**Core Concept: How to create a project**

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| Script |
| Welcome to the AmpliFund Core Concept video focused on how to create a Project. |
| Before you get started with making a project in AmpliFund, we recommend you consult with your implementation team on the best ways to leverage the project module with your grants portfolio. |
| If you are ready to create a project, once you log into AmpliFund, click on Project Management then Projects |
| Click on the plus icon in the upper right corner to create a project. |
| This will take you to the project entry screen.  The first field, which is required is the name of the project.  Then you will need to enter a start and end date for your project.  Next you can include a project budget. |
| The next field which is required is the project manager.  Project Managers have full access to edit project details, and create, edit, and delete all items related to their project. These users may also assign responsibility for goals and line items to other users.  You may also assign additional staff to a project.  Additional staff can view project details, performance plans, and budget plans. They cannot create, edit, or delete project details, goals, or line items.  If you want project managers or staff to have access to grants associated with projects be sure to add them on the grant level as well.  Also at the project level you can assign the project to a department and subject. |
| On this entry screen you also have the ability to associate applicable grants with your project.  If your grants for this project are not yet created, you can save your project and come back to the edit option on the project later. |
| Next, if you’d like you can add a project description.  Also here you can add default settings for task reminders.  In the project module you can assign tasks and associate them with a project.  These reminders can be changed at the individual task level, however setting the defaults can save you time in task set up later.  Finally you can add a unique identifier to your project. |
| After you’ve completed all relevant updates, click create in the bottom right hand corner. |
| After you’ve saved your project, you are taken to the project details screen.  In the upper right hand corner you have a few icons that may help you later.  You can edit the project using the pencil icon and can copy the project using the copy icon. |
| If you want to review the grant or grants you just linked to this project from the project information page, you can click on the grant name and be directed to the grant details page. |
| Through this Core Concept video, you’ve learned how to create a project in AmpliFund.  Should you have additional questions, please reference our support site.  Thank you! |