



Grant Maker Pre-Award Core Series

Master Data, Fund, Opportunity

Core Series Overview

- **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

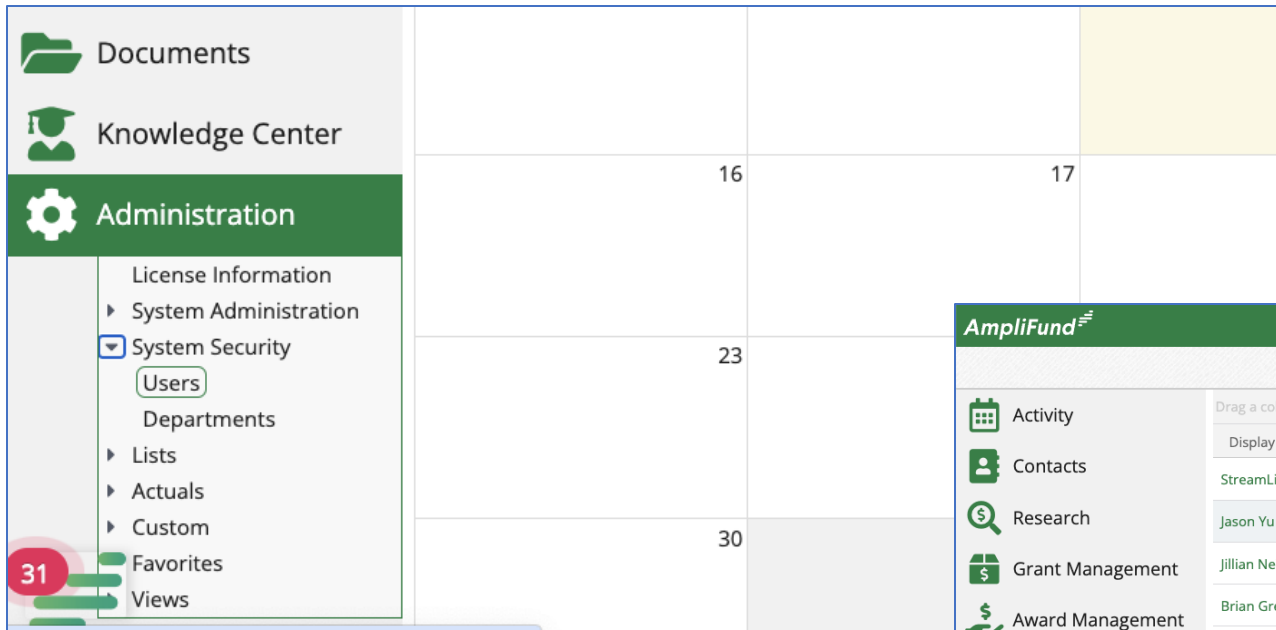
Agenda

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

Master Data

Access Users

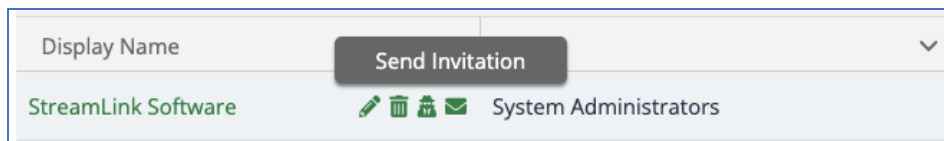
- Log in to AmpliFund.
- Click on Administration > System Security > Users.
- Land on a list of all Users in your account.



AmpliFund				
Drag a column header and drop it here to group by that column				
Activity	Display Name	Role	Invitation Sent	Has Logged In
Contacts	StreamLink Software	System Administrators	Yes	Yes
Research	Jason Yu	System Administrators	Yes	Yes
Grant Management	Jillian Neimeister	System Administrators	Yes	Yes
Award Management	Brian Green	Organizational Admin / Account Owner	Yes	No
Fund Management	Joe Beyer	Organizational Admin	No	No
Reports	Daniel Holtz	System Administrators	Yes	Yes
	Lauren Petz	System Administrators	Yes	Yes

Add Users

- 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.

