

***AmpliFund*** 

***Advanced Data Collection Guide***

# Contents

## **3 Data Collection Overview**

### **4 Creating Custom Forms and Form Extensions**

- 4 How To Add a Form
- 6 How To Edit a Form
- 7 How To Delete a Form
- 7 How to Publish a Form
- 7 How to Unpublish a Form
- 7 How To Preview a Form
- 7 How To Add a Form Extension
- 9 How To Edit a Form Extension
- 10 How To Delete a Form Extension
- 10 How to Publish a Form Extension
- 10 How to Unpublish a Form Extension
- 10 How To Preview a Form Extension

### **11 Configuring Forms and Form Extensions**

- 11 How To Add a Form to an Object Record
- 11 How To Remove a Form from an Object Record
- 12 How To Add a Form Extension to an Object Record
- 13 How To Remove a Form Extension from an Object Record

### **14 Collecting Data**

- 14 How To Fill a Custom Form
- 14 How To Fill a Custom Form Extension on Primary Objects
- 15 How To Fill a Custom Form Extension on Secondary Objects
- 15 How To Import Data to Custom Form Extensions
- 16 How To Export Data from Custom Forms and Form Extensions

## **17 Appendix**

### **18 Form Builder Features**

### **22 Data Collection Availability and Locations**

- 22 Forms
- 22 Form Extensions

### **24 Advanced Data Collection Frequently Asked Questions**

- 24 What are primary and secondary objects?
- 24 What is the difference between an object, object type, and object record?
- 24 Where will forms appear for the user?
- 24 Where will form extensions appear for the user?
- 24 Who can create forms and form extensions?
- 25 Who can configure forms and form extensions on object records?
- 25 Who can view and complete forms and form extensions?










## ***Data Collection Overview***

Advanced Data Collection allows AmpliFund users to collect additional data points specific to their organization through custom data fields. Custom fields can be added in a new section to an existing AmpliFund page as a form extension, or an entirely new form page can be created.

These custom forms and form extensions can be added to all records of a selected object type or can be added on a record-by-record basis.

Funder organizations can also create form and form extensions that are only visible to recipient users.

## Icons

-  Print
-  Help
-  Add
-  Edit
-  Copy
-  Delete
-  Add
-  Move Up
-  Move Down

# Creating Custom Forms and Form Extensions

Organizational Admin can create custom forms and form extensions in the *Administration* module.

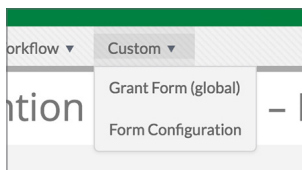
Forms are custom pages that are made up of sections and data fields and can only be added to primary objects, such as grants, opportunities, or funds. For a full list of available objects, see [Data Collection Availability and Locations](#).

Form extensions are custom sections made up of data fields that can be added to existing AmpliFund pages. Form extensions can be added to primary or secondary objects. Primary objects are main standalone records, such as grants, awards, and funds. Secondary objects are attached to primary records and include achievements, payment authorizations, and tasks. For a full list of available objects, see [Data Collection Availability and Locations](#).

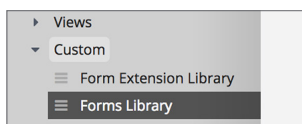
Both custom forms and form extensions can be enabled for all records for a selected object, or enabled on a per-record basis.

## How To Add a Form

Organizational Admin can create and manage forms for multiple objects in AmpliFund on the Forms Library list. .



1. Open **Administration > Custom > Forms Library**.



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

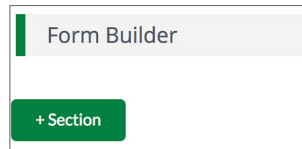
## Form Details

3. Add a **Form Name**. This is the name that will appear in the record's *Custom tab*.
4. Select **AmpliFund Object(s)** where the form will be available.
5. Check the **Enable Form on All Records for Object(s)** checkbox to add the form to all selected object records. If checked, the form cannot be hidden from a record.

