements, Outstanding Obligations, Available Funds, Pending Opportunities, Description, Created By, Created Date, Modified By, Modified Date*, and *Unique Identifier* columns are also available. 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 filter on grid views.

Fund Security

The funds that are visible and accessible on the Funds List vary depending on the user's security role. Each user is assigned a user security role that dictates their overall access. If a user is assigned as Fund Manager or Additional Staff, they will have additional security access to the fund.

Fund Administrators
: Fund Administrators can create, view, and edit all fund, opportunity, and award records. Fund Administrators may also assign other Fund Users as Fund Managers.

Fund Users
: Fund Users can view any assigned fund records as Fund Manager or Additional Staff. Fund Managers can create, edit, and delete items associated with their fund. Fund Users can create new fund records. They can also create, view, and edit all opportunity and award records (for clients with Competitive Award Management). 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.

Fund Manager
: Fund Managers have full access to edit fund details, and create, edit, and delete all items related to the fund they are managing. These users may also assign responsibility for goals and line items to other AmpliFund users.

Additional Staff
: Additional Staff may view fund details, cash receipts, performance plans, budget plans, opportunities (for clients with the Competitive Award

Management module), and awards. They cannot create, edit, or delete fund details, and other fund-related information.

How To View a Fund

Viewing a fund gives a user access to the fund details, fund management items, and fund-related tools.

1. Open **Fund Management>Funds**.
2. Click on a **fund name**.

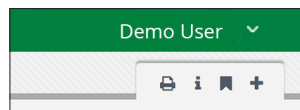| Name		Fund Manager	
Service Funds	✏ ⏍ 🗑	Sherry Gray	

How To Add a Fund

Funds may be created to capture pooled income source contributions, fund-related performance and budget items, as well as awards.

1. Open **Fund Management>Funds**.
2. Click the ✚ **(Create icon)** in the *Icon Bar*.

Demo User ⌄

🖨 ℹ 🔖 ✚

Fund Information

3. Add fund **Name**.
4. Add fund **Target Amount** to receive from income sources.
5. Select a **Fund Manager**. The Fund Manager can edit fund details, can create and edit items related to the fund, and assign responsibility for goals and line items to other users. This list pulls from *Contacts>Staff*.
6. Select fund **Categories** (optional). This list pulls from *Administration>Lists> Fund Activity Categories*.
7. Select **Additional Staff** (optional). Additional Staff can view fund details, cash receipts, performance plans, budget plans, opportunities (for clients with the Competitive Award Management module), and awards. They cannot create, edit, or delete fund details, and other fund-related information. This list pulls from *Contacts>Staff*.

8. Add **Fund Open Date** and **Fund Close Date** (optional).

Fund Details

Fund Details capture key information about money coming into the fund (Total Funding Committed and Total Income Received), money leaving the fund (Total Disbursements, Outstanding Obligations, and Pending Opportunities), and current balances (Current Fund Cash Balance and Available Funds).

Fund Details		
Total Funding Committed ❶	$2,500,000.00 ✚	
Total Income Received ❶	$2,500,000.00 ✚	
Total Disbursements ❶	$0.00	
Current Fund Cash Balance ❶	$2,500,000.00	
Outstanding Obligations ❶	$200,000.00	
Available Funds ❶	$2,300,000.00	
Pending Opportunities ❶	$0.00	

Description

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

Record Information

10. Add a **Unique Identifier** as an additional reference (optional).

11. Select record *Status* as **Enabled**. A *Disabled* record will not appear on the Funds list or in any reports.

12. Click **Create**.

How To Edit a Fund

1. Open **Fund Management>Funds**.

2. Click the ✏ **(Edit icon)** next to a fund name.

Name	⌄	Fund Manager	⌄
Service Funds	✏ ⎘ 🗑	Sherry Gray	

3. Update the information as necessary.

4. Click **Update**.

How To Copy a Fund

Fund details may be copied to a new fund. You may wish to copy annual funds that operate on a cyclical basis, or two funds that have similar information.

1. Open **Fund Management>Funds**.

2. Click the ⧉ **(Copy icon)** next to a fund name.

Name		Fund Manager	
Service Funds	✏ ⧉ 🗑	Sherry Gray	

3. Update the information as necessary.

4. Click **Update**.

How To Delete a Fund

Prerequisite: Fund cannot be linked to income sources or opportunity records.

Deleting a fund removes it from the Funds list and deletes corresponding fund-related information.