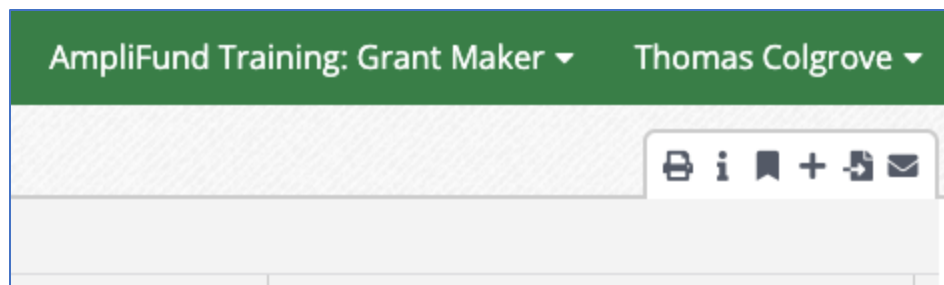


Display Name

StreamLink Software

Send Invitation

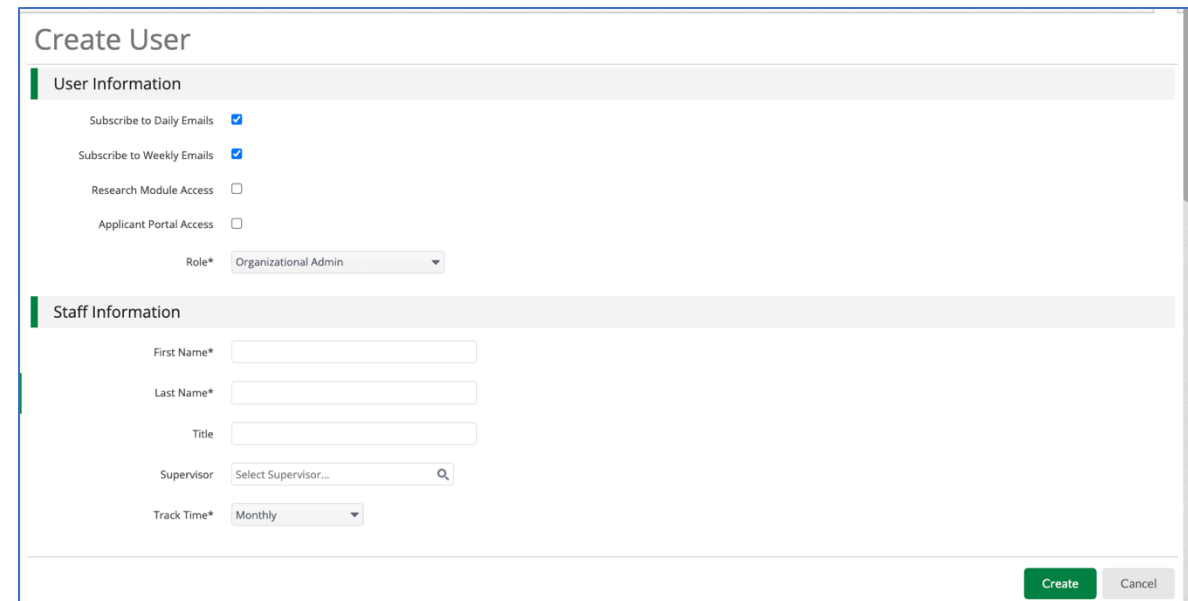
System Administrators



AmpliFund Training: Grant Maker

Thomas Colgrove

+ icon



Create User

User Information

Subscribe to Daily Emails ☒

Subscribe to Weekly Emails ☒

Research Module Access ☐

Applicant Portal Access ☐

Role* Organizational Admin

Staff Information

First Name*

Last Name*

Title

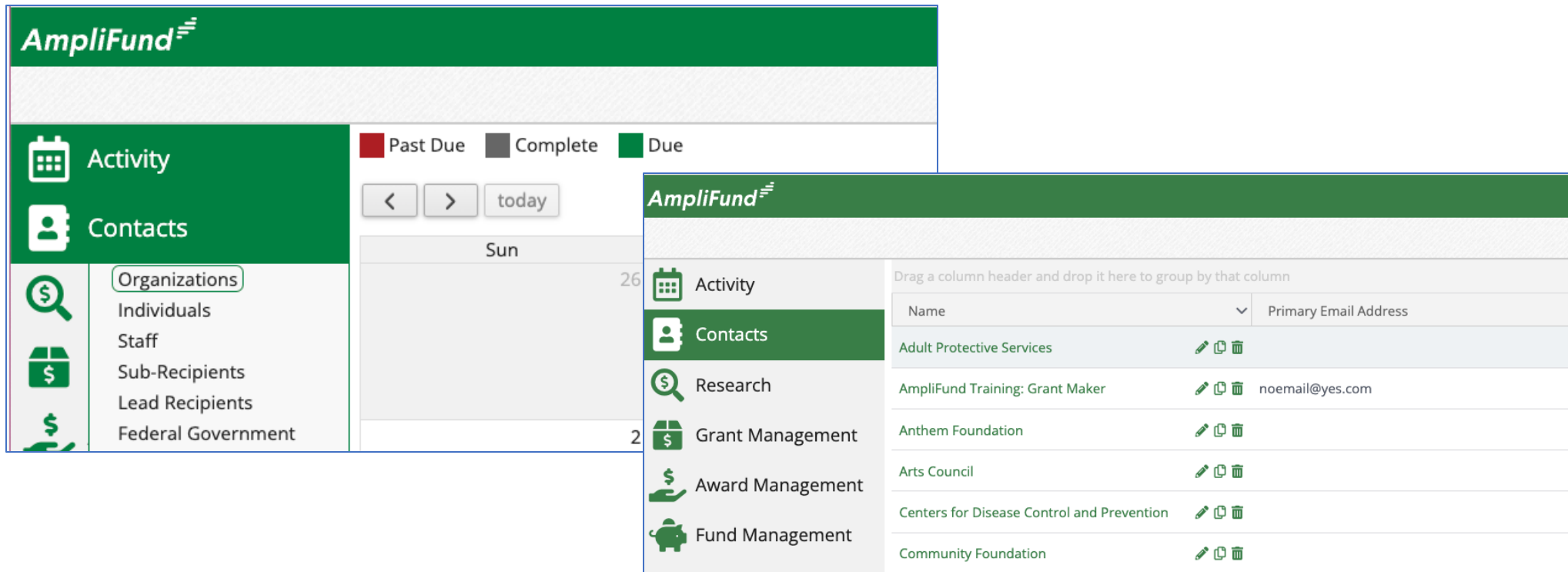
Supervisor Select Supervisor...

Track Time* Monthly

Create Cancel

Access Organizations

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

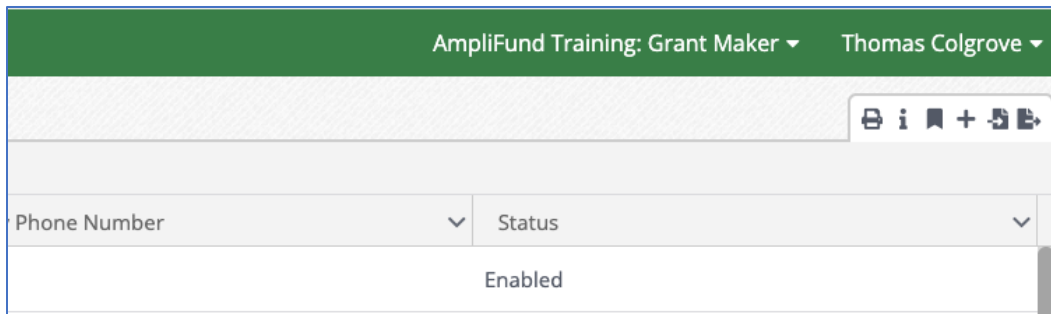


The screenshot displays the AmpliFund web application interface. The top navigation bar is green with the AmpliFund logo. The left sidebar contains a menu with icons for Activity, Contacts, and a search icon. The 'Contacts' section is expanded, showing a list of categories: Organizations (highlighted), Individuals, Staff, Sub-Recipients, Lead Recipients, and Federal Government. The main content area shows a calendar view for Sunday, with a date picker set to 'today'. A modal window is open, displaying a list of organizations. The modal has a green header with the AmpliFund logo and a search bar. Below the search bar, there is a table with columns for Name and Primary Email Address. The table lists several organizations, each with a row of icons for editing, deleting, and adding details.