6. For clients with *Recipient Access Licenses*, check the **Enable Form for Recipients Only checkbox** to make the form available to recipient organization users only.
7. Add a **Description** (optional).

## Form Builder

8. Click **+ Section** to add a section.



9. Add a **Section Name**.
10. Click **+ Field** to add a custom field.
11. Add a **Field Name**.
12. Select **Field Type**. Field types are divided into Content and Entry fields. Content fields provide information to the user. Entry fields request information from the user. For more information on each field type, see [Form Builder Features](#).

- **Text Label:** Users will see the field name
- **Description Text:** Users will see the field name and a long description
- **External Link:** Users will see a URL link
- **Attachment:** Users will see a link to download a file
- **Single Line Text Field:** Users will be prompted to enter information in a single line text box
- **Multi Line Text Box:** Users will be prompted to enter information in a large text box
- **Multiple Choice:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **⊕ (Add icon)**.
- **Multiple Selection - Checkboxes:** Users will be prompted to select multiple options from options provided. To create options, add **option** in field and click the **⊕ (Add icon)**.
- **Dropdown List:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **⊕ (Add icon)**.
- **File Upload:** Users are prompted to select and attach a file from their computer
- **Date:** Users are prompted to add or select a date
- **Numeric Field:** Users are prompted to add a number (no other

### Note

Only one file can be uploaded per *File Upload* field.

characters are allowed). Users can be restricted to decimal, whole, currency, or percent numeric entries.

- a. For entry type fields, check the **Make Required checkbox** to require users to add information to the field.

A screenshot of a configuration panel for a field. It shows 'Field Type' set to 'Single Line Text Field' and the 'Make Required' checkbox checked with a blue checkmark.

- b. For entry type fields, check the **Add to Grid checkbox** to add users' field responses to the form list page. The form list page can be viewed from the record's *Custom tab > form display name*.

A screenshot of a configuration panel for a field. It shows 'Make Required' unchecked and 'Add to grid' checked with a blue checkmark.

- c. For required grid fields, check the **Link checkbox** to have the field response appear as a link on the form list page. This link allows users to view the completed form. Only one field can be selected as a link.

A screenshot of a configuration panel for a field. It shows 'Add to grid' checked with a blue checkmark and 'Link' checked with a blue checkmark.

## Note

Field must be required and added to grid to become the form link. Each form must have a form link.

13. Check the **Add Help Text checkbox** to add help text to your field. If help text is added, a **i** (Help icon) will appear next to the field name.
  - a. Add **Help Text Description**. The help text will appear when users hover over the **i** (Help icon) next to a field name.

A screenshot showing two input fields. The top field is labeled 'Numeric Field' and has a tooltip that says 'This text helps explain the field.' The bottom field is labeled 'Field With Help Text' and has a small 'i' icon next to it.

14. Click **Save**.

## How To Edit a Form


All sections and fields can be edited before data has been added. Once data has been added, only the **Make Required**, **Add to Grid**, **Link**, and **Add Help Text** options can be edited.

1. Open **Administration > Custom > Forms Library**.
2. Click the **✎ (Edit icon)** next to a form name.
3. Update the information as necessary.
4. Click **Save**.

## Warning

Deleting a form will also permanently any data entered on the form across all associated objects.

## How To Delete a Form

1. Open **Administration>Custom>Forms Library**.
2. Click the  (**Delete icon**) next to a form name.
3. In the confirmation pop-up window, click **Delete**.

## How to Publish a Form

Forms must be published to be available on AmpliFund objects. Only published forms can be added to objects.

1. Open **Administration>Custom>Forms Library**.
2. Click a **form name**.
3. Click **Publish**.

## How to Unpublish a Form

Unpublished forms will be removed from all associated AmpliFund objects.

