**Core Concept: Fund Tools**

|  |
| --- |
| Script |
| Welcome to the AmpliFund Core Concept video focused on Fund Tools. |
| Once you have a fund entered in the system there are numerous tools you can use to manage your fund.  In today’s session we’ll cover how you might want to use these tools.  To get started log into AmpliFund and navigate to your fund details page, by clicking on Fund Management> Fund and selecting your fund. |
| Once you are in a fund, you’ll see options at the top including tools.  To see all tool options click on the tools drop down.  Under the tools drop down you see 4 key areas including: email manager, tasks, documents and notes.  Today we are reviewing these tools under funds, however you can access these tools in other areas of AmpliFund such as under the activity center. |
| First we’ll dive into email manager.  Users may create and send emails to staff, users and individuals in AmpliFund that will be connected to the record. The emails will be sent to the recipients’ primary email addresses and will also appear in Activity>Message Center.  In this entry screen you’d enter any recipients, subject, body and any attachments then hit send. |
| Next, let’s look at tasks.  From the Tasks list, Organizational Administrators can create and assign tasks to other staff that will be connected to the object record. Once created, tasks will appear on that staff’s AmpliFund calendar, and they will receive email notification of assigned tasks. |
| From the details screen, click on the plus sign to add a task then begin to enter the details.  The name, type, status, responsible individual and due date are required to enter a task.  The task types available are Other, Budget and Performance.  The task status options are Not Started, In Progress, Completed, On hold, rejected.  The responsible individual or additional staff must have a staff record in AmpliFund.  When you create a task for a staff or user, they will receive email notification of the task, to see details or mark the task as complete the individual needs to have a user record in AmpliFund and can log-in to view details, add progress or mark the task as complete. |
| After clicking save you land on a details page, where you can always click on the pencil icon to edit if needed or you can navigate back to your fund by clicking the fund at the top. |
| Next let’s look at documents. |
| Within Documents, users can upload and view object-specific files and folders. With your AmpliFund subscription, you have unlimited document storage.  This section can be helpful in keeping all documentation together and accessible to others in your organization. |
| In the top right tool bar, click on the folder with the plus sign to create folders or click on the paper with the arrow sign to upload any relevant documents to the fund record. |
| I’m going to navigate back to our fund record and look at our last tool which is notes.  Additional information related to the fund may be stored as a Note. Each note may include a title, note date, text, and attachments. |
| To add a note click on the plus icon and then enter the note name which is the only required field.  You can add any additional information about the note that would be helpful, like a type or date.  Once you’ve entered all applicable information click Create. |
| As you start to use the fund tools you can also use the Activity center to view information on these tools.  You can look at the calendar to see due dates of any tasks entered or click on the Tasks option.  Also, under the activity center you can get to the message center to see any emails you’ve sent via AmpliFund. |
| Through this video you’ve learned about the tools available for use with a fund within AmpliFund.  Should you have additional questions, please reference our support site!  Thank you! |