Grant Maker Pre-Award Core Series

Master Data, Fund, Opportunity

Core Series Overview

AmpliFund

- **Training 1**: AmpliFund & Illinois System Integrations
- **Training 2**: Pre-Award - Master Data, Fund, Opportunity
- **Training 3**: Pre-Award - Application Configuration
- **Training 4**: Pre-Award - Scoring/Reviewer Field Set-up & Application Testing
- **Training 5**: Pre-Award - Application Review Workflow Configuration & Testing

Agenda

AmpliFund

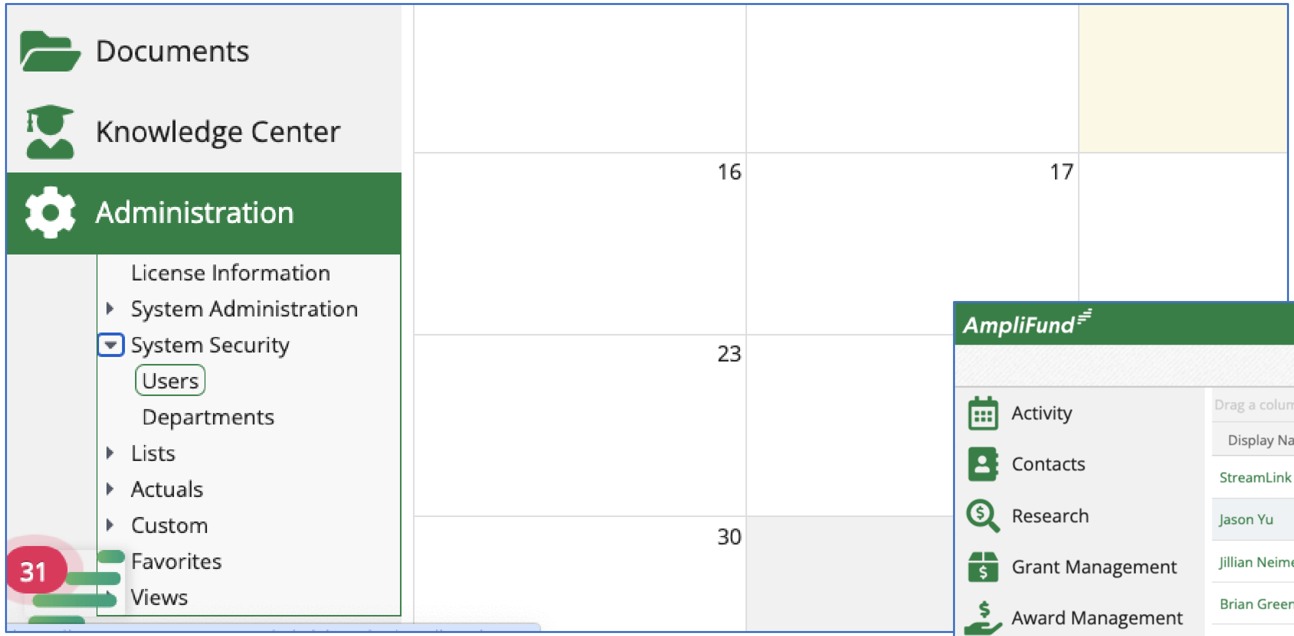
- Master Data
- Create Funds
- Create Opportunity
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

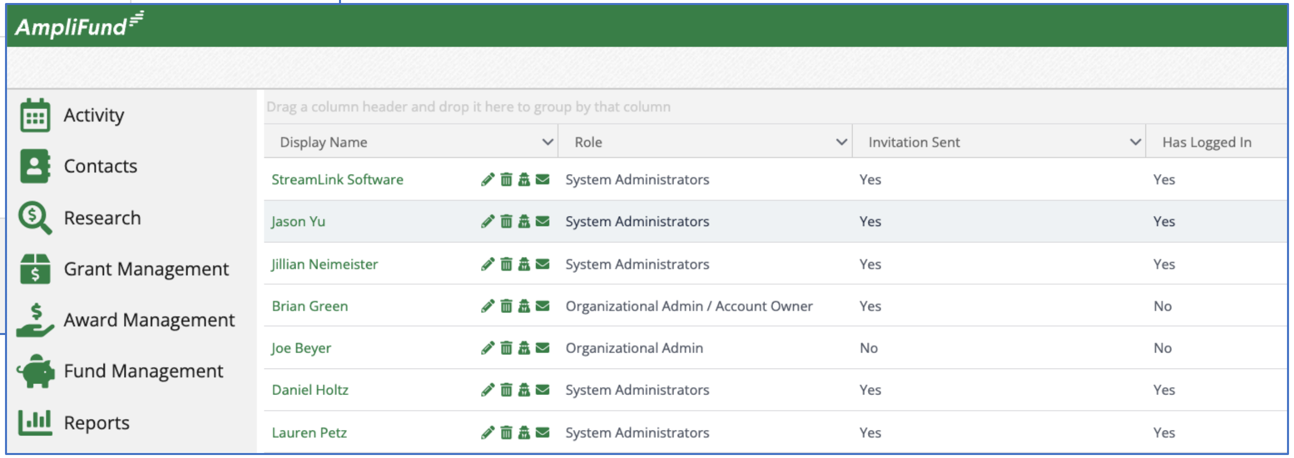
Master Data

Access Users

AmpliFund

- Log in to AmpliFund.
- Click on Administration > System Security > Users.
- Land on a list of all Users in your account.