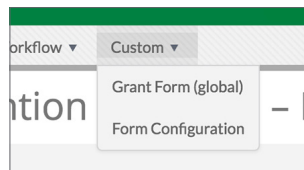
1. Open **Administration>Custom>Forms Library**.
2. Click a **form name**.
3. Click **Unpublish**.

## How To Preview a Form

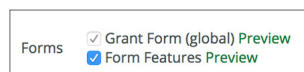
For more information on where the form will appear on the object, see [Data Collection Availability and Locations](#).

Prerequisites: The object type must be selected for the form in *Administration>Custom>Forms Library* and the form must be published.

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



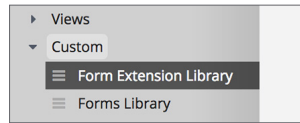
3. Click **Preview** next to a form name.



## How To Add a Form Extension

Organizational Admin can create and manage form extensions for multiple objects in AmpliFund on the Form Extension Library list.

1. Open **Administration > Custom > Form Extension Library**.



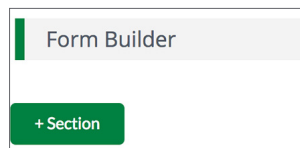
2. Click the **+** (**Add icon**) in the *Icon Bar*.

## Form Details

3. Add a **Form Name**. This is the name that will appear in the record's *Custom tab*.
4. Select **AmpliFund Object(s)** where the form will be available.
5. Check the **Enable Form on All Records for Object(s)** checkbox to add the form to all selected object records. If checked, the form cannot be hidden from a record.
6. For clients with *Recipient Access Licenses*, check the **Enable Form for Recipients Only** checkbox to make the form available to recipient organization users only.
7. Add a **Description** (optional).

## Form Builder

8. Click **+ Section** to add a section.



9. Add a **Section Name**.
10. Click **+ Field** to add a custom field.
11. Add a **Field Name**.
12. Select **Field Type**. Field types are divided into Content and Entry fields. Content fields provide information to the user. Entry fields request information from the user.
  - **Text Label:** Users will see the field name
  - **Description Text:** Users will see the field name and a long description
  - **External Link:** Users will see a URL link
  - **Attachment:** Users will see a link to download a file
  - **Single Line Text Field:** Users will be prompted to enter information in a single line text box
  - **Multi Line Text Box:** Users will be prompted to enter information in a large text box



**Note**  
Only one file can be uploaded  
per *File Upload* field.

- **Multiple Choice:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
  - **Multiple Selection - Checkboxes:** Users will be prompted to select multiple options from options provided. To create options, add **option** in field and click the **+** (Add icon).
  - **Dropdown List:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
  - **File Upload:** Users are prompted to select and attach a file from their computer
  - **Date:** Users are prompted to add or select a date
  - **Numeric Field:** Users are prompted to add a number (no other characters are allowed). Users can be restricted to decimal, whole, currency, or percent numeric entries.
- a. For entry type fields, check the **Make Required checkbox** to require users to add information to the field.

A screenshot of a configuration panel for a form field. It shows a 'Field Type' dropdown menu currently set to 'Single Line Text Field'. Below it, there is a 'Make Required' checkbox which is checked with a blue checkmark.

13. Check the **Help Text checkbox** to add help text to your field. If help text is added, a **i** (Help icon) will appear next to the field name.
- a. Add **Help Text Description**. The help text will appear when users hover over the **i** (Help icon) next to a field name.

A screenshot showing two form fields. The top field is labeled 'Numeric Field' and has a help icon (i) next to it. A tooltip box is hovering over the help icon, containing the text 'This text helps explain the field.' The bottom field is labeled 'Field With Help Text' and also has a help icon (i) next to it.

14. Click **Save**.

## How To Edit a Form Extension


All sections and fields can be edited before data has been added. Once data has been added, only the **Make Required**, **Add to Grid**, **Link**, and **Add Help Text** options can be edited.

