**Core Concept: Leveraging Configurable Views**

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| Script |
| Welcome to the AmpliFund Core Concept video focused on leveraging configurable views within AmpliFund. |
| In AmpliFund, our reporting suite is focused on providing you with numerous highly configurable options.  Your organization can leverage grant dashboards for quick insights, summary financial reporting for key gaps and comprehensive views to dig deep into your data.  We strive to help you be action oriented, to achieve maximum outcomes, improve efficiency, and stay focused on your mission. |
| In this Core Concept video, we’ll focus on leveraging configurable views in AmpliFund to access a variety of different data options. |
| In AmpliFund, we want to give you maximum flexibility with your data.  Configurable views in a variety of areas allow you to see, interact with and gain insight from your data.  You can access configurable views with your grants, events, tasks, achievements and expenses. |
| Views give you comprehensive access to data with the ability to filter, sort and group data so you can focus on aspects most important to your individual needs.  You can save views for later for easy, quick access and many views offer export capability. |
| In our Getting Going with Grants training section you learned about using the Grants view.  For a refresher on using that data, please visit our support site.  During today’s video, we’ll show how to leverage the achievements pages as another example.  When we log into AmpliFund, navigate to Activity>Achievements |
| By click on the down arrow next to any header you get the sorting and filtering options.  You can sort ascending or descending, and can add columns or filters.  Here I added the strategy column so we can group our goals by strategy. |
| To group by a column drag it to the header area like I did here.  You can add numerous columns to this section for additional grouping. |
| If after adding columns or sorting or filtering you want to save a view, you can do so by hitting the page icon in the upper right hand corner. |
| You’ll have the option to save your view, add a description and make it private so only you can see it.  If you leave the check box empty others within your organization will have access to the same view. |
| After you save a view it is accessible by going to Activity then Views.  Other than grant views you’ve saved, which will appear under Grant Management then views, all other views for your account will save under Activity then Views. |
| In the upper right corner you also have an option to print achievements, which would allow you to generate a PDF of the achievements page. |
| Finally, within this view you have some quick links you can view achievements against a goal or click the plus sign to add an achievement. |
| Through this Core Concept video, you’ve learned how you can use configurable views to gain access to data within AmpliFund.  Should you have additional questions, please visit our support site.  Thank you! |