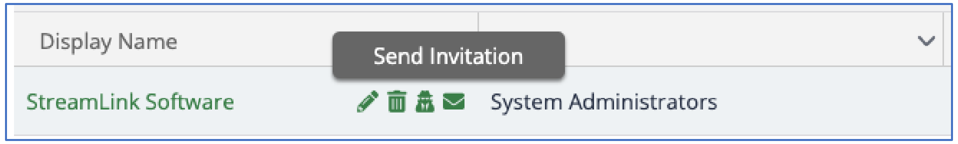


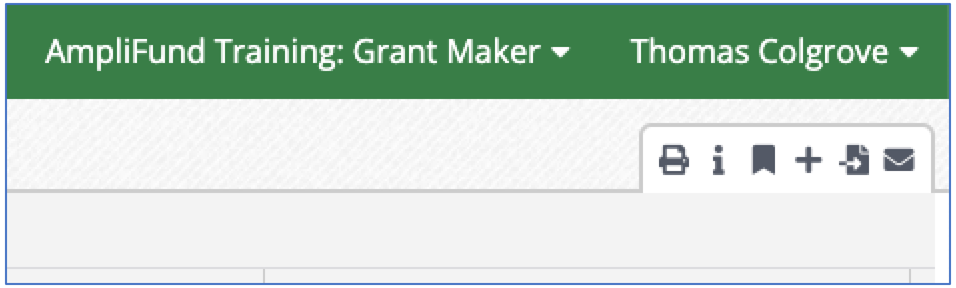


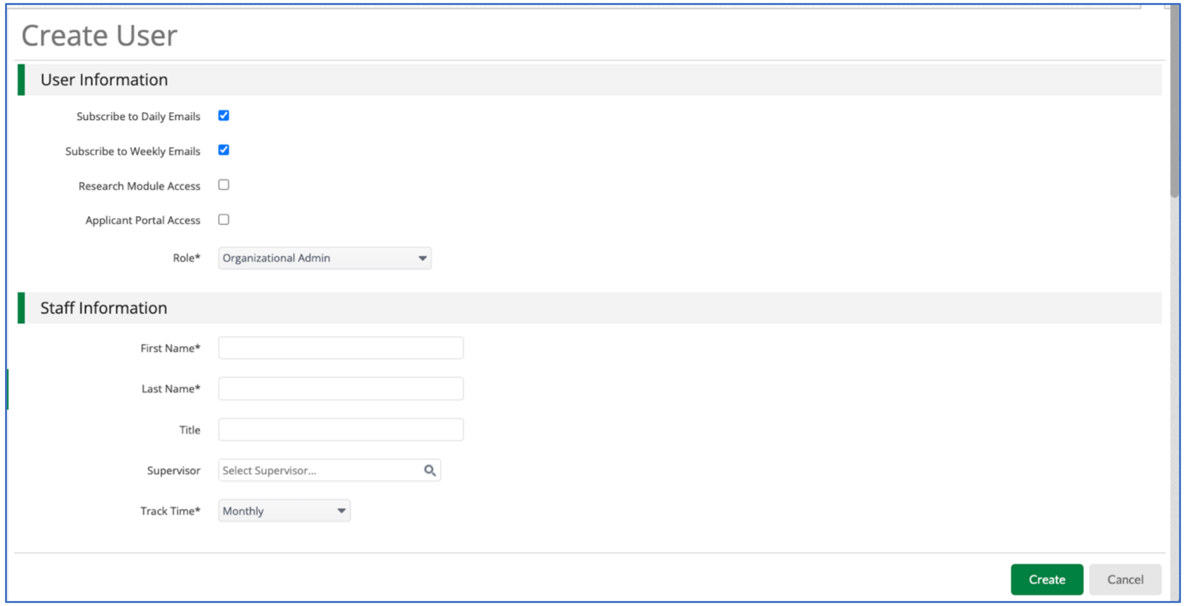
Add Users

AmpliFund

- Click on the + icon on the top right of the screen.
- Configure the User Information.
- Enter the Staff Information.
- Anything marked with an * is required.
- Enter other data as needed.
- Click Create on the bottom right of the screen.
- Invite User into AmpliFund.



