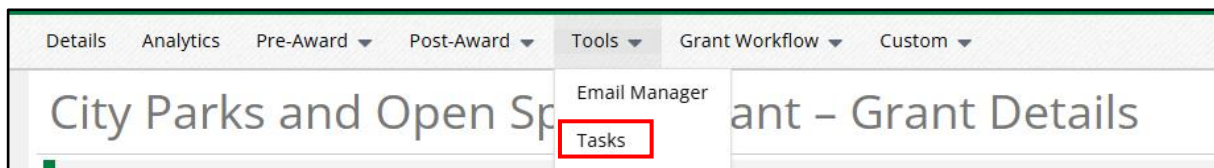


Improve Compliance with Deadlines

The Task feature and its automatic reminders can empower Grant Managers to ensure compliance with deadlines. Leveraging routine reminders for grants staff and recipients to submit their budget and performance reports, eliminates the need for funders to send multiple communications and provide internal transparency to grant managers.

How to Create Tasks

1. **Tools Tab** > Select **Tasks** > Click the **Create** icon **+** in the upper right Icon Bar under **Task Information**.
2. Open an **Object Record** (e.g. Organizations, Grants, Funds, Projects, Individuals, Staff, Lead Recipients, and Sub-Recipients)



- (1) Type in the **Task Name**

Hint: Consider using a naming convention suitable for your organization.

- (2) Select a **Task Type** from the drop-down menu

Hint: This field provides more context and supports other reporting capabilities in the system.

- (3) Use the optional **Description** box to add additional information.

- (4) Select the **Task Status**

Hint: If is a new task being created, keep the status as "Not Started."

- (5) Select one or more staff users as **Assignees**. They will receive email reminders and can view their task in Activity > **Tasks** or on the **Calendar**.

 A screenshot of the 'City of Pawnee Fund - Task' form. The form is titled 'Task Information' and contains several fields:

- 1** Name*: A text input field containing 'Budget Tracking Period L'.
- 2** Task Type*: A dropdown menu with 'Other' selected. The dropdown list is open, showing options: 'Other', 'Budget', and 'Performance'.
- 3** Description: A text area with the placeholder text 'Add Optional Additional Information Here'.
- 4** Task Status*: A dropdown menu with 'Not Started' selected. The dropdown list is open, showing options: 'Not Started', 'In Progress', 'Completed', 'On Hold', and 'Rejected'.
- 5** Assignee(s): A text input field containing 'Ron Swanson' with a close button (x).

 A green arrow points from the 'Task Status*' dropdown to the 'Assignee(s)' field.

3. Select a **Due Date** (1) and set up optional **Task Reminders** (2)

Hint: Task Reminders will send scheduled emails to the Assignee(s) to complete a task. You can select up to three separate reminders between 0 and 30 days before the task is due.

A screenshot of a task creation form. At the top, there is a 'Due Date*' field with a calendar icon, containing the date '6/30/2025'. Below this, there are three 'Reminder' fields: 'Reminder 1' with a dropdown set to '1 day(s) before due', 'Reminder 2' with a dropdown set to '7 day(s) before due', and 'Reminder 3' with a dropdown set to '30 day(s) before due'. A green circle with the number '1' is around the 'Due Date*' field, and another green circle with the number '2' is around the 'Reminder 2' dropdown.

4. Click **Save**

How to View and Complete a Task

1. **Assignees** can View their assigned **Tasks** and **Statuses** in two ways:

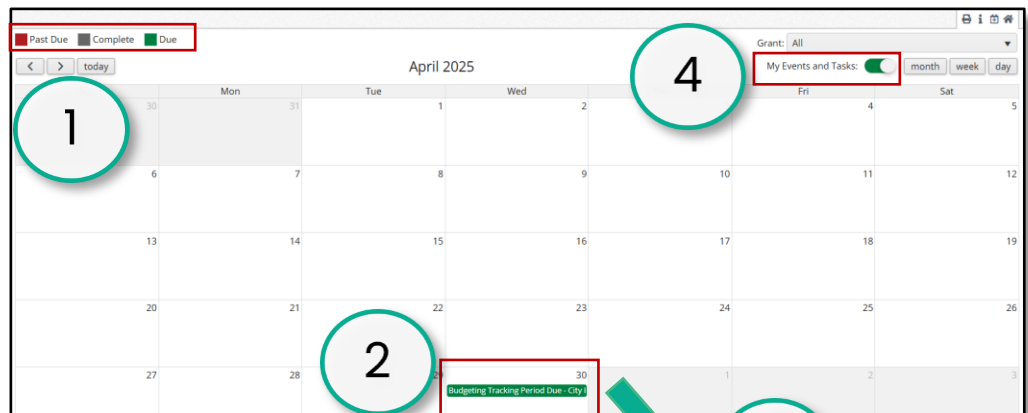
- a) Navigate to Activity > Tasks. The **Task Grid** will allow them to **Edit**  the Task Status and **Mark as Completed**  when they are finished.

A screenshot of the 'Task Grid' interface. At the top, there is an 'Actions' bar with a green checkmark icon and a 'My Tasks' toggle switch. Below this is a table with columns: 'Select All', 'Object Type', 'Object Name', 'Name', 'Assignee(s)', 'Due Date', and 'Task Status'. The table contains one row with the following data: 'Grant', 'City Parks and Open Spaces Grant', 'Budgeting Tracking Period Due - City Parks and Open Spaces Grant', 'Ron Swanson', '6/30/2025', and 'Not Started'.

- b) Log into AmpliFund or click Activity > Calendar

(1) The top left corner displays color-coded categories for any **Past Due, Complete, or Due Tasks**.

(2) By clicking on a **Task**, a pop-up with the Task's information will appear (3).



*Hint: Tasks can view all Assignees' tasks on the Task Grid or on the Calendar by toggling the green **My Events and Tasks** button to the left in the upper right corner (4).*

(3) Assignees can mark tasks complete from the pop-up window. Users will not notice receive email reminders once the task is marked as complete.

A screenshot of a 'Task Information' pop-up window. It contains the following fields: 'Name' (Budgeting Tracking Period Due - City Parks and Open Spaces Grant), 'Description' (empty), 'Status' (Not Started), 'Assignee(s)' (Ron Swanson), and 'Due Date' (4/30/2025). Below these fields, there is a 'Task Reminders' section with a list of reminders: 'Remind on 04/29/2025', 'Remind on 04/23/2025', and 'Remind on 03/31/2025'. At the bottom, there are three buttons: 'Mark as Completed', 'Go to Grant', and 'Close'.