



AmpliFund 




AmpliFund Core Series Training 4:

Budget Creation and Expense Entry

Agenda

- Welcome and Introductions
- Master Data Revisit
- Functionality
 - Budget Settings
 - Budgets
 - Expenses
 - Tracking Periods
 - Reports & Custom Views
- Key Takeaways & Action Items
- Question & Answer

Core Series Overview

- Training 1: Introduction to AmpliFund and Research
- Training 2: Grants Overview
- Training 3: Performance Plan Creation and Achievement Entry
-  • Training 4: Budget Creation and Expense Entry
- Training 5: Master Data

Master Data Revisit

Setting up master data elements that have a major role in grant budget creation:

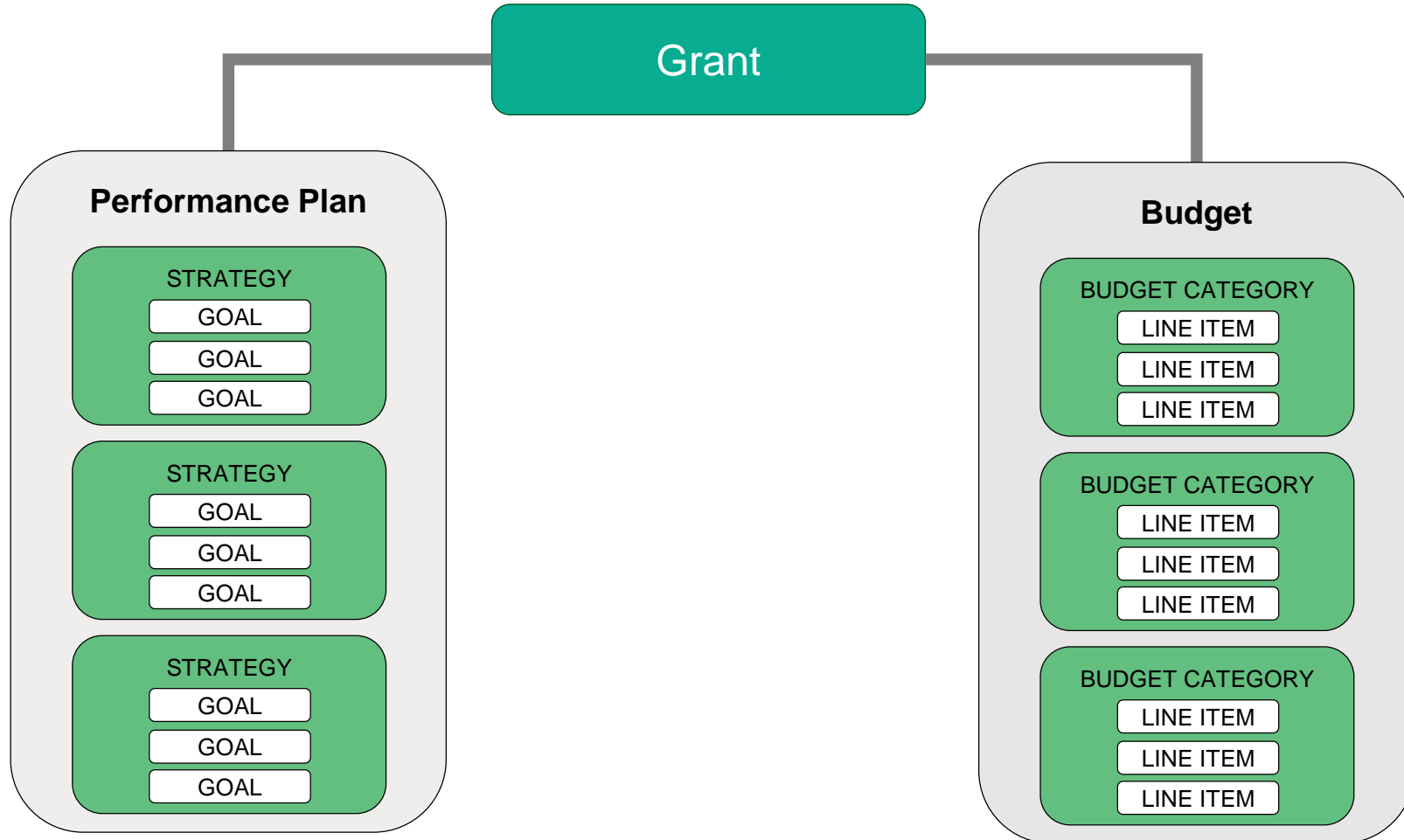
- **Staff**
 - People at your organization who can receive emails from AmpliFund and may be assigned responsibility for items
 - Compensation records associated with assigning staff to personnel line items
- **Budget Categories**
 - Serve as a mechanism to group together line items within a grant's budget and are required in order to build out budget line items
- **Benefit Types**
 - Non-wage compensation provided to staff in addition to their normal wages or salaries
- **GL Accounts**
 - Set-up to facilitate the mapping of a grant's actual expenses to its budget line items

