Building Dollars and Cents: Progress Checklist

*Welcome to Building Dollars and Cents, your third implementation phase focused on building budgets and tracking expenses. Please follow this checklist and complete all items before our next call.*

AmpliFact:

Budget settings enable budget categories and benefit types which are a pre-requisite to building your first budget

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Description automatically generated Core Concept Video 1: [Budget Creation Basics](https://amplifund.zendesk.com/hc/en-us/articles/360053626014-Building-Dollars-Cents-Core-Concept-Budget-Creation-Basics)

A close up of a logo

Description automatically generated Configure your budget settings

A picture containing object, drawing, room

Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570423-Grant-Management-Guide)
* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/360020068534-How-To-Configure-Budget-Settings)

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Description automatically generated Check in 1: Do you have any questions on how to configure your budget settings?

*Notes*:

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Description automatically generated Core Concept Video 2: [Budget Creation Non-Personnel Categories and Line Items](https://amplifund.zendesk.com/hc/en-us/articles/360055412013-Building-Dollars-Cents-Core-Concept-Non-Personnel-Budget-Categories-and-Line-Items)

A close up of a logo

Description automatically generatedEnter a non-personnel category and line item to your first budget

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Description automatically generated Optional:

AmpliFact:

Budget categories are the top level of your budget, expenses are tracked against line items.

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570423-Grant-Management-Guide)
* Step by Step instructions- [category](https://amplifund.zendesk.com/hc/en-us/articles/360020262873-How-To-Add-a-Category-to-the-Budget) & [line item](https://amplifund.zendesk.com/hc/en-us/articles/360020260973-How-To-Add-a-Non-Personnel-Budget-Line-Item)

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Description automatically generatedCheck in 2: Do you have any questions on non-personnel categories and line items?

*Notes:*

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Description automatically generated Core Concept Video 3: [Budget Creation Personnel Categories and Line Items](https://amplifund.zendesk.com/hc/en-us/articles/360055412073-Building-Dollars-Cents-Personnel-Budget-Categories-and-Line-Items)

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Description automatically generatedEnter a personnel budget category and line item

AmpliFact:

Personnel line items can pull from compensation records to allocate staff to each grant

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Description automatically generated Optional:

* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/360020065654-How-To-Add-a-Personnel-Budget-Line-Item)

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Description automatically generatedCheck in 3: Do you have any questions on personnel categories and line items?

*Notes:*

A picture containing clock, drawing

Description automatically generated Core Concept Video 4: [Expense Entry](https://amplifund.zendesk.com/hc/en-us/articles/360055412253-Building-Dollars-Cents-Core-Concept-Entering-Expenses)

A close up of a logo

Description automatically generatedEnter at least 1 expense

AmpliFact:

Cash match can be edited at the point of expense entry. You can store receipts in AmpliFund tied to expenses.

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Description automatically generated Optional:

* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/360019991914-How-To-Add-Expenses-Against-a-Line-Item)

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Description automatically generatedCheck in 4: Do you have any questions on entering expenses?

*Notes:*

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Description automatically generated Core Concept Video 5: [Budget Tracking Periods](https://amplifund.zendesk.com/hc/en-us/articles/360053626294-Building-Dollars-Cents-Core-Concept-Budget-Tracking-Periods)

A close up of a logo

Description automatically generatedSet up budget tracking periods for a grant

AmpliFact:

Budget tracking periods will generate reminders on when financial reporting is due to your funder.

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Description automatically generated Optional:

* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/360020046073-How-To-Configure-Grant-Settings)

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Description automatically generatedCheck in 5: Do you have any questions on budget tracking periods?

*Notes:*

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Description automatically generated Supplemental Videos (Optional):

* [Cash Receipts](https://amplifund.zendesk.com/hc/en-us/articles/360055412553-Building-Dollars-Cents-Supplemental-Video-Cash-Receipts)
* [Risk Definition](https://amplifund.zendesk.com/hc/en-us/articles/360051097334-Risk-Defintion)

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Description automatically generatedCheck in 6: Any additional questions on Building Dollars & Cents?

*Notes:*

*Thank you for your hard work during this phase to Build Dollars & Cents in AmpliFund! We’d appreciate your feedback, take our short survey* [*here*](https://amplifund.typeform.com/to/D0sq10ep)*!*