1. Open **Fund Management>Funds**.

2. Click the 🗑 **(Delete icon)** next to a fund name.

Name		Fund Manager	
Service Funds	✏ ⧉ 🗑	Sherry Gray	

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

How To Restore a Fund

A deleted fund can be recovered or restored.

1. Open **Fund Management>Funds**.

2. Click the ⌄ **(Menu icon)** in the *Status* column.

3. Hover over ▼ **Filter** to show filter menu.

4. In the filter menu, click **Clear** to show deleted funds.

5. Click the ⊗ **(Restore icon)** next to a deleted fund name.

New Fund   ✎ ⌗ ⊗ ⊕   Brian Green

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

⚠ Warning
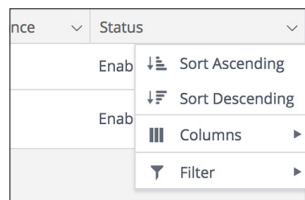
Once purged, the record and related information cannot be restored or recovered.
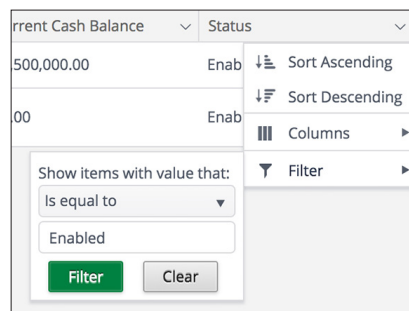
How To Purge a Fund

Prerequisite: Fund must be deleted.

Purging a fund completely removes that fund and all corresponding fund-related information from AmpliFund.

1. Open **Fund Management>Funds**.

2. Click the ⌄ **(Menu icon)** in the *Status* column.

nce	⌄	Status	⌄
	Enab	↓≣ Sort Ascending	
		↓≣ Sort Descending	
	Enab	⫼ Columns ▶	
		▼ Filter ▶	

3. Hover over ▼ **Filter** to show filter menu.

rrent Cash Balance	⌄	Status	⌄
500,000.00		Enab	↓≣ Sort Ascending
			↓≣ Sort Descending
.00		Enab	⫼ Columns ▶
			▼ Filter ▶

Show items with value that:
Is equal to ▼
Enabled
Filter   Clear

4. In the filter menu, click **Clear** to show deleted funds.

5. Click the ⊗ **(Purge icon)** next to a deleted fund name.

New Fund   ✎ ⌗ ⊗ ⊕   Brian Green

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

How To Disable a Fund

Disabling a fund removes it from the fund list and hides corresponding fund-related information. The fund and its information will not appear in any reports.

1. Open **Fund Management>Funds**.

2. Click the ✏ **(Edit icon)** next to a fund name.

Name		Fund Manager	
Service Funds	✏ ⧉ 🗑	Sherry Gray	

Record Information

3. Select **Disabled** in the *Status* dropdown.

4. Click **Update**.

![AmpliFund logo]

Icons

🖶	Print
ℹ	Help
✚	Create/Add
✏	Edit
🗑	Delete
↗	Export

Adding Fund Details

Fund Details capture key information about money coming into the fund (Total Funding Committed and Total Income Received), money leaving the fund (Total Disbursements, Outstanding Obligations, and Pending Opportunities), and current balances (Current Fund Cash Balance and Available Funds).

Fund Details		
Total Funding Committed ❶	$2,500,000.00 ✚
Total Income Received ❶	$2,500,000.00 ✚
Total Disbursements ❶	$0.00
Current Fund Cash Balance ❶	$2,500,000.00
Outstanding Obligations ❶	$200,000.00
Available Funds ❶	$2,300,000.00
Pending Opportunities ❶	$0.00

How To View Fund Sources or Disbursements

1. Open **Fund Management>Funds**.
2. Click a **fund name**.

Fund Details

3. Click an **amount**.

Fund Details	
Total Funding Committed ❶	$2,500,000.00 ✚

How To Add Committed (Pledged) Funding

Commitments are dollars pledged to the fund from external funding sources. The total dollars committed are reflected in the *Total Funding Committed* field of the fund details.

1. Open **Fund Management>Funds**.
2. Click a **fund name**.

Fund Details

3. Click the ✚ **(Add icon)** next to the *Total Funding Committed* amount.

Fund Details		
Total Funding Committed ⓘ	$2,500,000.00 ✚	

4. In the pop-up window, select a funding source **Type**.

5. Add a funding source **Name**. This list pulls from *Contacts>Organizations*, *Contacts>Individuals*, or *Grant Management*.

