

*AmpliFund*<sup>≡</sup>



# Core Series Recipient 1 – Applicant Portal: Application Overview and Submission

**We will start 2 minutes after the hour!**

# Recipient Core Series

- 
- A large green arrow pointing to the right, highlighting the first item in the list.
- Day 1 – Applicant & Recipient Core Series: AmpliFund Applicant Portal: Application Overview and Submission
  - Day 2 – Applicant & Recipient Core Series: AmpliFund Navigation and Recipient Performance Reporting
  - Day 3 – Applicant & Recipient Core Series: Recipient Financial Reporting
  - Day 4 – Applicant & Recipient Core Series: Advanced Recipient Management and Tools
  - Day 5 – Applicant & Recipient Core Series: State of Illinois Unique Applicant & Recipient Configurations

# Agenda

- Process Overview
- Overview of Applicant Portal
  - Create and Manage Applicant Portal Account
  - Project Information
  - Application Forms
  - Performance Plan
  - Budget
- Edit Reopened Application
- Administration and Support
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer

# Overview of Applicant Portal

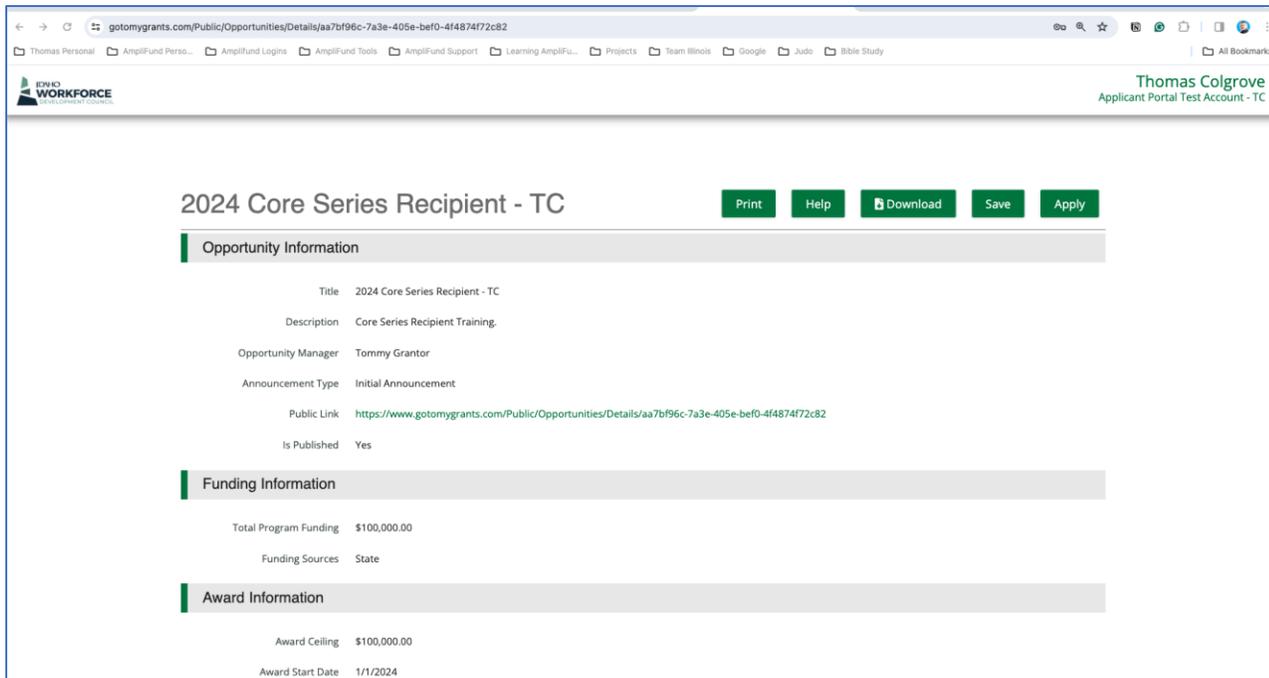
# Section Agenda

- Applicant Portal Overview
  - Create Applicant Portal Account
  - Account Information
  - Manage Applications
  - Manage Users

# Create Applicant Portal Account

If you are accessing the Applicant Portal for the first time you must create an account by following the steps below:

- Click on the public link to the Opportunity provided by your funder
- Click Log In on the top right of the screen or the Apply button
- Click Register

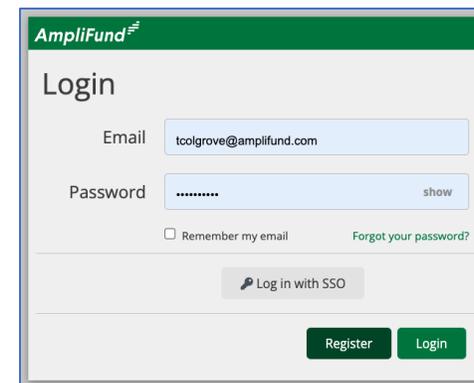


The screenshot shows a web browser window displaying the AmpliFund Applicant Portal. The page title is "2024 Core Series Recipient - TC". The user is logged in as "Thomas Colgrove" with a "Test Account". The page features a navigation bar with "Print", "Help", "Download", "Save", and "Apply" buttons. The main content is organized into three sections: Opportunity Information, Funding Information, and Award Information.

Opportunity Information	
Title	2024 Core Series Recipient - TC
Description	Core Series Recipient Training.
Opportunity Manager	Tommy Grantor
Announcement Type	Initial Announcement
Public Link	<a href="https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82">https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82</a>
Is Published	Yes

Funding Information	
Total Program Funding	\$100,000.00
Funding Sources	State

Award Information	
Award Ceiling	\$100,000.00
Award Start Date	1/1/2024

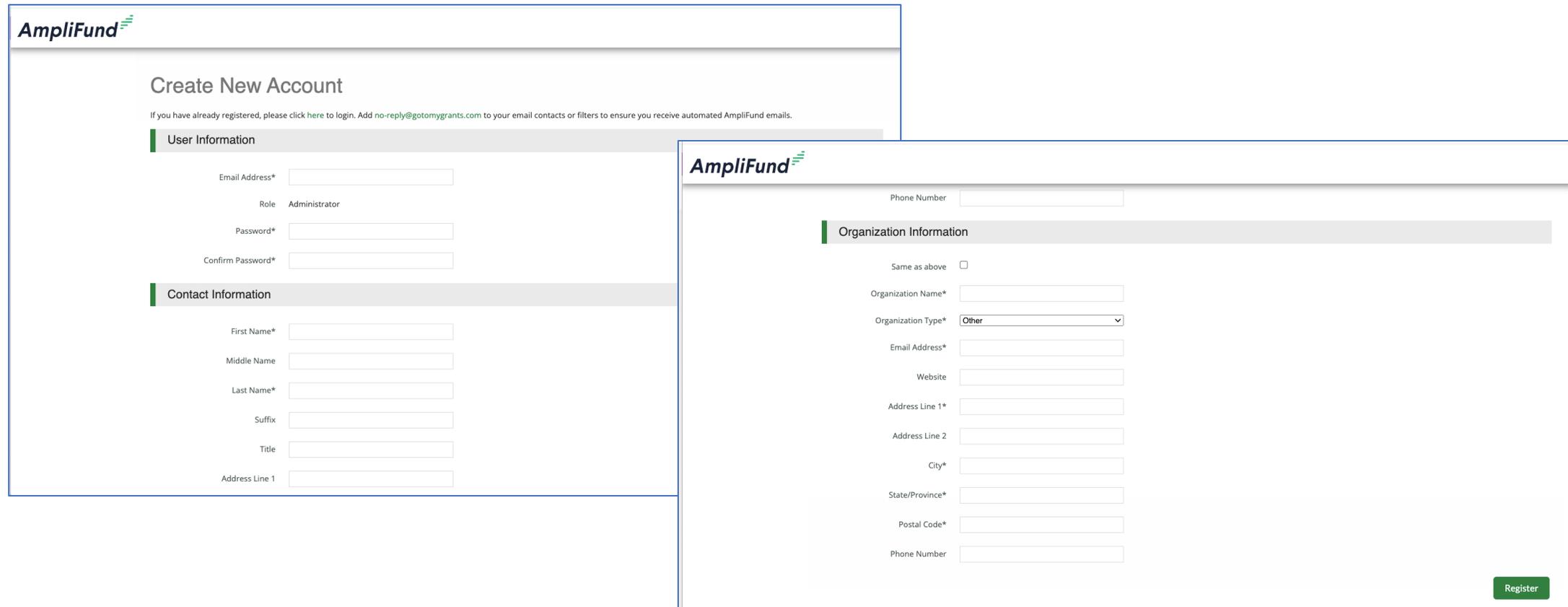


The screenshot shows the AmpliFund Login page. The page has a green header with the AmpliFund logo. The main content area is titled "Login" and contains the following fields and options:

