Activating Advanced Features: Progress Checklist

*Welcome to Activating Advanced Features, your fourth implementation phase focused on security and advanced imports. Please follow this checklist and complete all items before our next call.*

AmpliFact:

Security roles and assignment on a grant dictate what access a user has and what actions they can take

 Core Concept Video 1: [Advanced Security Options](https://amplifund.zendesk.com/hc/en-us/articles/360053866094-Activating-Advanced-Features-Core-Concept-1-Advanced-Security-Options)

 Review roles and grants to confirm user set up

 Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570423-Grant-Management-Guide)

 Check in 1: Do you have any questions on how to configure user roles and assignments of staff to grants?

*Notes*:

 Core Concept Video 2: [Grant Import Template](https://amplifund.zendesk.com/hc/en-us/articles/360055658213-Activating-Advanced-Features-Core-Concept-Grant-Import-Template)

AmpliFact:

The grant import file can be used for grants at all stages – pre and post award or denied grants.

Complete your grant import file

 Optional:

* [Grant import template](https://amplifund.zendesk.com/hc/en-us/articles/218274263-Grants-Import-Template) file

Check in 2: Do you have any questions on completing the grant import file?

*Notes:*

 Core Concept Video 3: [Budget Import Template](https://amplifund.zendesk.com/hc/en-us/articles/360055658253-Activating-Advanced-Features-Core-Concept-Budget-Import-Template)

Complete your budget import file

AmpliFact:

You can import budgets for multiple grants at the same time

 Optional:

* [Budget import template](https://amplifund.zendesk.com/hc/en-us/articles/115002672923-Budget-Import-Template) file

Check in 3: Do you have any questions on completing the budget import file?

*Notes:*

 Supplemental Videos (Optional):

* Cash Receipt Import File
	+ [Cash receipt import template](https://amplifund.zendesk.com/hc/en-us/articles/115001971614-Cash-Receipts-Import-Template) file

Check in 6: Any additional questions on Activating Advanced Features?

*Notes:*

*Thank you for your hard work during this phase to Activate Advanced Features in AmpliFund! We’d appreciate your feedback, take our short survey* [*here*](https://amplifund.typeform.com/to/lCP9UmEx)*!*