**Core Concept: How to create a fund**

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| Script  |
| Welcome to the AmpliFund Core Concept training video focused creating a fund.  |
| In our last Core Concept video we reviewed making sure you have your organization entered in master data, ensuring you’ve aligned internally on how you’ll name a fund and confirming you know the target fund amount and have your fund manager entered as a staff record.  If you’ve taken these steps, lets hop into AmpliFund and create our first fund together!  |
| After logging into AmpliFund, from the calendar you will navigate to   |
| Fund management, then click on Funds  |
| As you build out your account, this screen will contain all the funds you’ve added to AmpliFund.  To add your first fund, click on the plus sign in the upper right hand corner in the icon tool bar.  |
| This takes you to a fund entry screen.  First you need to enter a name for your fund, that is a required field.  All required fields are marked with an asterisk.  The next field is the target amount.  While this field is required, it will not limit your ability to add income either above or below the target in the future.  Next is the fund manager.  Fund Managers have full access to edit fund details, and create, edit, and delete all items related to the fund they are managing. To add a fund manager the individual must be entered as a staff records in AmpliFund.  For the fund manager to interact with the fund in AmplIFund, they must be a user so they can log in.  |
| The next field is optional, and is the categories field.  This is a pre-populated drop down of different categories that can be used as tags on your fund.  Examples in the drop down include Community development, environment, housing, transportation and more.  You can add 1 or more categories to your fund.  If you accidently select a category, simply hit the x to remove it from the list.  These tags will allow you to filter and sort funds in other areas of AmpliFund.  Next you have the ability to add additional staff to the fund.  Additional Staff may view fund details, performance plans, budget plans, opportunities, and awards. They cannot create, edit, or delete fund details, and other fund-related information.  To be assigned as additional staff the individual must have a staff record in AmpliFund.  |
| Next you have the option of including a fund open and close date  |
| The fund details are not able to be edited on this page, we will be reviewing fund details and how to add funding commitments and income in a future core concept video.  Fund details are able to be updated after you’ve created your fund record.  |
| Finally, if you like to include a description and or a unique identifier those optional fields are available at the bottom.  |
| Once you are done entering information on your fund, click create in the bottom right hand corner of the screen.  |
| After you click create you will land on the fund details page.  Should you need to edit your fund at anytime, you can click on the pencil icon in the top right icon toolbar.  Also in this toolbar you have the option to copy your fund by clicking on the paper icon.  This will open an editable screen to create a copy of your fund and will allow you to edit before creating the fund.  |
| Through this Core Concept video you learned how to create a fund in AmpliFund.  Should you have any additional questions, please visit our support site.  Thank you!  |