1. Open **Administration > Custom > Form Extension Library**.
2. Click the **✎ (Edit icon)** next to a form extension name.
3. Update the information as necessary.
4. Click **Save**.

## Warning

Deleting a form extension will also permanently any data entered on the form extension across all associated objects.

## How To Delete a Form Extension

1. Open **Administration>Custom>Form Extension Library**.
2. Click the  (**Delete icon**) next to a form name.
3. In the confirmation pop-up window, click **Delete**.

## How to Publish a Form Extension

Form extensions must be published to be available on AmpliFund objects. Only published form extensions can be added to objects.

1. Open **Administration>Custom>Form Extension Library**.
2. Click a **form extension name**.
3. Click **Publish**.

## How to Unpublish a Form Extension

Unpublished form extensions will be removed from all associated AmpliFund objects.

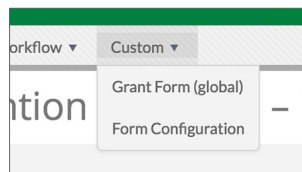
1. Open **Administration>Custom>Form Extension Library**.
2. Click a **form extension name**.
3. Click **Unpublish**.

## How To Preview a Form Extension

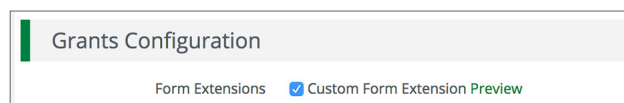
For more information on where the form extension will appear on the object, see [Data Collection Availability and Locations](#).

Prerequisite: The object type must be selected for the form in *Administration>Custom>Form Extension Library* and the form extension must be published.



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



3. Click **Preview** next to a form extension name.



## Icons

-  Print
-  Help

# Configuring Forms and Form Extensions

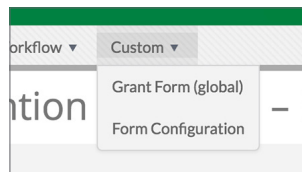
Admin users and object Managers (such as Grant Managers, Fund Managers, etc.) can add or remove forms and form extensions to records.

## How To Add a Form to an Object Record

Forms can be added to primary objects, such as awards, funds, grants, individuals, projects, opportunities, and staff records. Forms will be available for data collection in the *Custom tab* of the object record.

**Prerequisite:** The object type must be selected for the form in *Administration > Custom > Forms Library* and the form must be published.

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.

Grants Configuration	
Form Extensions	<input checked="" type="checkbox"/> Custom Form Extension <a href="#">Preview</a>
Forms	<input checked="" type="checkbox"/> Grant Form (global) <a href="#">Preview</a> <input checked="" type="checkbox"/> Form Features <a href="#">Preview</a>

4. Click **Save**. The form will appear under the object's *Custom tab*.

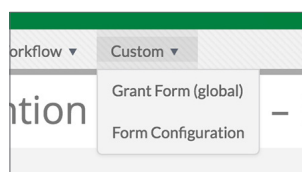
### Note

If the form is enabled on all objects, it cannot be removed from an individual record.

## How To Remove a Form from an Object Record

**Prerequisite:** Any completed form records must be deleted.

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



## Object Configuration

- Uncheck the **form checkbox** to remove the form from the primary object record.

The screenshot shows a 'Grants Configuration' form. It has two main sections: 'Form Extensions' and 'Forms'. In the 'Form Extensions' section, there is a checkbox labeled 'Custom Form Extension Preview' which is checked. In the 'Forms' section, there are two checkboxes: 'Grant Form (global) Preview' (checked) and 'Form Features Preview' (checked).

- Click **Save**. The form will no longer appear under the object's *Custom tab*.