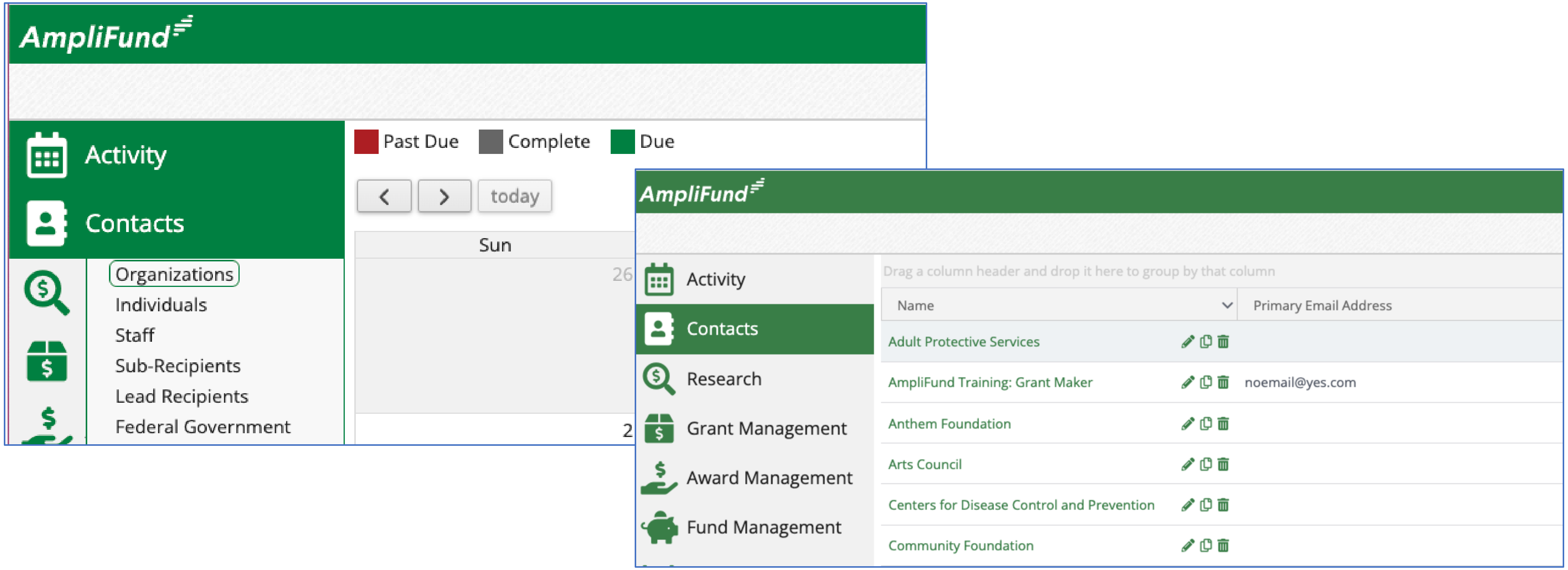




Access Organizations

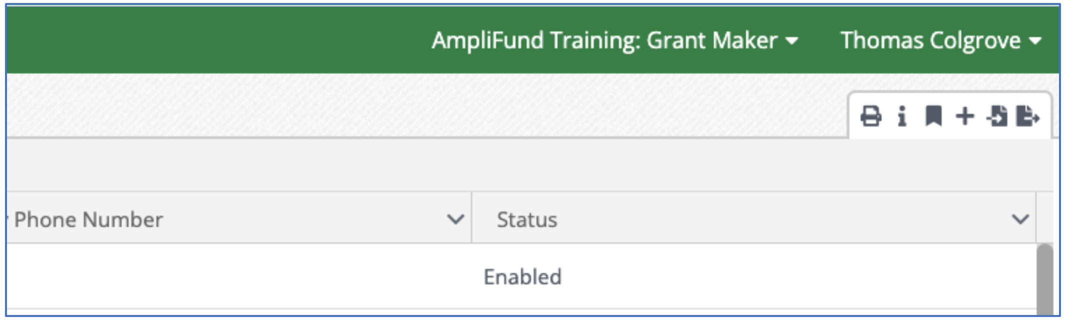
AmpliFund

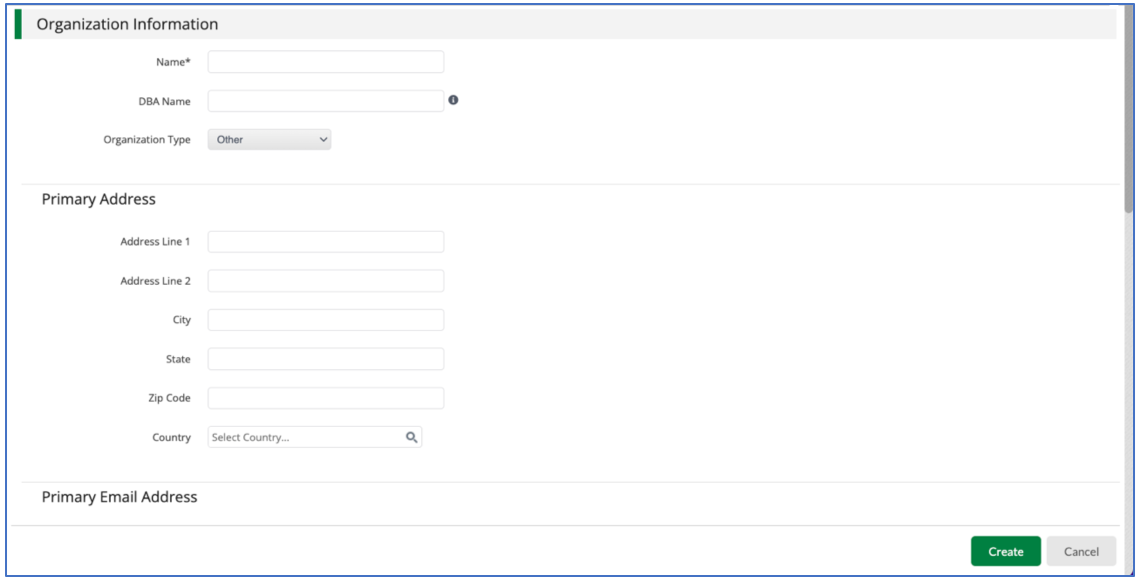
- Log in to AmpliFund.
- Click on Contacts > Organizations.
- Land on a list of all Organizations in your account.



Add Organization

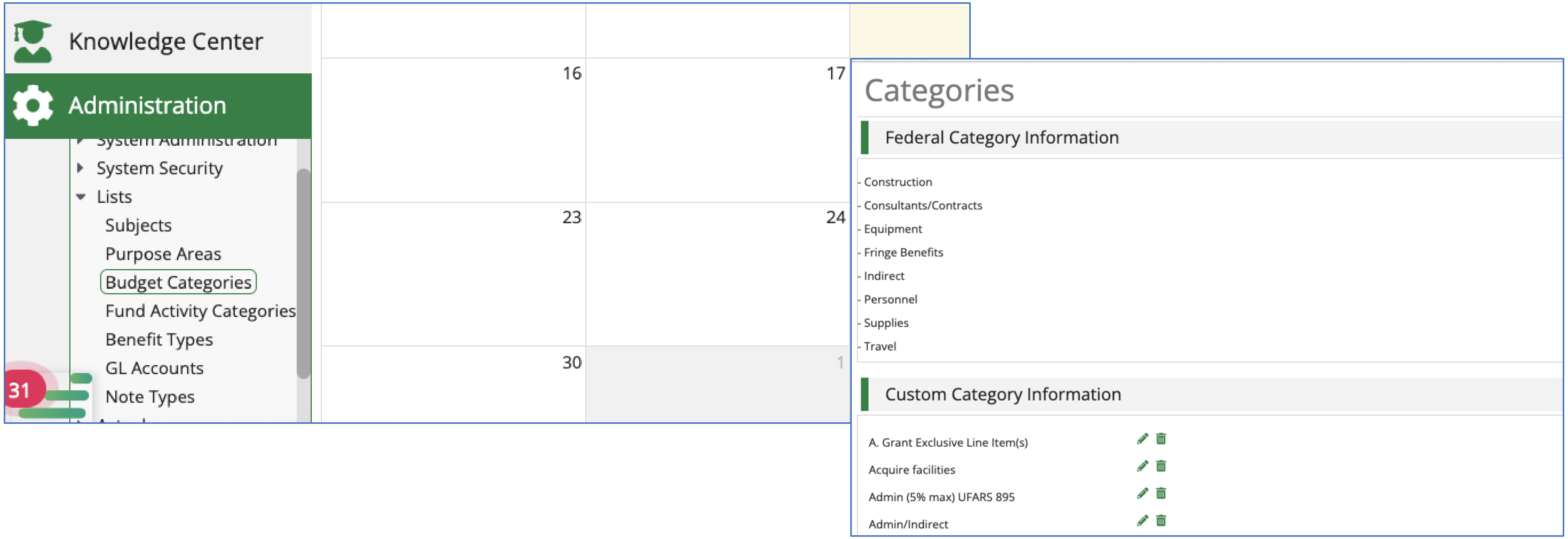
- Click the + icon on the top right of the screen.
- Enter the Name.
- Anything marked with an * is required.
- Enter other data as needed.
- Click Create on the bottom right of the screen.





