AmpliFund

AmpliFund User Interface Navigation

Contents

Navigation Overview

The major AmpliFund navigational elements are described below. Users will see these common navigational elements throughout AmpliFund.

Navigational Element		Element Details
1)	Left Navigation Panel	From the **Left Navigation Panel**, users are able to access all major functional areas of AmpliFund. The panel can be collapsed to show just the navigation icons. Hovering over the icon will show the module name. Clicking the icon or module name will show the module's menu.
2)	User Navigation Menu	From the **User Navigation Menu**, a user can access account information, change password, access the Message Center, submit a support ticket, view AmpliFund Terms and Conditions, and Logout of AmpliFund. To access this menu, click on the drop-down arrow next to your name.
3)	Icon Bar	The icons available in the **Icon Bar** are dynamic based on the page a user is viewing. Mouse over the icons to see a description of the icon's function.
4)	Page Navigation	The **Page Navigation** feature allows user to adjust the number of items per page. Use the arrows to flip between pages.

Context-Specific Tabs

While working in AmpliFund, users will see **Context-Specific Tabs** displayed across the top of the main AmpliFund window. The example below shows tabs that display when accessing an **Organization** record in the **Contacts** area of AmpliFund. Some of the **Context-Specific Tabs** will include dropdown lists that provide access to additional AmpliFund functionality. In this example, **Contact Info, Relationships, and Tools** are all dropdown menus that provide access to additional functionality.
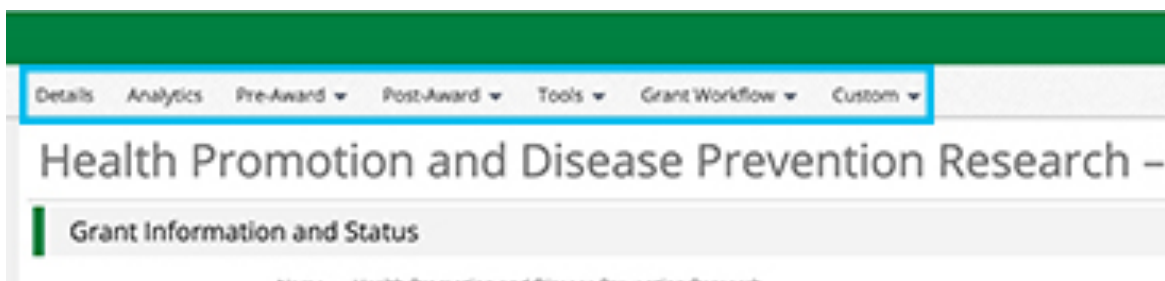

AmpliFund Page Views

Page Views are an extension of *AmpliFund Reports Module*. **Page Views** enable users to modify the page grid by sorting data, applying filters, adding columns, and applying grouping. Views can be saved.

➲ **To access the Page View modification options:**

1. Click the ⌄ **(Menu icon)** next to a column name.
2. Select **Sort Ascending**, **Sort Descending**, **Columns**, or **Filters**.

Page Modification Options Example: *Grant Management → All Grants Page View*
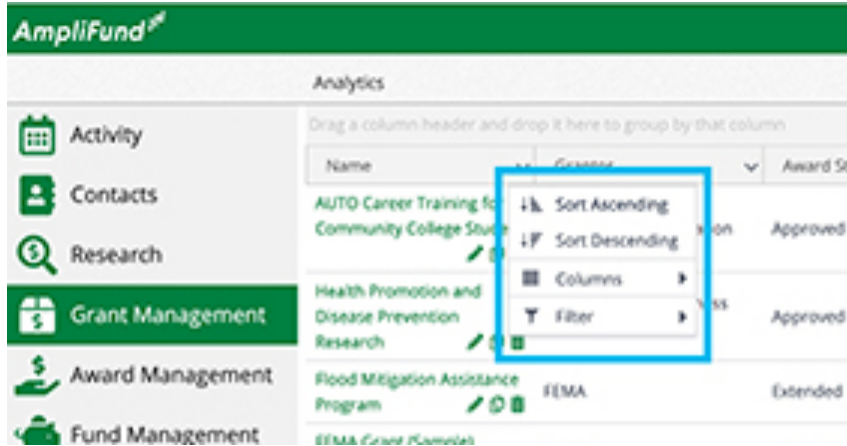
Sorting a Page View

Columns on a **Page View** can be sorted in either ascending or descending order.

⮑ **To sort data on a Page View:**

1. Click the **column name** to toggle between ascending, descending, or remove sort order.

   -- OR --

1. Click the ⌄ **(Menu icon)** next to a column name.
2. Select **Sort Ascending** or **Sort Descending.**

Adding and Removing Columns in a Page View

The default setup for a **Page View** can be modified by adding or removing columns in the view.

⮑ **To add or remove columns in a Page View:**

1. Click the ⌄ **(Menu icon)** next to a column name.
2. Hover over **Columns** in the dropdown menu.
3. Check the **checkboxes** next to the column names you want to view and uncheck the **checkboxes** you want to remove.

Note: You can reorder the columns in view by dragging and dropping the column headers in the desired order.

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Applying Filters to a Page View

Filters can be applied to a **Page View**.

➲ **To add filters to a Page View:**

1. Click the ﹀ **(Menu icon)** next to a column name.
2. Hover over **Filter** in the dropdown menu.
3. Select the **filter type** in the dropdown menu.
4. Enter the filter criteria in the **field.**
5. Click **Filter**.

