

AmpliFund



Core Series Recipient 4 – Advanced Management and Tools

We will start 2 minutes after the hour!

Recipient Core Series

- 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

- Submit Amendments
- Submit Custom Forms
- Enter Custom Form Extension Data
- Tools
- Resource Center
- Account Settings
- Data Management and Views
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer

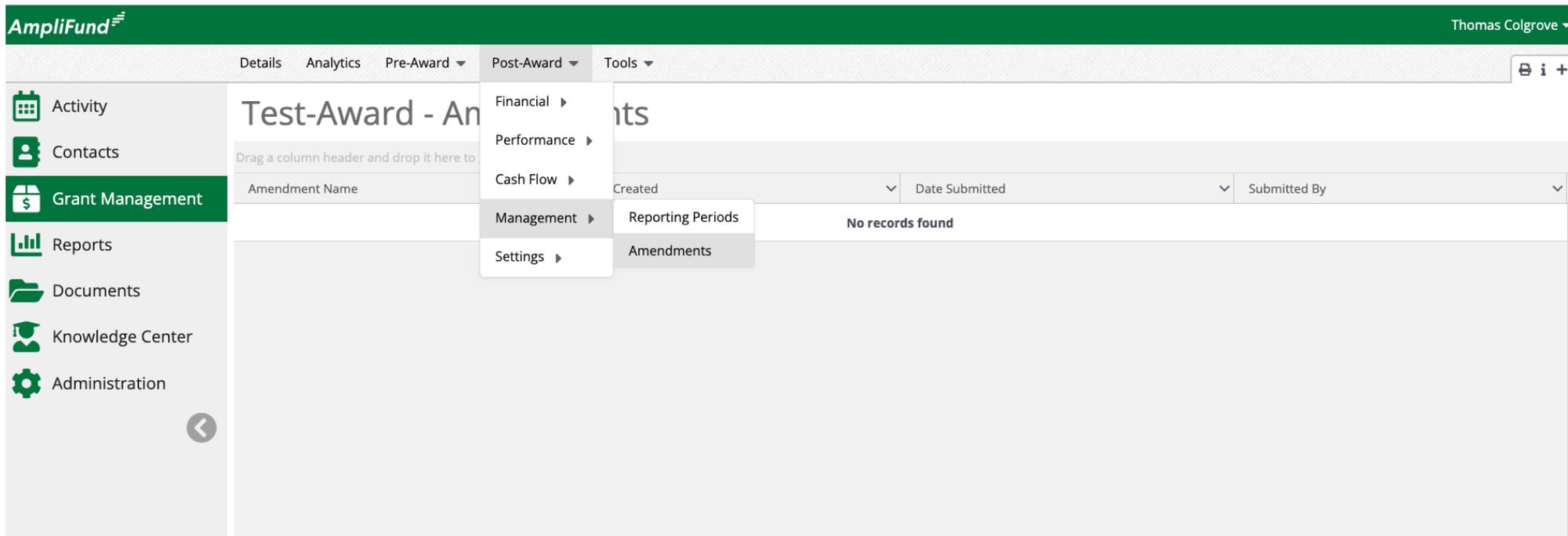
Submit Amendments

What are Amendments

- Amendments allow grant recipients and funding organizations to negotiate changes to an Award
- Recipients can propose the following Amendment Types:
 - Award amount
 - Award Duration
 - Budget Categories
 - Program Goals
- Funders review the proposed Amendments and approve, deny, or request more information within AmpliFund
- AmpliFund facilitates and tracks these interactions

Access Amendments

- From the Grant Details page click on Post-Award > Management > Amendments
- Click on the + icon on the top right of the screen



The screenshot displays the AmpliFund web application interface. The top navigation bar is green with the AmpliFund logo on the left and the user name "Thomas Colgrove" on the right. Below the navigation bar, there are tabs for "Details", "Analytics", "Pre-Award", "Post-Award", and "Tools". The "Post-Award" tab is selected, and a dropdown menu is open, showing options: "Financial", "Performance", "Cash Flow", "Management", and "Settings". The "Management" option is selected, and a sub-menu is open, showing options: "Reporting Periods" and "Amendments". The "Amendments" option is highlighted. The main content area shows a table with columns: "Amendment Name", "Created", "Date Submitted", and "Submitted By". The table is currently empty, displaying "No records found". On the left side, there is a sidebar with navigation icons and labels: "Activity", "Contacts", "Grant Management" (highlighted), "Reports", "Documents", "Knowledge Center", and "Administration". A "+ i +" icon is visible in the top right corner of the main content area.

Submit Amendments

- Click on the radial button next to the Amendment you wish to submit
- Click on the tab to access the Amendment details
- Complete the required information
- Provide a Justification
- Attach documents as needed
- Click Submit on the bottom right of the screen to submit to your funder
- Click Save to save the record, saving does not submit to your funder
- Click on the Amendment tab on the top left of the screen to navigate back to a list of all Amendments

Considerations

- You can Submit multiple Amendments at one time
- If Rejected, you will have to create a new Amendment

Award Duration

AmpliFund Thomas Colgrove ▾

Amendments

- Activity
- Contacts
- Grant Management
- Reports
- Documents
- Knowledge Center
- Administration

Amendment

Award Duration ⌵

Awarded Amount ○

Category Budget ○

Performance Goal ○

Amendment Request

Amendment Name *

Date Requested *

Award Duration

Start Date	1/1/2024
Current End Date	12/31/2024
Current Length Of Award	1 year 0 months 0 days
Current Close Out Date	12/31/2024
Requested End Date *	<input style="width: 80%;" type="text" value="12/31/2024"/>
Requested Length Of Award	1 year 0 months 0 days
Requested Close Out Date	12/31/2024

Save
Submit
Cancel



Awarded Amount

AmpliFund Thomas Colgrove

Amendments

Amendment

Award Duration **Awarded Amount** **Category Budget** **Performance Goal**

Amendment Request

Amendment Name *

Date Requested *

Awarded Amount

Current Total Awarded Amount \$100,000.00

Requested Total Awarded Amount*

Justification

Upload File(s)

