**Script - Post Award Budget Creation**

|  |
| --- |
| Script |
| Welcome to the AmpliFund grant maker training series focused on post award budget creation process. |
| After an award has been created in AmplIFund, there are a number of options as to how a budget can be created for the award.  The grant maker organization can copy over a submission budget from the budget template, can import the budget or can manually create a budget for the recipient.  The recipient can take all these same actions, if the award is configured so they have edit access to the budget.  Edit access for an award budget is a setting, you can reference our post award settings video for more detailed instructions on how to allow edit access for the recipient for a budget. |
| First let’s review the submission budget copy process.  In order to use this process to create a budget, the award must have been created via workflow from an application submitted in AmpliFund’s applicant portal.  Also the application budget template must have been used as part of the application process.  A few important considerations when copying a submission budget.  If the awarded amount is less than the application budget total, the category and line item names will copy over but will each have $0 associated with them.  If the awarded amount is more than the requested amount via the budget template, the budget will require editing to balance to the awarded total.  Recipients can complete this process if they have access to edit the award budget.  Finally, grant makers can complete this action either before or after award activation, however recipients can only copy a submission budget after the award has been activated. |
| Next let’s review the budget import process.  For an award budget to be imported into AmplIFund, the award record must be created, the relevant budget categories must be created in AmpliFund under Administration, Lists, Budget Categories and finally the recipient responsible staff must be available in the recipient account.  Some important considerations, the import can be completed by recipients if they have edit access to the budget, the import can occur before award activation if completed by the grant maker, but only after activation if completed by the recipient.  Finally the award budget settings do not have to be completed before the import. |
| Finally the last option for creating an award budget is to manually create the award budget in AmpliFund.  In order to manually create the budget, the award record must already be created, relevant budget categories must be created in AmpliFund under Administration, Lists, Budget Categories, the recipient responsible staff must be available in the recipient account and finally budget settings must be configured including adding all applicable budget categories to the award.  Some important considerations, the manual creation of a budget can be completed by recipients if they have edit access to the budget, the creation can occur before award activation if completed by the grant maker, but only after activation if completed by the recipient. |
| Let’s jump into AmpliFund and review where you would complete each of these tasks.  From the calendar navigate to Award Management then Awards. |
| From the list of awards, click on the award icon for the relevant award. |
| First we will review where to copy over the submission budget.  Navigate to the Pre-Award drop down, then Submission Budget. |
| Once in the submission budget in the upper right hand corner is a copy icon.  This icon will copy the pre-award budget to the post award budget.  To copy the budget click on the copy icon. |
| A pop-up window will appear, to continue with copying the budget click copy. |
| Next we’ll review where to import a post award budget.  Navigate to the relevant award then click on Post Award>Financial>Budget |
| Once you are in the budget you will receive a budget settings reminder, you can go complete the budget settings but it is not required to complete an import. |
| In the upper right hand corner of the budget screen is an import icon.  Using this icon you can import the budget import template from your excel file.  The budget import template is available on AmpliFund’s support site, additionally our support site has a video that walks through each column of the import template. |
| If you were to manually create the budget, you would start from this same budget screen.  As a reminder the budget settings would need to be configured first.  Those can be accessed by going to Post Award>Management> Budget Settings.  For detailed instructions on how to create budget categories and line items, you can reference our budget creation videos on the AmpliFund support site. |
| Through this AmpliFund training video, you’ve learned the options for creating a post award budget.  Should you have additional questions, please reference our support site.  Thank you! |