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

 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)

 Complete the 5 GL Account Set up steps in AmpliFund

 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)

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

*Notes*:

 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)

Use 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.

 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)

Check in 2: Do you have any questions on the expense import template file?

*Notes:*

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

Set up budget tracking periods for a grant

AmpliFact:

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

 Optional:

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

Check in 3: Do you have any questions on budget tracking periods?

*Notes:*

 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)

Check 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)*!*