Name	Primary Email Address
Adult Protective Services	
AmpliFund Training: Grant Maker	noemail@yes.com
Anthem Foundation	
Arts Council	
Centers for Disease Control and Prevention	
Community Foundation	

Add Organization

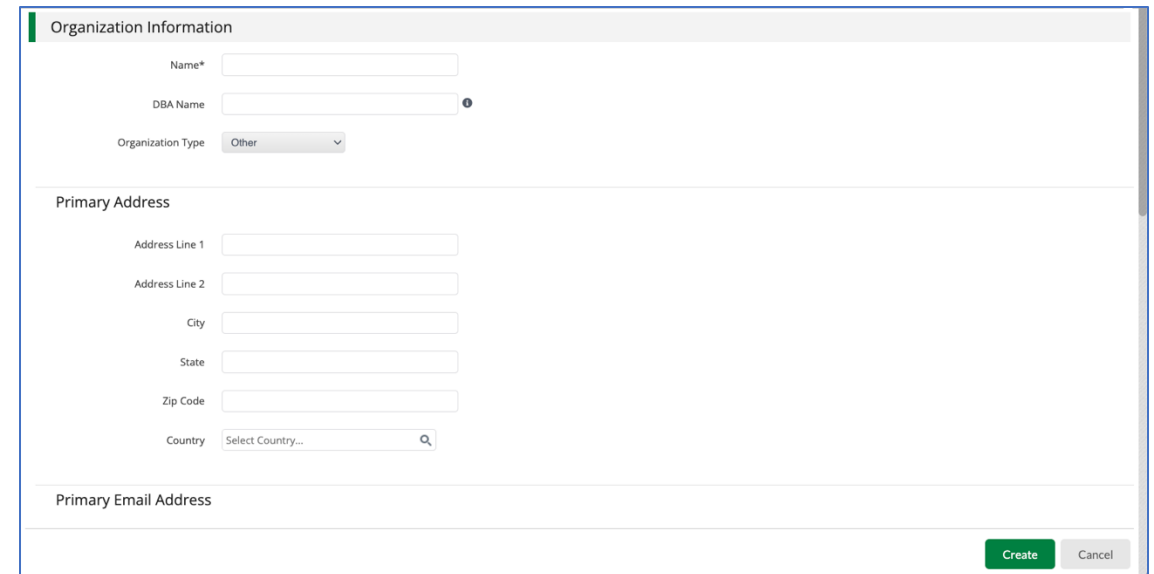
- Click the + icon on the top right of the screen.
- Enter the Name.
- Anything marked with an * is required.
- Enter other data as needed.
- Click Create on the bottom right of the screen.



AmpliFund Training: Grant Maker ▼ Thomas Colgrove ▼

Phone Number ▼ Status ▼

Enabled



Organization Information

Name*

DBA Name

Organization Type Other ▼

Primary Address

Address Line 1

Address Line 2

City

State

Zip Code

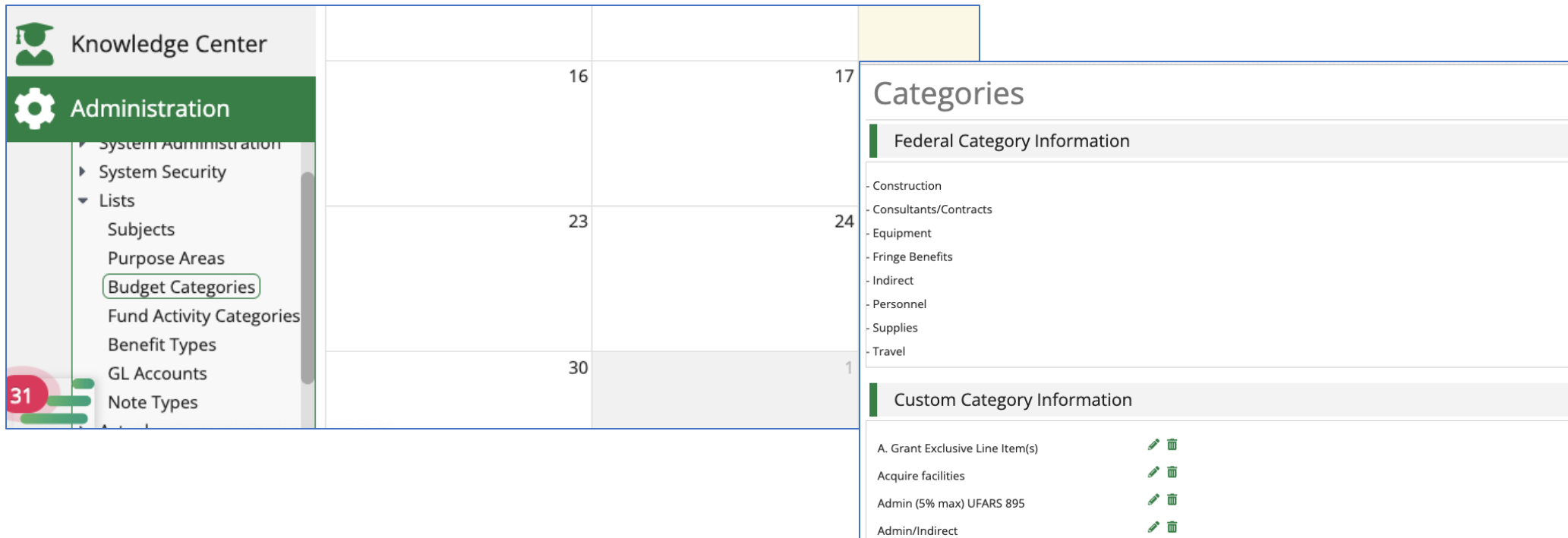
Country

Primary Email Address

Create Cancel

Access Budget Categories

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



The screenshot displays the AmpliFund interface. On the left, a navigation menu is visible with the following items: Knowledge Center, Administration (highlighted), System Administration, System Security, Lists (expanded), Subjects, Purpose Areas, Budget Categories (highlighted), Fund Activity Categories, Benefit Types, GL Accounts, and Note Types. A red circle with the number 31 is next to the Lists menu item.

The main content area shows a table of Budget Categories. The table has three columns: Category Name, Count, and Action. The categories listed are:









Category Name	Count	Action
Construction	16	17
Consultants/Contracts	23	24
Equipment	30	1

On the right side of the interface, there is a sidebar titled "Categories" with two sections: "Federal Category Information" and "Custom Category Information".