Adding and Removing Grouping in a Page View

Groupings can be added to a **Page View** by dragging a column header to the top of the view to group by the selected column. Multiple grouping criteria can be added in a view by dragging additional columns to the top of the view.
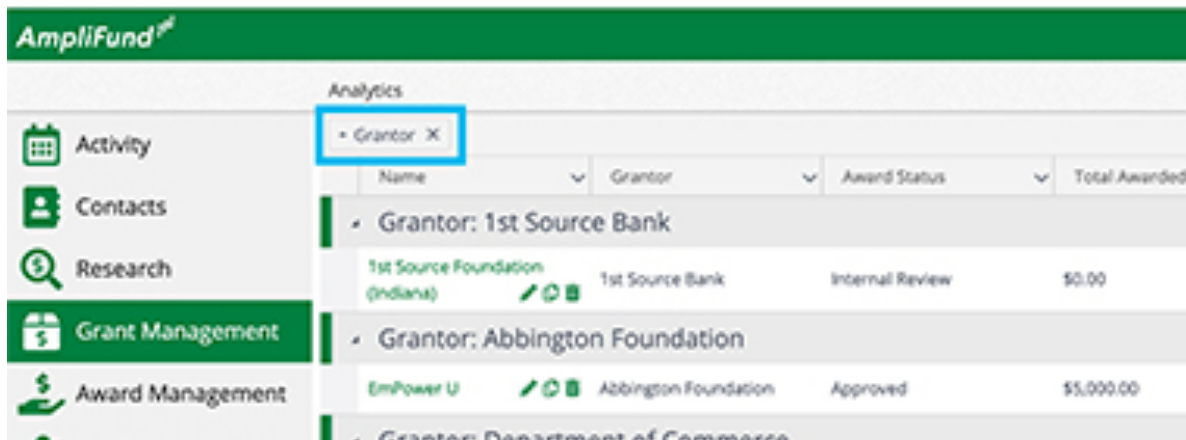
➲ **To add grouping to a Page View:**

1. Drag and drop a **column header** to the top of the view to group by that column.
2. Drag and drop additional **column headers** to add additional grouping.

➲ **To remove a grouping from a Page View:**

1. Click the **X** next to the column group name.

Page Grouping Example: *Grant Management → All Grants Page View → Grouped by Grantor*

Saving Modified Page Views

Modified **Page Views** can be saved in AmpliFund. Once a modified view is saved, it will appear in a **Views** list. Modified views can be created and saved from all **Page Views** in AmpliFund. Saved views

appear in the corresponding module's **Views** list such as ***Contacts → Views***, ***Grant Management →
Views***, and ***Project Management → Views***. Saving **Views** provides a method to quickly access view-
based information in your preferred format.

➲ **To save a modified Page View:**

1. Click the ⬜ **(Save Current View icon)** in the *Icon Bar*.
2. In the pop-up window, enter a **Name**.
3. Check the **Private View checkbox** to save the view to your account only.
4. Click **Create**.

Note: *If you do not check the* **Private View checkbox**, *the view will be available to all your
organization's users in their* **Views** *list. However, users will only see the data from grants that they
can access. A global view can be edited or deleted by other users. When editing a view, users can
modify the view's name, description, and privacy settings. Users cannot edit the name, description,
or privacy settings in a saved view.*

Exporting Page Views

AmpliFund page views, including modified page views, may be exported. The 📤 **(Export icon)** will
appear in the *Icon Bar* if the view is can be exported.

➲ **To export a Page View:**

1. Click the 📤 **(Export icon)** in the *Icon Bar*.
2. In the pop-up window, enter a **File Name.**
3. In the **Export Type** dropdown, select **csv** or **excel**.
4. Click **Export**.

Item-Specific Icons

Some grids in AmpliFund will offer a set of item-specific icons to perform actions. Click the icon to
perform the action. Common icons include the ✏ (Edit icon), 🗐 (Copy icon), and 🗑 (Delete icon). You
can hover over any icon to view its name and action.
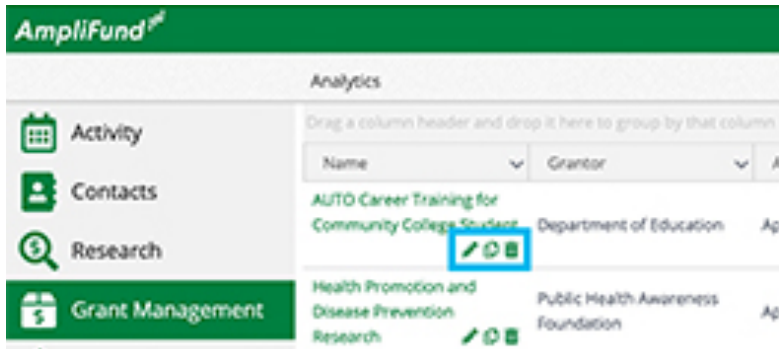
AmpliFund Favorites

In AmpliFund, users are able to favorite records. Once a record is marked as a favorite, it will appear in a *Favorites* list for quick access. Contact, grant, program, and fund records can be favorited.

➲ **To favorite a record:**

1. Click on the ☆ **(Favorite icon)** in the *Icon Bar*.
2. In the pop-up window, enter a **Name**.
3. Check the **Private checkbox** to add the favorited item to your account only.
4. Click **Create**.

*Note: If you do not check the **Private checkbox**, the favorite will be available to all your organization's users in their **Favorites** list (if they have access to the item). However, the only the user who created the Favorite can access its item-specific dropdown menu. Options available in this menu include **View, Edit,** or **Delete**.*