



AmpliFund 



Recipient Training

Massachusetts Library LSTA

08/03/2022

Agenda

- Welcome & Introductions
- Getting Started with AmpliFund
- AmpliFund Navigation & Account Overview
- Accessing Grant & Budget
- Expense Entry, Budget Reporting Period
- Performance Achievement & Performance Reporting Period Submission
- Amendment Request Submission
- Available Reporting
- Support Resources
- Q&A

Supported Browsers

- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+

For the best experience we encourage the use of Google Chrome



Hello Admin,

You are receiving this notification because your organization has been given an award from **Funder name**

This award of **#years #months 0 days** begins on **Award Start Date**

If you currently use AmpliFund, please [login](#) to see the details of your award and get started.

If you have never used AmpliFund, please use [this link](#) to set your password and login.

Regards,
AmpliFund Administrator
Funder name

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

Account owner will use this link to set-up log-in and can add additional users.

Award activation emails will be sent today

In-Product Review

Summary of Required Actions

- ❑ Administration: Log-in to AmpliFund & add relevant user to your account and invite them
- ❑ Grant Management: Update the Recipient Grant Manager
- ❑ Activity: Enter Expenses
- ❑ Post Award Management: Close Budget Reporting Period
- ❑ Activity: Mark Budget Reporting Period Task as Complete
- ❑ Activity: Enter Performance Achievements
- ❑ Post Award Management: Close Performance Reporting Period

As Needed:

- Sync calendar with AmpliFund
- Review available reports
- Register on the AmpliFund Support Site

The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of five horizontal lines of varying lengths, stacked vertically, resembling a signal or data visualization.

AmpliFund

Support

AmpliFund Support

Submit a support ticket:

support@amplifund.zendesk.com

Visit the support portal:

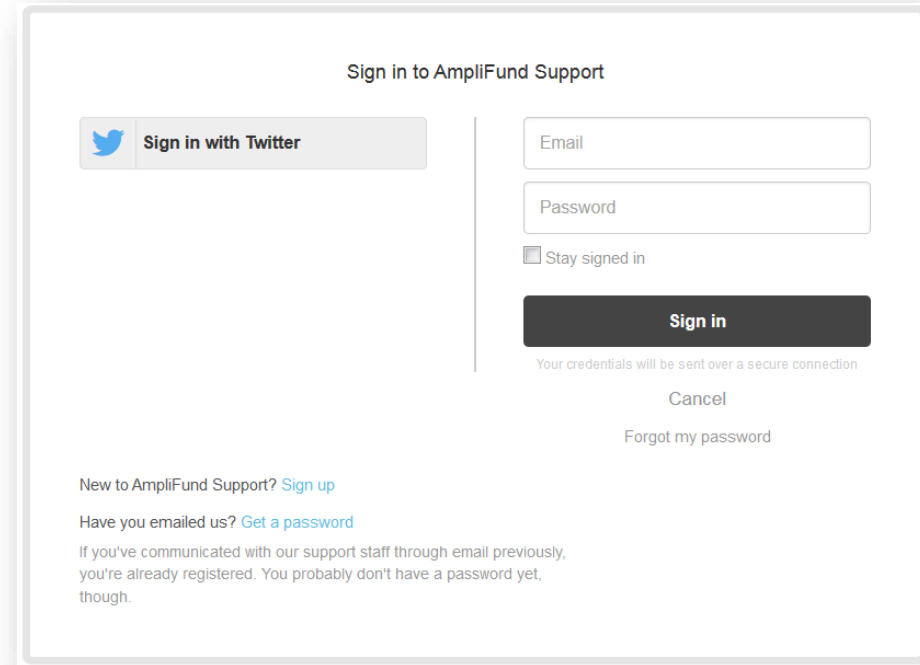
<https://amplifund.zendesk.com>

Supported Browsers:


- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+

AmpliFund Support Site

1. Go to <https://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. A welcome email from support@zendesk.com will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

