



AmpliFund 



AmpliFund Core Series Training 1:

Introduction to AmpliFund and Research

Agenda

- Welcome and Introductions
- Core Series Overview
- Functionality
 - AmpliFund Overview
 - Navigation Elements
 - Contacts and Users
 - Administrative Capabilities
 - Knowledge Center
 - Research
- Key Takeaways and Action Items
- Question and 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

Pre-Award Features



- Research Capabilities*
 - New funding opportunity alerts
 - Updated daily
 - Save search criteria
- Contact and Portfolio Management
- Submission Performance and Budget Planning
- Activity and Task Management

*Add-on Module

Post-Award Features



- Performance and Budget Tracking
 - Track achievements against objectives
 - Track expenses against line items
- Reporting Capabilities
 - Prebuilt/configurable reports
 - Run for a specific date range
 - Export out of AmpliFund

Navigation Elements

The screenshot displays the AmpliFund user interface. At the top, a green header bar features the AmpliFund logo on the left, a user profile dropdown for 'Julie Denver' in the center, and an options toolbar on the right containing icons for print, information, calendar, and home. A left navigation sidebar is highlighted with a green border and a circled '1', listing various menu items such as Activity, Calendar, Message Center (81), Events, Tasks, Workflow, Achievements, Expenses, Timesheets, Timesheet Approvals, Payment Request Approvals, Tracking Periods, Reporting Periods, Contacts, Grant Management, Research, Project Management, Documents, Reports, Knowledge Center, and Administration. The main content area shows a calendar for August 2019 with a legend for 'Past Due' (red), 'Complete' (grey), and 'Due' (green) items. A circled '2' is positioned above the user dropdown, and a circled '3' is positioned above the options toolbar.

1. **Left Navigation** – shows on every page
2. **User Navigation** – dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal, and logout
3. **Options Toolbar** – displays icons to perform functions available on the current page, icons vary based on page

Contacts

Contacts

Organizations
External entities



Grantors,
vendors, etc.

Individuals
External
Contacts



Grantor contacts,
vendors, etc.

Staff
Internal
Contacts



Grant managers, grant
writers, program
managers, etc.

AmpliFund		Back ▾	
Drag a column header and drop it here to group by that column			
Name		Primary Email Address	
American Musicological Society			
AmpliFund Training: Grantee			
Arts Council			
Centers for Disease Control - NCCDPHP			
Department of Homeland Security - FEMA			
Economic Development Administration (EDA)			
Interact for Health		Info@interact.net	
National Foundation on the Arts and the Humanities			
National Science Foundation			
Ohio Development Services Agency			
Salud			
Susan G. Komen Northwest Ohio			

Administrative Capabilities

- System Administration
 - Activity Log
- Manage System Security
 - User Roles and Invitations
 - Department
- Review License Information
- Configure Account Settings
- Define Lists
 - Subjects
 - Budget Categories
 - Benefit Types
 - GL Accounts

Introduction to Master Data

- Organizations
- Individuals
- Staff
- Subjects
- Budget Categories
- Benefit Types
- Departments
- GL Accounts

Master Data Elements can be entered into AmpliFund either **manually** or via **import** process. Import will be covered in the **Master Data training session**.