Budget Category

AmpliFund Thomas Colgrove ▾

Amendments

- Activity
- Contacts
- Grant Management
- Reports
- Documents
- Knowledge Center
- Administration

Amendment

Amendment Name *

Date Requested *

Category Budget

Categories

- Consultant
- Personnel
- Equipment
- Supplies
- Travel
- Construction

Add New Category

Budget Categories*

Category	Proposed	Budgeted	Category Total	Current Budgeted	Category Total	Actuals	Total
Personnel	<input type="text" value="\$0.00"/>	\$0.00	\$5,000.00			\$0.00	
Travel	<input type="text" value="\$0.00"/>	\$0.00	\$26,000.00			\$0.00	

Save
Submit
Cancel

Performance Goal

AmpliFund Thomas Colgrove

Amendments

Amendment

Date Requested *

Performance Plan Goal*

Numeric

Test Numeric

Percent Achieved

Test Percent Achieved

Percentage Changed

Test Percentage Changed

Reimbursement

Test Reimbursement

Add New Goal

Current Performance Goals

Test Numeric:	Current Number to be Achieved
Numeric	24
Test	

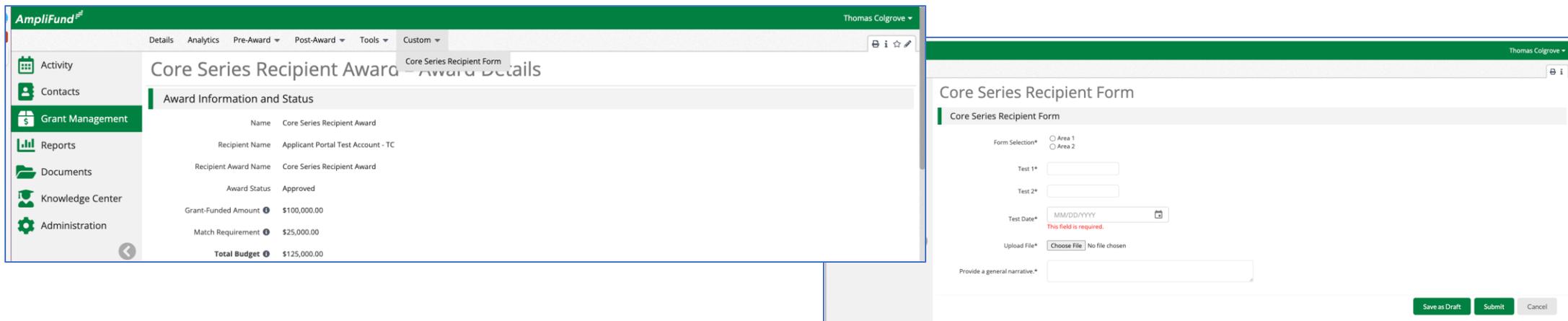
Proposed Number to be Achieved

Save **Submit** Cancel

Submit Custom Forms

Submit Custom Forms

- Custom Forms are a way for your funders to capture custom data
- They are unique forms that you will be expected to complete
- From the Grant Details page click on Custom > Select the appropriate Custom Form
- Click on the + icon on the top right of the screen
- Complete the Custom Form
- Click Submit on the bottom right of the screen
- Your funder will let you know if there you are required to complete Custom Forms



The image displays two screenshots from the AmpliFund web application. The left screenshot shows the 'Core Series Recipient Award' details page, which includes a sidebar with navigation options like Activity, Contacts, Grant Management, Reports, Documents, Knowledge Center, and Administration. The main content area shows 'Award Information and Status' with the following details:

Name	Core Series Recipient Award
Recipient Name	Applicant Portal Test Account - TC
Recipient Award Name	Core Series Recipient Award
Award Status	Approved
Grant-Funded Amount	\$100,000.00
Match Requirement	\$25,000.00
Total Budget	\$125,000.00

The right screenshot shows the 'Core Series Recipient Form' submission page. It features a 'Form Selection*' section with radio buttons for 'Area 1' and 'Area 2'. Below this are text input fields for 'Test 1*', 'Test 2*', and 'Test Date*' (with a date picker and a red error message 'This field is required.'). There is also an 'Upload File*' section with a 'Choose File' button and the text 'No file chosen'. At the bottom, there is a 'Provide a general narrative.*' text area and three buttons: 'Save as Draft', 'Submit', and 'Cancel'.

Enter Custom Form Extension Data

Custom Form Extensions

- Custom Form Extensions are a way for your funders to capture custom data
- They are fields added to existing record types in AmpliFund that you will be expected to complete
- Custom Form Extension can be added to several records including but not limited to
 - Grants
 - Reporting Periods
 - Payment Requests
- Your funder will let you know if you are required to complete Custom Form Extensions
- Navigate to the appropriate record if you are required to complete Custom Form Extensions

Custom Form Extensions Example - Grant

- Your funder informs you that there are new Custom Form Extension fields on the Grant Details page to complete
- From the AmpliFund homepage click on Grants > Grant Management
- Select the appropriate Grant
- Click on the pencil edit icon on the top right of the screen
- Scroll down and complete the new fields
- Click Save on the bottom right of the screen

Core Series Custom From Extension

Instructions Please follow these instructions and answer the following questions.