Master Data Elements

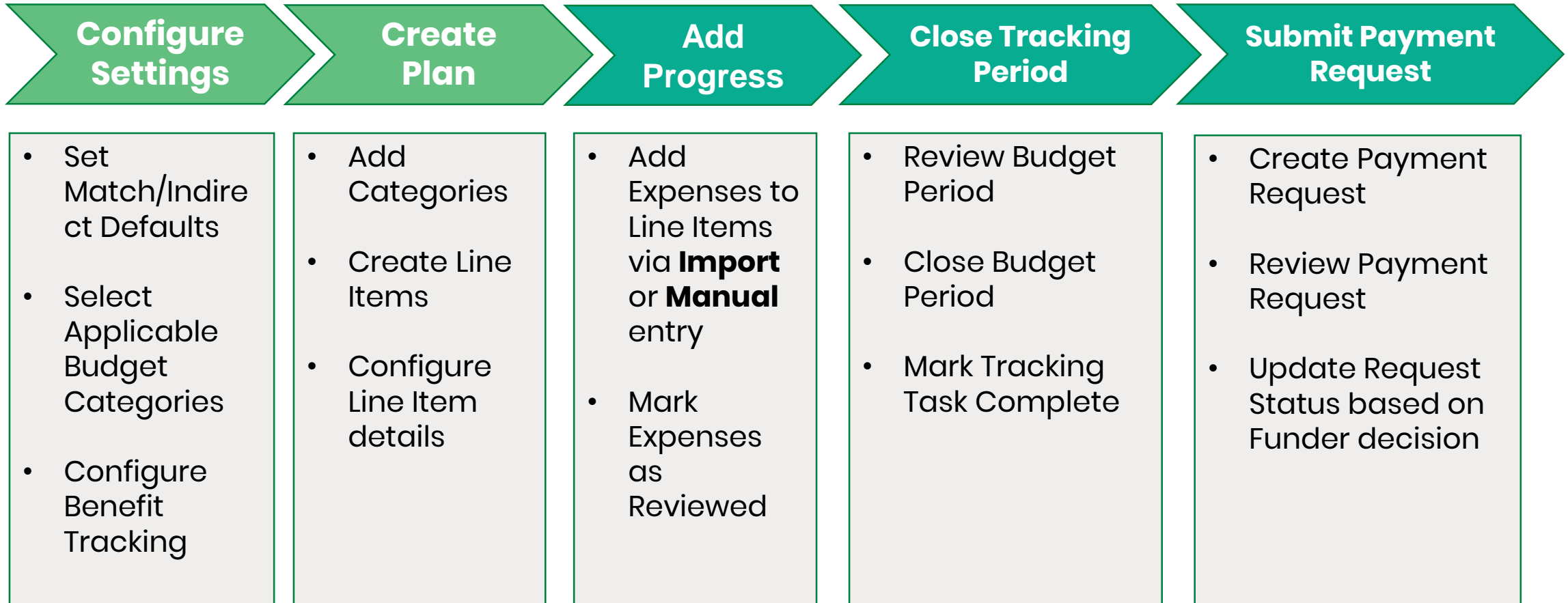
Data Element	Grants	Performance Plans	Budgets / Expenses
Organizations	✓		
Individuals			
Staff	✓	✓	✓
Compensation			✓
Subjects	✓		
Budget Categories			✓
Benefit Types			✓
Departments	✓		
GL Accounts			✓

