AmpliFund Foundations: Progress Checklist

*Welcome to AmpliFund Foundations, your first implementation phase focused on getting you into AmplIFund and building the basics of your account. Please follow this checklist and complete all items before our next call. Prior to starting you will need to register with our support site.*

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Description automatically generated Core Concept Video 1: [AmpliFund Site navigation](https://amplifund.zendesk.com/hc/en-us/articles/360051862613-Navigation)

A close up of a logo

Description automatically generated Log-in to your AmpliFund Account

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Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570383-User-Interface-Navigation-Guide)

A picture containing suitcase, luggage, night, lit

Description automatically generated Check in 1: Does everyone on your implementation team have an AmpliFund Log-in?

*Notes*:

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Description automatically generated Core Concept Video 2: [Master Data: Organizations & Individuals](https://amplifund.zendesk.com/hc/en-us/articles/360053084554)

A close up of a logo

Description automatically generatedEnter at least 1 organization & individual into your AmpliFund account

AmpliFact:

Organizations=funders, vendors, partners

Individuals=People at external organizations

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Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570343-Contact-Management-Guide)
* Step by Step instructions-[organizations](https://amplifund.zendesk.com/hc/en-us/articles/115002233753-How-To-Add-an-Organization) & [individuals](https://amplifund.zendesk.com/hc/en-us/articles/115002201153-How-To-Add-an-Individual)

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Description automatically generatedCheck in 2: Do you have any questions on organizations or individuals?

*Notes:*

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Description automatically generated Core Concept Video 3: [Master Data: Subjects and Departments](https://amplifund.zendesk.com/hc/en-us/articles/360053872813-AmpliFund-Foundations-Core-Concept-Master-Data-Subjects-and-Departments)

AmpliFact:

Subjects=tags for grants, helpful for reporting

Departments=areas of your organization

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Description automatically generatedEnter at least 2 subjects and 2 departments

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Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570443-Administration-Guide)
* Step by Step instructions-[subjects](https://amplifund.zendesk.com/hc/en-us/articles/115000784514-How-To-Add-a-Subject) & [departments](https://amplifund.zendesk.com/hc/en-us/articles/115000779733-How-To-Add-a-Department)

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Description automatically generatedCheck in 3: Do you have any questions on subjects or departments?

*Notes:*

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Description automatically generated Core Concept Video 4: [Master Data: Staff & Users](https://amplifund.zendesk.com/hc/en-us/articles/360053873313-AmpliFund-Foundations-Core-Concept-Master-Data-Staff-Users)

AmpliFact:

Staff=People at your organization

Users=Staff with access to the AmpliFund site

A close up of a logo

Description automatically generatedEnter at least 1 staff member and 1 user

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Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570343-Contact-Management-Guide)
* Step by Step instructions- [staff](https://amplifund.zendesk.com/hc/en-us/articles/115002196834-How-To-Add-a-Staff) & [users](https://amplifund.zendesk.com/hc/en-us/articles/115000764314-How-To-Add-a-New-User)

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Description automatically generatedCheck in 4: Do you have any questions on staff or users?

*Notes:*

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Description automatically generated Core Concept Video 5: [Master Data: Compensation, Benefit Types and Budget Categories](https://amplifund.zendesk.com/hc/en-us/articles/360053873353-AmpliFund-Foundations-Core-Concept-Master-Data-Compensation-Benefit-Types-Budget-Categories)

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Description automatically generatedEnter at least 2 Budget Categories, if applicable with your grant portfolio enter a compensation record and benefit type.

AmpliFact:

Budget Categories are required for all budget line items. A budget category could be Travel.

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Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570443-Administration-Guide)
* Step by Step instructions-[compensation](https://amplifund.zendesk.com/hc/en-us/articles/115001296113-How-To-Add-Compensation) & [benefit types](https://amplifund.zendesk.com/hc/en-us/articles/115000780513-How-To-Add-a-Benefit-Type) & [budget categories](https://amplifund.zendesk.com/hc/en-us/articles/115000780133-How-To-Add-a-Budget-Category)

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Description automatically generatedCheck in 5: Do you have any questions on compensation, benefit types or budget categories?

*Notes:*

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Description automatically generated Supplemental Videos (Optional):

* [Knowledge Center](https://amplifund.zendesk.com/hc/en-us/articles/360051862653-Knowledge-Center)
* [License Info](https://amplifund.zendesk.com/hc/en-us/articles/360051097654-License-Info)
* [Convert Staff to User](https://amplifund.zendesk.com/hc/en-us/articles/360051861433-How-to-Convert-a-Staff-to-a-User)
* [Master data import template](https://amplifund.zendesk.com/hc/en-us/articles/360053088134-AmpliFund-Foundations-Supplemental-Video-Master-Data-Import-Template)

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Description automatically generatedDetermine if you want to use an import for remaining master data or if you will enter it manually.

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Description automatically generatedCheck in 6: Any additional questions on AmpliFund Foundations?

*Notes:*

*Thank you for your hard work during this phase to build your AmpliFund Foundations! We’d appreciate your feedback, take our short survey* [*here*](https://amplifund.typeform.com/to/WqVJWS0p)*!*