- Email:
- Password:  with a "show" button
- Remember my email
- [Forgot your password?](#)
- 
-

# Create New Account Continued

- Fill out all required information
- Click Register on the bottom right of the screen



**AmpliFund**

## Create New Account

If you have already registered, please click [here](#) to login. Add [no-reply@gotomygrants.com](mailto:no-reply@gotomygrants.com) to your email contacts or filters to ensure you receive automated AmpliFund emails.

### User Information

Email Address\*

Role Administrator

Password\*

Confirm Password\*

### Contact Information

First Name\*

Middle Name

Last Name\*

Suffix

Title

Address Line 1

Phone Number

### Organization Information

Same as above

Organization Name\*

Organization Type\* **Other**

Email Address\*

Website

Address Line 1\*

Address Line 2

City\*

State/Province\*

Postal Code\*

Phone Number

**Register**

# Account Information

- Click on your Username on the top right of the screen
- Select Account Information
- Edit Account Information as needed
  - Complete all required information and then click Save & Return

The screenshot shows the AmpliFund web application interface. At the top right, the user's name "Thomas Colgrove" is displayed with a dropdown menu containing "Account Information", "Change Password", and "Log Out". Below the navigation bar, the "Account Information" page is active. The "Organization Information" section displays the following details:

Name	Applicant Portal Test Account - TC
Organization Type	Foundation
Email Address	thomas_colgrove@outlook.com
Website	
Address Line 1	123
Address Line 2	
City	Test
State/Province	Test
Postal Code	00000
Phone Number	

An "Edit" button is located at the bottom right of the information section.

The screenshot shows the AmpliFund web application interface with the "Account Information" page in edit mode. The "Organization Information" section contains the following form fields:

Name*	Applicant Portal Test Account - TC
Organization Type	Foundation
Email Address*	thomas_colgrove@outlook.com
Website	
Address Line 1*	123
Address Line 2	
City*	Test
State/Province*	Test
Postal Code*	00000
Phone Number	

A "Save & Return" button is located at the bottom right of the form.

# Manage Applications

- Click on Applications to view list of all Applications and Application Status


Thomas Colgrove  
Applicant Portal Test Account - TC

Applications
Account Information
Users
FAQ

---

## Applications

Application Na...	Application ID	Submission Sta...	Funder Name	Title	Opportunity St...	Submission Op...	Submission Clo...	Award Floor	Award Ceiling
Test Application 1	61812	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00

# User Management

- Click on Users
- Add users as needed
  - Complete all required information and then click Invite
- Edit Users as needed
  - Complete all required information and then click Save & Return

The image displays two overlapping screenshots of the AmpliFund web application interface. The background screenshot shows the 'Users' management page. At the top, there is a navigation bar with 'Applications', 'Account Information', 'Users', and 'FAQ'. Below this, the 'Users' section is active, showing a 'User Information' tab and a '+ Add User' button. A list of users is visible, with one entry for 'Thomas Colgrove - Organization Administrator' and a username of 'thomas\_colgrove@outlook.com'. An edit icon is next to the name. The foreground screenshot shows the 'New User' form. It has a title 'New User' and an 'Invite' button in the top right. The form is divided into two sections: 'User Information' and 'Contact Information'. The 'User Information' section includes fields for 'Email Address\*', 'Role\*' (set to 'Editor'), and a dropdown menu. The 'Contact Information' section includes fields for 'First Name\*', 'Middle Name', 'Last Name\*', 'Suffix', 'Title', 'Address Line 1', 'Address Line 2', 'City', 'State/Province', 'Postal Code', and 'Phone Number'. An 'Invite' button is located at the bottom left of the form.

# Project Information

# Section Agenda

- Project Information
  - Opportunity Information
  - Evaluation and Scoring Tab
  - Apply
  - Navigation
  - Required Fields
  - Autofill Data
  - No Match Example
  - Match Examples
  - Mark as Complete, Save and Continue

# Opportunity Information and Evaluation & Scoring

Log In

---

## 2022 City of Everett Human Needs Funds

Print
Help
Download
Save
Apply

Opportunity Details
Evaluation & Scoring

**Opportunity Information**

**Title** 2022 City of Everett Human Needs Funds

**Description** Each year, the City allocates \$3 per capita for grants to non-profit human service organizations providing services to City of Everett residents. Since 2016, an additional \$1 per capita has been included for Community Streets initiative activities.

Human Needs funds are provided to programs that are accessible without regard to ability to pay, as well as programs that are physically accessible, culturally sensitive, linguistically accessible, and non-discriminatory. The City intends to support programs that promote diversity of all types.

Funds are available on a January 1 - December 31 calendar year. Funds do not "rollover" into the next program year and any unexpended funds at the end of the year cannot be combined for a future ask.

**Awarding Agency Name** City of Everett

**Agency Contact Name** Kembra Landry

**Agency Contact Phone** 425-257-7155

**Agency Contact Email** klandry@everettwa.gov

**Fund Activity Category** Community Development

**Category Explanation** These funds are aimed at serving the basic needs of low/moderate income residents within the City of Everett.

**Opportunity Manager** Kembra Landry

**Posted Date** 7/1/2021

**Announcement Type** Initial Announcement

**Public Link** <https://www.gotomigrants.com/Public/Opportunities/Details/68fa4163-bf12-4af8-8739-94a6c734f016>

Log In

---

## 2022 City of Everett Human Needs Funds

Print
Help
Download
Save
Apply

Opportunity Details
Evaluation & Scoring

**Criteria**

Applicants must be registered 501(c)(3) organizations, as per EMC 2.93.010.

Applications must serve low or moderate income City of Everett residents in need.

Projects must provide basic needs services and should support established annual priorities set by the City's Citizen Advisory Committee.

**Review and Selection Process**

Proposals will go through initial staff review for application completeness and project eligibility. Once cleared, proposals will be submitted to the Citizen Advisory Committee for review and award consideration.

Proposals that directly support established annual priorities will be considered for funding first, with any remaining funds available for non-priority proposals.

Priority consideration will also be given to those programs which apply requested funds to a direct public service rather than to the administration of a program.

Agencies receiving human needs funding are not eligible for funding from another city of Everett funding source for the same program in any given year.

**Anticipated Announcement Dates**

Awards will be announced following City Council adoption of Citizen Advisory Committee funding recommendations. Contracts are typically executed in the late Winter/early Spring.

Costs incurred since January 1 of Calendar Year for the award are eligible for reimbursement.