Grant Area* Area 1
 Area 2
 Area 3

Important Grant Selections* Selection 1
 Selection 2
 Selection 3
 Selection 4

Provide a detailed narrative based on the instructions above.*

Record Information

Unique Identifier

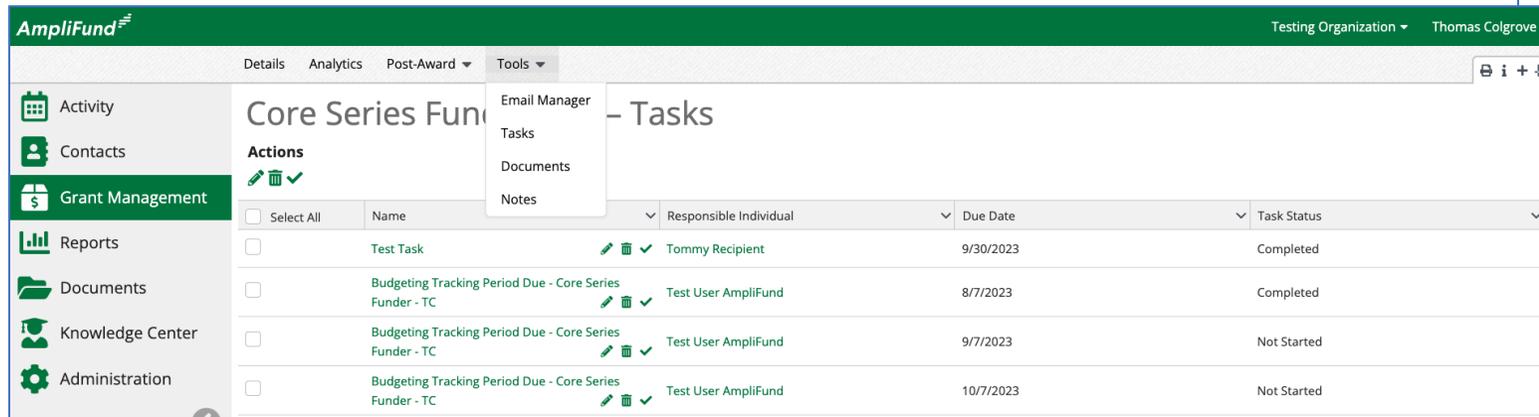
Record Status Enabled

Save Cancel

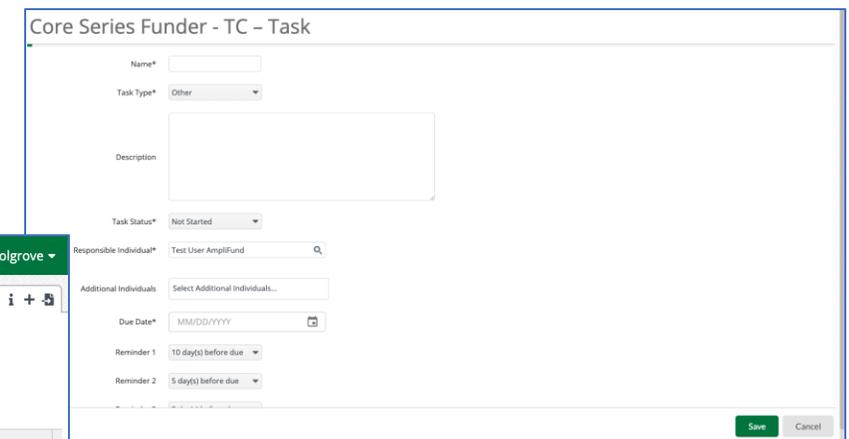
Tools

Tools – Tasks

- There are auto-generated standard tasks for Budget and Performance reporting requirements that you must mark as complete
 - Click on the checkmark icon next to the Task to mark as complete
- You can create Tasks and automatic reminders for yourself or other Users in your account
 - Click on the + icon on the top right of the screen
 - Enter all required information
 - Configure reminders
 - Click Save on the bottom right of the screen

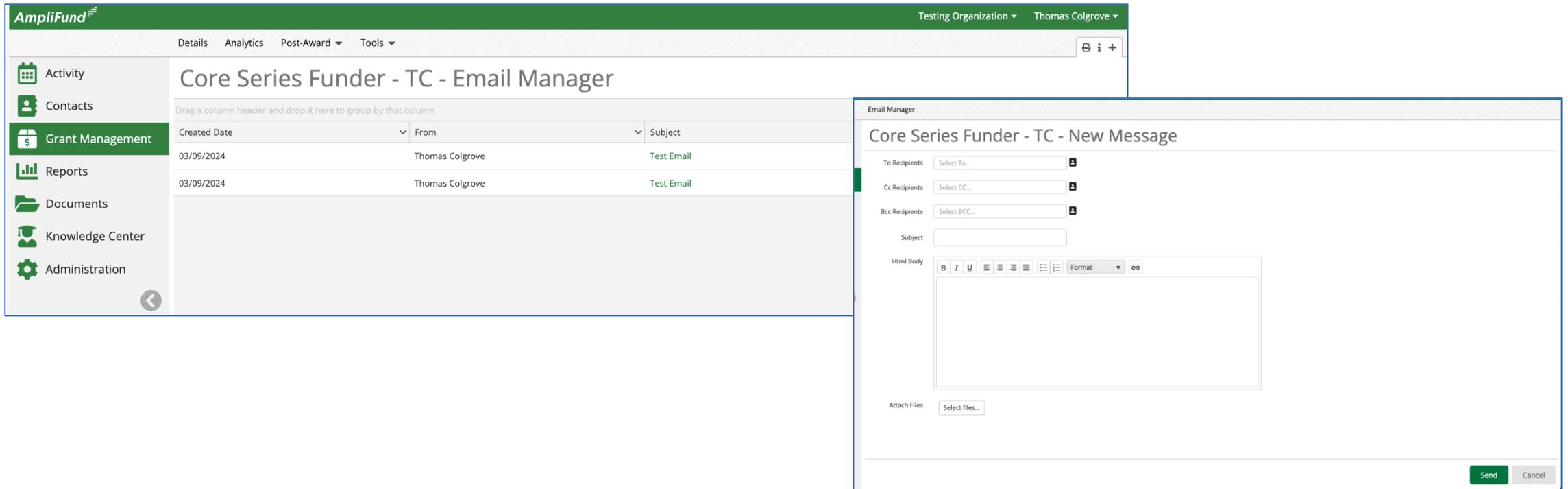


Select All	Name	Responsible Individual	Due Date	Task Status
<input type="checkbox"/>	Test Task	Tommy Recipient	9/30/2023	Completed
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	8/7/2023	Completed
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	9/7/2023	Not Started
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	10/7/2023	Not Started



Tools – Email Manager

- Send emails through AmpliFund via the Email Manger
- From the Grant Details page click on Tools > Email Manager
- Click on the + icon on the top right of the screen draft an email
- After sending you will land back on the Email Manager list page