Stay signed in

Sign in

Your credentials will be sent over a secure connection

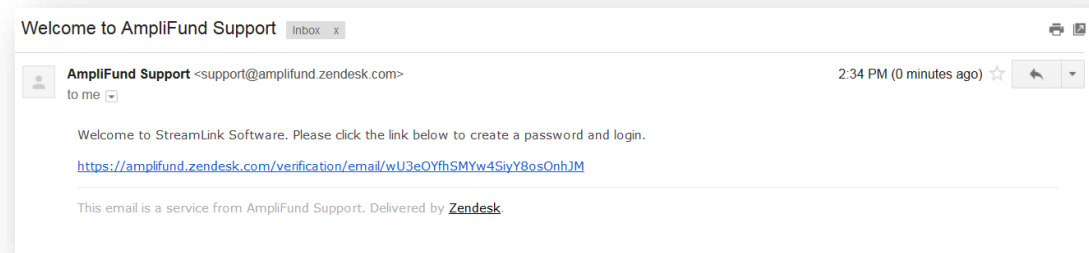
Cancel

[Forgot my password](#)

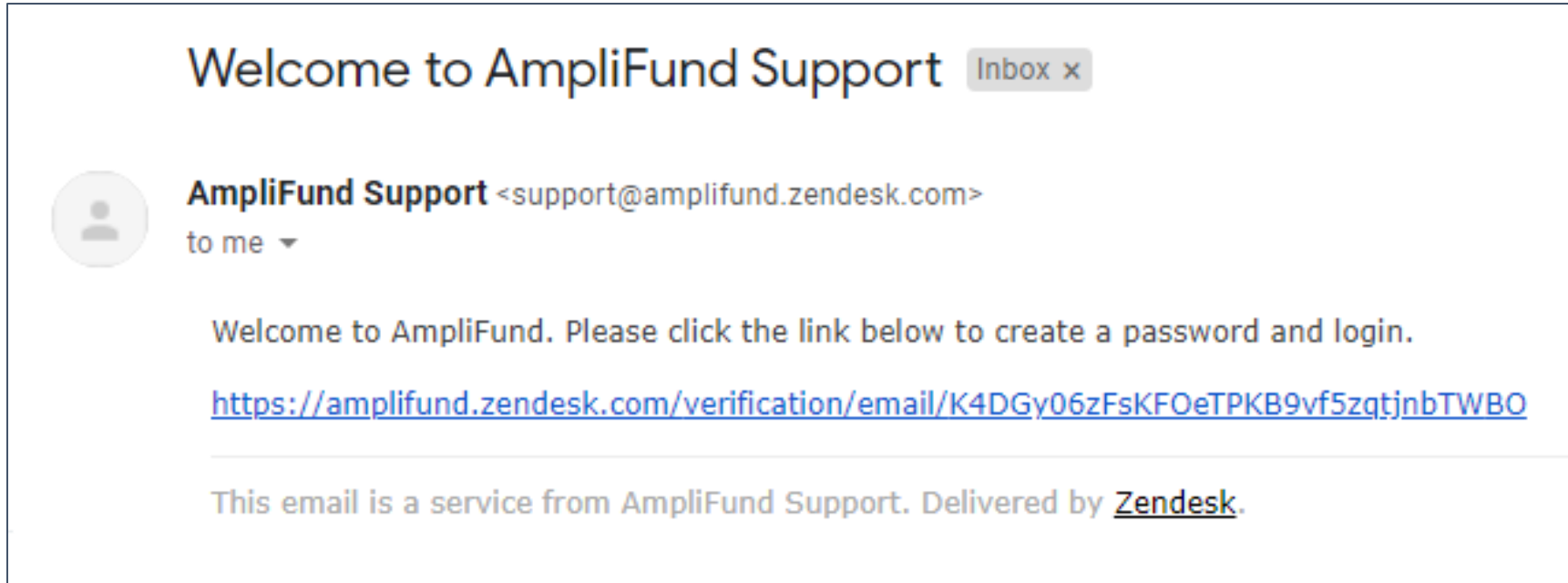
New to AmpliFund Support? [Sign up](#)

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.



