**How to Assign Custom Forms & Fields**

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| Script |
| Welcome to the AmpliFund Training video focused on assigning non global custom forms and fields. |
| Before we dive into how to assign custom forms, we will first go over what custom forms are. Custom forms are a way to capture custom data. They are unique forms that are not standard within Amplifund. Meaning they are forms that ask for information that is not asked already by Amplifund forms and records.To access and create these forms, you can do so by navigating to Administration > Custom > Forms Library |
| In addition to custom forms, there are also custom form extensions. Form extensions are similar to custom forms in that they both are a way to capture custom data. However, the difference is that form extensions are attached to an existing record in Amplifund rather being a separate standalone formExtension forms can be attached to awards, grants, reporting periods, payment requests and much more. To access and create them, you can do so by navigating to Administration > Custom > Form Extension Library |
| To assign non global custom forms and form extensions, you need to first make sure that the global check box is not checked. After confirming it's not a global form, then you can go the grant details page of your desired grant and go ahead and assign the custom form or form extension to it. You can do that by going to the custom tab at the top and click form configuration which will take you to a screen where you can assign either of the forms to the grant. |
| Now that we briefly went over the process of assigning custom forms and form extensions, lets switch to Amplifund and walk through that processFirst let's navigate to our grant by going to Grant Management > Grants. |
| Now that we are at the grant details page, we can go to Custom > Form Configuration |
| From here we can see the available custom forms or form extensions that we can assign to this grant record. |
| If we want to view the custom form or form extension before we assign it, we can click the preview hyperlink.  |
| To assign these to our grant record, simply check the box next to each custom form or form extension that you want assigned to this record.I am going to go ahead and check the box next to both our custom form and custom form extension.Once ready click Save |
| Now that both the custom form and form extension have been assigned to this grant, we can now capture our custom data for this record.To complete the custom form, go back to the Custom drop down, but this time click the custom form name which in this case is Additional Grant Info. |
| To complete the custom form extension, click the edit button and scroll down to the bottom of the grant details page right before the record information section to complete the custom form extension |
| Through this training video you’ve learned about how to assign custom forms and fields that are not global. Should you have any additional questions, please reference our support site. Thank you! |