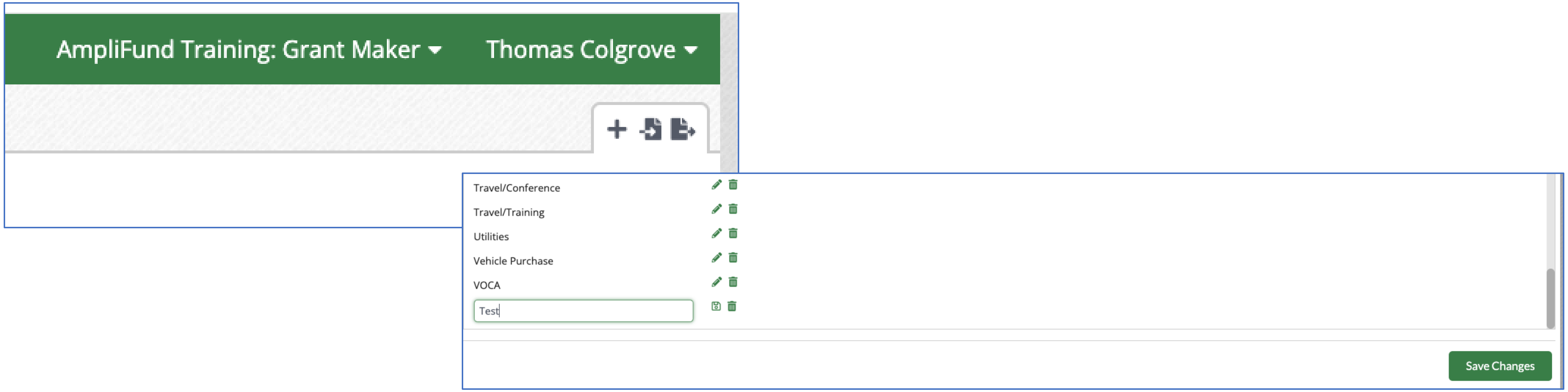
Access Budget Categories

- Log in to AmpliFund.
- Click on Administration > Lists > Budget Categories.
- Land on a list of all Budget Categories in your account.



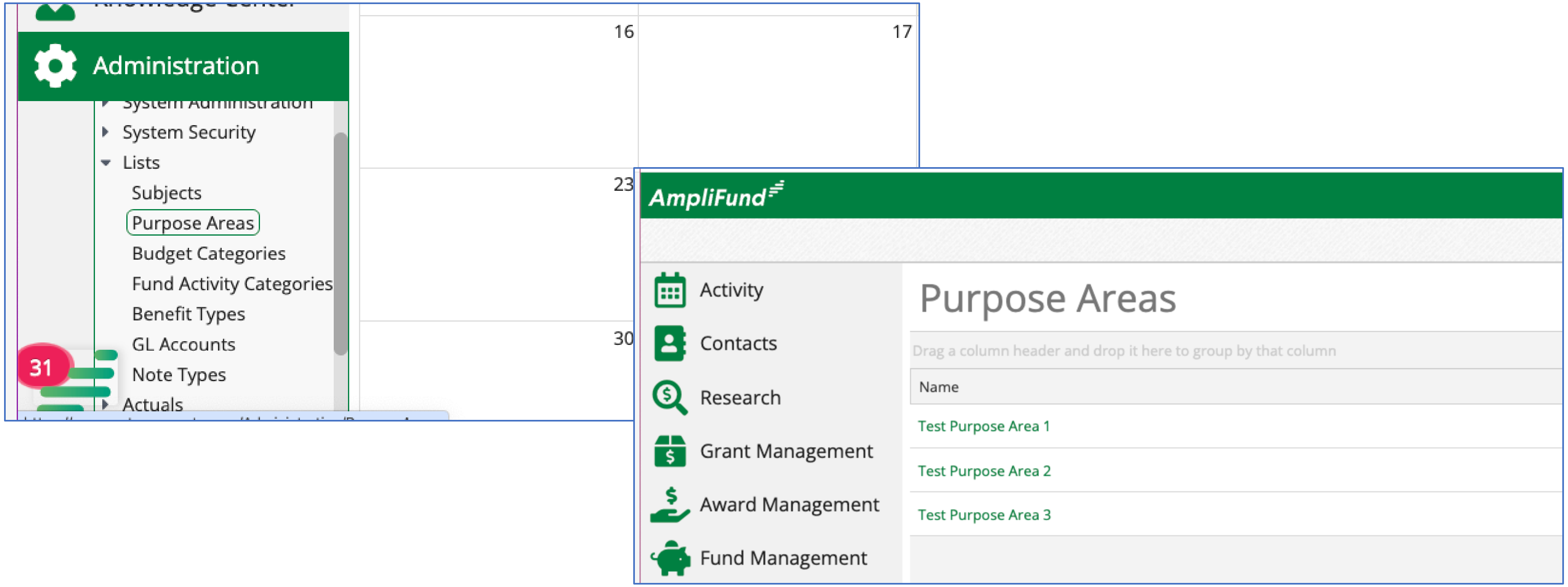
Add Budget Categories

- Click the + icon on the top right on the screen.
- Enter the new Budget Category name.
- Click on the floppy disc icon.
- Repeat for all new Budget Categories.
- Click save on the bottom right of the screen.



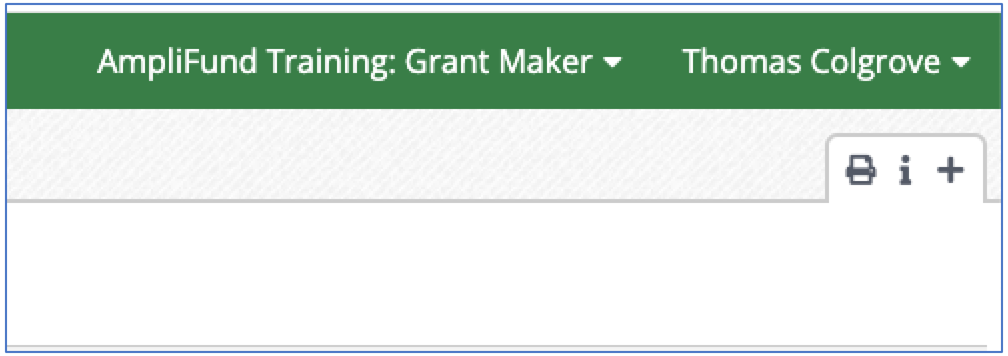
Access Purpose Areas

- Log in to AmpliFund.
- Click on Administration > Lists > Purpose Areas.
- Land on a list of all Purpose Areas in your account.