Federal Category Information

- Construction
- Consultants/Contracts
- Equipment
- Fringe Benefits
- Indirect
- Personnel
- Supplies
- Travel

Custom Category Information

- A. Grant Exclusive Line Item(s)  
- Acquire facilities  
- Admin (5% max) UFARS 895  
- Admin/Indirect  

Add Budget Categories

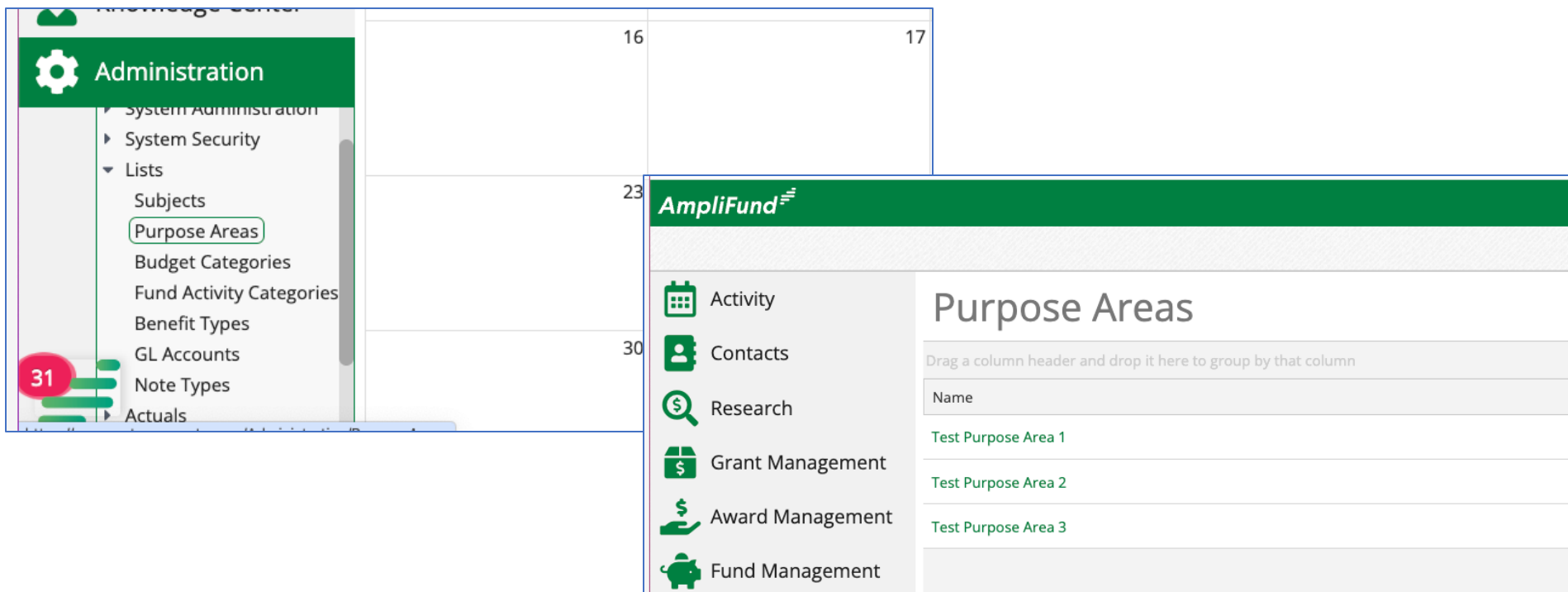
- Click the + icon on the top right on the screen.
- Enter the new Budget Category name.
- Click on the floppy disc icon.
- Repeat for all new Budget Categories.
- Click save on the bottom right of the screen.

The screenshot displays the 'AmpliFund Training: Grant Maker' interface. At the top, a green header bar contains the text 'AmpliFund Training: Grant Maker' and 'Thomas Colgrove'. Below this, a light gray area features a '+', a floppy disk icon, and an export icon. A dropdown menu is open, listing existing budget categories: 'Travel/Conference', 'Travel/Training', 'Utilities', 'Vehicle Purchase', and 'VOCA'. A new entry 'Test' is being added in a text input field. Each category has a green edit icon and a trash icon to its right. A green 'Save Changes' button is located at the bottom right of the interface.

Budget Category	Edit	Delete
Travel/Conference		
Travel/Training		
Utilities		
Vehicle Purchase		
VOCA		
<input type="text" value="Test"/>		

Access Purpose Areas

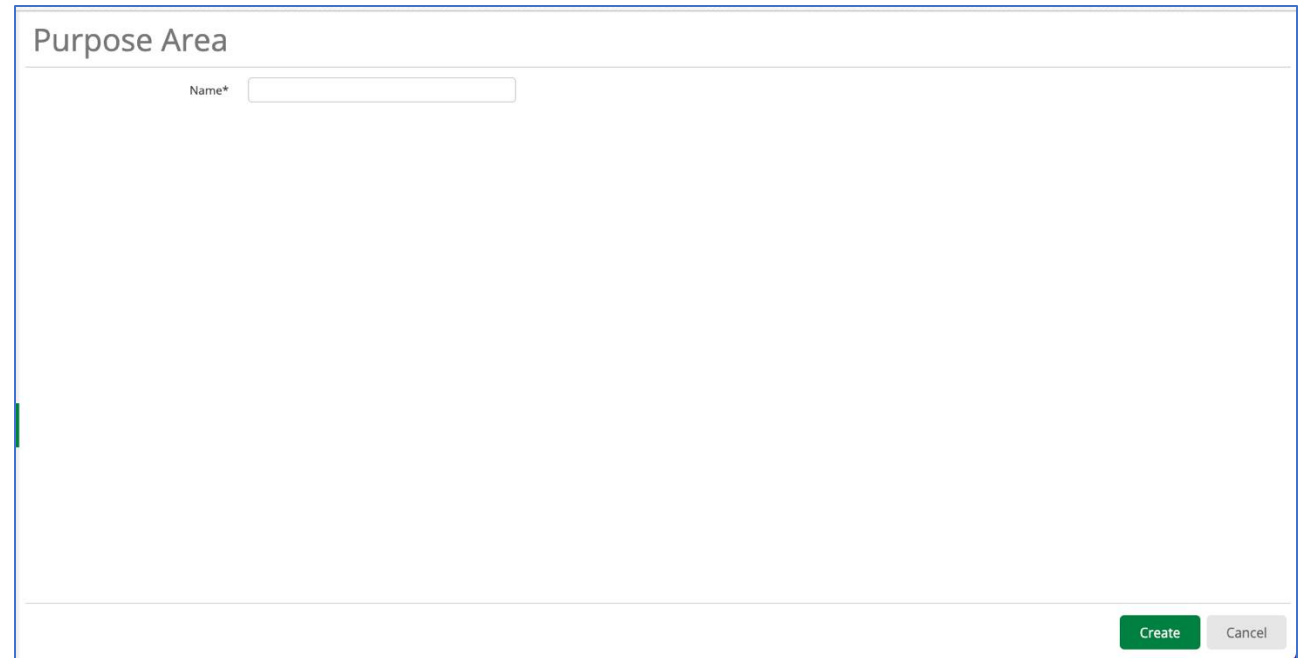
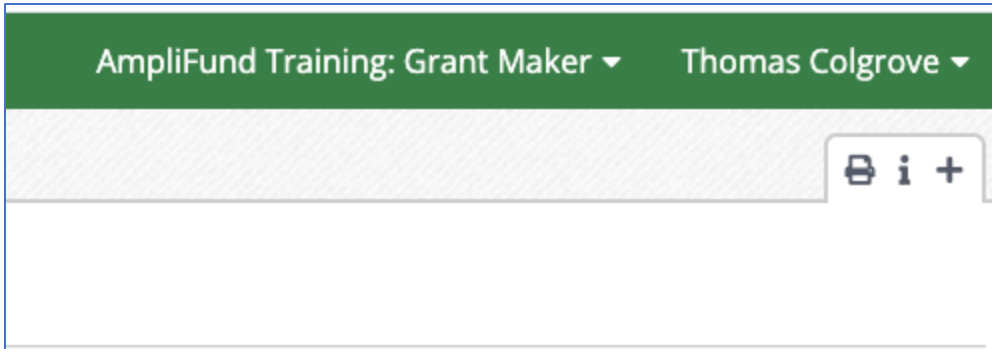
- Log in to AmpliFund.
- Click on Administration > Lists > Purpose Areas.
- Land on a list of all Purpose Areas in your account.