## How To Add a Form Extension to an Object Record

Form extensions can be added to the detail page of a primary object or to the information of a secondary object. Primary objects include awards, funds, grants, individuals, projects, opportunities, and staff records. Secondary or related objects include amendments, budget categories, budget line items, cash receipts, expenses, grant (performance) goals, notes, payment authorizations, payment requests, performance achievements, performance strategies, sub-awards, tasks, and tracking and reporting periods. For more information on where the form extension will appear on the object, see [Data Collection Availability and Locations](#).

Prerequisite: The object type must be selected for the form extension in *Administration > Custom > Form Extension Library* and the form extension must be published.

- Open a **primary object record**.
- Open the **Custom tab > Form Configuration**.

The screenshot shows a dropdown menu for the 'Custom' tab. The menu is open, showing two options: 'Grant Form (global)' and 'Form Configuration'. The 'Form Configuration' option is highlighted.

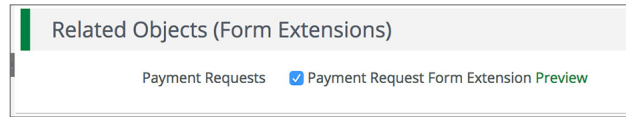
## Object Configuration

- Check the **form extension checkbox** to add the form extension to the primary object record's detail page.

The screenshot shows a 'Grants Configuration' form. It has two main sections: 'Form Extensions' and 'Forms'. In the 'Form Extensions' section, there is a checkbox labeled 'Custom Form Extension Preview' which is checked.

## Related Objects (Form Extensions)

4. Check the **form extension checkbox** to add the form extension to a secondary object on the record.



5. Click **Save**.

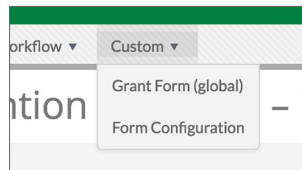
### **Note**

If the form extension is enabled on all objects, it cannot be removed from an individual record.

## How To Remove a Form Extension from an Object Record

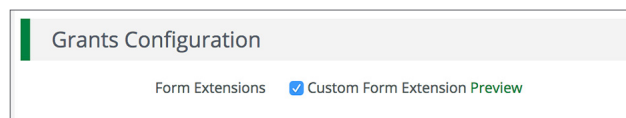
Prerequisite: Data cannot have been added to the form extension.

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



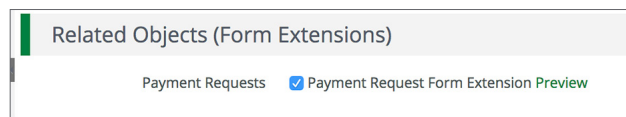
## Object Configuration

3. Uncheck the **form extension checkbox** to remove the form extension from the primary object record's detail page.










## Related Objects (Form Extensions)

4. Uncheck the **form extension checkbox** to remove the form extension from a secondary object on the record.



5. Click **Save**.

## Icons

-  Print
-  Help
-  Add
-  Edit
-  Delete
-  Import
-  Export

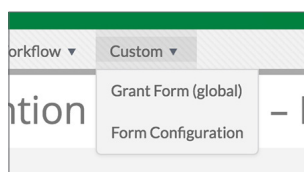
## Collecting Data

Once created and added to object types, custom forms and form extensions will be available on primary and secondary object types. For more information on where forms and form extensions will appear, see [Data Collection Availability and Locations](#).

### How To Fill a Custom Form

With the exception of recipient forms, all users with permission to view the record will also have access to the 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**.

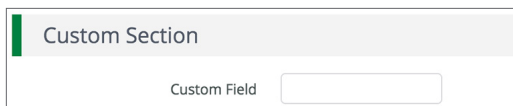
### Note

If the form extension is enabled on all objects, the form extension's fields can be shown or hidden as additional columns on the object's list page.

### How To Fill a Custom Form Extension on Primary Objects

Custom form extensions will appear as additional sections on the primary object's detail page. For more information on where forms and form extensions will appear, see [Data Collection Availability and Locations](#).

