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.*

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

 Log-in to your AmpliFund Account

 Optional:

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

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

*Notes*:

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

Enter at least 1 organization & individual into your AmpliFund account

AmpliFact:

Organizations=funders, vendors, partners

Individuals=People at external organizations

 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)

Check in 2: Do you have any questions on organizations or individuals?

*Notes:*

 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

Enter at least 2 subjects and 2 departments

 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)

Check in 3: Do you have any questions on subjects or departments?

*Notes:*

 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

Enter at least 1 staff member and 1 user

 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)

Check in 4: Do you have any questions on staff or users?

*Notes:*

 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)

Enter 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.

 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)

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

*Notes:*

 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)

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

Check 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)*!*