The screenshot displays the AmpliFund web application interface. On the left, a green navigation sidebar is visible with the 'Administration' section expanded, showing a list of options including 'System Administration', 'System Security', 'Lists', 'Subjects', 'Purpose Areas' (highlighted with a red circle and the number 31), 'Budget Categories', 'Fund Activity Categories', 'Benefit Types', 'GL Accounts', 'Note Types', and 'Actuals'. The main content area on the right shows the 'Purpose Areas' page. It features a green header with the AmpliFund logo and a sidebar with icons for Activity, Contacts, Research, Grant Management, Award Management, and Fund Management. The main content area has a title 'Purpose Areas' and a table with a header 'Name' and three rows of test data: 'Test Purpose Area 1', 'Test Purpose Area 2', and 'Test Purpose Area 3'. A red circle with the number 31 is also present in the bottom left corner of the screenshot.

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.



This screenshot shows the "Purpose Area" form. The form has a title "Purpose Area" at the top. Below the title, there is a label "Name*" followed by a text input field. At the bottom right of the form, there are two buttons: "Create" (green) and "Cancel" (gray).

Create Fund

Access Funds



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

Award Management

Fund Management

Funds

Awards

Favorites

Views

Knowledge Center

Administration

2

3

9

16

Activity

Contacts

Research

Grant Management

Award Management

Fund Management

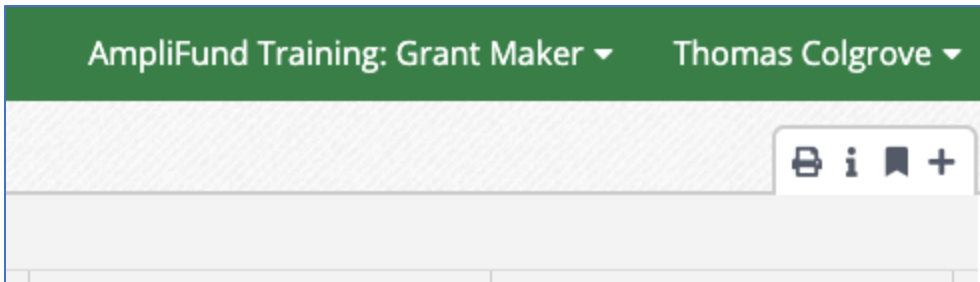
Drag a column header and drop it here to group by that column

Name	Fund Manager	Target Amount	Total Funding Comm
Service Funds	Joe Beyer	\$2,500,000.00	\$2,500,000.00
FY 19 Community Grants	Joe Smith	\$2,000,000.00	\$2,050,000.00
Community Education Fund	Susan Smith	\$14,500,000.00	\$14,500,000.00
Carl D. Perkins Career and Technical Education	Brian Green	\$5,500,000.00	\$5,500,000.00
Doc Stamp Tax	Susan Smith	\$2,000,000.00	\$2,000,000.00

AmpliFund Corporate Presentation

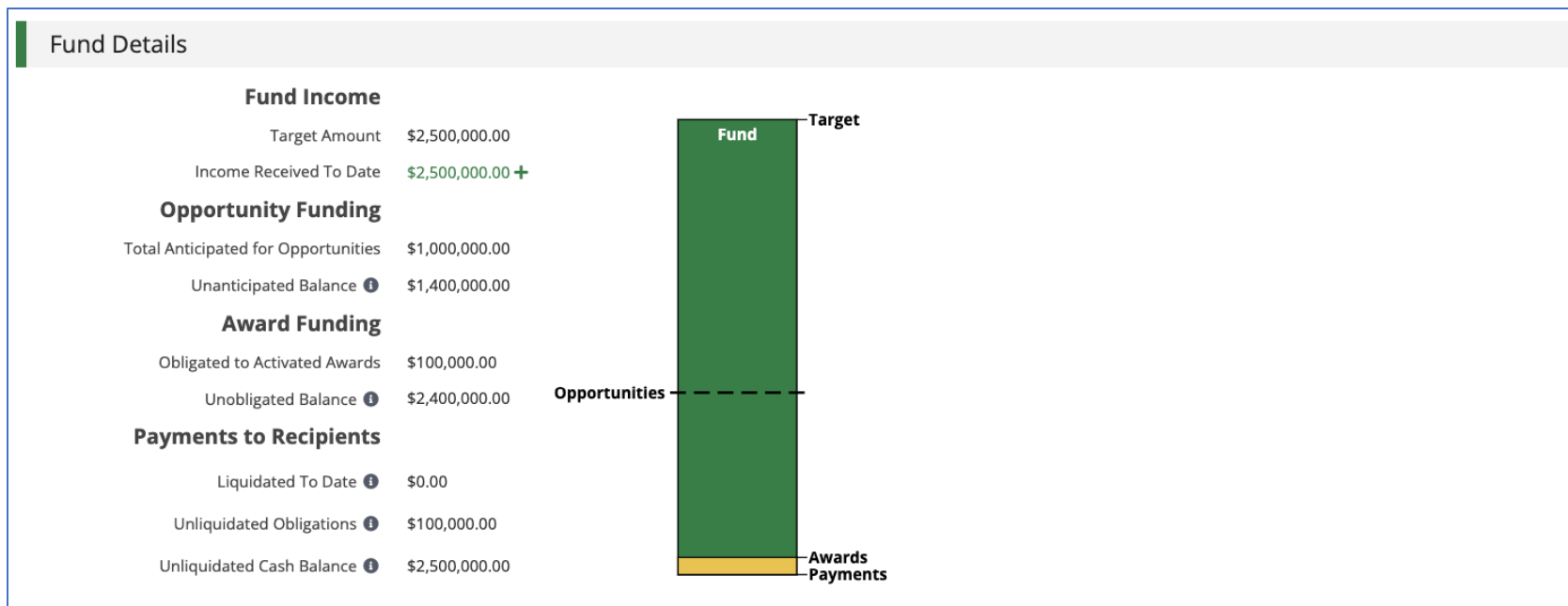
Create Funds

- 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.