Grant Overview

Plan Budget and Performance



Budget Plan Overview



Tracking Period frequency is set on the **Grant Settings** page and may be: Monthly, Quarterly, Semi-Annually, or Annually

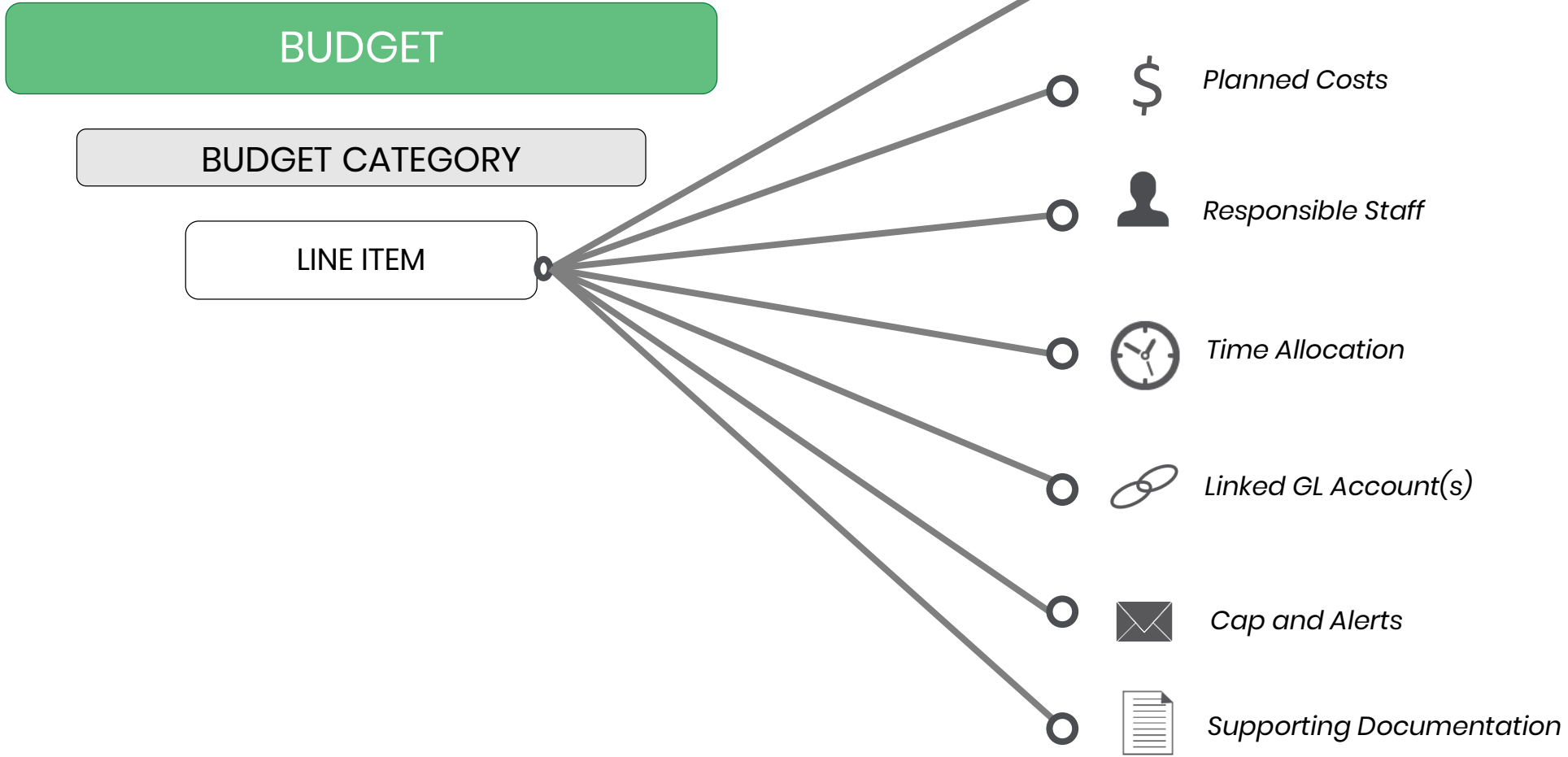
Budget Settings

Reflect funder-specific requirements per grant:

- Matching
 - Cash
 - In-kind
- Indirect Cost
- Budget Categories
- Benefit Types

Budget Management: Line Items

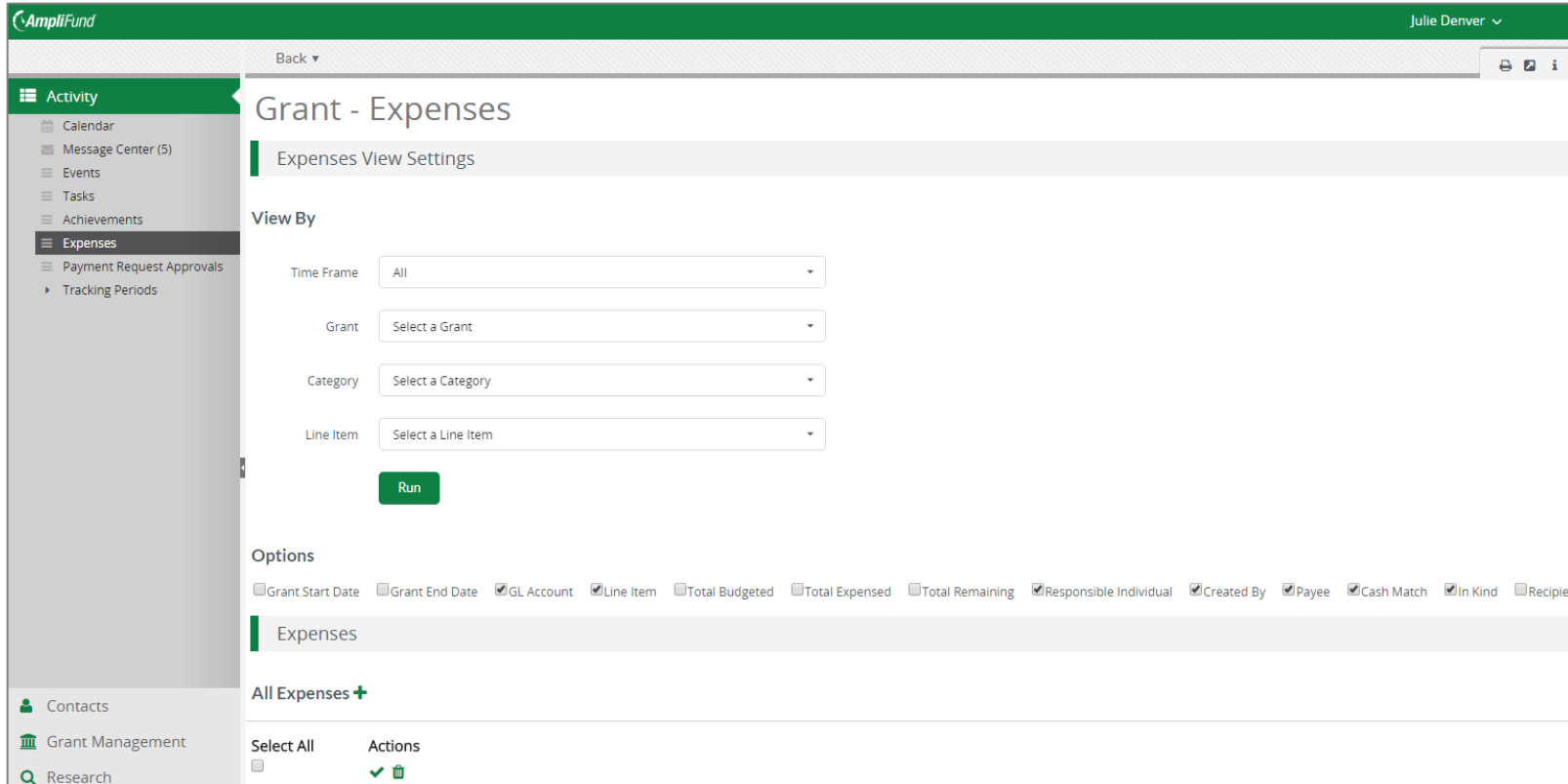
Manage Budget Line Items



Activity Center

Page	Description
Calendar	Every user's homepage; each user can view items assigned to them on the calendar
Message Center	Provides access to messages sent through AF
Events	Important dates in a grant's lifecycle as entered on a grant details page; events do not require any action to be taken; they simply serve as reminders
Tasks	Tasks track the completion of important grant management-related responsibilities that are not achievements or expenses
Achievements	Progress accomplished against a planned performance plan goal
Expenses	Tracks dollars spent against a planned grant budget line item. Expenses are added towards the defined grant budget line items
Tracking Periods	Segmented periods of a grant, typically corresponding to funder reporting requirements

Budget Management: Expenses



The screenshot displays the AmpliFund web application interface for managing expenses. The top navigation bar shows the user's name as Julie Denver. The left sidebar contains a menu with 'Activity' selected, and sub-items including Calendar, Message Center (5), Events, Tasks, Achievements, Expenses, Payment Request Approvals, and Tracking Periods. The main content area is titled 'Grant - Expenses' and includes a 'Back' button. Below the title is the 'Expenses View Settings' section, which contains a 'View By' section with four dropdown menus: Time Frame (set to 'All'), Grant (set to 'Select a Grant'), Category (set to 'Select a Category'), and Line Item (set to 'Select a Line Item'). A green 'Run' button is positioned below these filters. The 'Options' section below the filters includes a row of checkboxes for various data points: Grant Start Date, Grant End Date, GL Account (checked), Line Item (checked), Total Budgeted, Total Expensed, Total Remaining, Responsible Individual (checked), Created By (checked), Payee (checked), Cash Match (checked), In Kind (checked), and Recipient. Below the options is a section titled 'Expenses' with a sub-header 'All Expenses +'. At the bottom of this section, there are 'Select All' and 'Actions' buttons, with the 'Actions' button showing a green checkmark and a trash icon.

