**Core Concept: Grant Tools**

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| Welcome to the AmpliFund Core Concept video focused on Grant Tools.  |
| Once you have a grant entered in the system there are numerous tools you can use with your grant.  In today’s session we’ll cover how you might want to use these tools.  To get started log into AmpliFund and navigate to your grants page, then select the first grant you might want to use tools for.  |
| Once you are in a grant, you’ll see options at the top including tools.  To see all tool options click on the tools drop down.  Under the tools drop down you see 4 key areas including: email manager, tasks, documents and notes.  |
| First we’ll dive into email manager.  Users may create and send emails to staff, users and individuals in AmpliFund that will be connected to the record. The emails will be sent to the recipients’ primary email addresses and will also appear in Activity>Message Center.  In this entry screen you’d enter any recipients, subject, body and any attachments then hit send.    |
| Next, let’s look at tasks.  From the Tasks list, Organizational Administrators can create and assign tasks to other staff that will be connected to the object record. Once created, tasks will appear on that staff’s AmpliFund calendar, and they will receive email reminders related to that task.  |
| From the details screen, click on the plus sign to add a task then begin to enter the details.  The name, type, status, responsible individual and due date are required to enter a task.  |
| After hitting save you land on a details page, where you can always click on the pencil icon to edit if needed or you can navigate back to your grant by hitting the grant at the top.  |
| Within Documents, users can upload and view object-specific files and folders. Once an object record has been created, AmpliFund automatically creates a record folder that is accessible from the object record or from the Documents module.  |
| In the top right icon tool bar, click on the folder with the plus sign to create folders or click on the paper with the arrow sign to upload any relevant documents to the grant record.  |
| I’m going to navigate back to our grant record and look at our last tool which is notes.  Additional information related to the grant may be stored as a Note. Each note may include a title, note date, text, and an attachment.  |
| To add a note click on the plus icon and then enter the note name and any additional information about the note that would be helpful.  Once you’ve entered all applicable information click Create.  |
| As you start to use the grant tools you can also use the Activity center to view information on these tools.  The activity center is a central location for all actions related to your grants, including the tools we’ve reviewed and other actions we’ll review in future sessions like achievements at expenses.  You can look at the calendar to see due dates of any tasks entered or click on the Tasks option.  Also under the activity center you can get to the message center to see any emails you’ve sent via AmpliFund.  |
| Through this video you’ve learned about the tools available for use with a grant within AmpliFund.  Should you have additional questions, please reference our support site!  Thank you!  |