6. Add **Amount Committed**.

7. Click **Save**.

--OR--

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Commitments**.

4. Click the ✚ **(Create icon)** in the *Icon Bar*.

5. In the pop-up window, select funding source **Type**.

6. Add a funding source **Name**. This list pulls from *Contacts>Organizations*, *Contacts>Individuals*, or *Grant Management*.

7. Add **Amount Committed**.

8. Click **Add**.

How To Edit a Commitment

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Commitments**.

4. Click the ✐ **(Edit icon)** next to a funding source name.

Name		Type
AmpliFund Training Grantor	✐ 🗑	Organization

5. In the pop-up window, update the information as necessary.

6. Click **Update**.

How To Delete a Commitment

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Commitments**.

4. Click the 🗑 **(Delete icon)** next to a funding source name.

Name		Type
AmpliFund Training Grantor	✏ 🗑	Organization

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

How To Add Received Income

Income are dollars received to the fund from external funding sources. The total dollars received are reflected in the *Total Income Received* field of the fund details.

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

Fund Details

3. Click the ➕ **(Add icon)** next to the *Total Income Received* amount.

Total Income Received ℹ	$2,500,000.00 ➕

4. In the pop-up window, select a funding source **Type**.

5. Add a funding source **Name**. This list pulls from *Contacts>Organizations, Contacts>Individuals,* or *Grant Management*.

6. Add **Amount Received**.

7. Select **Payment Date** (optional). This is the date the payment was received.

8. Select **Payment Method**.

9. Add **Payment Reference Number** (optional). This is a number that an external financial system may reference.

10. Add **Description** (optional).

11. Add **Unique Identifier** (optional).

12. Click **Save**.

--OR--

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Income**.

4. Click the ✚ **(Create icon)** in the *Icon Bar*.

5. In the pop-up window, select funding source **Type**.

6. Select funding source **Name**. This list pulls from *Contacts> Organizations, Contacts>Individuals,* or *Grant Management*.

7. Add **Amount Received**.

8. Add a **Payment Date** (optional). This is the date the payment was received.

9. Select a **Payment Method**.

10. Add **Payment Reference Number** (optional). This is a number that an external financial system may reference.

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

12. Click **Create**.

How To Edit Income

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Income**.

4. Click the ✏ **(Edit icon)** next to a funding source name.

Fund Source	∨	Date Received
AmpliFund Training Grantor	✏ 🗑	3/1/2017

5. In the pop-up window, update the information as necessary.

6. Click **Save**.

How To Delete Income

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Income**.

4. Click the 🗑 **(Delete icon)** next to a funding source name.

Fund Source	∨	Date Received
AmpliFund Training Grantor	✏ 🗑	3/1/2017

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

How To Export Income

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Income**.

4. Click the ⬀ **(Export icon)** in the *Icon Bar*.
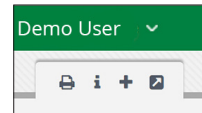
5. In the pop-up window, add a **File Name**.

6. Select an **Export File Type**.

7. Click **Export**.

Icons

🖶	Print
ℹ	Help
🔖	Save View
+	Create
✏	Edit
🗐	Copy
🗑	Delete

Creating Opportunities
For clients with the Competitive Award Management Module

Award opportunities for applicants may be created from a fund in *Fund Management*, or they may be added as a standalone opportunity in *Award Management*. When an opportunity is created from a fund, it is accessible through the fund, or *Award Management>Fund Opportunities*. For more information on opportunities, see the Competitive Award Management Guide.

How To Create an Opportunity from a Fund

A fund opportunity is a competitive award opportunity with program funding from organizations, individuals, grants, and/or funds. Many of the fields are optional on the Opportunity form so that information can be added at a later time. However, publishing and posting an opportunity without the necessary information is not recommended.

1. Open **Award Management>Fund Opportunities**.

2. Click the **+ (Create icon)** in the *Icon Bar*.

Opportunity Information

3. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

4. Add **Title**.

5. Add **Description** (optional).

6. Select **Fund Activity Category**. This list pulls from *Administration>Lists> Fund Activity Categories*.

7. Add **Category Explanation** or description (optional).

8. Select an **Opportunity Manager**. This list pulls from *Contacts>Staff*. Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity.