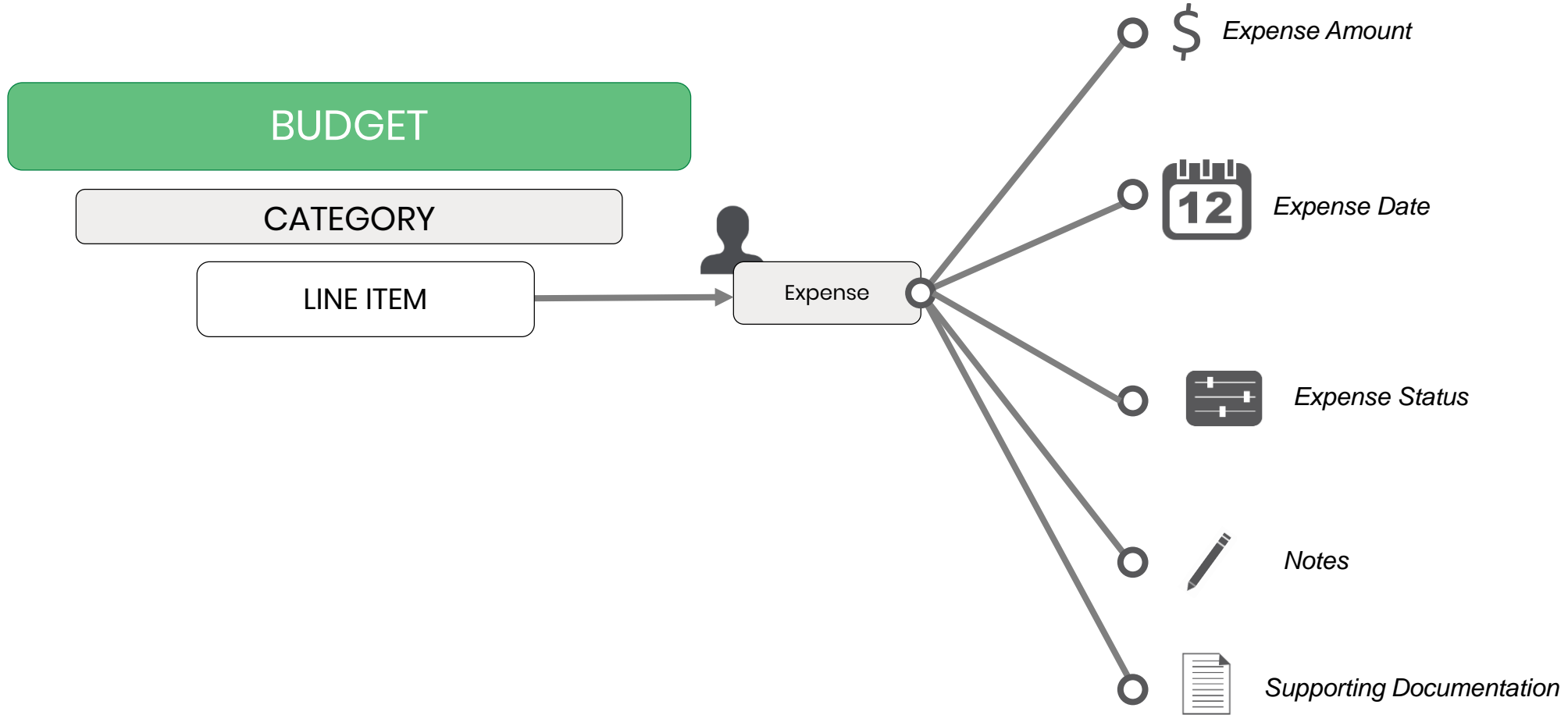
Activity → Expenses

Expenses are progress marked against budget line items

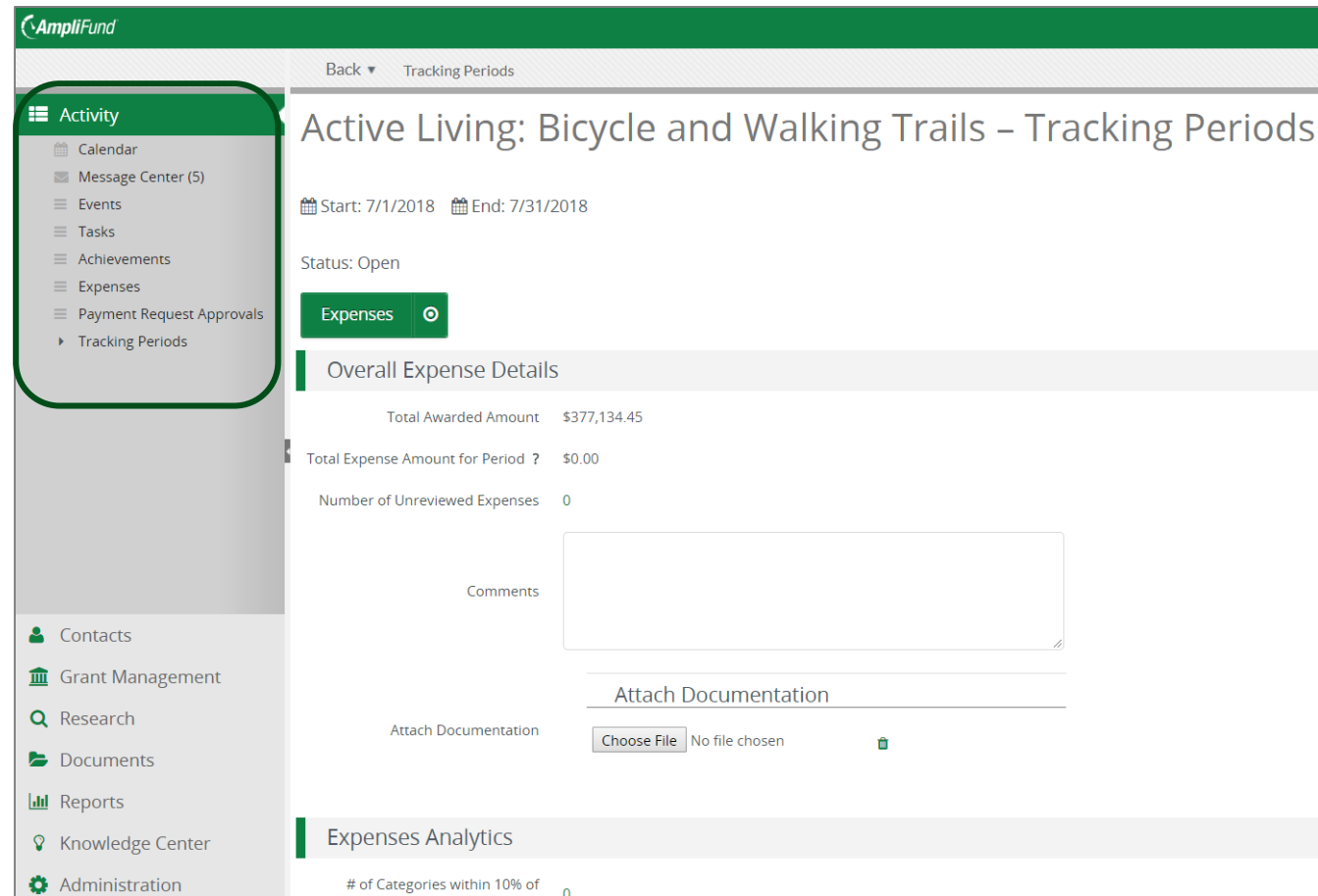
- View all expenses against a grant budget, specific grant category or line item
- Manually add new expenses to a budget line item

