**Core Concept: How to create an opportunity**

|  |
| --- |
| Script |
| Welcome to the AmpliFund Core Concept training video focused on creating an opportunity. |
| In this Core Concept video we will review how to create an opportunity record.  You can create an opportunity record from either Fund Management or Award Management.  Today we’ll demonstrate the process through Award Management, that process is slightly different however both are very similiar |
| After logging into AmpliFund.  Click on Award Management then fund opportunities |
| This will take you to a list of any fund opportunities you’ve created.  To add an opportunity click on the plus icon in the top right corner. |
| This is the opportunity creation page, if you scroll down you can see there are a number of options for information you can include.  Today we’ll walk through some of the key areas.  The only required fields for an opportunity are the opportunity name and the opportunity manager.  However, remember that this page will drive what your potential applicant sees about your opportunity so including as much detail as relevant will be helpful for them! |
| At the top next to each main section is a check box with “Make viewable to applicants”.  With this box checked, all fields in that section are set to appear on your opportunity details page in the applicant portal even if you don’t enter any information.  If there are fields where you intend to not enter any content, you can uncheck that box. |
| Then boxes will appear next to each field.  You can uncheck any fields you want to exclude from view on the applicant portal.  If you uncheck the box next to make viewable to applicants, the field will NOT populate on the applicant portal even if you have content entered.  We recommend only displaying fields where you have content present to ensure clarity to applicants. |
| The first few fields you can enter optional information on include items like an award description and agency information.  You can drag the bottom of the description field to make it bigger if you are entering a lot of text into the field.  While a formatting toolbar is not available, you can paste in formatted text from Microsoft Word. |
| The fund activity field is a pre-populated drop down of common categories.  This can be used in other areas of AmpliFund to filter your opportunity list. |
| The opportunity manager is a required field and pulls from your list of staff entered into AmpliFund.  Opportunity Managers can edit Opportunity Details and create, edit, and delete all items related to their opportunity, including application forms, and budget and performance plan templates. Additionally, Opportunity Managers can enroll opportunities and applications in workflows and will receive automated emails when applications have been submitted to their opportunity. |
| Take note of the posted date and archive date option.  The posted date indicates the date the opportunity will be posted for applicants to view the opportunity details on the applicant portal.  Applicants will be able to download a copy of the application on the portal after the posted date, however the posted date does not trigger the ability for applicants to apply.  The archive date indicates the date the opportunity will be removed from visibility to applicants, including removing their ability to access their submitted application.  After your selected archive date applications are also not visible in your account.  No archive date is required. |
| There are a few other options of general information to include and the last option in this section is the “Is Published” field.  If checked, A published opportunity will be available to applicants to apply after the open date.   We recommend that you only publish the opportunity after all changes to the opportunity have been made and you’ve completed configuring and testing your application form..  Leave this as unchecked for now and come back to check this box at a later date. |
| Once the opportunity has been created, you will be able to   add funding sources to the   Total Program Funding.  You can enter a funding description or restriction if you’d like. |
| The next section is award information.  This allows you to include an award ceiling or the maximum amount you will award and a floor, the minimum amount you will award.  You can enter date information, award types, etc.  At the bottom take note of the indirect and matching requirements.  If your opportunity includes indirect costs and/or matching be sure to change these drop downs to yes.  This will drive the ability for applicants to enter corresponding amounts in the application and will impact the ability to add matching or indirect costs to the budget template in the application process.  Cash match and indirect cost percentages should be entered in decimals. |
| The next section is submission information.  While all information is optional, there are a few key fields.  First is if this is a one-time or rolling submission.  If you select rolling the submission end date option will disappear.  The submission open/close date and time will dictate when applicants can submit an application to your opportunity.  The apply button will not appear on the applicant portal for an opportunity until the submission open date.  The opportunity will close at the time stamp you set, so careful attention to the time of date and time zone is recommended.  As the funder, you can extend the close date, however after you set the close date, applicants cannot apply or submit after that date until you change it here.  The other item of note in this section is the check box for allow multiple applications.  By checking this box you would allow an individual organization to submit more than one application to your opportunity.  This could be important if you allow different departments or divisions within an applicant to submit applications. |
| The next section is the question submission section.  If you intend to take questions via email or want to provide other application question instructions or documentation you can enter information here. |
| If you as the funder intend to hold a session for technical assistance, you can enter information about that session under this section.  The options are No, Yes, or Yes and Mandatory.  Here you can include the date and any relevant links. |
| The next section is additional information, this provides you an additional spot to put any relevant links and descriptions. |
| The final section is award administration information.  This section allows you a number of different field options to enter any additional relevant information.  These are all optional.  As a reminder if you don’t want a field to appear, simply uncheck the “Make viewable to applicants box next to the section, then uncheck the box next to the field.  We recommend only including on your opportunity fields that are populated with content. |
| After you’ve finished entering all relevant information, click create at the bottom. |
| After you click create, you will land on the opportunity details page.  This includes all information you just entered.  To edit any content, click on the pencil icon in the top right hand corner of the screen.  The icon tool bar also has a copy icon, if this opportunity is yearly or contains similar information to another opportunity, you can use the copy icon to create another record. |
| Through this Core Concept video, you’ve learned how to create an opportunity record in AmpliFund.  Should you have additional questions, please reference our support site.  Thank you! |