1. Open a primary object's **record**, such as a grant, opportunity, project, or fund.
2. Click the  (**Edit icon**) in the *Icon Bar* on the *Details tab*.
3. Add information as necessary.



4. Click **Save**.

## Note

If the form extension is enabled on all objects, the form extension's fields can be shown or hidden as additional columns on the object's list page.

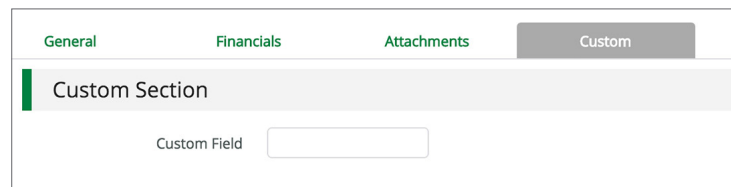
## How To Fill a Custom Form Extension on Secondary Objects

Custom form extensions will appear as additional sections or in a *Custom tab* in a pop-up window for secondary objects. For more information on where forms and form extensions will appear, see [Data Collection Availability and Locations](#).

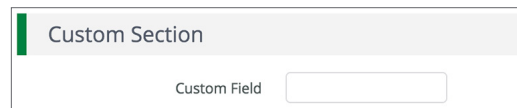
1. Open a primary object's **record**, such as a grant, opportunity, project, or fund.
2. Open the **secondary object**, such as an expense, note, or task, using the primary object's tabs.
3. **Create** or **edit** a secondary object.

All Expenses +

4. If necessary, open the **Custom tab**.



5. Add information as necessary.




6. Click **Create** or **Save**.

## How To Import Data to Custom Form Extensions

Data can be imported by adding custom columns to our [existing import templates](#).

Prerequisite: The form extension must be enabled on all objects.

1. Download the associated **import template** from our support site at <https://amplifund.zendesk.com/hc/en-us/categories/201641706-Import-Templates>.
2. Add **additional columns** that match the custom fields on your form extension.
3. Open the **object's list page**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select the file from your computer.

6. Select the **Destination** field for each Source column. If you are using an import template (recommended), the source and destination fields should match.
7. Select a **Match Key**, if prompted. This will determine how AmpliFund identifies and updates the records.
8. Click **Import**.

## How To Export Data from Custom Forms and Form Extensions

1. Open the **object's list page** or **form list page**.
2. Click the **📄 (Export icon)** in the *Icon Bar*.
3. In the pop-up window, add an export **File Name**.
4. Select an **Export File Type**.
5. Click **Export**.



# ***Appendix***

# Form Builder Features

**Form Builder Icons** All sections and fields can be edited, deleted, or moved up or down using the icons.



**Section** Sections group fields together (although not fields are not required to be within a section).

Section Name*	Non-Entry Fields	Non Entry Fields
---------------	------------------	------------------

**Field** Fields can be content or entry types. Content fields provide content only and do not request a response. Entry fields request or require a response.

**Text Label** Text Label fields are short texts that appear as the *Name Field* content. They do not request a response.

Field Name*	Text Label	Text Label
Field Type	Text Label	

**Description Text** Description Text fields are long texts that appear as a field name and paragraph(s). They do not request a response and cannot be scored.

Field Name*	Description Text	Description Text This section contains a description.
Field Type	Description Text	
	Add description...	

**External Link** External Link fields appear as URL links. They do not request a response and cannot be scored.

Field Name*	External Link	External Link <a href="https://gotomygrants.com">https://gotomygrants.com</a>
Field Type	External Link	
	https://...	

**Attachment** Attachment fields appear as links to downloadable files. They do not request a response and cannot be scored.

Field Name*	Attachment	Attachment	<a href="#">AmpliFund_Guide_Reports_20180808.pdf</a>
Field Type	Attachment		
	<input type="button" value="Choose File"/>		AmpliFund_G...180117.pdf

**Single Line Text Field** Single Line Text fields request or require short answer responses.

Field Name*	Single Line Text Field	Single Line Text Field	<input type="text"/>
Field Type	Single Line Text Field		

**Multi Line Text Box** Multi Line Text Box fields request or require long answer responses. A formatting toolbar can be added to the field and a character limit for responses can be enforced.