Add Purpose Areas

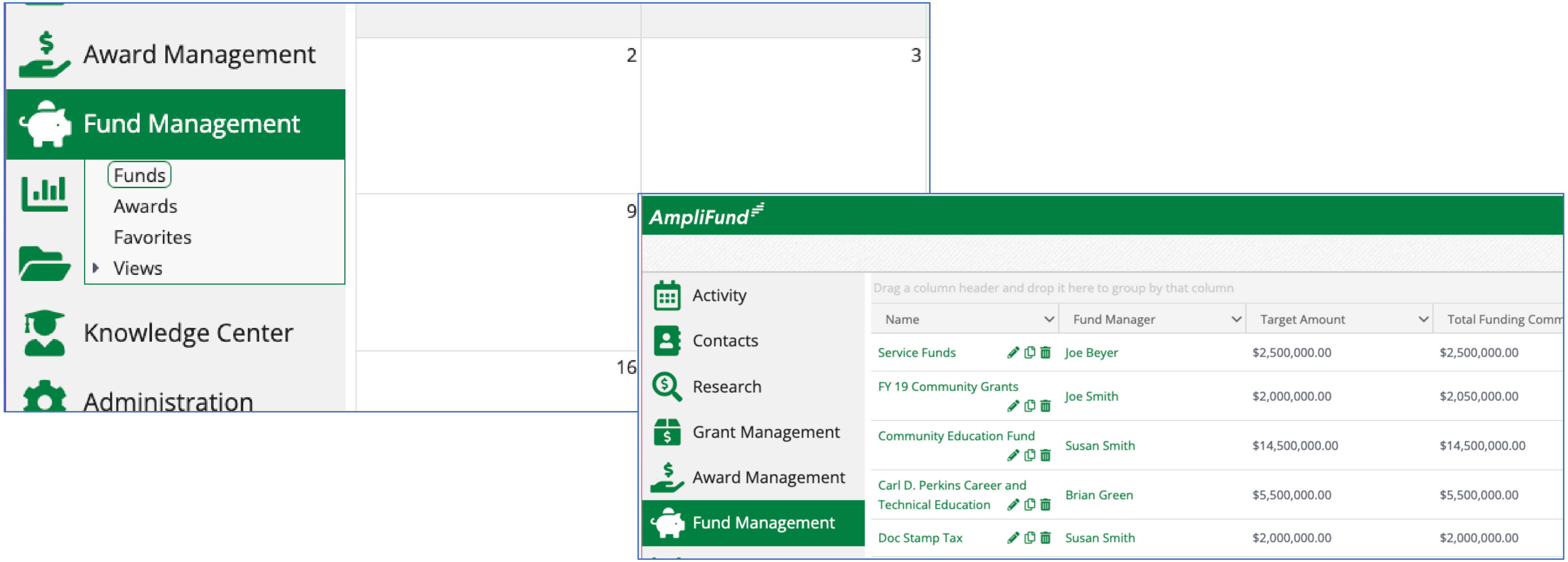
- Click on the + icon on the top right of the screen.
- Enter the Name.
- Click Create on the bottom right of the screen.



Create Fund

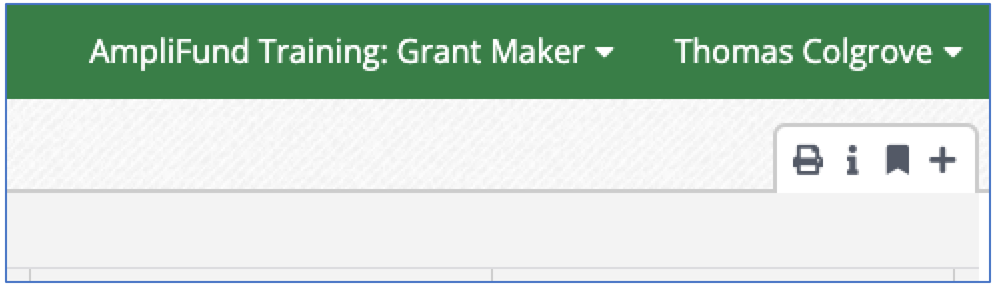
Access Funds

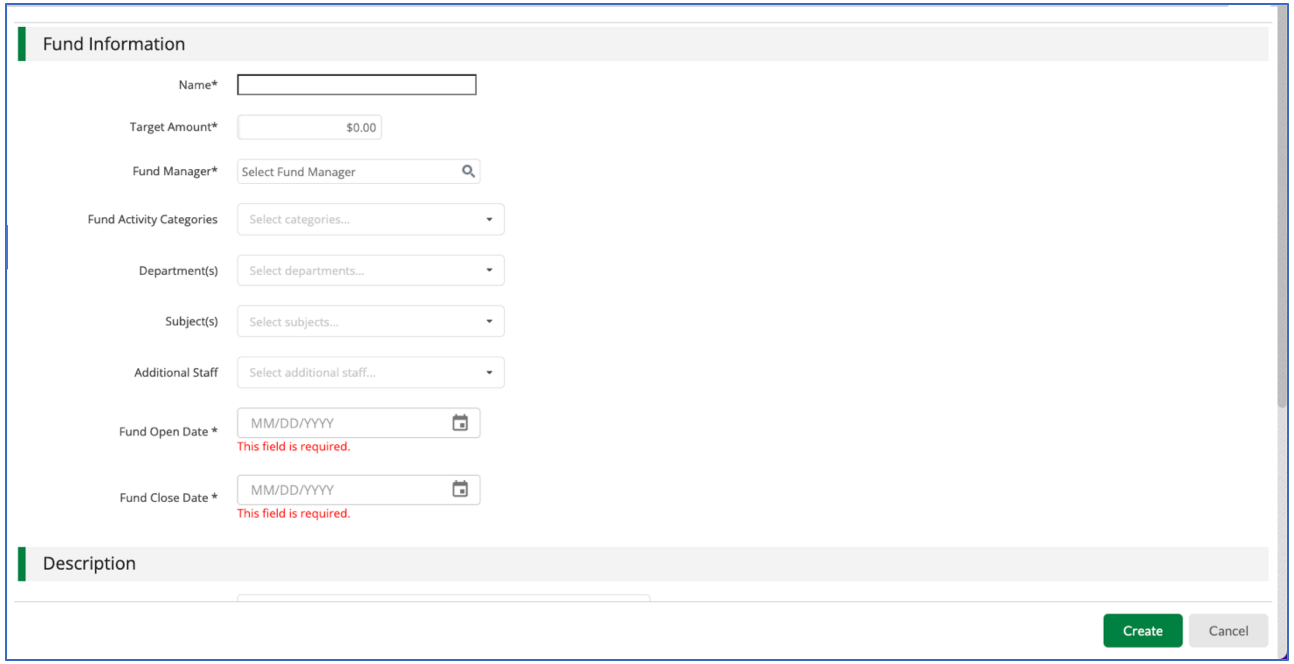
- Log in to AmpliFund.
- Click on Fund Management > Funds.
- Land on a list of all Funds in your account.