A screenshot of the "Fund Information" form in the AmpliFund system. The form is titled "Fund Information" and contains several fields for configuring a fund. The fields are: Name* (text input), Target Amount* (text input with a value of \$0.00), Fund Manager* (dropdown menu with a search icon), Fund Activity Categories (dropdown menu), Department(s) (dropdown menu), Subject(s) (dropdown menu), Additional Staff (dropdown menu), Fund Open Date* (date input with a calendar icon and a red error message "This field is required."), and Fund Close Date* (date input with a calendar icon and a red error message "This field is required."). Below the Fund Information section is a "Description" section with a text area. At the bottom right of the form are two buttons: "Create" (green) and "Cancel" (gray).

Add Total Income Received

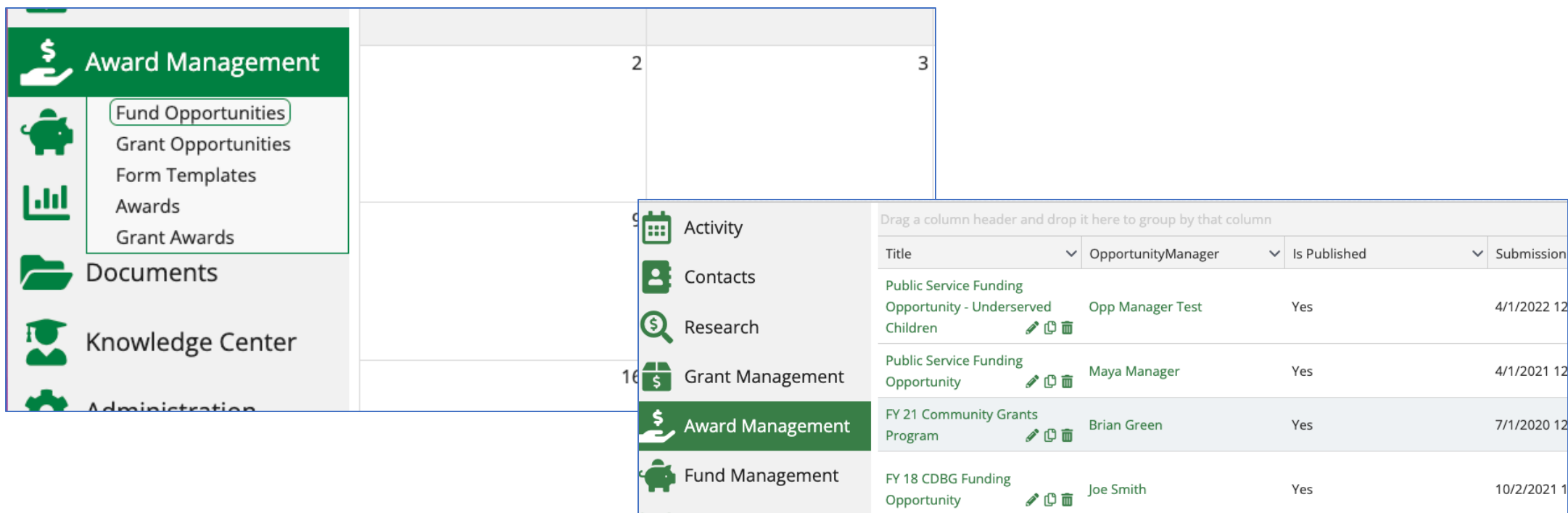
- Scroll down to the Fund Details section.
- Click the + icon next to the Income Received to Date field and add the Funds.



Create Opportunity

Access Opportunities

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

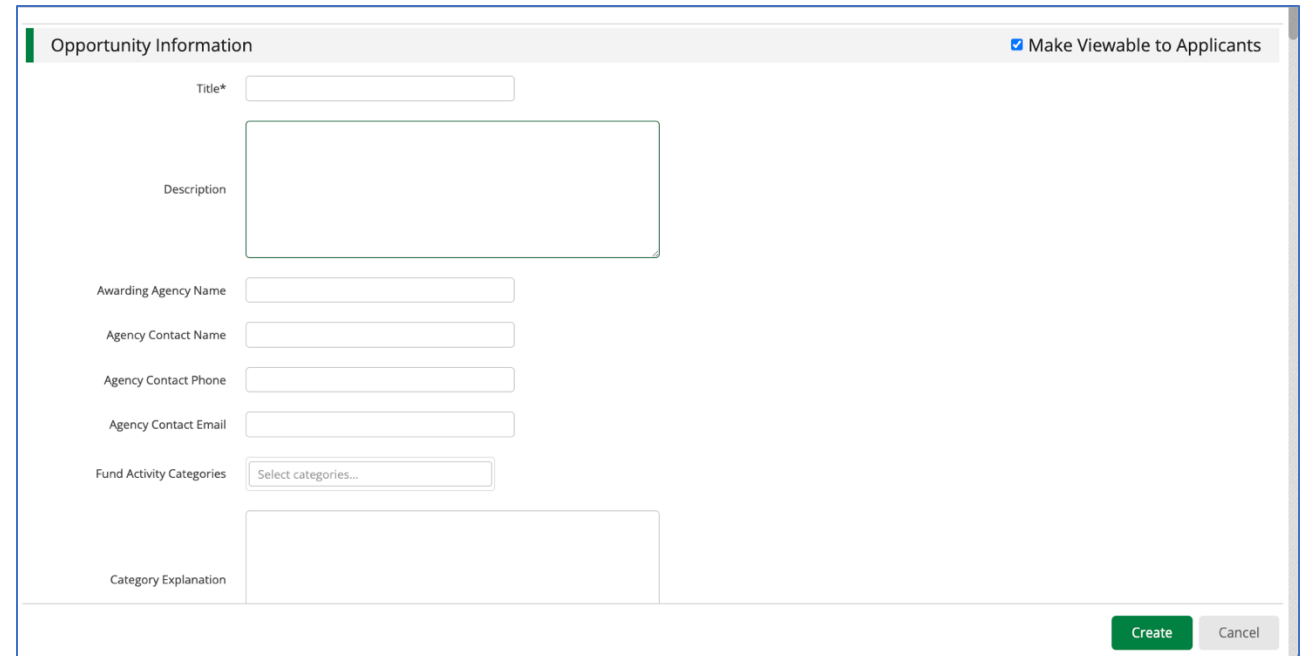
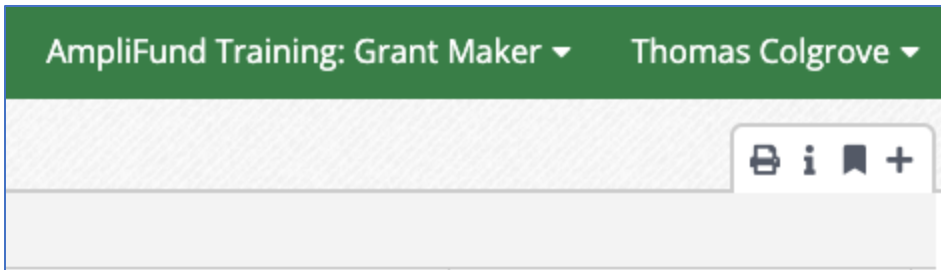