9. Select a **Posted Date**. This is the date a published fund opportunity will be available to applicants.

10. Select an **Archive Date**. This is the date a published fund opportunity will no longer be available to applicants.

11. Add a **Funding Opportunity Number** (optional). This is a reference number for the opportunity assigned by your organization.

12. Add a Catalog of Federal Domestic Assistance Number, or **CFDA Number** (optional).

13. Check the **Is Published checkbox** to publish the opportunity. A published opportunity will be available to applicants between the Posted and Archive Dates. We recommend that you only publish the opportunity after all changes to the opportunity have been made.

> Is Published ☐

> ❗ Note
>
> Once the opportunity has been created, you will be able to add funding sources to the *Total Program Funding*.

Funding Information

14. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

> ☑ Make Viewable to Applicants

Award Information

15. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

> ☑ Make Viewable to Applicants

16. Add **Award Ceiling** (optional). This is the maximum amount a single award recipient may receive.

17. Add **Award Floor** (optional). This is the minimum amount a single award recipient may receive.

18. Select the expected **Award Start Date** (optional).

19. Select the expected **Award End Date** (optional).

20. Add the **Expected Number of Awards** (optional).

21. Select **Matching Requirement**.

    a. If *Yes*, add **Cash Match Requirement** and **In-Kind Match Requirement** percentages (in decimal format).

Matching Requirement	Yes ▼
In-Kind Match Requirement	0.00 %
Cash Match Requirement	0.00 %

Submission Information

22. Uncheck the **Make Viewable to Applicants checkbox** to hide all information in the section to applicants.

☑ Make Viewable to Applicants

23. Select **Submission Timeline Type**.
    - **One-Time:** Applications will only be accepted for a specified timeframe
    - **Rolling:** Applications will continuously be accepted after specified date
24. Select **Submission Open Date**. This is the date and time that applications will be accepted.
25. Add **Submission Close Date** (for one-time submissions). This is the date and time that applications will no longer be accepted.
26. Select **Time Zone** for submission open and close times.
27. Add **Submission Timeline Additional Information** (optional).
28. Check the **Allow Multiple Applications checkbox** to allow an organization to submit multiple applications.

Eligibility Information

29. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

30. Select **Eligibility Type**.
    - **Public:** Opportunity appears on funder's opportunity list in the Applicant Portal
    - **Private:** Opportunity does not appear on funder's opportunity list in the applicant portal and can only be accessed by URL link
31. Select **Eligible Applicants**. These are organization types that can apply to the opportunity.
32. Add **Additional Eligibility Information** (optional).

Additional Information

33. Uncheck the **Make Viewable to Applicants checkbox** to hide information in the section to applicants.

☑ Make Viewable to Applicants

34. Add **Additional Information URL** (optional). This is a website link that may provide more information for applicants.

35. Add **Additional Information URL Description** (optional).

36. Click **Create**. This will also create a Public Link that can be used to access the opportunity on the Applicant Portal. The link will only be active for applicants when the opportunity has been published.

Public Link   https://gotomygrants.com/Public/Opportunities/details/xxxxxx-xxx-xxx-xxxxx-xx

Icons

🖶	Print
ℹ	Help
🔖	Save View
✚	Create
✏	Edit
💷	View Award
☑	Import

Creating Awards

Awards may be created from an opportunity (for clients with Competitive Award Management), a fund or as a standalone award. If an award is created from a fund, the fund will be listed as the award's funding source.

Lead Recipient Licenses

Lead recipient licenses allow a funder's award recipients to access their own AmpliFund license to manage the award they have been given. These licensees may then report their expenses and programmatic achievements to the funder through AmpliFund. Before an award can be created, the recipient organization must be added on *Administration>License Information>Lead Recipients tab*. AmpliFund clients with lead recipient licenses may save an award before activating an award and lead recipient license.

AmpliFund clients that do not have Lead Recipient Licenses may be create awards as a record of the award recipient and amount awarded. In this case, the Lead Recipient field will be optional and the Activate option will not be available.

How To Create an Award from a Fund

When an award is created through a fund, it is accessible through the fund, *Fund Management>Awards*, or *Award Management>Fund Awards*.

1. Open **Fund Management>Funds**.

2. Click a **fund name**.

3. Open the **Fund Management tab>Awards**.

4. Click the ✚ **(Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Recipient**. This list pulls from *Contacts>Organizations*.