Save
Apply

# Apply to the Opportunity

- Click the Apply button to start the application process



[Log In](#)

## 2022 City of Everett Human Needs Funds

[Print](#) [Help](#) [Download](#) [Save](#) [Apply](#)

[Opportunity Details](#)

[Evaluation & Scoring](#)

### Opportunity Information

Title 2022 City of Everett Human Needs Funds

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Announcement Type Initial Announcement

Public Link <https://www.gotomygrants.com/Public/Opportunities/Details/68fa4163-bf12-4af8-8739-94a6c734f016>

# Navigation

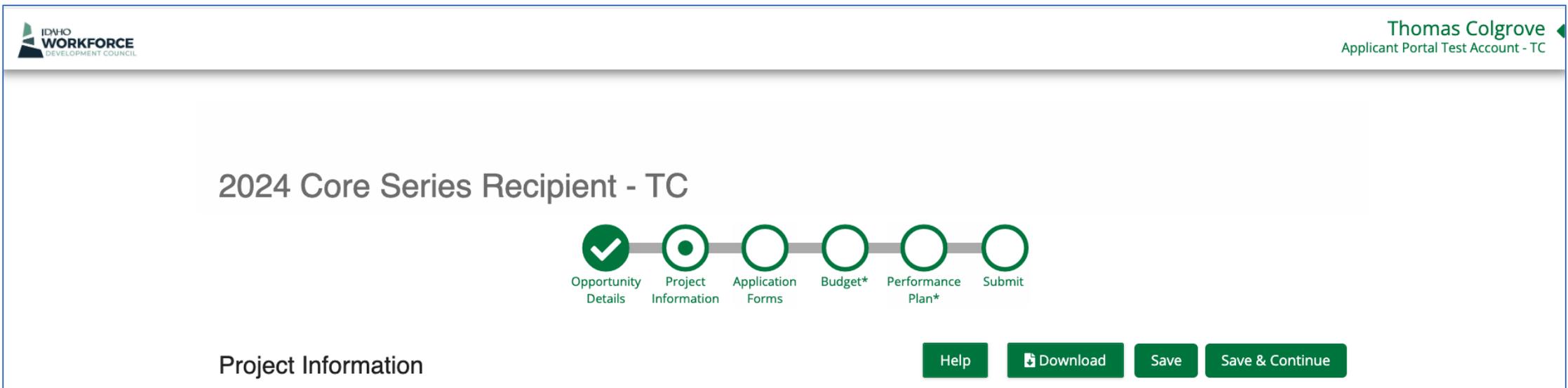
- Land on the Project Information Page

The screenshot displays the AmpliFund application portal interface. At the top left is the IDHIO WORKFORCE DEVELOPMENT COUNCIL logo. At the top right, the user is identified as Thomas Colgrove, Applicant Portal Test Account - TC. The main heading is '2024 Core Series Recipient - TC'. Below this is a progress bar with six steps: Opportunity Details (checked), Project Information (active), Application Forms, Budget\*, Performance Plan\*, and Submit. To the right of the progress bar are buttons for Help, Download, Save, and Save & Continue. The 'Project Information' section is expanded to show 'Application Information' with the following fields:

- Application Name\*
- How much are you requesting from the funder?  
Award Requested\*
- How much are you planning to contribute to the budget?
  - Cash Match Requirement  ⓘ
  - Cash Match Contributions\*
  - In-Kind Match Requirement  ⓘ
  - In-Kind Match Contributions\*
  - Other Funding Requirement  ⓘ
  - Other Funding Contributions\*

# Navigation Continued

- All navigation sections on the top of the screen must be complete before submitting your application
- Each circle should be green with a white checkmark like the Opportunity Details section below
- Navigate to different sections of the application by clicking on the desired navigation section



The screenshot displays the AmpliFund application interface. At the top left is the IDHO WORKFORCE DEVELOPMENT COUNCIL logo. At the top right, the user's name "Thomas Colgrove" and account type "Applicant Portal Test Account - TC" are shown. The main heading is "2024 Core Series Recipient - TC". Below this is a progress bar with six circular indicators: "Opportunity Details" (checked), "Project Information", "Application Forms", "Budget\*", "Performance Plan\*", and "Submit". At the bottom left is the "Project Information" section. At the bottom right are four buttons: "Help", "Download", "Save", and "Save & Continue".

# Required Fields

- Ensure each section is complete in the top navigation, you must complete all required fields marked with an \*

### Project Information

Help Download Save Save & Continue

#### Application Information

Application Name\*

**How much are you requesting from the funder?**

Award Requested\*

**How much are you planning to contribute to the budget?**

Cash Match Requirement \$0.00 ⓘ

Cash Match Contributions\*

In-Kind Match Requirement \$0.00 ⓘ

In-Kind Match Contributions\*

Other Funding Requirement \$0.00 ⓘ

Other Funding Contributions\*

Total Award Budget \$0.00

#### Primary Contact Information

Name\*

Email Address\*

Address Line 1\*

Address Line 2

City\*

State/Province\*

Postal Code\*

Phone Number

Save ✓ Mark as Complete Save & Continue

# Autofill Data

- The Primary Contact Information section will auto-populate with the information from the Applicant Portal
- Review the steps in the Overview of Applicant Portal section to update the information so you only have to enter it once

### Primary Contact Information

Name\*

Email Address\*

Address Line 1\*

Address Line 2

City\*

State/Province\*

Postal Code\*

Phone Number

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# No Match Example

- If no match is required, you will not see any fields to enter match
- If match is optional, you will have a \$0.00 requirement and can add as needed

**IDHO WORKFORCE DEVELOPMENT COUNCIL**

Thomas Colgrove  
Applicant Portal Test Account - TC

## Project Information

Help Download Save Save & Continue

### Application Information

Application Name\*

**How much are you requesting from the funder?**

Award Requested\*

Total Award Budget \$0.00

### Primary Contact Information

Name\*

Email Address\*

# Match Example

- If a match is required, there will be an additional required section called "How much are you planning on contributing to the budget?"
- If your funder configured a match requirement, AmpliFund will calculate the minimum match amount based on the Award Requested amount
- If match is optional, you will have a \$0.00 requirement and can add as needed

The screenshot displays the 'Project Information' section of the AmpliFund application portal. The user is Thomas Colgrove, logged in as 'Applicant Portal Test Account - TC'. The page title is 'Project Information' with a green checkmark. Below the title are four buttons: 'Help', 'Download', 'Save', and 'Save & Continue'. The main section is 'Application Information'. It contains the following fields and requirements:

Field	Value	Requirement / Note
Application Name*	Test Application 2	✓
Award Requested*	\$100,000.00	
Cash Match Requirement	\$10,000.00	
Cash Match Contributions*	\$0.00	Contribution is less than funder cash match requirement.
In-Kind Match Requirement	\$10,000.00	
In-Kind Match Contributions*	\$0.00	Contribution is less than funder in-kind match requirement.
Other Funding Requirement	\$5,000.00	
Other Funding Contributions*	\$0.00	Contribution is less than funder other funding requirement.
Total Award Budget	\$100,000.00	

# Mark as Complete, Save and Continue

- After completing all required fields Mark as Complete and Save and Continue
- AmpliFund will not let you Mark as Complete and Save and Continue if there are any incomplete required fields
- AmpliFund displays validation errors if there are incomplete required fields or if entries are not in line with the Opportunity requirements

### Primary Contact Information

Name\*

Email Address\*

Address Line 1\*

Address Line 2

City\*  *This field is required.*

State/Province\*  *This field is required.*

Postal Code\*  *This field is required.*

Phone Number

### Primary Contact Information

Name\*

Email Address\*

Address Line 1\*

Address Line 2

City\*

State/Province\*

Postal Code\*

Phone Number

Mark as In Progress: gotomygrants.com/Public/OpportunityApplications/projectinformation/61831

Thomas Personal AmpliFund Perso... AmpliFund Logins AmpliFund Tools AmpliFund Support Learning AmpliFu... Projects Team Illinois Google Ju

**EMERSON WORKFORCE DEVELOPMENT COUNCIL**

In-Kind Match Contributions\* \$10,000.00

Other Funding Requirement \$5,000.00

Other Funding Contributions\* \$5,000.00

Total Award Budget \$125,000.00

**Success**  
The item was saved successfully.

### Primary Contact Information

Name\*

Email Address\*

Address Line 1\*

Address Line 2

City\*

State/Province\*

Postal Code\*

Phone Number

# Application Forms

# Section Agenda

- Application Forms
  - Inputting Data
  - Required Fields
  - Mark as Complete, Save and Continue
  - Application Form Status Grid

# Inputting Data

## Content Fields

- Data that your funder provides as instructions, attachments, links, etc.