Budget Management: Expenses

Track Expenses



Tracking Periods



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Back Tracking Periods

Activity

- Calendar
- Message Center (5)
- Events
- Tasks
- Achievements
- Expenses
- Payment Request Approvals
- Tracking Periods

Contacts

Grant Management

Research

Documents

Reports

Knowledge Center

Administration

Active Living: Bicycle and Walking Trails – Tracking Periods

Start: 7/1/2018 End: 7/31/2018

Status: Open

Expenses

Overall Expense Details

Total Awarded Amount	\$377,134.45
Total Expense Amount for Period ?	\$0.00
Number of Unreviewed Expenses	0

Comments

Attach Documentation

Attach Documentation Choose File No file chosen

Expenses Analytics

of Categories within 10% of 0

Activity → Tracking Periods

Tracking Period offer the ability to review all expenses submitted within a period and closeout

- Analytics provide metrics of planned line items versus actual expenses

Reports and Configurable Views

Post-Award Reports	Description
Post-Award Status	Overview of the entire grant portfolio including spend down percent and program performance by percent
Grant Budget Variance	Provides a grant's variance between the planned grant budget and submitted expenses for a specified time period
Grant Expense Detail	Provides visibility into expenses entered against a specified grant

Configurable Views: Views provide an alternative method to configure data in a meaningful way to the user. Views can be saved for future use or exported for further manipulation.



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AmpliFund In-Product Review

www.gotomygrants.com

Key Takeaways

- Ensure relevant master data elements exist in AmpliFund
- Lifecycle of Budget Line Items
 - Understand creation
 - Marking progress against Line Items with Expenses
 - Closeout: Tracking Periods (Payment Requests)
- Reporting against the Budget

Action Items to Complete

- Update Budget Settings including assigning correct Budget Categories
- Create a Budget with multiple Categories and Line Items



AmpliFund



Question & Answer

Post Implementation Support

Submit a support ticket:

support@amplifund.Zendesk.com

Visit the support portal:

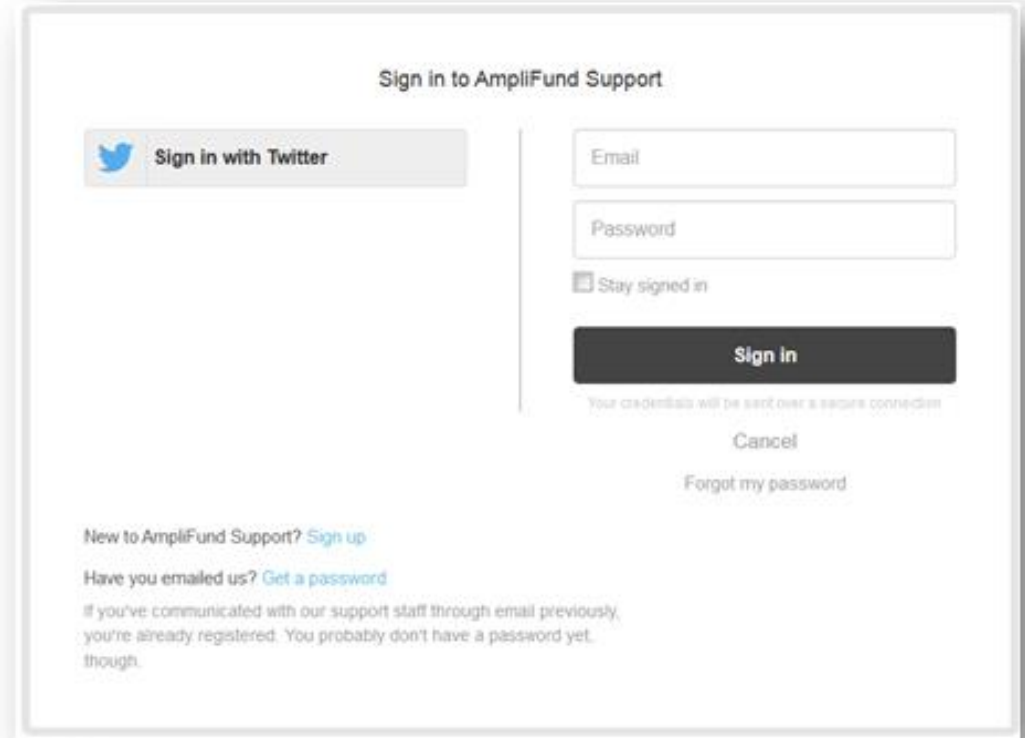
<https://amplifund.zendesk.com>

Supported Browsers:


- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Microsoft IE 11 +
- Apple Safari 10+

AmpliFund Support Site

1. Go to <https://amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign Up** button
7. A welcome email from support@amplifund.zendesk.com will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

Stay signed in

Sign in

Your credentials will be sent over a secure connection

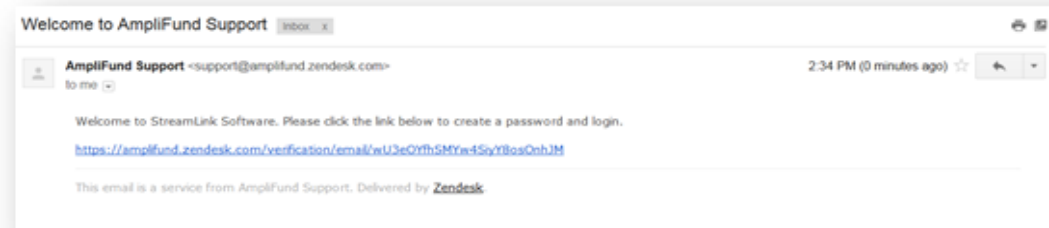
Cancel

[Forgot my password](#)

New to AmpliFund Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.



AmpliFund Support Site

AmpliFund

Have a question about AmpliFund? Search our support site.

- Release Notes**
Weekly announcement of enhancements, updates, and fixes in AmpliFund
- User Guides**
AmpliFund User Guides and Quickstart Guides for download
- Instructions**
Step-by-step instructions on using AmpliFund's features
- Upcoming Training and Videos**
Live training events and videos on how to use AmpliFund
- Import Templates**
Excel templates for importing data into AmpliFund
- FAQs**
Frequently Asked Questions about using AmpliFund
- Submit a Ticket**
Still need help? Submit a request to our help desk.

Reference Materials & URLs

Reference Materials

- Contact Management Guide
- Grant Management Guide
- Administration Guide
- Security Roles Matrix

AmpliFund URLs

- www.gotomygrants.com
- <https://amplifund.zendesk.com>