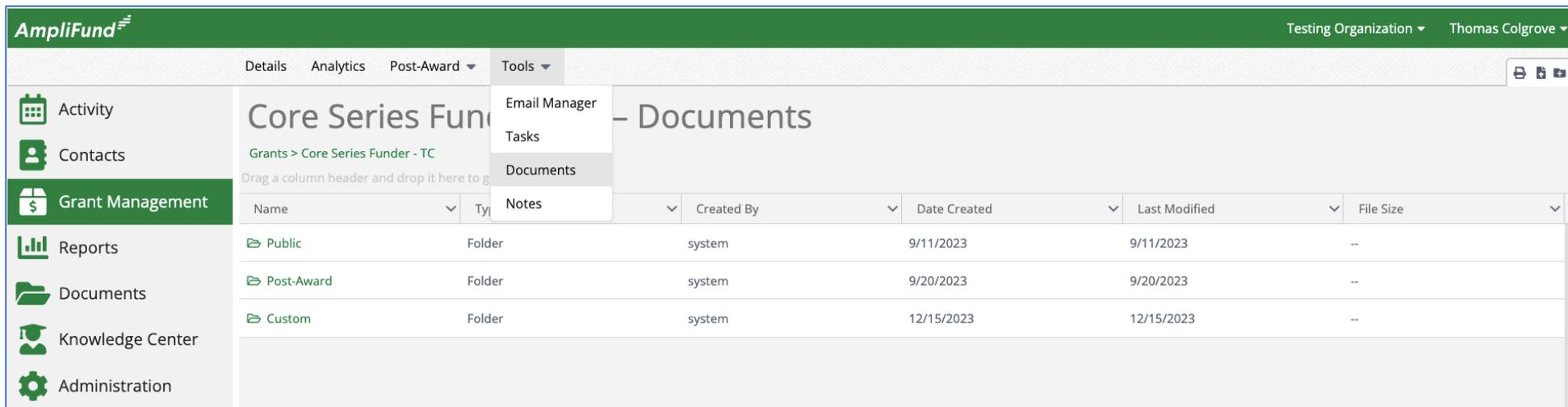
The screenshot displays the AmpliFund interface. The top navigation bar includes 'AmpliFund', 'Testing Organization', and 'Thomas Colgrove'. The main navigation menu on the left lists: Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area is titled 'Core Series Funder - TC - Email Manager' and contains a table with the following data:

Created Date	From	Subject
03/09/2024	Thomas Colgrove	Test Email
03/09/2024	Thomas Colgrove	Test Email

Below the table is a 'New Message' form titled 'Core Series Funder - TC - New Message'. The form includes fields for 'To Recipients', 'Cc Recipients', and 'Bcc Recipients', each with a 'Select' dropdown and a plus icon. There is also a 'Subject' field and an 'Html Body' field with a rich text editor toolbar (B, I, U, text alignment, list, link, Format, and link icon). At the bottom, there is an 'Attach Files' section with a 'Select files...' button. The form concludes with 'Send' and 'Cancel' buttons.

Tools – Documents

- Use Documents to store files
- From the Grant Details page click on Tools > Tasks
- Anything in the Public Folder is also accessible by your funder
- Click on the folder icon on the top right of the screen to add a new folder
- Click on the upload icon on the top right of the screen to upload files

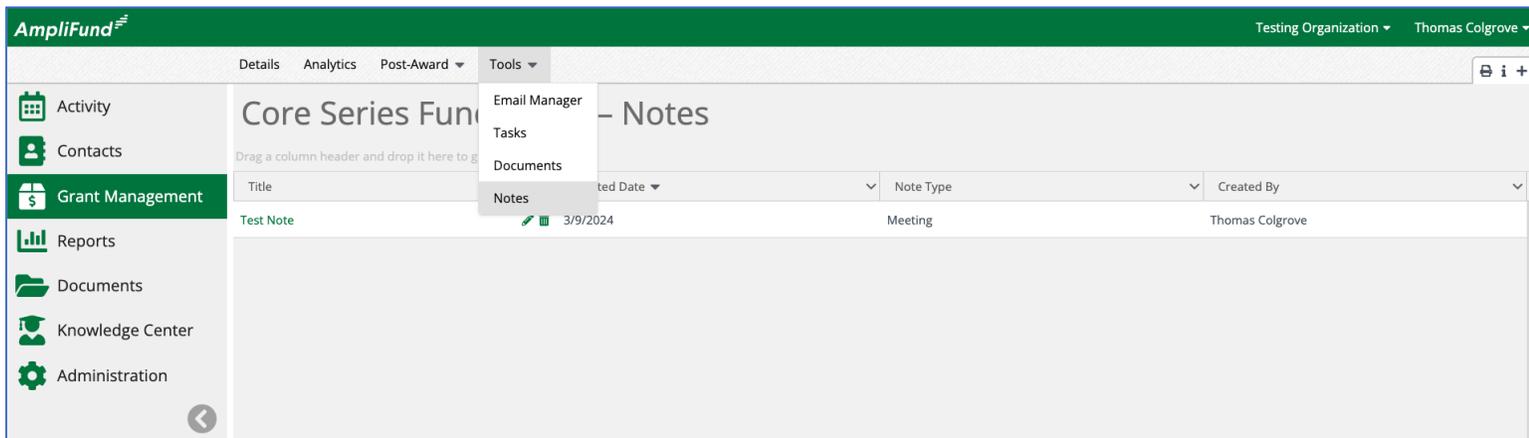


The screenshot displays the AmpliFund interface for the 'Documents' section. The top navigation bar includes 'AmpliFund', 'Testing Organization', and 'Thomas Colgrove'. The main navigation menu on the left lists 'Activity', 'Contacts', 'Grant Management' (highlighted), 'Reports', 'Documents', 'Knowledge Center', and 'Administration'. The breadcrumb trail shows 'Grants > Core Series Funder - TC'. The 'Tools' dropdown menu is open, showing 'Email Manager', 'Tasks', 'Documents', and 'Notes'. The main content area features a table with columns for Name, Type, Created By, Date Created, Last Modified, and File Size. The table lists three folders: 'Public', 'Post-Award', and 'Custom', all created by 'system'.