Master Data Elements

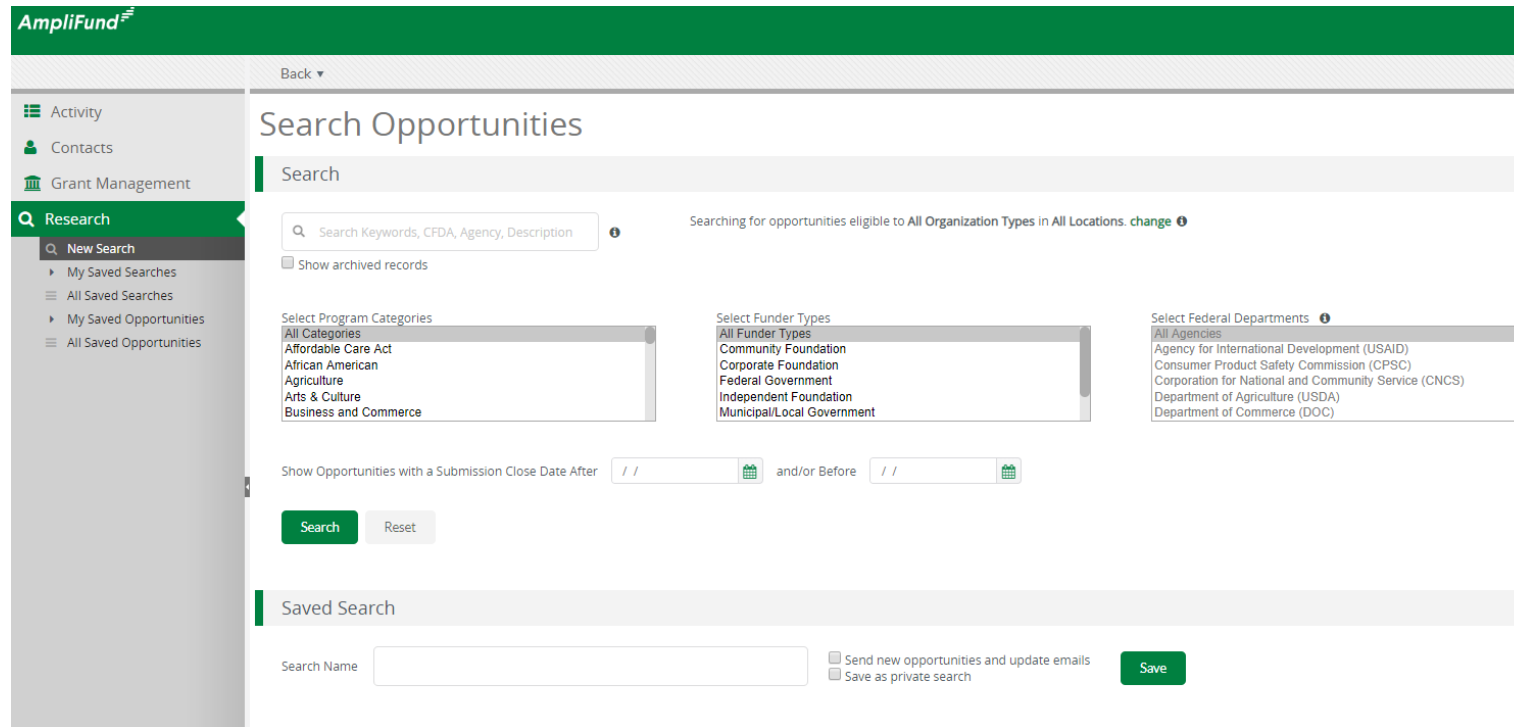
Data Element	Description
Organizations	Organizations include any entity whose contact information you want to capture in your account. The organizations list includes your funders, vendors, and partner organizations.
Individuals	Individuals are people at external organizations with information in your account. This includes contacts at your funders, vendors, and sub-recipients if applicable.
Staff	Staff are people at your organization who can receive emails from AmpliFund and may be assigned responsibility for items.
Subjects	Subjects provide a means to tag a grant record with key words, making your entire grant portfolio easier to filter. A grant may be linked to as many subjects as desired.
Budget Categories	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	Benefit Types include various kinds of non-wage compensation provided to staff in addition to their normal wages or salaries.
Departments	Departments refer to internal departments or programs at your organization.
GL Accounts	GL Accounts in AmpliFund are 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			✓

AmpliFund Research is an add-on module

- Filter capabilities on multiple criteria
- Ability to save searches
- Option to receive email notifications on saved searches
- Import from AmpliFund Research into Grants list



The screenshot displays the AmpliFund Research interface. At the top, there is a green header with the AmpliFund logo and a 'Back' button. A left sidebar contains navigation options: Activity, Contacts, Grant Management, and Research (highlighted). Under Research, there are links for 'New Search', 'My Saved Searches', 'All Saved Searches', 'My Saved Opportunities', and 'All Saved Opportunities'. The main content area is titled 'Search Opportunities' and features a search bar with the placeholder 'Search Keywords, CFDA, Agency, Description'. Below the search bar, there are three filter sections: 'Select Program Categories' (listing All Categories, Affordable Care Act, African American, Agriculture, Arts & Culture, Business and Commerce), 'Select Funder Types' (listing All Funder Types, Community Foundation, Corporate Foundation, Federal Government, Independent Foundation, Municipal/Local Government), and 'Select Federal Departments' (listing All Agencies, Agency for International Development (USAID), Consumer Product Safety Commission (CPSC), Corporation for National and Community Service (CNCS), Department of Agriculture (USDA), Department of Commerce (DOC)). There are also date pickers for 'Show Opportunities with a Submission Close Date After' and 'and/or Before'. At the bottom, there is a 'Saved Search' section with a 'Search Name' input field, checkboxes for 'Send new opportunities and update emails' and 'Save as private search', and a 'Save' button.