Create Funds

- Click on the + icon on the top right of the screen.
- Configure the Fund Information.
- Anything marked with an * is required.
- Click Create on the bottom right of the screen.





Add Total Income Received

- Scroll down to the Fund Details section.
- Click the + icon next to the Income Received to Date field and add the Funds.

Fund Details

Fund Income

Target Amount	$2,500,000.00
Income Received To Date	$2,500,000.00 +

Opportunity Funding

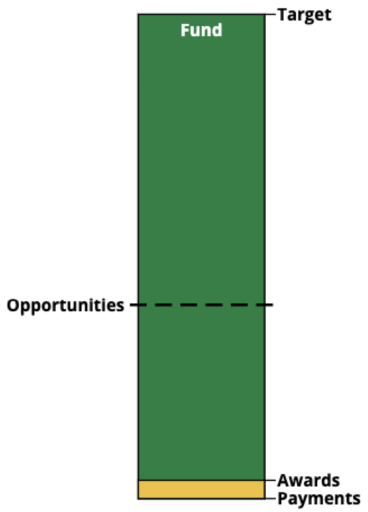
Total Anticipated for Opportunities	$1,000,000.00
Unanticipated Balance	$1,400,000.00

Award Funding

Obligated to Activated Awards	$100,000.00
Unobligated Balance	$2,400,000.00

Payments to Recipients

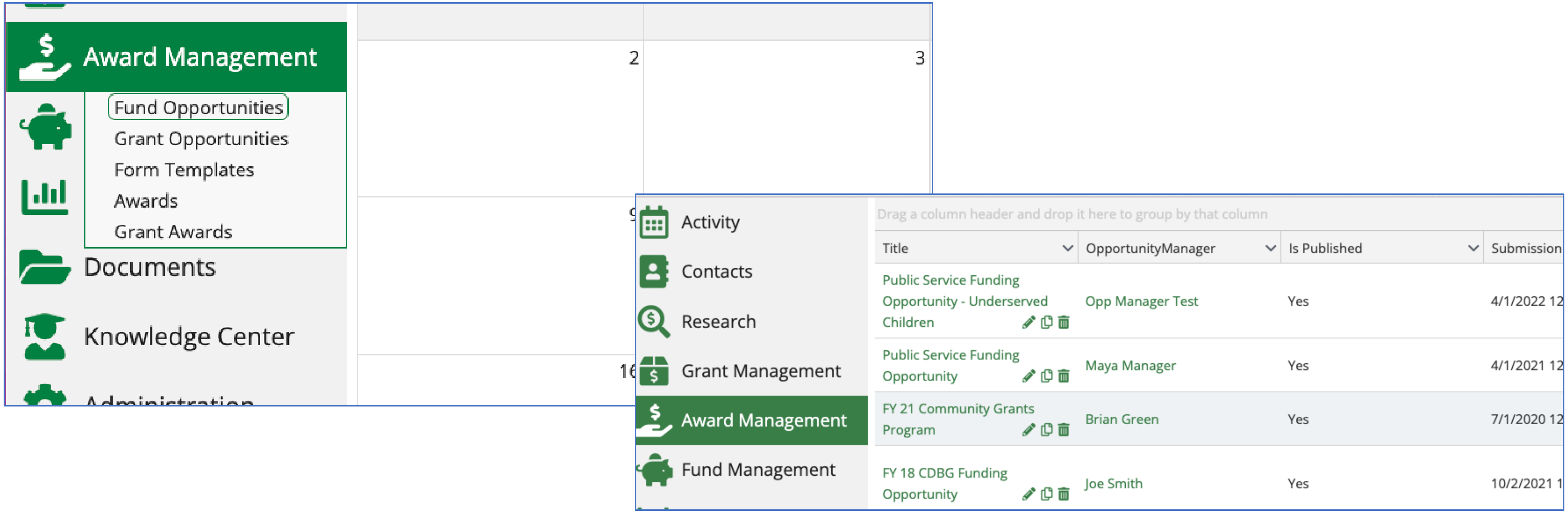
Liquidated To Date	$0.00
Unliquidated Obligations	$100,000.00
Unliquidated Cash Balance	$2,500,000.00