Name	Type	Created By	Date Created	Last Modified	File Size
Public	Folder	system	9/11/2023	9/11/2023	--
Post-Award	Folder	system	9/20/2023	9/20/2023	--
Custom	Folder	system	12/15/2023	12/15/2023	--

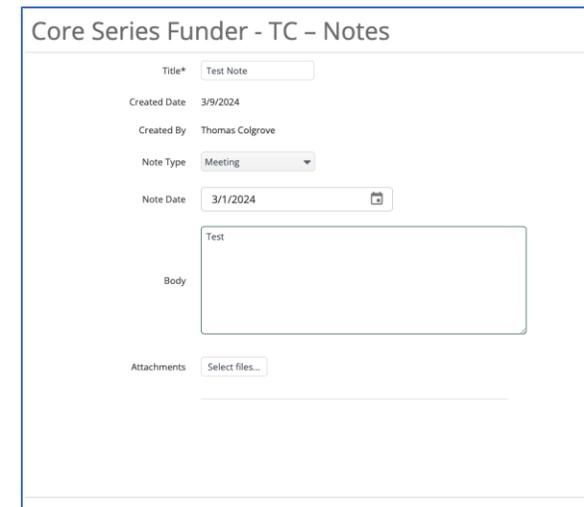
Tools – Notes

- Use Notes to take notes about this Grant
 - Some recipients use Notes to document items in case of an audit
- Click on Tools > Notes
- Click on the + icon on the top right of the screen to add a new Note
 - Enter all required information
 - Click Save on the bottom right of the screen
- Click on the Notes tab on the top left of the screen to get back to the Notes list page



The screenshot shows the AmpliFund interface. The top navigation bar includes 'AmpliFund', 'Testing Organization', and 'Thomas Colgrove'. The main navigation menu on the left includes 'Activity', 'Contacts', 'Grant Management', 'Reports', 'Documents', 'Knowledge Center', and 'Administration'. The 'Tools' dropdown menu is open, showing options for 'Email Manager', 'Tasks', 'Documents', and 'Notes'. The 'Notes' section is active, displaying a table with columns for 'Title', 'Created Date', 'Note Type', and 'Created By'. A single note is listed with the title 'Test Note', created on 3/9/2024, of type 'Meeting', and created by 'Thomas Colgrove'.

Title	Created Date	Note Type	Created By
Test Note	3/9/2024	Meeting	Thomas Colgrove



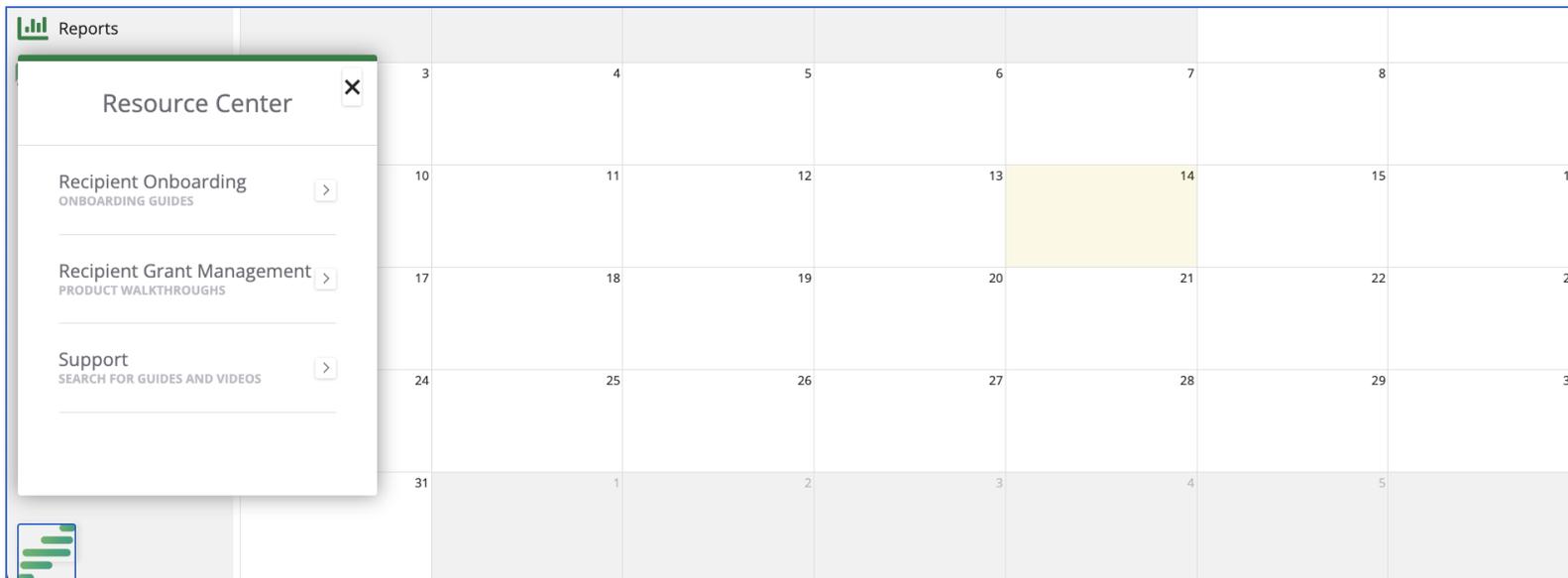
The screenshot shows the 'Core Series Funder - TC - Notes' form. The form fields are as follows:

- Title*: Test Note
- Created Date: 3/9/2024
- Created By: Thomas Colgrove
- Note Type: Meeting
- Note Date: 3/1/2024
- Body: Test
- Attachments: Select files...