6. Select a **Responsible Person** for the award. This list pulls from *Contacts>Staff*.

7. Add **Award Identification Number** (optional). This a reference number for an external system.

8. Add **Award Name** (optional). If no award name is provided, the name will default to "Recipient Name - Award."

9. Add **Awarded Date, Length of Award** in years and additional months, and

Start Date.

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

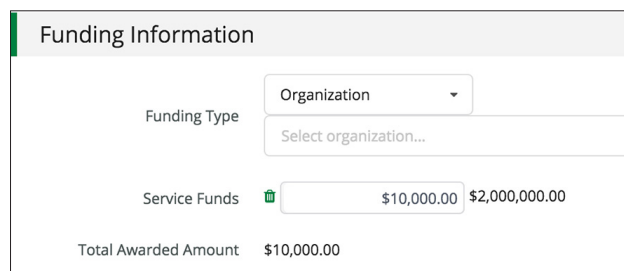11. Add a **Unique Identifier** (optional).

Funding Information

12. Add **award amount** from fund. The fund available amount is listed next to the award amount field.

13. Click **Create**.

How To Create a Standalone Award

1. Open **Fund Management>Awards**.

2. Click the ✚ **(Create icon)** in the *Icon Bar*.

3. In the pop-up window, select an award **Recipient**.

4. Select your organization's **Responsible Person** for the award (optional). This list pulls from *Contacts>Staff*.

5. Add an **Award Identification Number** (optional). This a reference number for an external system.

6. Add **Award Name** (optional). If no award name is provided, the name will default to "Recipient Name - Award."

7. Add **Awarded Date, Length of Award** in years and additional months, and **Start Date**.

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

9. Add a **Unique Identifier** (optional).

Funding Information

10. Select a **Funding Type** and **funding source**.

Funding Information		
Funding Type	Organization ▾	
	Select organization...	
Service Funds	🗑 $10,000.00	$2,000,000.00
Total Awarded Amount	$10,000.00	

11. Add **award amount** from funding source.

12. Click **Create**.

Icons

🖶	Print
ℹ	Help
🔖	Save View
➕	Create
✏	Edit
💰	View Award
☑	Import

Configuring and Activating Awards

Once you have created an award, you can add award details and settings. The award's Details page allows you to provide more information about the award and its budget, and allows you to set up task reminders. Once you have activated the award, the recipient will receive an email notification that includes an invite to AmpliFund to track and manage the award.

How To Configure Award Performance Plan Settings

1. Open **Fund Management>Awards**.

2. Click the 💰 **(View Award icon)** next to a lead recipient name.

Lead Recipient	⌄	Total Awarded Amount
Community Service Organization 💰 ✏		$200,000.00

3. Open the **Post-Award tab>Performance Plan Settings**.

Recipient Settings

4. Select **performance plan editing permissions** in the *Performance Plan Creation* dropdown. By default, both the funder (your organization) and the award recipient can edit performance plans.

> Performance Plan Creation
>
> [Recipient and Funder can edit ⇕]

5. Select **achievement editing permissions** in the Achievement Creation dropdown. By default, both the funder (your organization) and the award recipient can create achievements.

> Achievement Creation
>
> [Recipient and Funder can edit ⇕]

Goal Types

6. Select the **goals types** that will be available to the recipient. All goal types are selected by default.

7. Click **Save**.

How To Configure Award Budget Settings

1. Open **Fund Management>Awards**.

2. Click the 💵 **(View Award icon)** next to a lead recipient name.

3. Open the **Post-Award tab>Budget Settings**.

4. Click the ✎ **(Edit icon)** in the *Icon Bar*.

Recipient Settings

5. Select **budget editing permissions** in the *Budget Creation* dropdown. By default, both the funder and recipient can edit the budget.

6. Select **expense editing permissions** in the *Expense Creation* dropdown. By default, both the funder and recipient can create expenses.

Matching Information

7. Select **Match** requirements. If *Enabled* or *Required*:

   a. Select if **Match Percentage** should be defined as percentage of total grant budget or grant-funded amount only.

   b. Select **type of Default Cash Match**.

c. Add default **Cash Match Amount or Percentage**, as necessary.

Default Cash Match	Amount ▼
Cash Match Amount*	$0.00

d. Select **type of In-Kind Match for Personnel** line items.

e. Add default **In-Kind Match for Personnel** line items **Amount or Percentage**, as necessary.

Default In Kind Match Personnel	Amount ▼
In-Kind Match Amount Personnel*	$0.00

f. Select **type of In-Kind Match for Non-Personnel** line items.

g. Add default **In-Kind Match for Non-Personnel** line items **Amount or Percentage**, as necessary.

