

## Grant Seeker Core Series

### **Custom Forms & Form Extensions**

### <sup>2</sup> Core Series Overview



Training 1: Custom Forms & Form Extensions

- Training 2: Workflow
- Training 3: Projects



- Custom Forms
  - What are Custom Forms
  - Access Custom Forms
  - Create Custom Forms
- Custom Forms Extensions
  - What are Custom Form Extensions
  - Access Custom Form Extensions
  - Create Custom Form Extensions
- Custom Form Configuration
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer



# What are Custom Forms

#### What are Custom Forms



Custom Forms are new forms that are not standard in AmpliFund.

Examples include:

- Approval to Apply Checklist.
- Document Uploads for Post-Award.
- Performance Details for Closeout Checklist.



# Access Custom Forms

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#### Access Custom Forms Library



- Click on Administration > Custom > Forms Library.
- Land on a list of all Custom Forms.

AmpliFund <sup>#</sup>					Am	pliFund Training: Grant Seek	er 👻 Thomas Colgrove 👻					
							0i0*					
Activity	Past Due Complete	Due				Grant: All	•					
Contacts	< > today	Mon	Tue	May 2024	Thu	My Events and Tasks:	month week day					
( Research	3011	28	29	30	1 2	3	3at 4					
Grant Management												
Project Management		5	6	7	8 9	10	11					
Lill Reports												
Documents												
Knowledge Center		12	13	14	<sup>15</sup> AmpliFund <sup>≓</sup>					AmpliFu	nd Training: Grant Seeker 👻	Thomas Colgrove 👻
Administration					-							⊖ i +
License Information	1	19	20	21	22 Activity	Forms Lib	rary					
System Security					Contacts							
Actuals					Research	Display Name	✓ Object	✓ Global	✓ Recipient	✓ Published	✓ Description	~
<ul> <li>Custom</li> <li>Form Extension Library</li> </ul>		26	27	28	29 Grant Management	Grantee Checklist	🖋 🗘 Grants	Yes	No	Yes		
(Forms Library) Favorites						Quarter 1 Deliverables	🖉 🗘 Grants	Yes	Yes	Yes		
► Views					Project Management	Recurring Deliverables	🖋 🗘 Grants	Yes	Yes	Yes		
					Reports	ARCHES Awardee Progress Summary	Report Awards	No	No	No		
					Documents	Atlanta Demographics	🖋 🗘 Grants	No	Yes	Yes		
					Knowledge Center	Daily Timesheet - October	🖋 🗘 Staff	No	No	Yes		
					Administration	Data Collection Example	🖋 🗘 Grants	No	No	Yes		
					0	Demographics	Awards	No	No	Yes		
						Demographics Example	🖋 🗘 Grants	No	Yes	Yes		



# **Create Custom Forms**

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#### • Create Custom Forms



• Click the + icon on the top right of the screen.

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										<b>∂i+</b>
Forms Libra	ary									
Drag a column header and dro	op it here	e to group by that column								
Display Name	~	Object	✓ Global	~	Recipient	~	Published	~	Description	~
Grantee Checklist	ø ()	Grants	Yes		No		Yes			
Quarter 1 Deliverables	ø ()	Grants	Yes		Yes		Yes			
Recurring Deliverables	Ø	Grants	Yes		Yes		Yes			
ARCHES Awardee Progress Re Summary	eport 🖋 🕻	Awards	No		No		No			
Atlanta Demographics	ø ()	Grants	No		Yes		Yes			
Daily Timesheet - October	ø ()	Staff	No		No		Yes			
Data Collection Example	e (*)	Grants	No		No		Yes			

#### Configure Form Details



- Enter Name.
- Select AmpliFund Objects (where the form can be completed by a user).
- Optional:
  - Enable Form on All Records for Object(s) The form cannot be removed from any Records from the selected Object(s).
  - Enable Form for Recipients Only Form is only visible to recipient users.
  - Enter Description.

Create Form		
Form Details		
Form Name*		
AmpliFund Object(s)* 🕚	•	
	Enable Form on All Records for Object(s)     Enable Form for Recipients Only	
Form Description		

#### Add Section



- Click on the Section tab to add a Section.
- Enter the Section name.