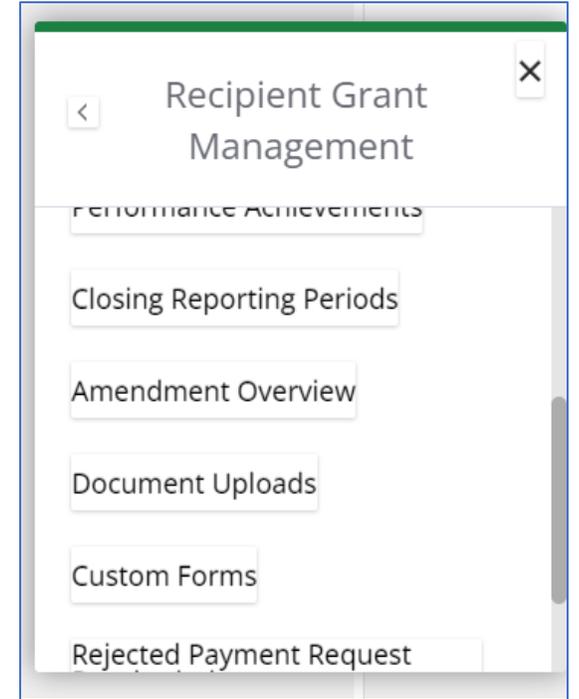
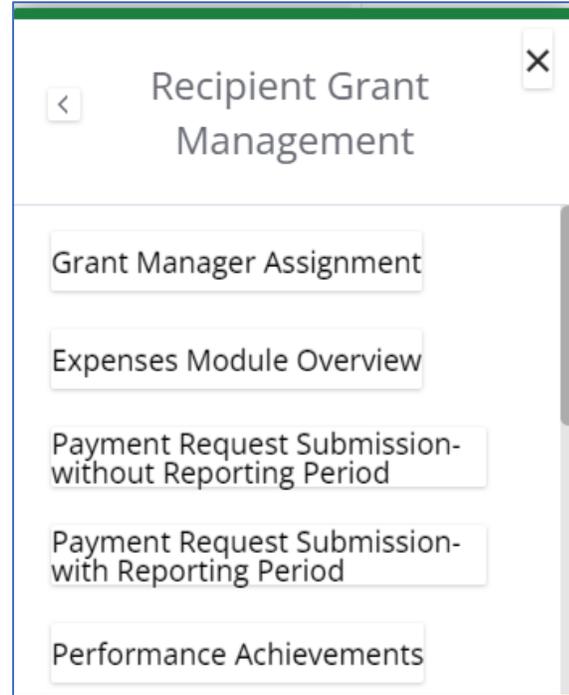
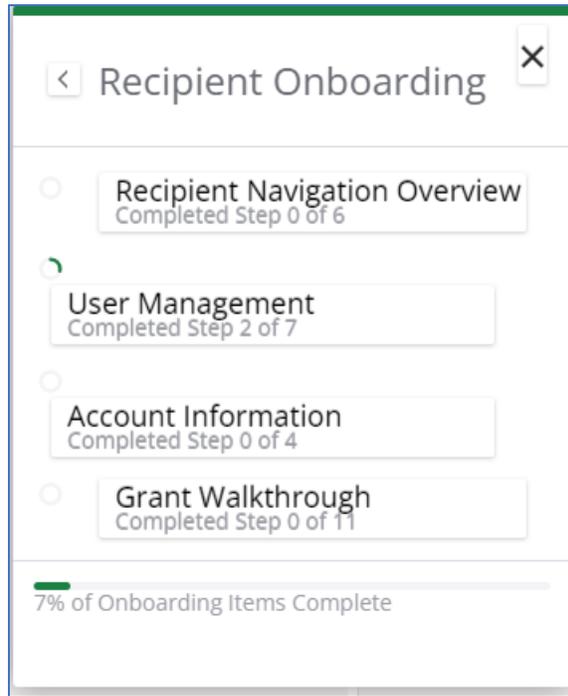
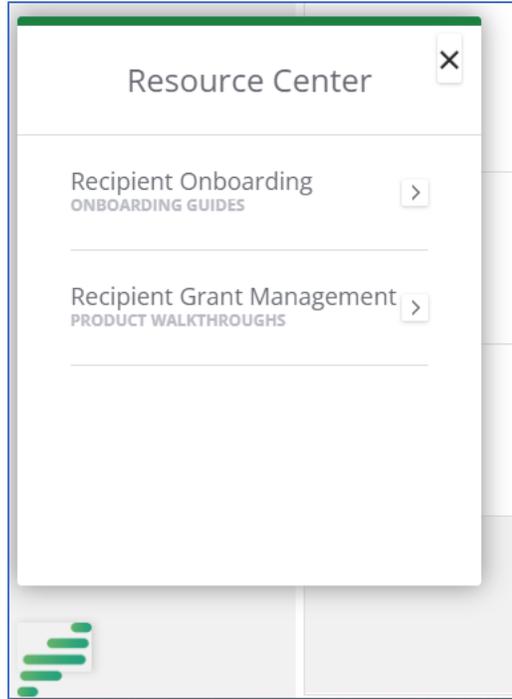
Resource Center

What is the Resource Center

- The Resource Center is an in-product tool that links to support resources and step-by-step assistance for common processes within AmpliFund
- Click on the AmpliFund logo on the bottom left of the screen to access the Resource Center
- Work through the available resources
- The Resource Center will be available in Illinois later this year



Resource Center Images



Account Settings

Account Settings

- Click on Administration > License Information
- Click on the Setting tab on the top left of the screen
- Click on the pencil edit icon on the top right of the screen
- Configure the following sections as needed
 - Settings
 - Matching
 - Indirect Cost Rate
 - Expenses
 - GL Account Definition
 - Risk Monitoring
 - Password Policy

Account Settings Images

AmpliFund Thomas Colgrove

Details Settings

- Activity
- Contacts
- Grant Management
- Reports
- Documents
- Knowledge Center
- Administration**
 - License Information
 - System Administration
 - System Security
 - Lists
 - Actuals
 - Favorites
 - Views

Settings

Organization Fiscal Year Start Month	None
Organization Work Week Start Day	None
Organization Work Week Length	0
Accounting Method	None
Vendor ID	
FICA Rate	0.00%