Field Name*	Multi Line Text Box	Multi Line Text Box	<input type="text"/>
Field Type	Multi Line Text Box		

**Multiple Choice** Multiple Choice fields request or require a single selection from multiple options.

Field Type	Multiple Choice	Multiple Choice	<input type="radio"/> Choice A <input type="radio"/> Choice B <input type="radio"/> Choice C
	<input type="button" value="Choice A"/>		
	<input type="button" value="Choice B"/>		
	<input type="button" value="Choice C"/>		

**Multiple Selection - Checkboxes** Multiple Selection - Checkboxes fields request or require selection(s) from multiple options.

Field Type	Multiple Selection - Checkboxes	Multiple Selection - Checkboxes	<input type="checkbox"/> Choice A <input type="checkbox"/> Choice B <input type="checkbox"/> Choice C
	<input type="button" value="Choice A"/>		
	<input type="button" value="Choice B"/>		
	<input type="button" value="Choice C"/>		

**Dropdown List** Dropdown List fields request or require a single selection from multiple options.

Field Type	Dropdown List	Dropdown List	Choice A ▾
	Choice A		
	Choice B		
	Choice C		

**File Upload** File Upload fields request or require a file to be uploaded.

Field Type	File Upload	File Upload	Choose File	No file chosen
------------	-------------	-------------	-------------	----------------

**Date** Date fields request or require a date to be selected.

Field Type	Date	Date	MM/DD/YYYY	
------------	------	------	------------	--

**Numeric Field** Numeric Fields request or require a numeric entry. These can be decimal, whole numbers, currency, or percent entires.

Field Type	Numeric Field	Numeric Field - Decimal	1.00
	Numeric - Decimal	Numeric Field - Whole	1
Make Required	<input type="checkbox"/>	Numeric Field - Currency	\$1.00
Add to grid	<input type="checkbox"/>	Numeric Field - Percent	1.00%

**Help Text** Help Text will appear when the user hovers over the (Help icon) next to the field name.

Field Name*	Field With Help Text	Numeric F	<input type="text"/>
Field Type	Text Label	Field With Help Text	<input type="text"/>
Add Help Text	<input checked="" type="checkbox"/>	This text helps explain the field.	
	This text helps explain the field.		
	106		

**Required Field** Entry fields can be marked as required. The form cannot be submitted until all required fields are filled.

Field Name*	Required Field	Required Field*	<input type="text"/>
Field Type	Single Line Text Field		
Make Required	<input checked="" type="checkbox"/>		

**Add to Grid** Adding the field to grid will add users' field responses to the form list page. The form list page can be viewed from the record's *Custom tab > form display name*.

Field Name*	Field on Grid	<h3>Health Promotion and</h3> <p>Drag a column header and drop it here to group by that co</p> <table border="1"> <tr> <td>Field on Grid</td> </tr> <tr> <td>Field on Grid Response</td> </tr> </table>	Field on Grid	Field on Grid Response
Field on Grid				
Field on Grid Response				
Field Type	Single Line Text Field			
Make Required	<input type="checkbox"/>			
Add to grid	<input checked="" type="checkbox"/>			

**Link** Linking the field will have the field response appear as a link on the form list page. The form list page can be viewed from the record's *Custom tab > form display name*. This link allows users to view the completed form. One field must be selected as a link. The field must be required and added to grid to be a link.