Form Builde	r
Test	
Section Name* + Field	Test Section
+ Section	

#### 12 Add Field

- Click on the Field to add a Field.
- Enter Name.
- Select Field Type.

Form Builder		
Test		
Test Section		
Field Name*	Test Field	
Field Type	Text Label 🗸	
Add Help Text 🚯		
+ Field		

Content Text Label  $\checkmark$ Description Text External Link Attachment Entry Single Line Text Field Multi Line Text Box **Multiple Choice** Multiple Selection - Checkboxes Dropdown List File Upload Date Numeric Field

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#### Configure Field



- Make Required The field must be completed to create a new record.
- Add to Grid Add this filed to the Custom Form list page.
- Link This field is the link to the Custom Form after it is created.
- Add Help Text Add a message to help users complete the field.

Create F	orm		
Form Builde	r		
Test			
Test Section	1	# <b>ā</b>	0 0
Field Name*	Test Field	亩(	00
Field Type	Single Line Text Field ~		
Make Required			
Add to grid			
Link			
Add Help Text 🚯			
	Test help		
	128		
+ Field			
+ Section			

#### Save and Publish



- Save the Custom Form to create the Record.
- Publish the Custom Form to activate and start using.
  - Form must be published to use in production.
  - Form must be published to pull data for custom reporting.



#### Review and Update Custom Forms



- Navigate back to the Forms Library (review slide 7).
- Click on the Display Name to review the Custom Form.
- Click on the pencil edit icon to edit the Custom Form.
- Click on the paper icon to copy the Custom Form.

Forms Library									
Drag a column header and c	lrop it her	e to group by that column							
Display Name	~	Object 🗸	Global	✓ Recipient	✓ Published				
Grantee Checklist	e (*)	Grants	Yes	No	Yes				
Quarter 1 Deliverables	ø (*)	Grants	Yes	Yes	Yes				
Recurring Deliverables	ø (*)	Grants	Yes	Yes	Yes				
ARCHES Awardee Progress Summary	Report 🖋 🕻	Awards	No	No	No				



# What are Custom Form Extensions

#### What are Custom Form Extensions



- Custom Form Extensions are new sections and fields added on to standard objects in AmpliFund.
- Examples Include:
  - Adding custom sections to the Award Details page.
  - Adding custom sections to Expenses.
  - Adding custom sections to Payment Requests.



# Access Custom Form Extensions

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#### **Access Custom Forms Extension Library**



- Click on Administration > Custom > Forms Extension Library.
- Land on a list of all Custom Forms Extensions.

AmpliFund <sup>≓</sup>					,	AmpliFund Training: Grant Seek	er 👻 Thomas Colgrove 👻					
				1.000			8i0*					
Activity	Past Due Complete	Due				Grant: All	•					
Contacts	< > today			May 2024		My Events and Tasks:	month week day					
Research	Sun 28	Mon	Tue 30	Wed	Thu 2	Fri 3	Sat 4					
🚼 Grant Management												
Project Management	5	6	7		8 9	10	11					
LIII Reports												
Documents	12	13	14		15 AmeliCund <sup>±</sup>					AmoliEu	ind Training: Grant Seeker -	
Knowledge Center					Ampiiruna					Априго		
Administration License Information > System Administration > System Security	19	20	21		22 Activity	Form Ext	ension Libra	iry column				₿i+
Lists     Actuals					Research	Display Name	✓ Object	✓ Global	✓ Recipient	✓ Published	✓ Description	~
Custom     (Form Extension Library)	26	27	28		29	Invoice ID	🖋 🗘 Expenses	Yes	No	Yes		
Forms Library Favorites					Grant Management	Additional Grant Details	🧳 🗘 Grants	No	No	Yes		
▶ Views	_				Project Manageme	East Bay Example - Gran	nt Grants	No	No	Yes		
					Reports	Grant Details	🖋 🗘 Grants	No	No	Yes		
					Documents	Letter of Interest Inform	nation 🖋 🗘 Grants	No	No	Yes		
					Knowledge Center	PHPR POC	🖋 🗓 Grant Goals	No	No	Yes		
					Administration	Pre-Award Checklist	🖋 🗘 Grants	No	No	Yes		
						3						

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# **Create Custom Form Extensions**

#### **<sup>2</sup>** Create Custom Form Extensions



• Click the + icon on the top right of the screen.