The screenshot shows the AmpliFund interface. On the left is a sidebar with a green header 'Award Management' containing a dollar sign icon. Below it are icons for a piggy bank, a bar chart, a folder, a graduation cap, and a gear. The main content area shows a table with columns for Title, OpportunityManager, Is Published, and Submission. A dropdown menu is open over the table, showing options: Activity, Contacts, Research, Grant Management, Award Management (highlighted), and Fund Management. The table lists four opportunities.

Title	OpportunityManager	Is Published	Submission
Public Service Funding Opportunity - Underserved Children	Opp Manager Test	Yes	4/1/2022 12
Public Service Funding Opportunity	Maya Manager	Yes	4/1/2021 12
FY 21 Community Grants Program	Brian Green	Yes	7/1/2020 12
FY 18 CDBG Funding Opportunity	Joe Smith	Yes	10/2/2021 1

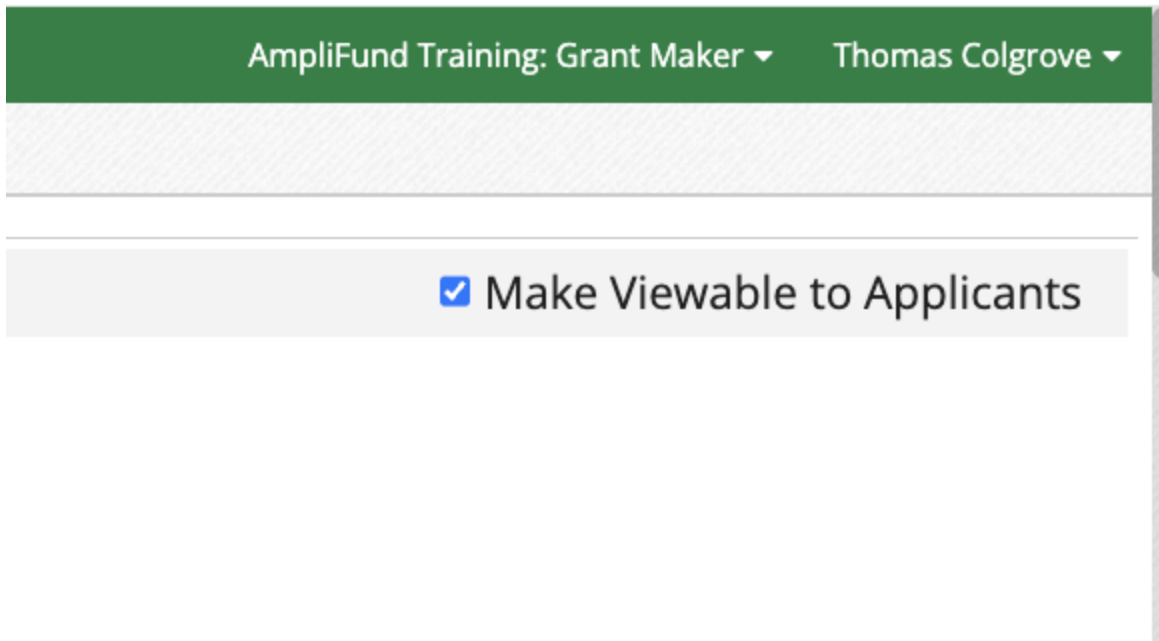
Create Opportunity

- 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.

A screenshot of the 'Opportunity Information' form. The form is titled 'Opportunity Information' and has a checkbox labeled 'Make Viewable to Applicants' which is checked. The form contains several input fields: 'Title*' (a short text field), 'Description' (a large text area), 'Awarding Agency Name' (a text field), 'Agency Contact Name' (a text field), 'Agency Contact Phone' (a text field), 'Agency Contact Email' (a text field), 'Fund Activity Categories' (a dropdown menu with 'Select categories...' as the placeholder), and 'Category Explanation' (a text area). At the bottom right of the form, there are two buttons: 'Create' (a green button) and 'Cancel' (a grey button).

Opportunity Considerations

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



The screenshot shows a user interface for 'AmpliFund Training: Grant Maker' by Thomas Colgrove. A green header bar contains the text 'AmpliFund Training: Grant Maker' and 'Thomas Colgrove', both followed by a downward arrow. Below the header is a light gray bar with a diagonal line pattern. A horizontal line separates this from a light gray box containing a checked checkbox and the text 'Make Viewable to Applicants'. A vertical gray bar is on the right side of the interface.

