**Core Concept: Application Configuration 2**

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| Script  |
| Welcome to the AmpliFund Core Concept training video focused application configuration.  There will be 3 videos focused on application configuration in our series.  |
| There are a number of steps to successfully build and publish an application for your opportunity in AmpliFund.  In this Core Concept video we are continuing to review building the application form.  To ensure a smooth process through building the form, be sure you’ve configured the application settings first and we recommend watching application configuration #1.  |
| Our application configuration series will be covered in 3 videos to dive deep into the many options and capabilities for building an application form.  This video will focus on demonstrating how to build a form including adding sections, content and question fields.  We’ll also demonstrate how to copy and paste a form.  |
| Let’s dive right into AmpliFund.    |
| From the calendar, we are going to click on Award Management>Fund Opportunities.  |
| This takes you to the list of opportunities you’ve created in AmpliFund.  Remember that you need an opportunity created to begin an application.  Select the relevant opportunity by clicking on the opportunity name.  |
| This takes you to the opportunity details page, then at the top click on Configuration>Application Forms  |
| This would take you to a list of application forms associated with an opportunity.  To create your first form, click on the plus icon in the upper right.  |
| The first step is to name your form.  This will be the title of the form that an applicant would click on to enter the form in the applicant portal.  |
| After you enter a name, you want to add your first section.  Sections are a good way to group like questions together.  Click on the plus icon to add your section.  |
| The first field is the section name.  Note that there is an option for visible to reviewers only.  If you check that box the section would only be visible to reviewers.  In our 3rd application configuration video we’ll be diving deeper into reviewer only fields and uses for those.  I’ll add a name and then will click on the field button to add my first field.  |
| Now you can see my section and a new set of options has appeared to enter my first field on the form.  Let’s walk through each of these options as you’ll see them repeated every time you add  a field.  First is the Name field.  This is what your applicants will see for a content field this is the instruction or details you are providing them, for a question type field this would be the question you are asking.  Next is conditional field which does not apply to your grant maker core basic subscription.  If you’d like to change your subscription please reach out to your implementation team.  The next is a check box for scoring.  If this is a scored question leave the box as checked.  We’ll be diving deep on scoring and options in our 3rd configuration video.  If the field is a scored field, you’ll need to enter a category and a scale, if the scale is different from the default you set in the application settings.  Again we have an option to make this visible to reviewers only and then we can select our field type.  This is a drop down.  |
| The drop down options contain all the content and question entry type fields we reviewed in our first configuration video.  You would select the relevant option.  I’m going to start by entering a text label content field.  |
| I selected text label, removed the check box for scoring and entered the text I want my applicants to see.  Then I’ll click to add my next field.  |
| Now I’m gong to add a question to our applicants asking them to provide me with the number of parks in their city.  So I chose a numeric field, I selected to make this question required, I removed the scoring check box.  Since this is a numeric field, I have additional options for the type.  I’ll select Numeric – Whole since I’m looking for whole numbers in this response.  Then I’ll click to add another field.  |
| Next, I’m going to ask a multiple choice question as I’m looking for a Yes/No response.  I entered my question text, selected multiple choice and put the responses of Yes/No.  To add each additional response hit the plus icon.  |
| Now, I’ve done some work here.  I’m going to click create in the bottom right hand corner of my screen to make sure all my changes are saved, then we’ll keep going.  Now you can see your form.  Let’s keep editing and adding more questions, to do that click on the pencil icon in the section to add more questions to that section.  |
| Now I’m back in our editable form and will click the field to add another field.  |
| Now, I want applicants to select all possible answers, so I chose the multiple selection – Check boxes.  I add all types of potential park amenities by clicking on the plus icon and entering the text.  Next let’s say I want to move the biking trails above walking trails.  I can do that by using the arrows.  I then also decide I don’t want to show an other option, so I can use the trash can to delete that.  |
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| Next, I’m asking for a date here, so I selected the date option and also checked the box to make this question required.  |
| Now, I’m ready to add my next section to this form, so I’ll click on the Section add.  |
| I named my section then hit field to enter my next field.  Now I’m going to add another content field to provide my applicants some instruction on this section.  |
| Here I entered a descriptive text field to provide my applicants with detailed instructions.  I used the formatting toolbar to bold text and was able to include a number list in this field.  Descriptive text fields do not require the name portion to be populated.  |
| Now, I added a multi line text box to ask applicants to provide a detailed response about facilities.  I chose to add the formatting toolbar so applicants can add formatting to their responses.  |
| Next, I want my applicants to upload a file, so I’ve selected that option and identified what file they should upload in the name field.  |
| Now, I added a content only field that provides applicants a link to visit to learn more.  I put in the name of the field to provide context to the link then the actual website link goes in the box below external link.  |
| My last question in this section will be a drop down list.  Here you can see we have an additional option to allow multiple selections, if we leave this blank applicants can only select 1 item from the list.  Applicants will receive instructions to click control to select multiple options, if you include the ability to allow multiple selections.  |
| I added my selections and then saved my application.  |
| After hitting save I realize I want to move one of my questions from the bottom.  I hit the edit pencil to get back into the editable form.  When I do that on the right hand side I have up and down arrows next to each question.  I can use those to move my question to a different spot in the form.  Note that you cannot move questions between sections, you can only move questions within the same section or questions that are not in a section.  If you need to move a question from one section to another, you will need to delete the field and rebuild in the appropriate section.  You do also have the ability to rearrange sections using the arrows.  |
| Now after hitting save I’m back on the application form details.  Now, I’d like to make another form to add to this same application.  I’ll click on Configuration>Application forms at the top   |
| Now I’m back to where I started this application form.  To add my next form to this, I will click the plus sign in the upper right hand corner.  |
| This takes you back into the application form builder where you start with naming your form.  I’ll name this one and add my first section.  |
| After adding my section, I started again with a text label to provide some high level instructions to our applicants and then will add my first field.  |
| For my first question on this form, I’ll add a multi line text box and this time will set a character limit of 500.  |
| From here I can continue to add additional fields just like we did on the last form by clicking on field.  Once I’m done adding fields I’ll click create in the bottom right hand corner.  This takes me back to my form details.  |
| Now as a final step lets go back to the application configuration screen, by clicking on Configuration then Application forms.  |
| This takes us back to our list of application forms.  Let’s review the actions available on this page.  First, next to the form names, you can hit the pencil to edit the form.  The next icon is the copy icon.  Copying the form will allow you to paste a copy in this application.  This can allow you to reuse forms for similar content.  The trash can allows you to delete a form and the arrows allow you to change the order the applicants would see the forms.  You can also drag and drop forms to the order you’d like.  |
| If I hit copy on one of the forms, I can either include or exclude scoring information.  Even if you include scoring information you can always manually change it on a per question basis.  To copy hit copy.  |
| After hitting copy, you now see my community overview form appears in this application twice.  To edit I can go into the form with the pencil icon.  |
| In the top right hand corner of this screen I also have a paste option.  Here I can paste in any forms that are in my account, even if they are under other opportunities.  If I hit the paste icon the following screen appears.  |
| I can select my applicable forms using predictive text and chose to include scoring information or not.  If you include scoring information in your copy it will copy over the scoring categories in the application configuration.    |
| You can paste multiple forms at once by selecting them.  If you accidently select a form, simply hit the X to remove it.  Once you are ready to paste a form hit paste.  |
| The forms will paste into the application and then you can edit, move or delete the forms as you see fit.  |
| Through this Core Concept video, you’ve learned how to configure an application form.  Should you have additional questions, please reference our support site.  Thank you!  |