**Supplemental video: Application Budget Template**

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| Script  |
| Welcome to the AmpliFund Training Video focused on the application budget template.  |
| There are a number of key steps to successfully build and launch an application.  In this video we’ll focus on configuring budget template.    |
| First, let’s learn a little about the budget template and why you might use it.  The budget template is an optional tool you can include in your applications within AmpliFund.  It gathers from applicants their proposed spending by category and can include indirect cost and match amounts.  Applicants can add one or multiple line items by category to provide detail.  By using the template all proposed budgets will look the same, making assessment by reviewers easier.  The budget template tool also ensures a balanced budget based on the amount requested from the applicant.  Finally you are able to specify which categories are permitted or you can provide applicants with the flexibility to add their own proposed categories.  |
| There are a few steps you need to take to configure the budget template.  First, you should have entered budget categories as part of your master data.  You can confirm this was completed by visiting Administration>Lists>Budget categories.  For a detailed reminder on how to enter budget categories, you can watch our master data video on that topic.  Also, you will need to select the option to require or include the budget template in the application configuration settings.  For a detailed review on the application settings, watch our Configuring application settings video.  Now, with those steps complete, lets jump into AmpliFund together and configure the budget template.  |
| From the calendar, click on Award management then Fund Opportunities.  |
| Select from the list the relevant opportunity by clicking on the name.  |
| From the opportunity details page, click on Configuration> Budget Template  |
| This takes you to the budget template creation page where you’ll add applicable categories for your opportunity.  Click on the plus sign in the upper right hand corner to add your first category.  |
| The category entry screen will appear and you can select the first category for the budget.  As a reminder these categories come from your list of Budget Categories under Administration>Lists>Budget Categories.  You then have a description box.  You can use this to provide the applicant with instructions or details about this category or your expectations.  If you have matching requirements or instructions you want to provide applicants, the description box is a great space for that information.  Or if you are expecting a budget narrative from the applicant put text in the description text box explaining your expectations.  |
| You can make the text box bigger by pulling the bottom right corner down.  If you have formatted text you can paste that in from Microsoft word.  Once you’ve entered the text you’d like click save.  |
| Now your category will appear on the list with the description text you included.  To edit or delete use the icons next to the category name.  Continue the process of adding categories via clicking the plus icon.  |
| Now you might be wondering what this looks like from an applicant view.  Let’s take a look at that together now.  |
| First, here’s what the budget template looks like for an applicant.  In red, you can see the categories you created for the applicants to propose spending under.  To add a line item, the applicant clicks on the plus sign next to the category.  In purple is the spot where an applicant could add a category, if you’ve set this up as an option in the application settings.  And finally in dark blue, the total revenue budget calculates against the total amount requested that the applicant puts in the project information tab.    |
| When an applicant is adding a line item, it will look like this.  In red you see the category they selected.  In purple is the description text you included when configuring the budget template.  The items in dark blue are to be populated by the applicant then they can click save.  |
| If you are allowing applicants to propose spending categories, they will see this in 3 steps.  First they can create the category name and description.  The second view shows how the category will appear on the budget.  And finally they can add line items to the category.  Similar to an application form, applicants will have to mark the budget template as save and complete to be able to submit their application.  |
| Through this AmpliFund training video, you have learned how to set up the budget template in an application.  Should you have additional questions, please reference our support site.  Thank you!  |