Default In Kind Match Non Personnel	Percentage ▼
In Kind Match Percent Non Personnel*	0.00 %

Indirect Cost Rate

8. Select if you will **Track Indirect Cost Rate**.

a. If *Yes*, add the **Rate Type**, **Indirect Rate** (in decimal format), **Start Date**, and **End Date**. To add additional rates, click the ✚ **(Add icon)**.

Rate Type	Indirect Rate	Start Date	End Date	
Provisional ▼	0.00000000 %	10/15/2018 📅	12/14/2019 📅	✚

Categories

9. Select a **budget category** and click **Add**. Repeat as necessary. Click the 🗑 **(Delete icon)** to remove.

Budget Categories	All Federal Categories ⬍	Add

10. Check the **Allow Recipient to Create Categories** checkbox if recipients will be able to create their own budget categories.

Benefits

11. Select how benefits will be added in the **Add Benefits By** dropdown.

- **Personnel line item:** Benefits can be added from and are attached to personnel line items

- **Benefit Type:** Benefits can be added as standalone line item type.

12. Select **Supported Benefit Types** and click **Add**. These are benefit types that will be available on the award. Repeat as necessary. Click the 🗑 **(Delete icon)** to remove.

13. Check the **Allow Recipient to Set Up Benefits** checkbox if recipients will be able to add their own benefit types.

14. Click **Save**.

How To Activate an Award

Prerequisite: The Performance Plan Settings and Budget Settings must be configured.

1. Open **Fund Management>Awards**.

2. Click the ✏ **(Edit icon)** next to a lead recipient name.

3. Update information as necessary.

Award Information

4. Select Payment Request Type.

- **Reimbursement:** Recipient will be reimbursed for expenses

- **Advance:** Recipient will be given payments in advance

5. Select **Budget Tracking Interval**. This is the frequency of budget reporting.

6. Select **Due Date for Budget Items**. This is the due date for budget reporting after the interval ends.

7. Select **Performance Tracking Interval**. This is the frequency of performance reporting.

8. Select **Due Date for Performance Items**. This is the due date for performance reporting after the interval ends.

⚠ Note

Risk is shown as Low, Medium, or High on the award Analytics page. If multiple areas are monitored, the highest risk will be shown.

Risk Definition

9. Check the **Monitor Reporting Risk checkbox** to show award reporting risk. Reporting risk is defined as days report is past due.

   a. If desired, update the **Low, Medium,** and **High** risk thresholds.

10. Check the **Monitor Budget Risk checkbox** to show award budget risk. Budget risk is defined as percent variance of expenses to budget.

    a. If desired, update the **Low, Medium**, and **High** risk thresholds.

11. Check the **Monitor Performance Risk checkbox** to show award performance risk. Performance risk is defined as percentage of goals on target.

    a. If desired, update the **Low, Medium**, and **High** risk thresholds.

12. Click **Activate**.

Icons

🖶 Print

ⓘ Help

🔖 Save View

➕ Create

✏️ Edit

💵 View Award

☑ Import

Active Awards

Once the recipient logs in to AmpliFund and accepts the award, the award becomes active. From the award Details page, you can view the Recipient Award Name, Recipient Grant Manager's contact information, and Recipient Description. You can also add amendments, view awarded amount history, and set default reminders for tasks, budget, and performance.

How To View an Award

1. Open **Grant Management>Grants Awarded**.

2. Click a **grant name**.

--OR--

1. Open **Fund Management>Awards**.

2. Click the 💵 **(View Award icon)** next to a lead recipient name.

Lead Recipient	⌄	Total Awarded Amount
Community Service Organization 💵 ✏️		$200,000.00

How To Edit an Award

1. Open **Grant Management>Grants Awarded**.

2. Click the ✏️ **(Edit icon)** next to a grant name.

Award Name	⌄	Recipient	⌄	Funding Source
Combatting Children's Hunger - Award ✏️ 🗑		Community Service Organization		Service Funds

⚠️ **Note**

Some of the information can only be edited by the recipient.

3. Update information as necessary.

4. Click **Save**.

--OR--

1. Open **Fund Management>Awards**.

2. Click the ✏️ **(Edit icon)** next to a lead recipient name.

Lead Recipient	⌄	Total Awarded Amount
Community Service Organization 💵 ✏️		$200,000.00

⚠️ **Note**

Some of the information can only be edited by the recipient.