## Entry Fields

- Data that you enter on the Application Forms
- Single line text, multi-line text, multiple choice, checkboxes, dropdowns, dates, numeric values, tables, and file uploads

### Instructions

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Download this PDF for more information.  
[Logo-FullColor-hi-res.jpeg](#)

Review this website for more information.  
[test.com](#)

### Application Questions

Single Line Text Field example \*

Multi Line Text Box example \*

Multiple Choice Example \*

- Yes  
 No

### Dropdown List example \*

File Upload example \*

Date example \*

Numeric Field example \*

Table Example

	Test A	Test B
Test 1	<input type="text"/>	<input type="text"/>
Test 2	<input type="text"/>	<input type="text"/>
Test 3	<input type="text"/>	<input type="text"/>

# Required Fields

- To complete each Application Form, you must complete each required field marked with an \*

## Instructions

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Download this PDF for more information.

[Logo-FullColor-hi-res.jpeg](#)

Review this website for more information.

[test.com](#)

## Application Questions

Single Line Text Field example \*

Multi Line Text Box example \*

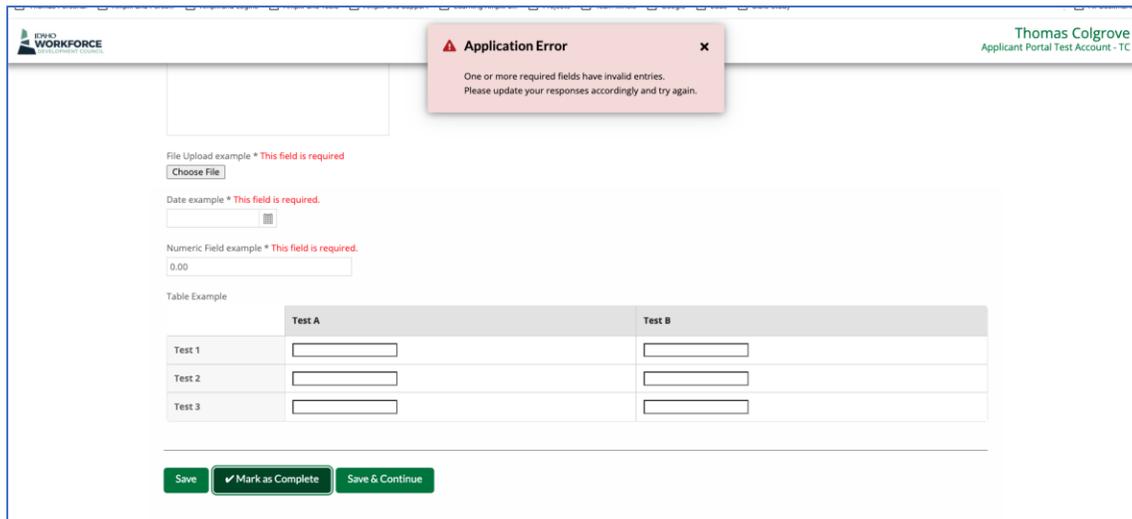
Multiple Choice Example \*

Yes

No

# Mark as Complete, Save and Continue

- You must mark each Application Form as complete and then save and continue or you will not be able to submit
- AmpliFund will not allow you to Mark as Complete if you have not completed all required fields
- Clicking Save and Continue will take you to the next Application Form or next section of the application process



**Application Error** ✕

One or more required fields have invalid entries.  
Please update your responses accordingly and try again.

File Upload example \* This field is required  
Choose File

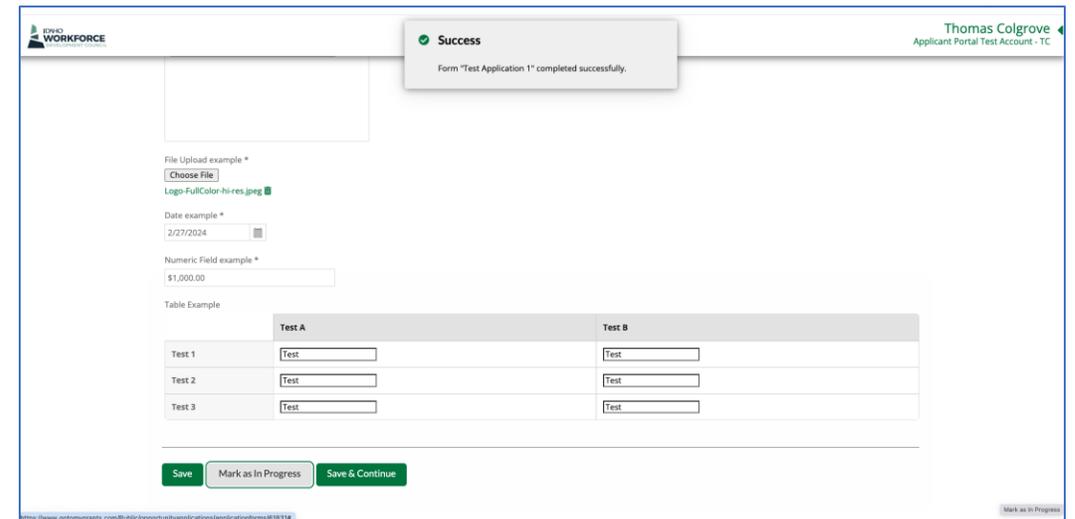
Date example \* This field is required.  
2/27/2024

Numeric Field example \* This field is required.  
0.00

Table Example

	Test A	Test B
Test 1	<input type="text"/>	<input type="text"/>
Test 2	<input type="text"/>	<input type="text"/>
Test 3	<input type="text"/>	<input type="text"/>

Save  Save & Continue



**Success**

Form \*Test Application 1\* completed successfully.

File Upload example \*  
Choose File  
Logo-FullColor-hi-res.jpeg

Date example \*  
2/27/2024

Numeric Field example \*  
\$1,000.00

Table Example

	Test A	Test B
Test 1	<input type="text" value="Test"/>	<input type="text" value="Test"/>
Test 2	<input type="text" value="Test"/>	<input type="text" value="Test"/>
Test 3	<input type="text" value="Test"/>	<input type="text" value="Test"/>

Save  Save & Continue

https://www.gohmigrants.com/Public/opportunity/applications/applicationform/618314

# Application Form Status Grid

- Click on the Application Forms section on the top navigation to access the Application Form Status Grid
- Here you can see the status of each application and download applications


Thomas Colgrove  
Applicant Portal Test Account - TC

## 2024 Core Series Recipient - TC



Forms 
[Help](#)
[Download](#)
[Save & Continue](#)

Name	Status	Print
Test Application 1	In Progress	
Test Application 2	New	

⏪ < 1 > ⏩
25 items per page
1 - 2 of 2 items

[Save & Continue](#)

# Performance Plan

# Section Agenda

- Performance Plan
  - Performance Plan Goal Types
  - Enter Performance Plan Goals
  - Mark as Complete, Save and Continue

# Performance Plan Goal Types

Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	“Number of program participants” with a goal target of 50.

