Building Dollars and Cents Part 2: Progress Checklist

*Welcome to Building Dollars and Cents Part 2, focused on building your GL structure to import expenses and learning about cash management options. Please follow this checklist and complete all items before our next call.*

AmpliFact:

There are 5 set up steps in AmpliFund to prepare the structure for importing expenses

A picture containing clock, drawing

Description automatically generated Core Concept Video 1: [GL Account Set-up](https://amplifund.zendesk.com/hc/en-us/articles/360060145233-Building-Dollars-and-Cents-Core-Concept-GL-Account-Set-up)

A close up of a logo

Description automatically generated Complete the 5 GL Account Set up steps in AmpliFund

A picture containing object, drawing, room

Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570443-Administration-Guide)
* Step by Step instructions:
  + [How to customize GL Accounts](https://amplifund.zendesk.com/hc/en-us/articles/115000780773-How-To-Customize-GL-Accounts)
  + [How to add GL Accounts](https://amplifund.zendesk.com/hc/en-us/articles/115000785394-How-To-Add-a-GL-Account) or [How to Import GL Accounts](https://amplifund.zendesk.com/hc/en-us/articles/115000783893-How-To-Import-GL-Accounts)
  + [Grant settings](https://amplifund.zendesk.com/hc/en-us/articles/360020046073-How-To-Configure-Grant-Settings) for Grant Financial Code & Enabling Expense Imports
  + [Adding GL Account to a Budget Line Item](https://amplifund.zendesk.com/hc/en-us/articles/360020064914-How-To-Add-Financial-Information-to-a-Budget-Line-Item)

A picture containing suitcase, luggage, night, lit

Description automatically generated Check in 1: Do you have any questions on GL Set-up?

*Notes*:

A picture containing clock, drawing

Description automatically generated Core Concept Video 2: [Expense Import Template File](https://amplifund.zendesk.com/hc/en-us/articles/1500000456542-Building-Dollars-and-Cents-Core-Concept-Expense-Import-Template)

A close up of a logo

Description automatically generatedUse the expense import template file to import your expenses

AmpliFact:

You can import expenses for multiple grants at the same time using the expense import template.

A picture containing object, drawing, room

Description automatically generated Optional:

* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/115000789354-How-To-Import-Expenses)
* [Expense Import Template File](https://amplifund.zendesk.com/hc/en-us/articles/210570803-Expenses-Import-Template)

A picture containing suitcase, luggage, night, lit

Description automatically generatedCheck in 2: Do you have any questions on the expense import template file?

*Notes:*

A picture containing clock, drawing

Description automatically generated Core Concept Video 3: [Budget Tracking Periods](https://amplifund.zendesk.com/hc/en-us/articles/360053626294-Building-Dollars-Cents-Core-Concept-Budget-Tracking-Periods)

A close up of a logo

Description automatically generatedSet up budget tracking periods for a grant

AmpliFact:

Budget tracking periods will generate reminders on when financial reporting is due to your funder.

A picture containing object, drawing, room

Description automatically generated Optional:

* [Step by Step instructions](https://amplifund.zendesk.com/hc/en-us/articles/360020046073-How-To-Configure-Grant-Settings)

A picture containing suitcase, luggage, night, lit

Description automatically generatedCheck in 3: Do you have any questions on budget tracking periods?

*Notes:*

A picture containing clock, drawing

Description automatically generated Supplemental Videos (Optional):

* [Payment Requests](https://amplifund.zendesk.com/hc/en-us/articles/1500000457082-Building-Dollars-and-Cents-Supplemental-Video-Payment-Requests-Advanced-Customers)
* [Cash Receipts](https://amplifund.zendesk.com/hc/en-us/articles/360055412553-Building-Dollars-Cents-Supplemental-Video-Cash-Receipts)

A picture containing suitcase, luggage, night, lit

Description automatically generatedCheck in 6: Any additional questions on Building Dollars & Cents?

*Notes:*

*Thank you for your hard work during this phase to Build Dollars & Cents in AmpliFund! We’d appreciate your feedback, take our short survey* [*here*](https://amplifund.typeform.com/to/dipPjw5z)*!*