3. Update information as necessary.

4. Click **Save**.

Fund Tools

The *Tools tab* allows users to create and send email messages, create and assign tasks, add documents, and create notes attached to the fund record.
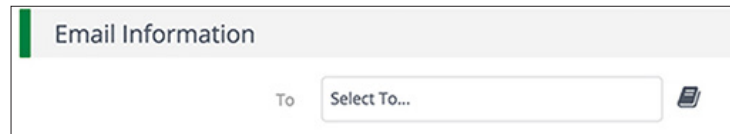
AmpliFund®

Icons

🖶 Print
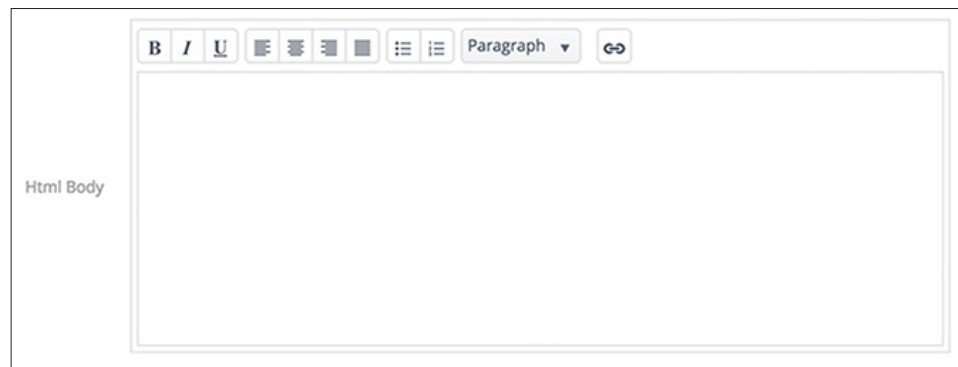
ℹ Help

➕ Create

Email Manager

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

How To Create an Email

1. Open an **object record**.

2. Open the **Tools tab>Email Manager**.

3. Click the ➕ **(Create icon)** in the *Icon Bar*.

4. In the *To* field, select the **email recipient**. This list pulls from *Contacts>Individuals* and *Contacts> Staff*.

   Email Information

   | To | Select To... |

5. In the *CC* and *BCC* fields, select **additional recipients** (optional). These lists pull from *Contacts>Individuals* and *Contacts>Staff*.

6. Add the message **Subject**.

7. In the *Html Body* field, add the **email message**.

   Html Body

8. Click **Select files...** to add a file from your computer (optional).

9. In the *Attachments* dropdown, select files from the *Documents* module to attach (optional).

   Attachments   Public

10. Click **Send**.

How To View an Email

1. Open an **object record**.

2. Open the **Tools tab>Email Manager**.

3. Hover over an **subject name** to show the dropdown menu arrow.

From		Subject
StreamLink Software	⌄	Email ▾
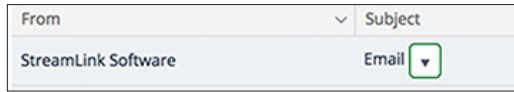
4. Click the **dropdown arrow**.

5. Select **View**.

Icons

🖶 Print

ⓘ Help

➕ Create

✏ Edit

🗑 Delete

☑ Mark as Complete

❗ Note

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

Tasks

From the *Tasks* list, Organizational Administrators, Department Admin, and Object Managers can create and assign tasks to other staff that will be connected to the object 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 an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click a **task name**.

How To Add a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the ➕ **(Create icon)** in the *Icon Bar*.
4. Add the task **Name**.
5. Select the **Task Type**.
6. Add the task **Description** (optional).
7. Select the **Task Status**.
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
9. Select **Additional Recipients** (optional). This list pulls from *Contacts>Staff*. Additional Recipients will receive email reminders and can view the task in *Activity>Tasks*. They can also mark the task as complete.
10. Select a **Due Date**.
11. 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.
12. Click **Save**.

How To Edit a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.

