



AmpliFund[≡]




AmpliFund Core Series Training 2:

Grants Overview

Agenda

- Welcome and Introductions
- Master Data Revisit
- Functionality
 - Grant Details
 - Tools
 - Activity Center
 - Reports and Custom Views
- 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

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

- **Organizations**
 - Includes your grantors/funders, vendors, and partner organizations
- **Staff**
 - People at your organization who can receive AmpliFund emails and may be assigned responsibility for items
- **Subjects**
 - Provides a means to tag a grant record with key words
- **Departments**
 - Internal departments or programs at your organization, related to security roles and settings

Master Data Elements

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

Grant Details

- **Add basic information such as:**
 - Grant Name
 - Grantor Organization
 - Key Grant Dates
 - Award Status
 - Key Staff Involved
 - Pre- and Post- Award Budgets
 - Grant Financial Code
 - Tracking Periods

The screenshot displays the AmpliFund interface. On the left is a navigation sidebar with 'Grant Management' selected. The main content area shows 'Grant Information and Status' for a grant named 'Active Living: Bicycle and Walking Trails'. A 'Tools' dropdown menu is open, listing 'Email Manager', 'Tasks', 'Documents', and 'Notes'. The grant details are as follows:

Name	Active Living: Bicycle and Walking Trails
Grantor	Interact for Health
Award Type	Grant
Award Status	Approved
Awarded Amount	\$400,000.00
Total Match	\$25,000.00
Grant Budget	\$425,000.00
Total Expenses	\$1,500.00
Payments Requested	\$0.00
Payments Received	\$0.00
Outstanding Payment Requests	\$0.00

- Email Manager
- Tasks
- Documents
- Notes

Tools are available on several record types:

Organizations
Individuals
Staff
Grants

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

Reports and Configurable Views

Pre-Award Reports	Description
Pre-Award Status	Overview of the entire grant portfolio including the grant solicitation success rate

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.

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

- Collect required Grant information prior to creating a new Grant
- Ensure relevant master data elements exist in AmpliFund
- Grant details populate other areas of the system, like the Calendar, Events, and Tasks

Action Items to Complete

- Create a grant record on your own
- Create and save a view
- Run Pre-Award Award Status Report

How to Prepare for the next session

- Performance Planning and Deliverables
 - What is it you said you were going to do?
- Who is involved with your Performance Plans?



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Question & Answer

Post Implementation Support

Submit a support ticket:

support@amplifund.Zendesk.com

Visit the support portal:

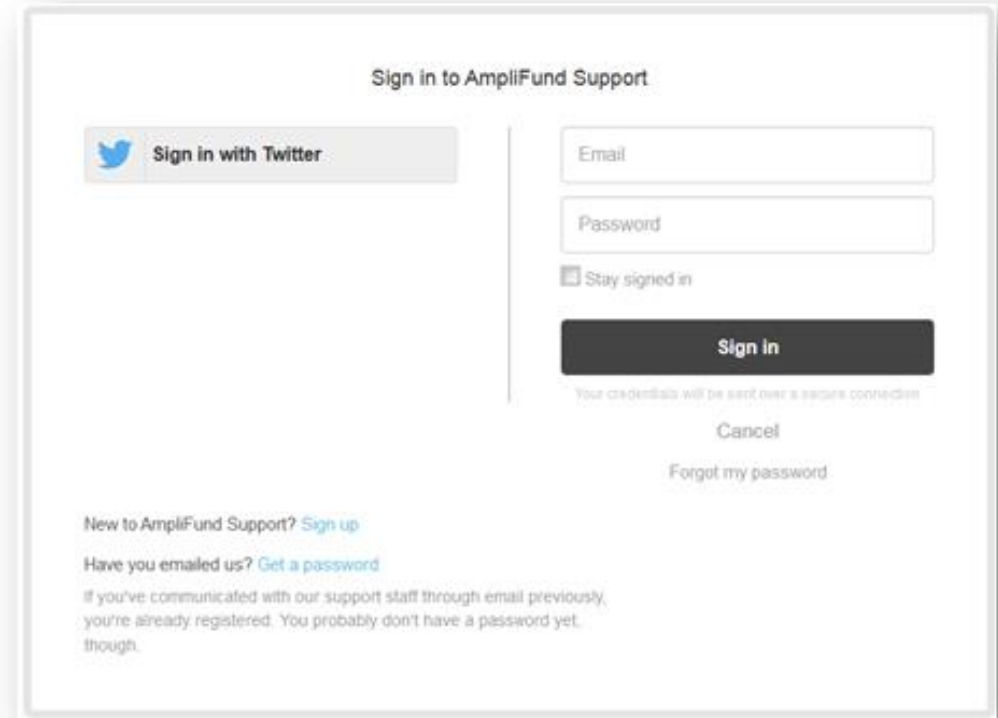
<https://amplifund.zendesk.com>

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

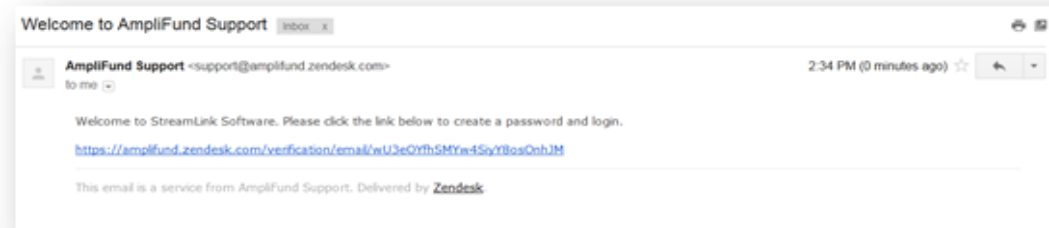
[Cancel](#)

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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
- Grant Management Guide
- Document Management Guide
- Administration Guide

AmpliFund URLs

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