# Performance Plan Goal Types

Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Volunteer Retention Rate” with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Decrease in Student Absences” with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	“Number of Patient Screenings” with target/maximum units of 100, and a reimbursement rate per unit of \$22.

# Enter Performance Plan Goals

- All Performance Plan Goals marked with an \* are required
- Click on the + icon to add a new goal

The screenshot displays the '2024 Core Series Recipient - TC' interface. At the top left is the IDWFO WORKFORCE DEVELOPMENT COUNCIL logo. At the top right, the user is identified as 'Thomas Colgrove' with an 'Applicant Portal Test Account - TC'. A progress bar shows seven steps: Opportunity Details (checked), Evaluation & Scoring (checked), Project Information (checked), Application Forms (solid green), Budget\* (white), Performance Plan\* (white with a dot), and Submit (white). Below the progress bar, the 'Performance Plan' section has buttons for 'Help', 'Download', and 'Save & Continue'. Underneath, a 'Proposed Performance Plan' section lists four quarters, each with 'Goals\*' and an '+ Add Goal' button, and a note 'No items for strategy'. At the bottom, there are buttons for 'Mark as Complete' and 'Save & Continue'.

# Enter Performance Plan Goals Continued

- Select the Goal Type
- Enter the Goal Name
- Complete all required fields marked with an \*
- Best practice is to add as much data as possible
- Required fields change based on the Goal Type
  - Milestone Goals have a due date
  - Numeric Goals have a number to be achieved

### New Goal

**Goal Information**

Goal Type\*

Name\*

Description

Due Date

**Save**

### New Goal

**Goal Information**

Goal Type\*

Name\*

Description

Due Date

**Save**

### New Goal

**Goal Information**

Goal Type\*

Name\*

Number To Be Achieved\*

Description

**Save**

# Mark as Complete, Save and Continue

- After entering all required goals you can Mark as Complete and Save and Continue
- AmpliFund will display a success message if everything is complete
- AmpliFund will display a validation error if more information is required

The image displays two screenshots of the AmpliFund Performance Plan interface, illustrating the process of marking a plan as complete and handling validation errors.

**Left Screenshot (Success):** The interface shows the 'Performance Plan' section with a 'Proposed Performance Plan' header. Below this, there are four quarters, each with a goal and a test type (Milestone, Numeric, Narrative). A 'Mark as In Progress' button is visible next to the 'Test Narrative' for Quarter 3. A 'Success' message box is displayed at the top, stating 'Saved successfully'. The 'Save & Continue' button is highlighted in green.

**Right Screenshot (Validation Error):** The interface shows the 'Performance Plan' section with a 'Proposed Performance Plan' header. Below this, there are four quarters, each with a goal and a test type (Milestone, Numeric, Narrative). A validation error message is displayed at the bottom: 'No items for strategy Please add at least 1 goal.' The 'Mark as Complete' button is highlighted in green.

# Budget

# Section Agenda

- Project Information and Budget
- Enter Line Items
  - No Match/Match
    - › Line Item Narrative and Document Upload
  - Calculated Line Item Example
  - Purpose Areas
  - Edit Line Items
  - Final Budget/Mark as Complete, Save and Continue
  - Submit Complete Application
  - In-Product Demo

# Enter Line Items with no Match

- Configure the Budget View Settings
- Click on the + icon next to the Budget Category you wish to enter a line item
- Enter the Name
- Enter the Direct Cost
- Leave Non-Grant Funded set to No
- Enter Narrative (May be required or optional)
- Add Attachments as needed
- Click Create on the bottom right of the screen

**Budget**
Help
Download
Save & Continue

---

**Budget View Settings**

**Options**

Line Items  Non-Grant Funded

**Proposed Budget**

**Expense Budget**

Category	Grant Funded	Non-Grant Funded	Total Budgeted
<span style="color: green;">+</span> Travel	\$0.00	\$0.00	\$0.00
<span style="color: green;">-</span> Add Line Item	\$0.00	\$0.00	\$0.00
<span style="color: green;">+</span> Supplies	\$0.00	\$0.00	\$0.00
<span style="color: green;">+</span> Construction	\$0.00	\$0.00	\$0.00
<span style="color: green;">+</span> Consultant	\$0.00	\$0.00	\$0.00
<span style="color: green;">+</span> Personnel	\$0.00	\$0.00	\$0.00
<span style="color: green;">+</span> Create New Category			
<b>Total Expense Budget Cost</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

**New Line Item**

**Budget Item Information**

Category: Travel

Item Type: Non-Personnel

Name\*:

Direct Cost\*:

Non-Grant Funded: No

Total Budgeted: \$10,000.00

Narrative\*:

**Attachments**

Attachment(s)

Create
Cancel

# Enter Line Items with Match

- Click on the + icon next to the Budget Category you wish to enter a line item
- Enter the Name
- Enter the Direct Cost
- Set the Non-Grant Funded to Yes
  - Cash Match
  - In-Kind Match
  - Other Funding
  - Match can be entered in \$ or as a %
- Enter Narrative (May be required or optional)
- Add Attachments as needed
- Click Create on the bottom right of the screen

### Test Travel 2

**Budget Item Information**

Category

Item Type

Name\*

Direct Cost\*

Non-Grant Funded

Grant Funded \$0.00

Cash Match

In-Kind Match

Other Funding

Total Budgeted \$25,000.00

Narrative\*

# Calculated Line Item Example

- The Calculated Line Item functionality allows for auto calculations when entering Line Items
- Click the Item Type dropdown and select Direct Cost Allocation
- The Calculation Type dropdown appears with the following options
  - Base x Rate
  - Quantity x Rate
  - Salary x Percentage x Rate
  - Time x Quantity x Rate
  - Travel x Quantity x Rate
- Configure the new required fields based on your selection
- All other steps to enter the Line Item are the same as previously reviewed

# Calculated Line Item Continued

### New Line Item

**Budget Item Information**

Category:

Item Type:

Name\*:

Direct Cost\*:

Non-Grant Funded:

Total Budgeted: \$0.00

Narrative\*:

**Attachments**

Attachment(s)

### New Line Item

**Budget Item Information**

Category:

Item Type:

Calculation Type:

Name\*:

Base\*:

Rate\*:

Direct Cost: \$0.00

Non-Grant Funded:

Total Budgeted: \$0.00

Narrative\*:

# Enter Line Item with Purpose Areas

- Some Budget entries require Purpose Areas
- If a Category requires Purpose Areas you will complete the same steps as previously reviewed when creating the Line Item in addition to the following entries
  - Enter Name
  - Enter Direct Cost
  - Configure Match if required
  - Enter Narrative
  - Add attachments if needed
  - Enter how much of the Direct Cost goes toward each Purpose Area
    - For example, If this program has three Funding Areas (Purpose Areas) and I add a Line Item for Equipment with a Direct Cost of \$10,000, I must account for how much of the Direct Cost goes toward each Purpose Area.
      - All Direct Cost must be accounted for
      - Not all Purpose Areas must have entries

# Enter Line Item with Purpose Areas Continued

### New Line Item

**Budget Item Information**

Category: Equipment ▼

Item Type: Non-Personnel ▼

Name\*:

Direct Cost\*:

Non-Grant Funded: No ▼

Total Budgeted: \$10,000.00

Narrative\*:

**Attachments**

Attachment(s)

### New Line Item

**Attachments**

Attachment(s)

**Purpose Areas**

Test Purpose Area 1	<input type="text" value="\$0.00"/>
Test Purpose Area 2	<input type="text" value="\$0.00"/>
Test Purpose Area 3	<input type="text" value="\$0.00"/>
<b>Total</b>	<b>\$0.00</b>

Total must equal Total Budgeted amount.