AmpliFund



AmpliFund In-Product Review

www.gotomygrants.com

Key Takeaways

- Ensure all grantor records have been added to the Organization List
- Set up all relevant Departments
- Ensure all related Staff records have been created
- Convert Users for those who need immediate access to the system

Action Items to Complete

- Log into AmpliFund and create a Contact Record
- Research a Grant and save a custom search

How to Prepare for the next session

- Find a Grant to enter into your AmpliFund account
- Ensure you have a basic timeline of dates and requested/awarded amounts
- Ensure Organization and Staff records have been created



AmpliFund



Question & Answer

Post Implementation Support

Submit a support ticket:

support@amplifund.zendesk.com

Visit the support portal:

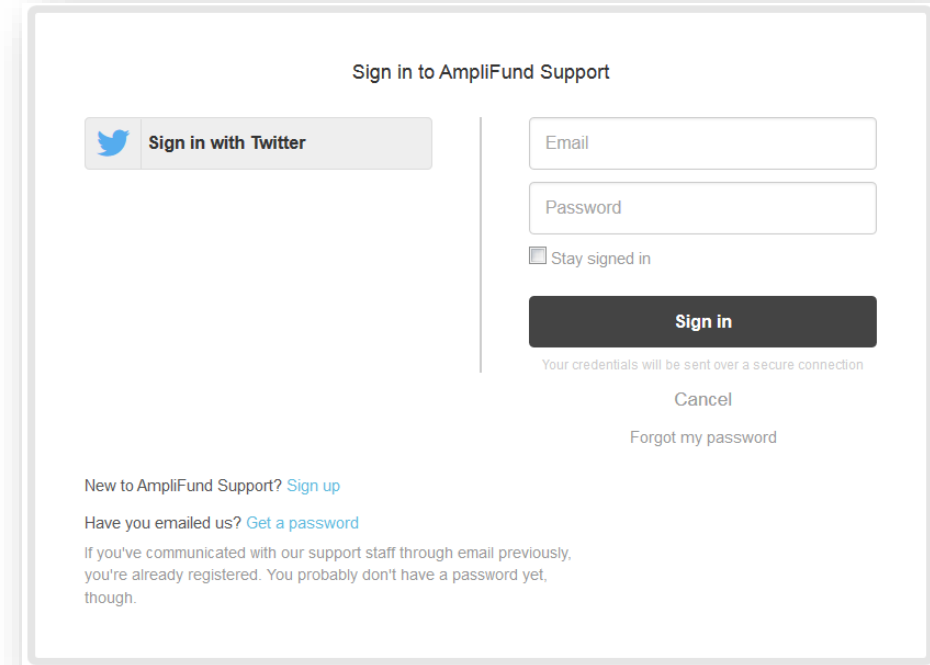
<https://amplifund.zendesk.com>

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@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

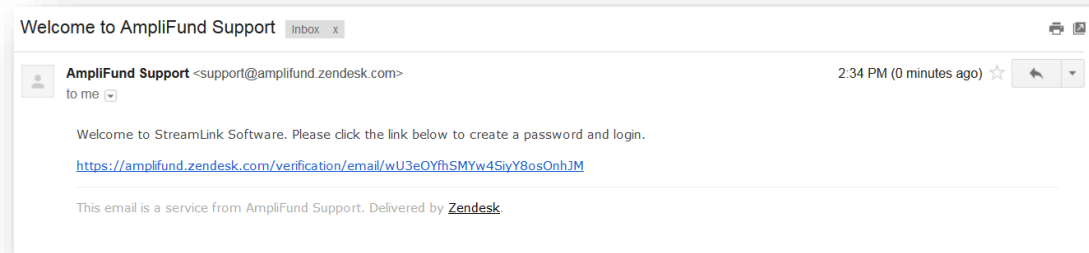
Cancel

[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

- User Interface Navigation Guide
- Contact Management Guide
- Administration Guide
- Security Roles Matrix

AmpliFund URLs

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