AmpliFund <sup>≓</sup>						AmpliFund Training:	Grant Seeker 👻	Thomas Colgrove <del>-</del>
								⊖ i +
Activity	Form Exten	sic	on Library					
Contacts	Drag a column header and drop	o it her	e to group by that column					
( Research	Display Name	~	Object 🗸	Global 🗸	Recipient 🗸	Published	<ul> <li>Description</li> </ul>	~
Grant Management	Invoice ID	ø ()	Expenses	Yes	No	Yes		
ş Grant Management	Additional Grant Details	d 🖉	Grants	No	No	Yes		
Project Management	East Bay Example - Grant Application	ø ()	Grants	No	No	Yes		
Reports	Grant Details	e 🗘	Grants	No	No	Yes		
Documents	Letter of Interest Information	ØĊ	Grants	No	No	Yes		
Knowledge Center	PHPR POC	ø ()	Grant Goals	No	No	Yes		
Administration	Pre-Award Checklist	ø ()	Grants	No	No	Yes		
0								

#### <sup>22</sup> Configure Form Details



- Enter Name.
- Select AmpliFund Objects (where the form can be completed by a user).
- Optional:
  - Enable Form on All Records for Object(s) The form cannot be removed from any Records from the selected Object(s).
  - Enable Form for Recipients Only Form is only visible to recipient users.
  - Enter Description.

Create Form Extension							
Form Extension Details							
Form Extension Name*							
AmpliFund Object(s)* 🕚	•						
	<ul> <li>Enable Form Extension on All Records for Object(s) </li> <li>Enable Form Extension for Recipients Only </li> </ul>						
Form Extension Description							





- Click on the Section tab to add a Section.
- Enter the Section name.

Form Builde	۲.
Test	
Section Name*	Test Section
+ Field + Section	

#### <sup>24</sup> Add Field

- Click on the Field to add a Field.
- Enter Name.
- Select Field Type.

Form Builder		
Test		
Test Section		
Field Name*	Test Field	
Field Type	Text Label	
Add Help Text 🚯		
+ Field		

Content Text Label  $\checkmark$ Description Text External Link Attachment Entry Single Line Text Field Multi Line Text Box **Multiple Choice** Multiple Selection - Checkboxes Dropdown List File Upload Date Numeric Field

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#### **25** Configure Field



- Make Required The field must be completed to create a new record.
- Add Help Text Add a message to help users complete the field.

Form Extens	sion Builder
Test	
Test	
Field Name*	
Field Type	Single Line Text Field ~
Make Required	
Add Help Text 🚯	
+ Field	
+ Section	

#### **Save and Publish**



- Save the Custom Form Extension to create the Record.
- Publish the Custom Form to activate and start using.
  - Form must be published to use in production.
  - Form must be published to pull data for custom reporting.



#### **Review and Update Custom Forms**



- Navigate back to the Form Extension Library (review slide 7).
- Click on the Display Name to review the Custom Form Extension.
- Click on the pencil edit icon to edit the Custom Form Extension.
- Click on the paper icon to copy the Custom Form Extension.

Forms Library					
Drag a column header and d	rop it her	e to group by that column			
Display Name	~	Object 🗸	Global	✓ Recipient	✓ Published
Grantee Checklist	ø (*)	Grants	Yes	No	Yes
Quarter 1 Deliverables	ø (*)	Grants	Yes	Yes	Yes
Recurring Deliverables	ø (*)	Grants	Yes	Yes	Yes
ARCHES Awardee Progress I Summary	Report 🖋 🕻	Awards	No	No	No



# Custom Form Configuration

#### **Configure Custom Forms and Extensions**

- Manual configuration is required if the Form or Extension was not configured to be on all AmpliFund Object(s).
- Navigate to the appropriate AmpliFund Object(s).
- For example, navigate to the Grants Details page. ٠
  - Click on Grant Mangement > Grants.
  - Select the appropriate Grant.
  - Click Custom > Form Configuration.
  - Select the appropriate Form or Extension.
  - Click Save.