### New Line Item

Narrative\*

**Attachments**

Attachment(s)

**Purpose Areas**

Test Purpose Area 1	<input type="text" value="\$5,000.00"/>
Test Purpose Area 2	<input type="text" value="\$5,000.00"/>
Test Purpose Area 3	<input type="text" value="\$0.00"/>
<b>Total</b>	<b>\$10,000.00</b>

# Edit Line Items

- Click on the pencil edit icon next to the Line Item to edit as needed

## Budget

Help
Download
Save & Continue

---

Budget View Settings

### Options

Line Items  Non-Grant Funded

Proposed Budget

### Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
+ Travel	\$10,000.00	\$0.00	\$10,000.00
Test Travel	\$10,000.00	\$0.00	\$10,000.00
+ Equipment <span style="margin-left: 20px;">Edit</span>	\$0.00	\$0.00	\$0.00
+ Supplies	\$0.00	\$0.00	\$0.00
+ Construction	\$0.00	\$0.00	\$0.00
+ Consultant	\$0.00	\$0.00	\$0.00
+ Personnel	\$0.00	\$0.00	\$0.00
+ Create New Category			
<b>Total Expense Budget Cost</b>	<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$10,000.00</b>

# Final Budget/Mark as Complete, Save and Continue

- The Final Budget should account for all requested Grant Funds and any Match requirements
- The Total Overall Budget Cost should be \$0.00
- AmpliFund will display a validation error if not all funds are accounted for

Proposed Budget			
<b>Expense Budget</b>			
Category	Grant Funded	Non-Grant Funded	Total Budgeted
+ Travel	\$0.00	\$25,000.00	\$25,000.00
Travel	\$0.00	\$25,000.00	\$25,000.00
+ Equipment	\$0.00	\$0.00	\$0.00
+ Supplies	\$0.00	\$0.00	\$0.00
+ Construction	\$0.00	\$0.00	\$0.00
+ Consultant	\$0.00	\$0.00	\$0.00
+ Personnel	\$75,000.00	\$0.00	\$75,000.00
Test Personnel	\$75,000.00	\$0.00	\$75,000.00
+ Create New Category			
<b>Total Expense Budget Cost</b>	<b>\$75,000.00</b>	<b>\$25,000.00</b>	<b>\$100,000.00</b>
<b>Revenue Budget</b>			
<b>Grant Funding</b>			
Award Requested	\$100,000.00		\$100,000.00
<b>Subtotal</b>	<b>\$100,000.00</b>		<b>\$100,000.00</b>
<b>Non-Grant Funding</b>			
Cash Match		\$10,000.00	\$10,000.00
In-Kind Match		\$10,000.00	\$10,000.00
Other Funding		\$5,000.00	\$5,000.00
<b>Subtotal</b>		<b>\$25,000.00</b>	<b>\$25,000.00</b>
<b>Total Revenue Budget Cost</b>			<b>(\$125,000.00)</b>
<b>Total Overall Budget Cost</b>			<b>(\$25,000.00)</b>
The Total Overall Budget Cost must be \$0.00			
<input checked="" type="button" value="Mark as Complete"/> <input type="button" value="Save &amp; Continue"/>			

Proposed Budget			
<b>Expense Budget</b>			
Category	Grant Funded	Non-Grant Funded	Total Budgeted
+ Travel	\$0.00	\$25,000.00	\$25,000.00
Travel	\$0.00	\$25,000.00	\$25,000.00
+ Equipment	\$0.00	\$0.00	\$0.00
+ Supplies	\$0.00	\$0.00	\$0.00
+ Construction	\$25,000.00	\$0.00	\$25,000.00
Test Construction	\$25,000.00	\$0.00	\$25,000.00
+ Consultant	\$0.00	\$0.00	\$0.00
+ Personnel	\$75,000.00	\$0.00	\$75,000.00
Test Personnel	\$75,000.00	\$0.00	\$75,000.00
+ Create New Category			
<b>Total Expense Budget Cost</b>	<b>\$100,000.00</b>	<b>\$25,000.00</b>	<b>\$125,000.00</b>
<b>Revenue Budget</b>			
<b>Grant Funding</b>			
Award Requested	\$100,000.00		\$100,000.00
<b>Subtotal</b>	<b>\$100,000.00</b>		<b>\$100,000.00</b>
<b>Non-Grant Funding</b>			
Cash Match		\$10,000.00	\$10,000.00
In-Kind Match		\$10,000.00	\$10,000.00
Other Funding		\$5,000.00	\$5,000.00
<b>Subtotal</b>		<b>\$25,000.00</b>	<b>\$25,000.00</b>
<b>Total Revenue Budget Cost</b>			<b>(\$125,000.00)</b>
<b>Total Overall Budget Cost</b>			<b>\$0.00</b>
<input type="button" value="Mark as In Progress"/> <input checked="" type="button" value="Save &amp; Continue"/>			

# Submit Complete Application

- All navigation sections on the top of the screen must be complete before submitting your application
- Each circle should be green with a white checkmark like the Opportunity Details section below
- If you receive any validation errors, you can click on the desired navigation section and complete all required information and Mark as Complete and Save and Continue

## 2024 Core Series Recipient - TC



You are about to submit your application, **Test Application 2**, to **AmpliFund Training: Grant Maker**.

Take the time to review your application by using the timeline above. You can select any section and jump to that page.

When the application is fully complete, please select the "Submit" button. This will submit your final application to the funder.

**Your budget has errors that require your attention!**

[Review](#)

[Submit](#)

## 2024 Core Series Recipient - TC



You are about to submit your application, **Test Application 2**, to **AmpliFund Training: Grant Maker**.

Take the time to review your application by using the timeline above. You can select any section and jump to that page.

When the application is fully complete, please select the "Submit" button. This will submit your final application to the funder.

[Review](#)

[Submit](#)

# Submit Complete Application Continued

- Click Submit and AmpliFund displays a success message!

Thomas Colgrove  
Applicant Portal Test Account - TC

## 2024 Core Series Recipient - TC



Opportunity Details   Evaluation & Scoring   Project Information   Application Forms   Budget\*   Performance Plan\*   Submit

### Success!

You have submitted your application.

Download your completed application by selecting the "Application" button below.

To return to the main screen with all of your applications, select the "Exit" button.

 Application   Exit



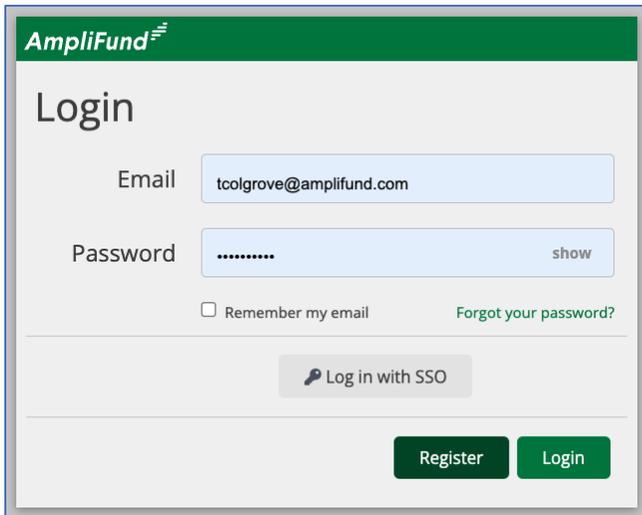
# Edit Reopened Application

# Section Agenda

- Edit Reopened Applications
  - Access Submitted Applications
  - Download Submitted Applications
  - Edit Reopened Applications
  - Warning – Withdrawing Applications does not allow for Resubmission

# Access Submitted Applications

- Log into the Applicant Portal
- Click Applications on the top left of the screen



The screenshot shows the AmpliFund Applicant Portal login interface. It features a green header with the AmpliFund logo. Below the header, the word "Login" is displayed. There are two input fields: "Email" with the value "tcolgrove@amplifund.com" and "Password" with masked characters. A "show" button is next to the password field. Below the password field, there is a checkbox for "Remember my email" and a link for "Forgot your password?". A "Log in with SSO" button is also present. At the bottom, there are "Register" and "Login" buttons.

