Reporting: Progress Checklist

*Welcome to Reporting, your fifth implementation phase focused on learning about the AmpliFund reporting options. Please follow this checklist and complete all items before our next call.*

AmpliFact:

There is a dashboard available for analytics on all grants and on individual grants.

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Description automatically generated Core Concept Video 1: [Grant Dashboard](https://amplifund.zendesk.com/hc/en-us/articles/360054285594-Reporting-Core-Concept-Grant-Dashboards)

A close up of a logo

Description automatically generated View the All Grant Dashboard & an Individual Grant Dashboard in your account

A picture containing object, drawing, room

Description automatically generated Optional:

* [User Guide](https://amplifund.zendesk.com/hc/en-us/articles/210570423-Grant-Management-Guide)
* Step by Step instructions-[overall](https://amplifund.zendesk.com/hc/en-us/articles/360020437653-How-To-View-Overall-Grant-Dashboard) & [individual](https://amplifund.zendesk.com/hc/en-us/articles/360020437613-How-To-View-an-Individual-Grant-Dashboard)

A picture containing suitcase, luggage, night, lit

Description automatically generated Check in 1: Do you have any questions on the grant dashboard options?

*Notes*:

AmpliFact:

Status reports allow you to see key grant details such as grant start dates, budgets, etc.

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Description automatically generated Core Concept Video 2: [Status Reports](https://amplifund.zendesk.com/hc/en-us/articles/360054285094-Reporting-Core-Concept-Grant-Status-Reports)

A close up of a logo

Description automatically generatedRun the pre-award and post-award status reports in your account

A picture containing object, drawing, room

Description automatically generated Optional:

* Step by Step instructions- [running a report](https://amplifund.zendesk.com/hc/en-us/articles/360024568674-How-To-Run-a-Report) & [filtering](https://amplifund.zendesk.com/hc/en-us/articles/360024568194-How-To-Filter-Report-Data)

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Description automatically generatedCheck in 2: Do you have any questions on the pre and post award status reports?

*Notes:*

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Description automatically generated Core Concept Video 3: [Financial Reports: Grant Budget Variance and Grant Expense Detail](https://amplifund.zendesk.com/hc/en-us/articles/360054285194-Reporting-Core-Concept-Financial-Reports)

A close up of a logo

Description automatically generatedRun the grant budget variance report and grant expense detail report in your account

AmpliFact:

Financial reporting provides summary budget insight and line item expense detail

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Description automatically generated Optional:

* How to change [report formatting](https://amplifund.zendesk.com/hc/en-us/articles/360024567794-How-To-Change-Report-Formatting) and how to [export a report](https://amplifund.zendesk.com/hc/en-us/articles/360024718773-How-To-Export-Reports)

A picture containing suitcase, luggage, night, lit

Description automatically generatedCheck in 3: Do you have any questions on financial reporting?

*Notes:*

AmpliFact:

Configurable views is another tool in AmpliFund to gain access to comprehensive data you can manipulate and export.

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Description automatically generated Core Concept Video 4: [Configurable Views](https://amplifund.zendesk.com/hc/en-us/articles/360056073493-Reporting-Core-Concept-Leveraging-Configurable-Views)

A close up of a logo

Description automatically generatedCheck at least one page view in your account

A picture containing suitcase, luggage, night, lit

Description automatically generatedCheck in 4: Do you have any questions on configurable views?

*Notes:*

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Description automatically generatedCheck in 5: Any additional questions on Reporting?

*Notes:*

*Thank you for your hard work during this phase to Reporting in AmpliFund! We’d appreciate your feedback, take our short survey* [*here*](https://amplifund.typeform.com/to/U0AXPXZO)*!*