Field Name*	Grid Link Field	<h3>Prevention Research – F</h3> <table border="1"> <tr> <td>Grid Link Field</td> <td></td> </tr> <tr> <td>Grid Link Response</td> <td> </td> </tr> </table>	Grid Link Field		Grid Link Response	
Grid Link Field						
Grid Link Response						
Field Type	Single Line Text Field					
Make Required	<input checked="" type="checkbox"/>					
Add to grid	<input checked="" type="checkbox"/>					
Link	<input checked="" type="checkbox"/>					

# Data Collection Availability and Locations

The following tables identify which objects are available for custom forms and form extensions and where the forms and form extensions will appear on the object records.

## Forms

<b>Object</b>	<b>Object Type</b>	<b>Form Location</b>
Awards	Primary	<i>Custom tab</i>
Funds	Primary	<i>Custom tab</i>
Grants	Primary	<i>Custom tab</i>
Individuals	Primary	<i>Custom tab</i>
Opportunities	Primary	<i>Custom tab</i>
Organizations	Primary	<i>Custom tab</i>
Projects	Primary	<i>Custom tab</i>
Staff	Primary	<i>Custom tab</i>

## Form Extensions

<b>Object</b>	<b>Object Type</b>	<b>Form Location</b>
Amendments	Secondary	First section for all types
Awards	Primary	<i>Details tab</i>
Budget Categories	Secondary	Last section in pop-up window
Budget Line Items	Secondary	<i>Details tab</i>
Cash Receipts	Secondary	Last section above <i>Record Information</i> section
Expenses	Secondary	<i>Custom tab</i> of pop-up window
Funds	Primary	<i>Details tab</i>
Grant Goals	Secondary	<i>Custom tab</i> of pop-up window
Grants	Primary	<i>Details tab</i>
Individuals	Primary	<i>Details tab</i>
Notes	Secondary	Last section
Opportunities	Primary	<i>Details tab</i>
Organizations	Primary	<i>Details tab</i>

<b>Object</b>	<b>Object Type</b>	<b>Form Location</b>
Payment Authorizations	Secondary	Last section above <i>Record Information</i> section
Payment Requests	Secondary	Last section above <i>Record Information</i> section
Performance Achievements	Secondary	Last section for all types
Performance Strategies	Secondary	Last section in pop-up window
Projects	Primary	<i>Details tab</i>
Reporting Periods	Secondary	First section for all types
Staff	Primary	<i>Details tab</i>
Sub-Awards	Secondary	Above <i>Record Information</i> section
Tasks	Secondary	Last section in pop-up window
Tracking Periods	Secondary	First section for all types

# Advanced Data Collection Frequently Asked Questions

## What are primary and secondary objects?

Primary objects are main standalone records. Form and form extensions can be added to the following primary objects: awards, funds, grants, individuals, opportunities, projects, and staff.

Secondary objects are attached to the primary record. Form extensions can be added to the following secondary objects: amendments, budget categories, budget line items, cash receipts, expenses, grant (performance) goals, notes, payment authorizations, payment requests, performance achievements, performance strategies, sub-awards, tasks, and tracking and reporting periods.

## What is the difference between an object, object type, and object record?

For the purposes of Advanced Data Collection, AmpliFund objects are record types such as award, grant, or task. Objects can have an object type of primary or secondary. Object records are individual records that have been added in your account.

## Where will forms appear for the user?

Forms will appear under the *Custom tab* of a primary object.

## Where will form extensions appear for the user?

Custom form extensions will appear as additional sections on the primary object's detail page, or as additional sections or in a *Custom tab* in a pop-up window for secondary objects. For more information on where forms and form extensions will appear, see [Data Collection Availability and Locations](#).

## Who can create forms and form extensions?

Only Organizational Admin users can create forms and form extensions in *Administration > Custom*.



## Who can configure forms and form extensions on object records?

Organizational Admin, Admin users, and Manager users can enable or disable forms and form extensions on individual object records.

## Who can view and complete forms and form extensions?

With the exception of recipient forms and form extensions, all users with permission to view the record will also have access to custom forms and form extensions. Only recipient users can view recipient forms and form extensions.