Matching

Matching Required	No
-------------------	----

Indirect Cost Rate

Track Indirect Cost	No
---------------------	----

Expenses

Always check for duplicate expenses when importing	No
--	----

GL Account Definition

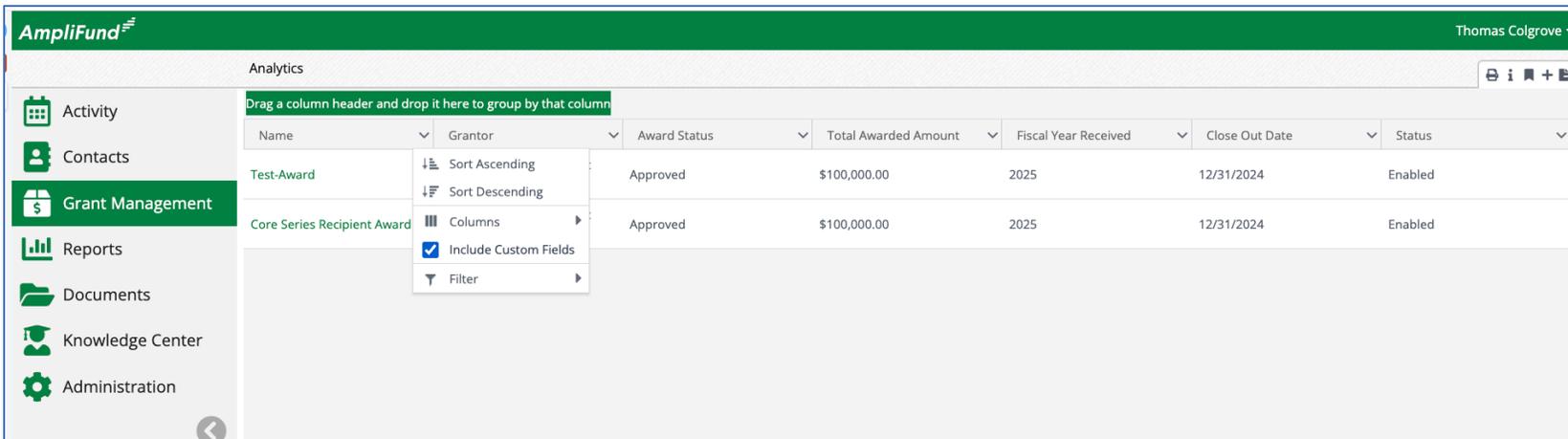
Use Account Code 1*	No
---------------------	----

<https://www.gotomygrants.com/account/Settings.aspx>

Data Management and Views

Filter and Sort Data

- Filtering data becomes more important as you gain more data records
- For example, some recipients have dozens of Grants from several funders
- Filtering data will help recipients access data more effectively and efficiently
 - Sort Ascending
 - Sort Descending
 - Add Columns
 - Filter
- Sort by Column by dragging a column to the top bar

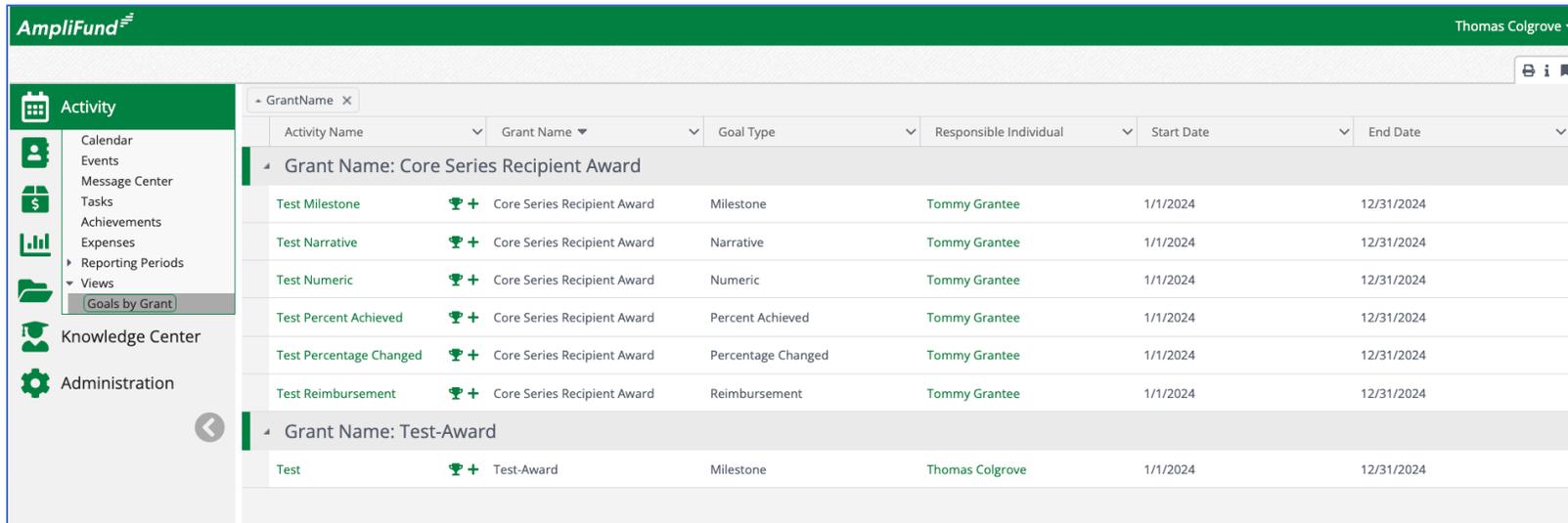


The screenshot displays the AmpliFund Analytics dashboard. The top navigation bar is green with the AmpliFund logo and the user name 'Thomas Colgrove'. The left sidebar contains navigation icons for Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area shows a table with columns: Name, Grantor, Award Status, Total Awarded Amount, Fiscal Year Received, Close Out Date, and Status. A context menu is open over the 'Grantor' column header, showing options: Sort Ascending, Sort Descending, Columns, Include Custom Fields (checked), and Filter. The table data includes two rows: 'Test-Award' and 'Core Series Recipient Award', both with an 'Approved' status, a total awarded amount of '\$100,000.00', a fiscal year of '2025', and a close out date of '12/31/2024'. The status for both is 'Enabled'.

Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status
Test-Award		Approved	\$100,000.00	2025	12/31/2024	Enabled
Core Series Recipient Award		Approved	\$100,000.00	2025	12/31/2024	Enabled

Save Custom Views

- Click on the bookmark icon on the top right of the screen to save a Custom View
- Access the Custom Views from one of the following tabs
 - Activity
 - Grants
 - Administration



The screenshot shows the AmpliFund software interface. The top navigation bar is green with the AmpliFund logo on the left and the user name "Thomas Colgrove" on the right. Below the navigation bar is a sidebar menu with icons for Activity, Calendar, Events, Message Center, Tasks, Achievements, Expenses, Reporting Periods, Views, Knowledge Center, and Administration. The main content area displays a table of activities. The table has columns for Activity Name, Grant Name, Goal Type, Responsible Individual, Start Date, and End Date. There are two sections of data, one for "Grant Name: Core Series Recipient Award" and one for "Grant Name: Test-Award".

Activity Name	Grant Name	Goal Type	Responsible Individual	Start Date	End Date
Grant Name: Core Series Recipient Award					
Test Milestone	Core Series Recipient Award	Milestone	Tommy Grantee	1/1/2024	12/31/2024
Test Narrative	Core Series Recipient Award	Narrative	Tommy Grantee	1/1/2024	12/31/2024
Test Numeric	Core Series Recipient Award	Numeric	Tommy Grantee	1/1/2024	12/31/2024
Test Percent Achieved	Core Series Recipient Award	Percent Achieved	Tommy Grantee	1/1/2024	12/31/2024
Test Percentage Changed	Core Series Recipient Award	Percentage Changed	Tommy Grantee	1/1/2024	12/31/2024
Test Reimbursement	Core Series Recipient Award	Reimbursement	Tommy Grantee	1/1/2024	12/31/2024
Grant Name: Test-Award					
Test	Test-Award	Milestone	Thomas Colgrove	1/1/2024	12/31/2024

In-Product Demo

Key Concepts

Key Concepts

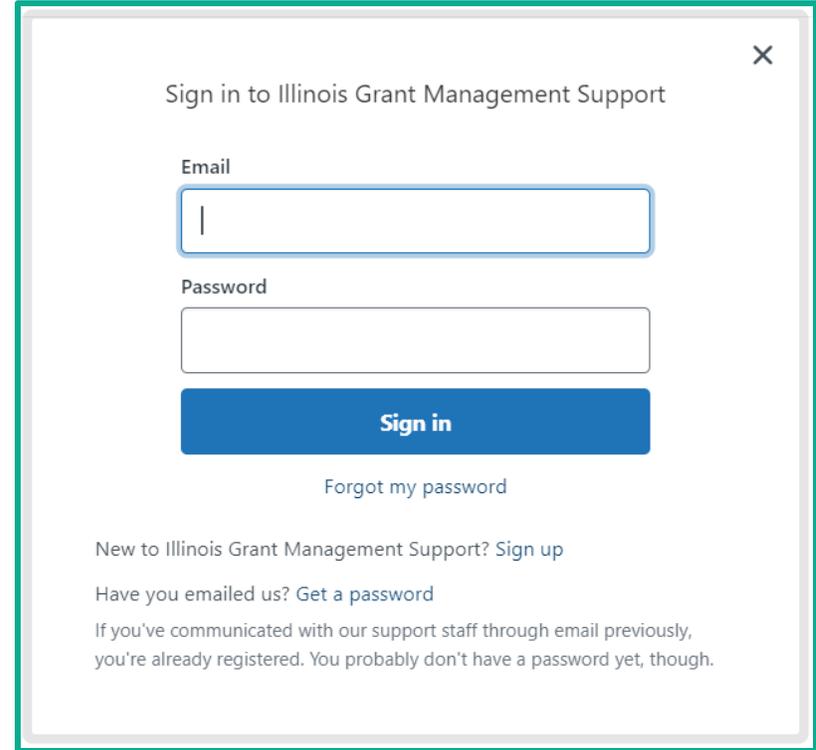
- Submit Amendments
- Submit Custom Forms
- Enter Custom Form Extension Data
- Tools
- Resource Center
- Account Settings
- Data Management and Views

Next Session: Illinois Specific Training

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 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.

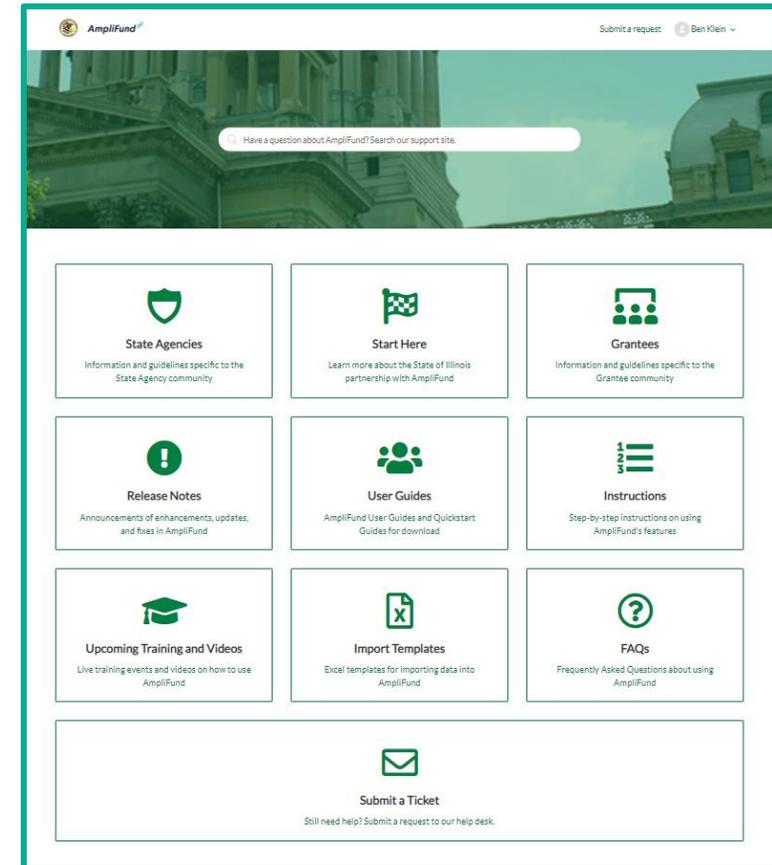
AmpliFund Illinois Support Portal

Submit a support ticket:

- Commercial – Support@amplifund.zendesk.com
- Illinois – Support@il-amplifund.zendesk.com
- Nebraska – 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