Welcome to AmpliFund Support



AmpliFund Support Site

AmpliFund

Have a question about AmpliFund? Search our support site.

- Release Notes**
Weekly announcement of enhancements, updates, and fixes in AmpliFund
- User Guides**
AmpliFund User Guides and Quickstart Guides for download
- Instructions**
Step-by-step instructions on using AmpliFund's features
- Upcoming Training and Videos**
Live training events and videos on how to use AmpliFund
- Import Templates**
Excel templates for importing data into AmpliFund
- FAQs**
Frequently Asked Questions about using AmpliFund
- Submit a Ticket**
Still need help? Submit a request to our help desk.

Thank You

www.gotomygrants.com

Appendix

Support Slides

Navigating AmpliFund

The screenshot displays the AmpliFund interface. On the left, a navigation menu is highlighted with a red box and labeled '1'. It includes options: Contacts, Grant Management, Reports, Documents, and Administration. At the top right, a dropdown menu for 'Joe Test Applicant' is highlighted with a red box and labeled '2'. Below it, a toolbar with icons for home, search, and other functions is highlighted with a red box and labeled '3'. The main area shows a calendar for August 2020 with a yellow highlight on Friday, August 7th. A legend at the top indicates 'Past Due' (red), 'Complete' (grey), and 'Due' (green). A 'My Events and Tasks' toggle is visible on the right.

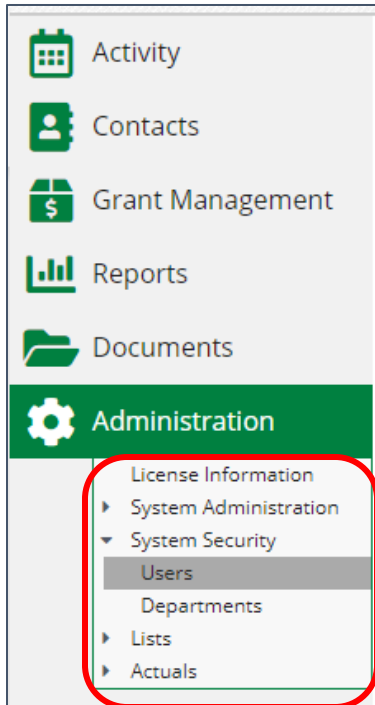
- 1. Left Navigation** – shows on every page
- 2. User Navigation** – includes account information, change password, message center, support, terms and conditions, applicant portal, and logout
- 3. Options Toolbar** – displays icons to perform functions available on the current page, icons vary based on page

The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element.

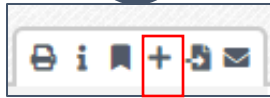
Adding Users

Creating Additional Users

1



2



3

Create User

User Information

Subscribe to Daily Emails

Subscribe to Weekly Emails

Applicant Portal Access

Role*

Staff Information

First Name*

Last Name*

Title

Supervisor

Track Time*

Primary Address

Address Line 1

Address Line 2

City

State

Zip Code

1. Open Administration > System Security > Users
2. Click the + icon in the top right hand corner to create a User
3. Enter user preferences & information
 - Select the User's Email Preference
 - User role
 - User's First Name, Last Name, and E-Mail Address
4. Click the 'Create' button