\mpliFund <sup>≢</sup>			Forms	Grantee Checklist Preview Cample Data Collection Form Preview Forms Data Collection Example Preview Nult Time Tracking Preview				
	Details Analytics Pre-Award 🕶 Post-Award 🕶 Tools 🕶 Grant Workflow 🕶	Custom 👻			Post Award Transition Form Preview			
<b></b>		Grantee Checklist		Related Objects (Form	Extensions)			
Activity	Community Development Block Gran		- Grar	Expenses	Invoice ID Preview			
		NLH Time Tracking						
	Grant Information and Status	Form Configuration		Grant Goals	PHPR POC Preview			
Research	Name Community Development Block Grants (Ohio)							Save
🕏 Grant Management	Grantor Ohio Development Services Agency							
	Award Tumo Cropt							



Community Development Block Grants (Ohio) – Advanced Data Collection Configuration Grants Configuration Pre-Award Checklist Preview East Bay Example - Grant Application Preview Form Extensions Letter of Interest Information Preview Grant Details Preview Additional Grant Details Previe

#### **30 Complete a Custom Form**

- Navigate to the appropriate object.
- Click on Custom > Select the appropriate Custom Form.
- Click on the + icon on the top right of the screen.
- Complete the Custom Form.
- Click Create on the bottom right of the screen.

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	Details Configuration 🕶 App	lications Opportunity Review Tools 🕶	Custom 👻			
Activity	(USE THIS TEM	Committee Scoring Report				
	(051 1115 1114	Form Configuration				
	Opportunity Information	Opportunity Information				
🔇 Research	CSFA Number 🕚					
Grant Management	CSFA Popular Name	Vets Cash				
Award Management	Title	Title (USE THIS TEMPLATE) Veterans Scratch-Off Lottery Ticket Program				
rund Management	100% of the net proceeds from Illinois lottery tic grants to groups that help veterans address cha 1) Behavioral Health,		cket sales are used to support Illi allenges associated with the follo			
Project Management	Description	2) Homelessness, 3) Health Insurance Costs, 4) Longsterm Care				



Department of Veterans' Affairs -

AmpliFund<sup>=</sup>

Thomas Colgrove -

Am	AmpliFund <sup>=</sup>						
	Activity	Committee Scoring Report					
Ŀ	Contacts	Certification					
5	Research	<ul> <li>Name of person completing this form *</li> </ul>					
\$	Grant Management	10111.		<b>H</b>			
\$	Award Management	Date the form is being completed.*	This field is required.				
Ŵ	Fund Management	Finances					
	Project Management	Funds Available*	\$0.00				
111	Reports	New Applications*	\$0.00				
	Documents	Total Amount Awarded*	\$0.00				
	Knowledge Center	Remaining Funds	\$0.00				
ń	Administration						



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## **In-Product Demo**





# Next Steps

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#### **Next Steps**

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- Recreate the Custom Form from today's session.
- Recreate the Custom Form Extension from today's session.
- Document one of your business processes as a bullet list for the Workflow session.
  - Application Process.
  - Award Closeout Process.



# **Customer Support**

#### **<sup>35</sup> 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 <a href="mailto:support@zendesk.com">support@zendesk.com</a> will be sent to you via email.
- 8. Click the link to set your password.

old X 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 - <u>support@amplifund.zendesk.com</u>. Illinois - <u>support@il-amplifund.zendesk.com</u>. Nebraska - <u>support@ne-amplifund.zendesk.com</u>.

#### **Visit Support Portal:**

Commercial - <u>https://amplifund.zendesk.com</u>. Illinois - <u>https://il-amplifund.zendesk.com</u>. Nebraska - <u>https://ne-amplifund.zendesk.com</u>.

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#### **Production Site:**

Commercial - <u>https://www.gotomygrants.com</u>. Illinois - <u>https://il.amplifund.com</u>. Nebraska - <u>https://ne.amplifund.com</u>.





# **Question & Answer**