In-Product Demo

Next Steps

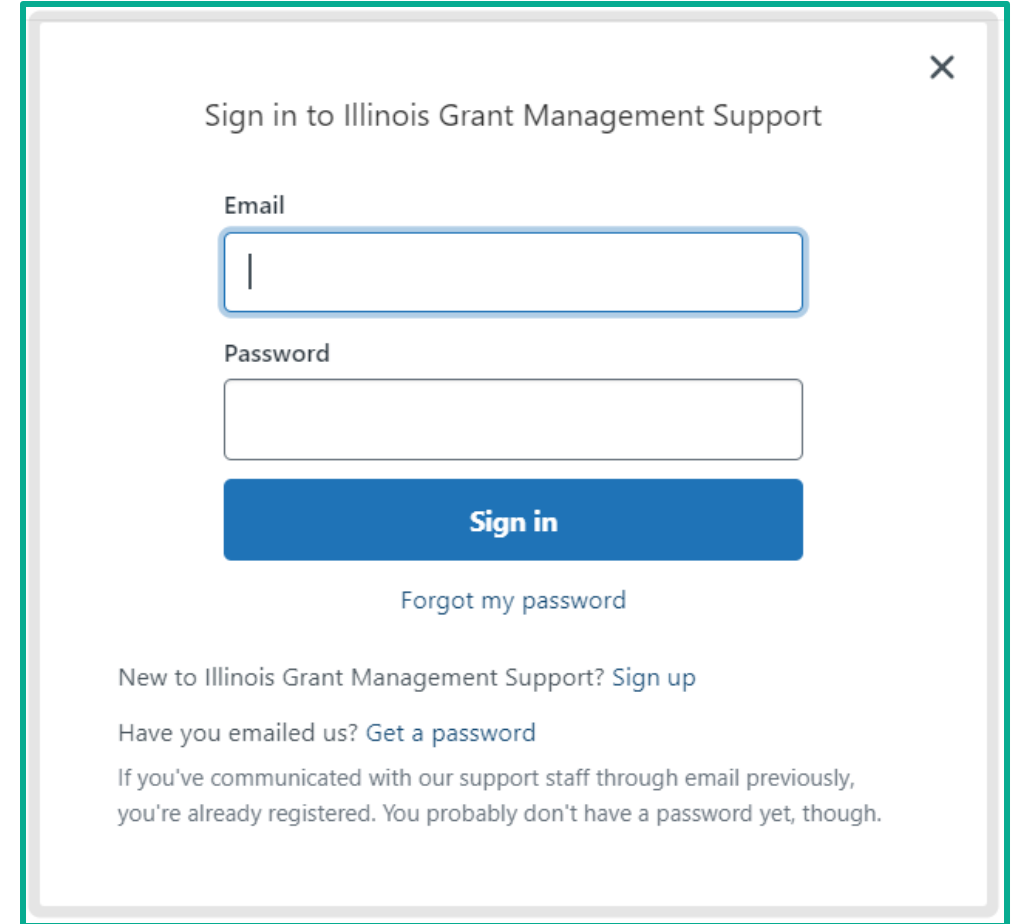
Next Steps

- 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.



The screenshot shows a sign-in form titled "Sign in to Illinois Grant Management Support" with a close button (X) in the top right corner. The form contains two input fields: "Email" and "Password". Below the "Password" field is a blue "Sign in" button. Under the button is a link that says "Forgot my password". At the bottom of the form, there are two links: "New to Illinois Grant Management Support? Sign up" and "Have you emailed us? Get a password". A paragraph of text at the very bottom states: "If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though."

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>.

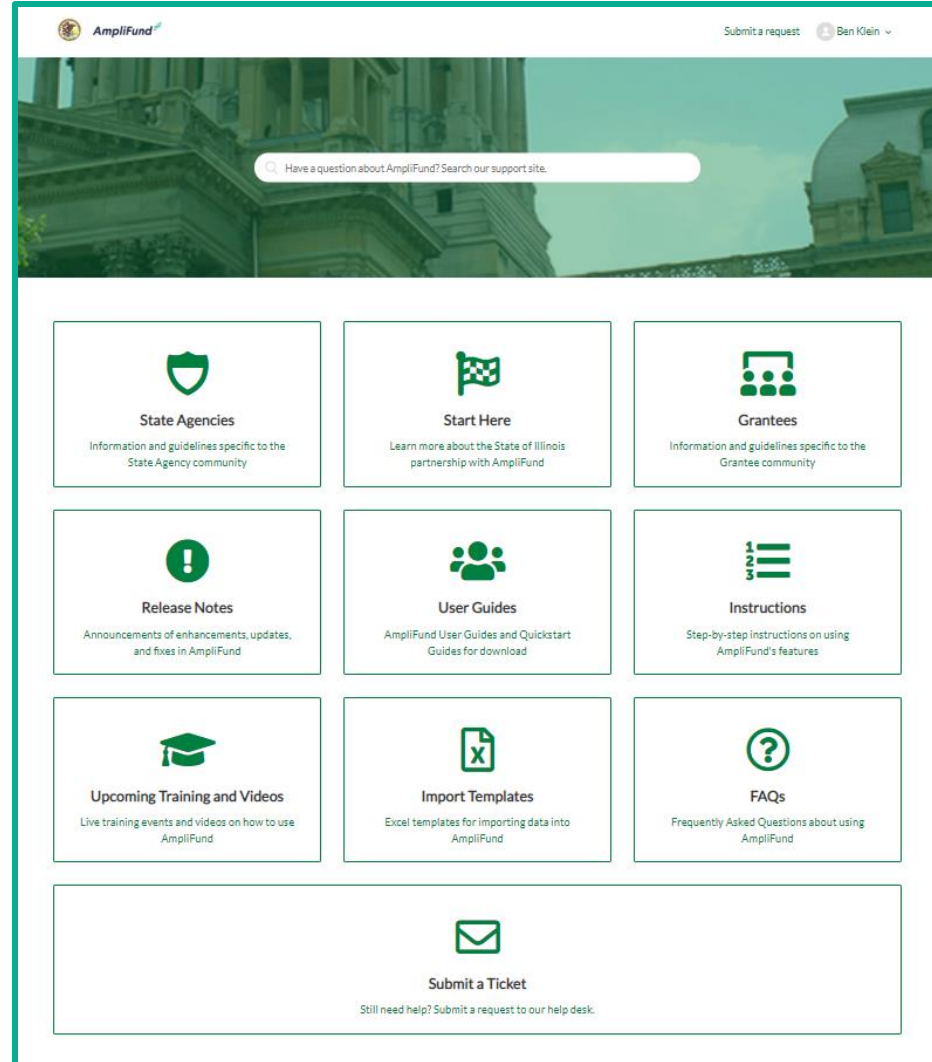
Nebraska – <https://ne-amplifund.zendesk.com>.

Production Site:

Commercial – <https://www.gotomygrants.com>.

Illinois – <https://il.amplifund.com>.

Nebraska – <https://ne.amplifund.com>.



Question & Answer