Applications Account Information Users FAQ

## Applications

Application Na...	Application ID	Submission St...	Funder Name	Title	Opportunity St...	Submission Op...	Submission Cl...	Award Floor	Award Ceiling
Test Application 1	61812	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00
Test Application 2	61831	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00
2024 Core Series Recipient - TC	61874	Unsubmitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00

# Download Submitted Applications

- Click on the desired Application
- Click on the Download tab

## 2024 Core Series Recipient - TC

Opportunity Details Evaluation & Scoring Project Information Application Forms Budget\* Performance Plan\* Submit

Opportunity Details ✓

Print Help Download Withdraw

### Opportunity Information

Title	2024 Core Series Recipient - TC
Description	Core Series Recipient Training.
Opportunity Manager	Tommy Grantor
Announcement Type	Initial Announcement
Public Link	<a href="https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82">https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82</a>
Is Published	Yes

# Edit Reopened Applications

- Select the Application that says Reopened
- Edit the appropriate sections of the Application Form
- The funder chooses what sections of the Application to Reopen

Applications	Account Information	Users	FAQ						
<h2>Applications</h2>									
Application Na...	Application ID	Submission St...	Funder Name	Title	Opportunity St...	Submission Op...	Submission Cl...	Award Floor	Award Ceiling
Test Application 1	61812	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00
Test Application 2	61831	Submitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00
2024 Core Series Recipient - TC 	61874	Unsubmitted	AmpliFund Training: Grant Maker	2024 Core Series Recipient - TC	Open	1/1/2024 12:00 AM	12/31/2024 12:00 AM		\$100,000.00

# Withdrawing Applications

- Withdrawing applications does not allow for Resubmitting

## 2024 Core Series Recipient - TC



Opportunity Details Evaluation & Scoring Project Information Application Forms Budget\* Performance Plan\* Submit

Opportunity Details ✓

Print Help Download Withdraw

### Opportunity Information

Title	2024 Core Series Recipient - TC
Description	Core Series Recipient Training.
Opportunity Manager	Tommy Grantor
Announcement Type	Initial Announcement
Public Link	<a href="https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82">https://www.gotomygrants.com/Public/Opportunities/Details/aa7bf96c-7a3e-405e-bef0-4f4874f72c82</a>
Is Published	Yes

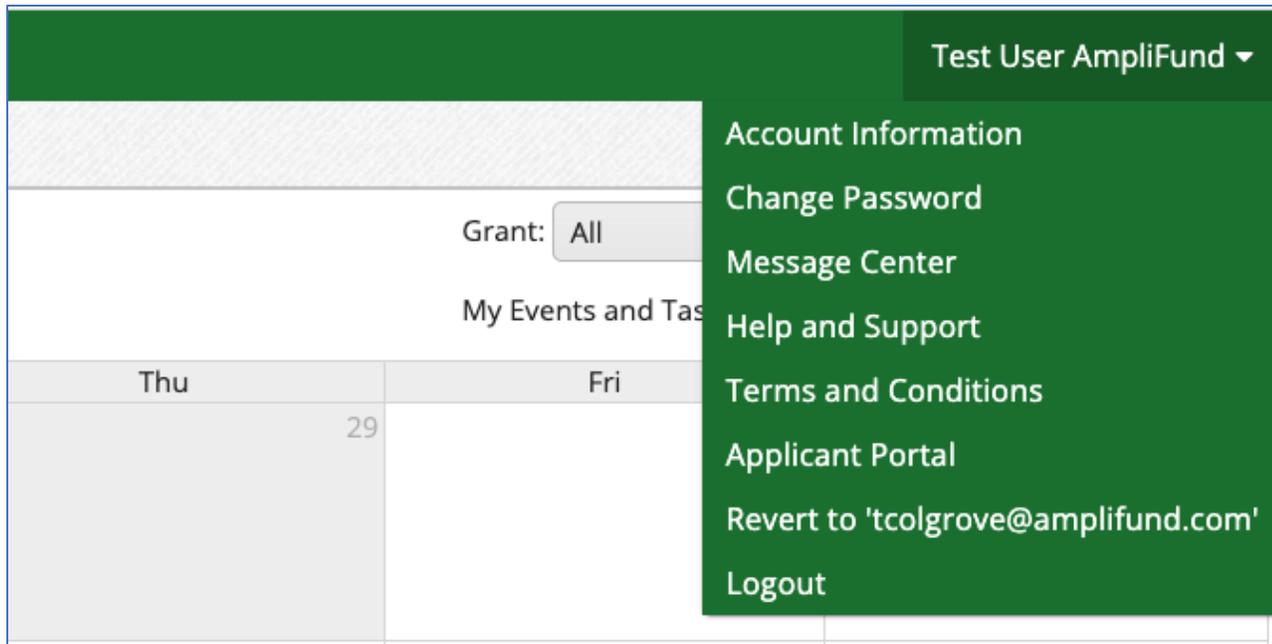
# Administration and Support

# Section Agenda

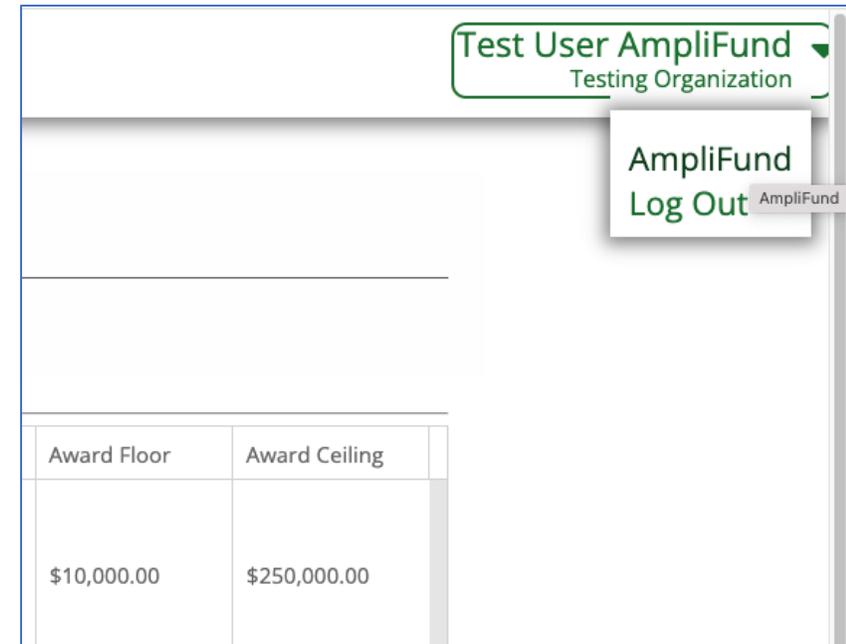
- Toggle Between Applicant Portal and AmpliFund Account
- What to do if you start two Organizations or Applications
- In-Product Demo

# Toggle between AmpliFund / Applicant Portal

- Click on your name on the top right of the screen and select Applicant Portal or AmpliFund



The screenshot shows a user interface with a dark green header bar. On the right side of the header, the text "Test User AmpliFund" is displayed with a downward-pointing arrow. A dropdown menu is open, listing the following options: Account Information, Change Password, Message Center, Help and Support, Terms and Conditions, Applicant Portal, Revert to 'tcolgrove@amplifund.com', and Logout. In the background, there is a calendar view showing "Thu" and "Fri" with the number "29" visible.