3. Click the ✏ **(Edit icon)** next to a task name.

> Scope of Work ✏ 🗑 ☑

4. Update the information as necessary.

5. Click **Save**.

How To Delete a Task

1. Open an **object record**.

2. Open the **Tools tab>Tasks**.

3. Click the 🗑 **(Delete icon)** next to a task name.

> Scope of Work ✏ 🗑 ☑

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

How To Mark a Task as Complete

1. Open an **object record**.

2. Open the **Tools tab>Tasks**.

3. Click the ☑ **(Mark as Complete icon)** next to a task name.

> Scope of Work ✏ 🗑 ☑

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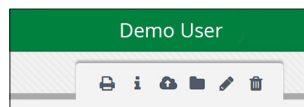
Icons

🖶   Print

ℹ   Help

➕   Create

Documents

Within Documents, users can upload and view object-specific files and folders. Once an object record has been created, AmpliFund automatically creates an record folder that is accessible from the object record or from the *Documents* module.

To learn more about document management, see the [AmpliFund Document Management Guide](#).

How To Upload a Document

1. Open an **object record**.

2. Open the **Tools tab>Documents**.

3. Click the ☁ **(Upload Document icon)** in the *Icon Bar*.

4. In the pop-up window, click **Choose a file** to upload file(s) from your computer.

5. Click **Upload**.

How To View a Document

1. Open an **object record**.

2. Open the **Tools tab>Documents**.

3. Click a **file name.**

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
ℹ 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**.
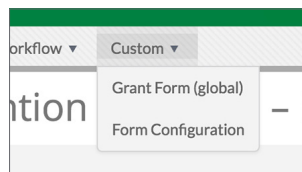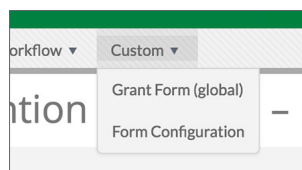

3. Click the ✚ **(Add icon)** in the *Icon Bar*.
4. Add information as necessary.
5. Click **Create**.
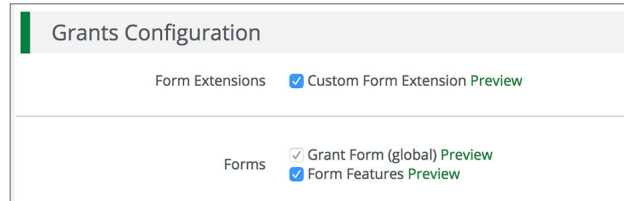
How To Add Custom Forms and Form Extensions to an Object

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

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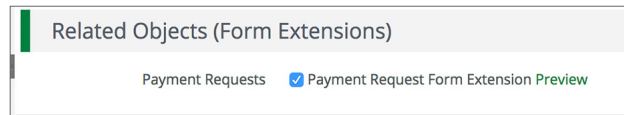2. Open the **Custom tab>Form Configuration**.

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.

> ### 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.

> ### Related Objects (Form Extensions)
>
> Payment Requests ☑ Payment Request Form Extension Preview

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**.

> orkflow ▼   Custom ▼
>
> ation   Grant Form (global)
>   Form Configuration   – F

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
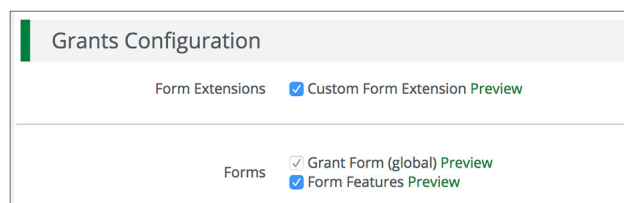
Related Objects (Form Extensions)

4. Uncheck the **form extension checkbox** to remove the form extension from a secondary object on the record.
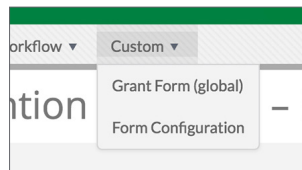
Related Objects (Form Extensions)

Payment Requests ☑ Payment Request Form Extension Preview
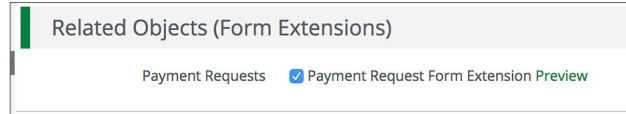
5. Click **Save**.

Appendix

Goal Types

Goals may be quantified using six different types. The goal types allow staff to track progress based on the planned item.

Milestone
Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the responsible staff member. An example of a milestone goal is "Create and send Q1 Staff Survey."

Narrative
Narrative goals are question and answer goals. Responsible staff members may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"

Numeric
Numeric goals are a discrete number to achieve. As units of the goal are completed, staff may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.

Percent Achieved
Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.

Percent Change
Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting absentee rate of 10%, and a goal absentee rate of 3%.

Reimbursement
Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled "Add as budget item." If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.