**Supplemental Video Grant Reminders**

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| Script |
| Welcome to the AmpliFund Core Concept video focused on Grant Reminders. |
| You can leverage reminders to keep staff on top of important reporting due dates and tasks.  AmpliFund offers you the ability to configure up to 3 automatic reminders for budget reporting periods, performance plan reporting periods and assigned tasks.  Based on the cadence you configure, AmpliFund will automatically send email reminders to responsible individuals. |
| We’ll dive into each of these 2 default reminders in a bit more detail in the coming slides, then we’ll configure reminders in AmpliFund.  This is how the configuration screen appears in AmpliFund. |
| First let’s dive into task reminders.  Setting up the default settings for task reminders is related to the Tasks that appear under the Tools drop down menu.  After you configure the default task reminder settings these will appear pre-populated when you create a new task.  In the task entry screen you still have the ability to change the reminder settings on a per task basis.  Task reminders go to the responsible person designated on the task. |
| Next let’s move onto budget reminders.  Budget reminders are directly related to the due date you set for budget items under the grant settings.  When you configure the budget reporting periods and due dates for budget items in grant settings, tasks are automatically created and assigned to the grant manager.  The default settings you create for reminders will trigger reminders to the grant manager at the designated cadence.  Via the tasks page, you can still go into the budget reporting period tasks and adjust the cadence on a per task basis if you’d like.  It is important that if you want reminders sent you configure the default task reminder cadence before completing your grant settings. |
| Finally let’s review performance reminders.  The reminders are related to the due date you set for performance reporting under the grant settings.  When you configure the performance reporting periods and due dates for performance plans in grant settings, tasks are automatically created and assigned to the grant manager.  The default settings you create for reminders will trigger reminders to the grant manager at the designated cadence.  Via the tasks page you can still go into the performance reporting tasks and adjust the cadence on a per task basis if you’d like.  Similar to the budget reminders, it is important that if you want reminders sent you configure the default task reminder cadence before completing your grant settings. |
| Before we configure our reminders, just a few reminders to consider.  Default reminder settings must be configured prior to grant settings for default cadence to appear in budget and performance tasks.  You can always adjust the reminder cadence on a per task basis by editing a task or when creating a new task.  Budget and performance reminders are sent to the grant manager, while task reminders are sent to the responsible individual on the task. |
| To set up grant reminders in AmpliFund, click on Grant Management, then Grants. |
| Select the applicable grant from your list of available grants. |
| Click on Post Award then Settings then Reminders. |
| To edit settings click on the pencil icon in the top right corner. |
| Leverage the drop down menus to select the cadence of reminders you’d like to set.  You can set up to 3 reminders per type.  Based on these settings AmpliFund will send email notifications to responsible individuals reminding them of the upcoming task. |
| After you configure your preferred cadence, click on save in the bottom right hand corner. |
| If at any time you need to change the reminder frequency, you can come back to this page and click the pencil icon to edit reminders. |
| Through this AmpliFund training video, you’ve learned about grant reminders.  Should you have any questions please visit our support site.  Thank you! |