The screenshot shows a user interface with a white header bar. On the right side of the header, the text "Test User AmpliFund" is displayed with a downward-pointing arrow, and "Testing Organization" is written below it. A dropdown menu is open, listing the following options: AmpliFund and Log Out. Below the header, there is a table with two columns: "Award Floor" and "Award Ceiling".

Award Floor	Award Ceiling
\$10,000.00	\$250,000.00

# Add User

- Click on Administration > System Security > Users
- Click on the + Icon on the top right of the screen
- Complete the User Information Section
- Complete all other required fields marked with an \*
- Click Create on the bottom right of the screen
- Click on the envelope icon to invite them into AmpliFund

The screenshot shows the AmpliFund Administration interface. The left sidebar contains navigation options: Activity, Contacts, Grant Management, Reports, Documents, Knowledge Center, and Administration. The Administration menu is expanded, showing License Information, System Administration, System Security (selected), Users (highlighted), Departments, Lists, Actuals, Favorites, and Views. The main content area displays a calendar view for the current week, with dates 25, 26, 3, and 4. Below the calendar, the user 'Thomas Colgrove' is selected, and the status is 'Enabled'. The interface also shows a 'Testing Organization' dropdown and a 'Thomas Colgrove' dropdown. A table below the calendar shows the status of users, with all three listed as 'Enabled'.

Display Name	Role
Thomas Colgrove	System Administrators
Test User AmpliFund	Organizational Admin
Tommy Recipient	Organizational Admin / Account Owner

# Change Account Owner

- Click Administration > License Information
- Click on the pencil edit icon on the top right of the screen
- Update the Primary Admin User
- Click update on the bottom right of the screen

Documents	3
Knowledge Center	
<b>Administration</b>	10
License Information	
▸ System Administration	
▸ System Security	
▸ Lists	
▸ Actuals	17
Favorites	
Views	

Primary Admin User

Account Owner\*  ⓘ

Test User AmpliFund

Tommy Recipient

Primary Phone Number

# Two Organizations or Applications

- If you have accidentally submitted two Applications for the same Opportunity, you can delete/withdraw one from the Applicant Portal.
- If you are intentionally submitting two Applications to the same Opportunity, they must have unique names.
- If you have accidentally created two Organizations and are working on Applications from both, you will need to ask AmpliFund Customer Support to merge the accounts. Approval from an Organizational Admin from each account is required.

# In-Product Demo

# Key Concepts

# Key Concepts

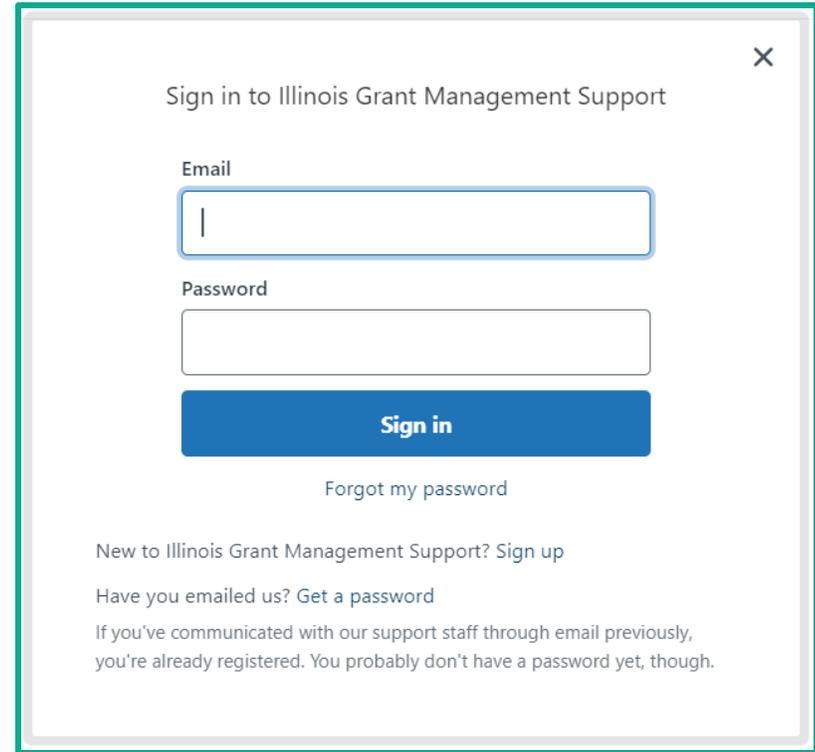
- Creating and managing the Applicant Portal Account
- Applying to the Opportunity in AmpliFund
  - Opportunity Details
  - Project Information
  - Application Forms
  - Performance Plan
  - Budget
  - Submission
- Manage Applications
- Toggle between the Applicant Portal and AmpliFund accounts

***Next Session: AmpliFund Navigation and Performance Reporting***

# Customer Support

# Create AmpliFund Support Account

1. Go to the appropriate support site
  - <https://amplifund.zendesk.com>
  - <https://il-amplifund.zendesk.com>
  - <https://ne-amplifund.zendesk.com>
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](mailto:support@zendesk.com) will be sent to you via email
8. Click the link to set your password



Sign in to Illinois Grant Management Support

Email

Password

**Sign in**

[Forgot my password](#)

New to Illinois Grant Management Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

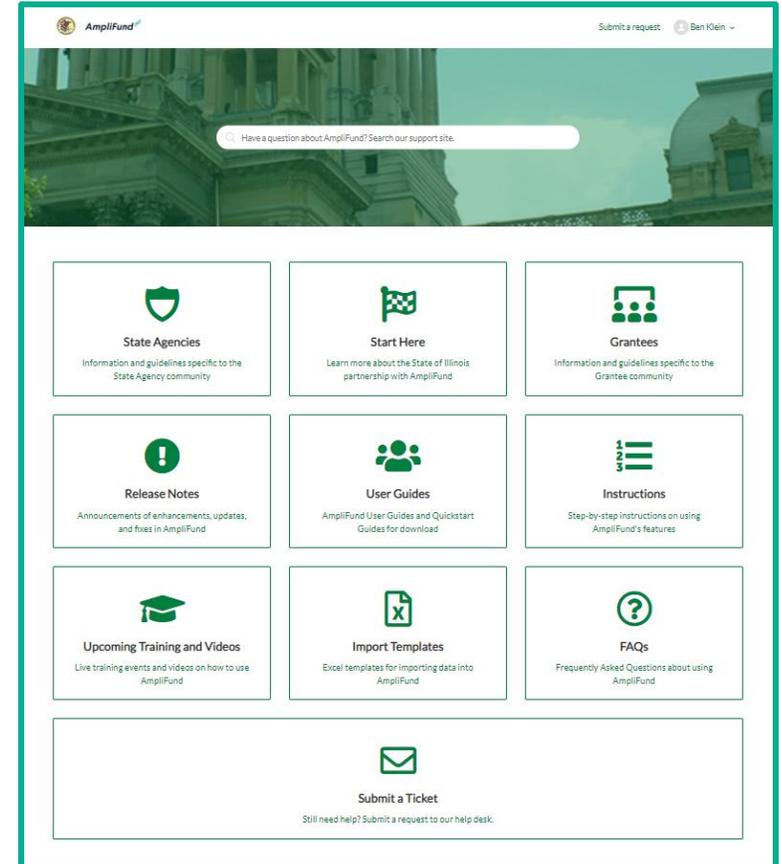
# Amplifund Illinois Support Portal

## Submit a support ticket:

- Commercial – [Support@amplifund.zendesk.com](mailto:Support@amplifund.zendesk.com)
- Illinois – [Support@il-amplifund.zendesk.com](mailto:Support@il-amplifund.zendesk.com)
- Nebraska – [Support@ne-amplifund.zendesk.com](mailto:Support@ne-amplifund.zendesk.com)

## Supported Browsers:

- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+



# Question and Answer