Create Opportunity

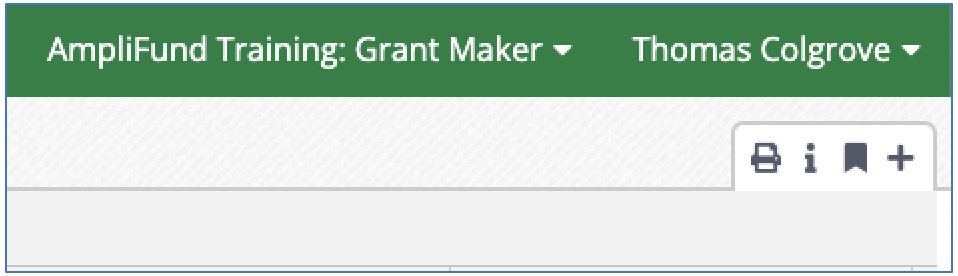
Access Opportunities

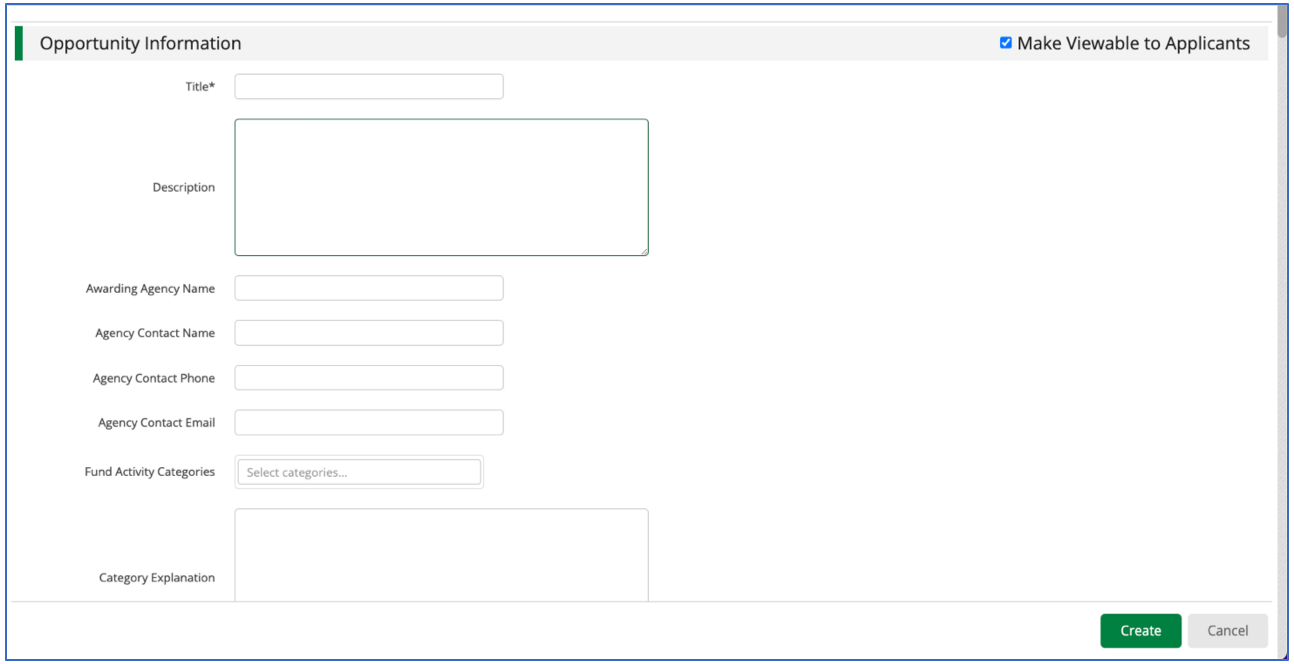
- Log in to AmpliFund.
- Click on Award Management > Fund Opportunities.
- Land on a list of all Opportunities in your account.



Create Opportunity

- Click the + icon on the top right of the screen.
- Enter the Title.
- Enter other details as needed.
- Click Create on the bottom right of the screen.

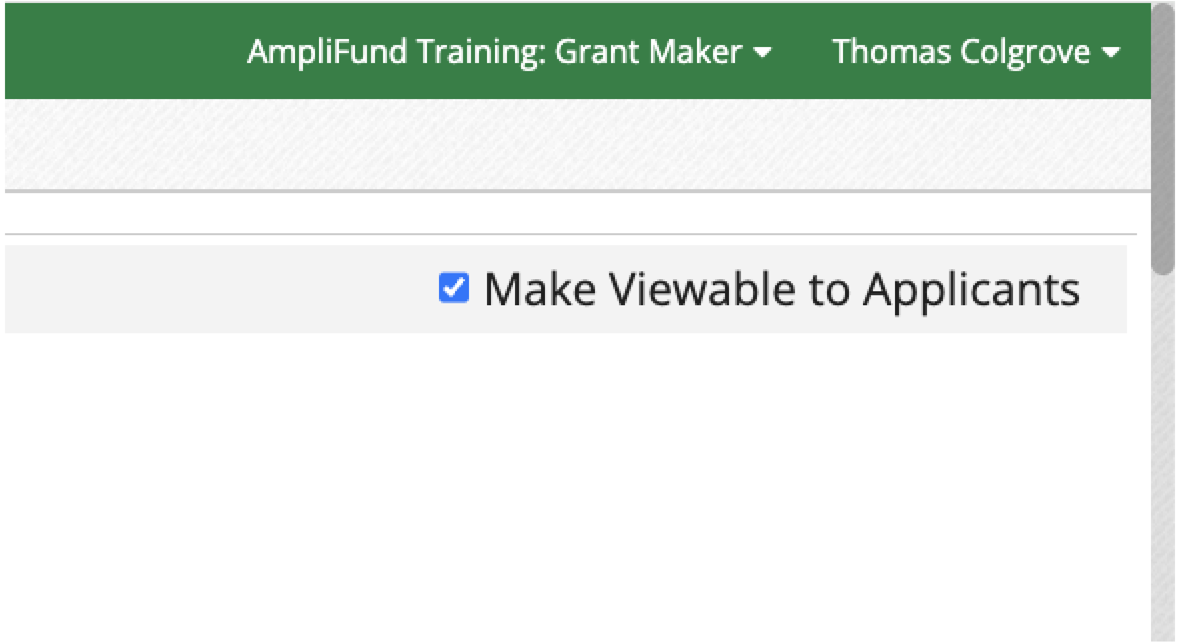




Opportunity Considerations

AmpliFund

- Make Viewable to Applicants Checkbox.
- Not all fields must be completed.
- Custom Forms and Form Extensions options.



