**Script: Core Concept: Master Data Organizations and Individuals**

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| Script |
| Welcome to the AmpliFund Core Concept video focused on the Master data components of Organizations and Individuals. |
| Master data is the starting point for building a robust grants management system within AmpliFund. This data will be critical in setting up your grants, performance plans, budgets, and reporting. |
| During this video we will focus on the process for manually entering organizations and individuals. There are import options available which are reviewed in another video. We recommend manually entering at least a few of each type of master data component to familiarize yourself with AmpliFund. |
| Let’s start with organizations. Organizations can include funders, vendors and other partners. Any external entity you want tracked in your AmpliFund system can be logged as an organization. The only required field is the name, however there are a number of other informational fields you can capture in the system. Organizations are required to set up grants, they can be linked to individuals and you can use the organization field to filter reports.  As you think about adding organizations, we recommend aligning internally on a naming convention standard. As you get deeper into using AmpliFund, it can become confusing if some organizations are listed with abbreviations, while others have words fully spelled out. |
| Next, we’ll look at individuals. Individuals are people at any external organization. You can link individuals to the organizations we just learned about. |
| For instance, if you work with Grace Grant, a Director of Operations at the Department of Economic Development who is your funder, you can link Grace to the Department of Economic Development. Grace could be your primary contact, then you can add Jake Jones as another individual who works there. |
| Now, let’s take a look at AmpliFund and enter an organization and an individual together! When you log into AmpliFund you will land on the calendar. On the left navigation menu, click on Contacts, then organizations. |
| To add your first organization, click on the plus sign in the upper right hand corner on the icon tool bar. |
| Now let’s enter our first organization together. I’ll call our first funder, Department of Economic Development. As you look at the required fields, the name is the only field that must be filled in to proceed. However, on the organization entry screen you can enter additional entity information such as the address, email address, DUNS number, etc. One field we’ll call your attention to is the organization type. This drop down has the options of Vendor, Federal/State/Local Government, Foundation, or Corporation. While not a required field, by entering an organization type, you will later be able to easily filter via this field. We recommend entering a type for each organization you add. |
| After you complete entering the information on your first organization, click Create. Congratulations! You’ve entered your first piece of master data into AmpliFund! |
| After you hit create you will see the organization details page. If later you need to edit the organization details, click on the pencil in the icon tool bar in the top right. The pencil will take you back to the editable page of the organization. |
| Next, let’s enter our first individual. Remember, individuals are anyone who is associated with an external organization. To get to the individuals page, I will again click on Contacts on the left navigation bar and then Individuals, |
| Just like on the organization tab, to enter our first individual, I will click on the plus sign in the upper right hand corner on the icon toolbar. |
| This takes me to an editable form to add an individual. The only required fields are the first name, last name and email address, however you have the option to store additional contact information such as title, address, phone number and other information. I’ll enter Grace Grant and her email. Then I’ll scroll down and click create. |
| This takes me to the individual detail page, where I see Grace’s profile. If you need to edit the individuals profile, click the pencil icon in the top right icon tool bar to get back to an editable page. |
| Next, I want to link Grace Grant to the Department of Economic Development where she works. To do that, I’ll click on Relationships at the top, then organization. Right now, Grace is not linked to any organizations. To create that link, I’ll click on the plus icon in the top right. |
| This will take me to my list of organizations that I could link Grace to. To link your individual, click the checkbox next to the appropriate organization, here I’ve selected the Department of Economic Development. Then at the bottom right click Add. |
| After hitting add you now see a list of Grace’s organizations. If you need to delete the link, click on the trash can icon or to edit click on the pencil. |
| Now, let’s say I want to add Grace as the primary contact that way when I later add Jake, I know which email is primary. I’ll go into Grace’s record and select Contact Info>then Email Address. Next to her email I’ll select the flag for mark as primary. |
| Through this video, you’ve learned how to enter organizations and individuals, link an individual to an organization and mark an email address as primary for an organization. For additional instructional documentation, please visit our support site. Thank you! |