In-Product Demo

Next Steps

Next Steps

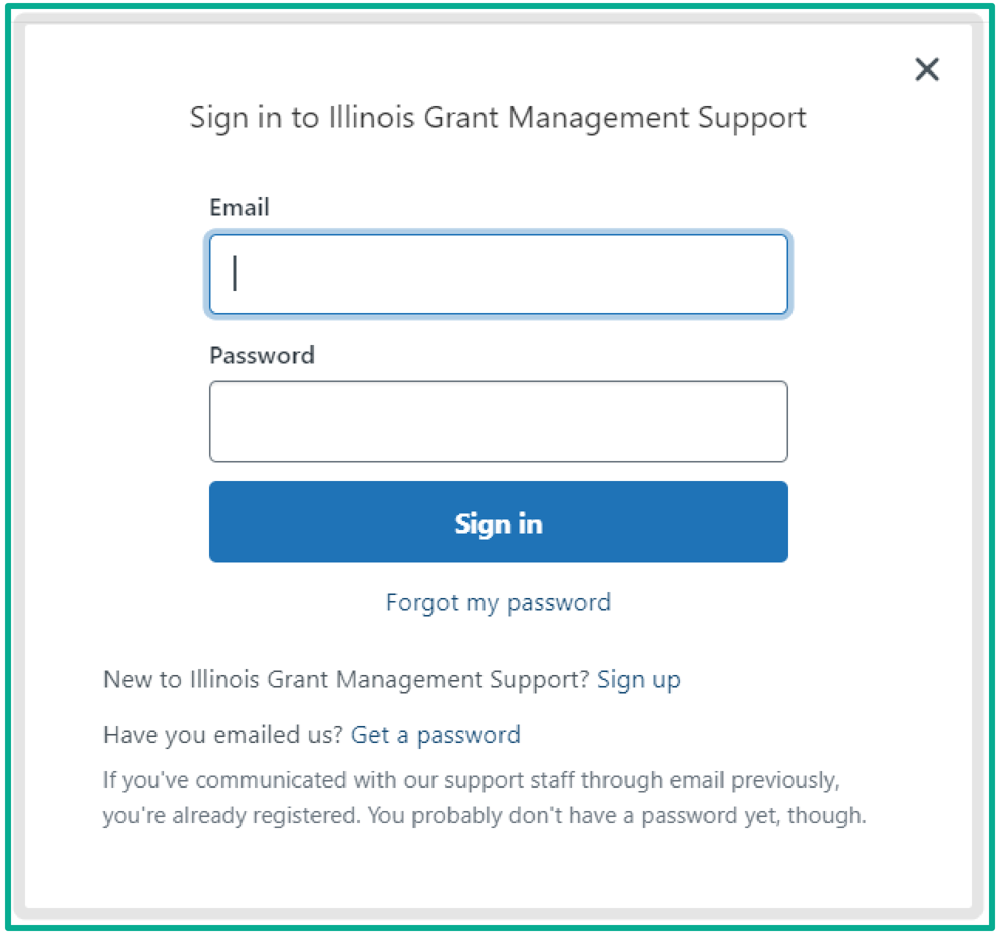
AmpliFund

- Create test Master Data elements:
  - User
  - Organization
  - Fund
  - Budget Category
  - Purpose Area
- Create a Fund.
- Create an Opportunity.
- Gather Application, Budget, and Performance Plan information for the next session.

Customer Support

Create AmpliFund Support Account

1. Access the appropriate support site.
2. Click the **Sign up** link.
3. Enter your **full name.**
4. Enter your **email address.**
5. Complete the **I'm not a robot** check.
6. Click the **Sign up** button.
7. An email from support@zendesk.com will be sent to you via email.
8. Click the link to set your password.



AmpliFund Illinois Support Portal

Submit a support ticket:

Commercial - support@amplifund.zendesk.com.

Illinois - support@il-amplifund.zendesk.com.

Nebraska - support@ne-amplifund.zendesk.com.

Visit Support Portal:

Commercial - https://amplifund.zendesk.com.

Illinois - https://il-amplifund.zendesk.com.

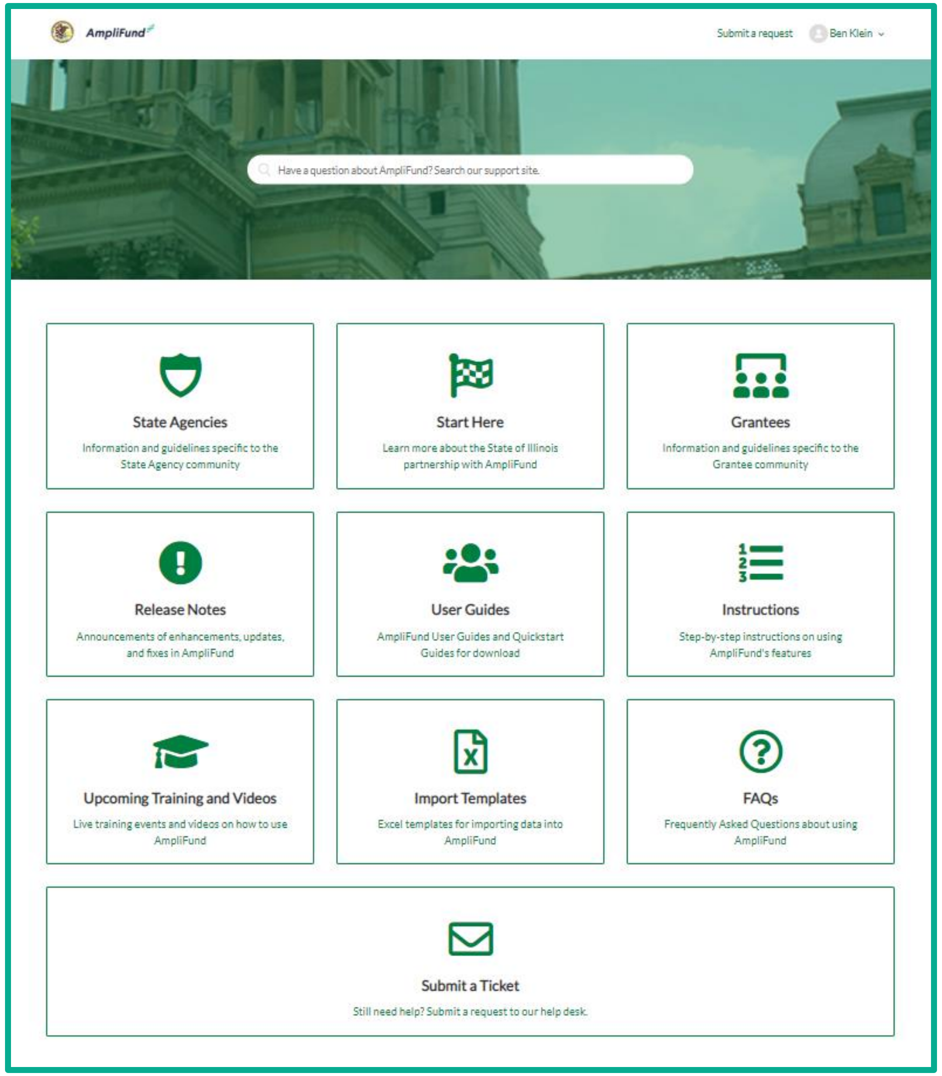
Nebraska - https://ne-amplifund.zendesk.com.

Production Site:

Commercial - https://www.gotomygrants.com.

Illinois - https://il.amplifund.com.

Nebraska - https://ne.amplifund.com.



Question & Answer