User Options

Subscribe to Daily/Weekly Emails

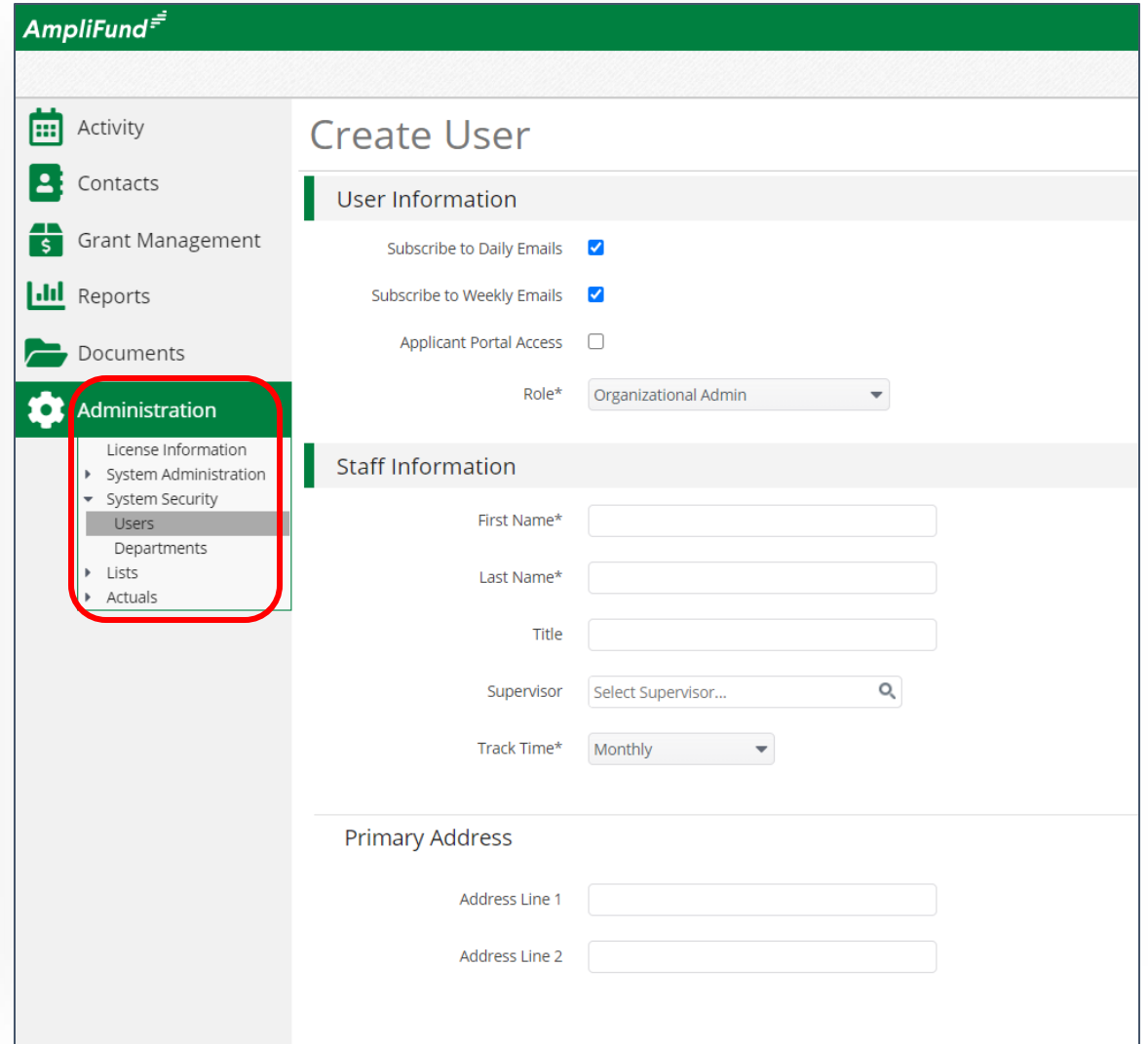
- Set to Yes to receive daily and/or weekly emails from AmpliFund with tasks/reminders

Applicant Portal Access

- Set to **Yes** to provide a user in your organization with access to submit applications

Role*

- **Organization Administrator**
 - Full view and edit access to your organization's AmpliFund account
- **Executive**
 - View only access to your organization's AmpliFund account
- **Department User (No Salary)**
 - Only has access to budget or performance plan items to which you assign the user as the Responsible Individual
- **Department User (Salary)**
 - Has access to budget or performance plan items to which you assign the user as the Responsible Individual including personnel line items



AmpliFund

Activity
Contacts
Grant Management
Reports
Documents
Administration
License Information
System Administration
System Security
Users
Departments
Lists
Actuals

Create User

User Information

Subscribe to Daily Emails

Subscribe to Weekly Emails

Applicant Portal Access

Role* Organizational Admin

Staff Information

First Name*

Last Name*

Title

Supervisor

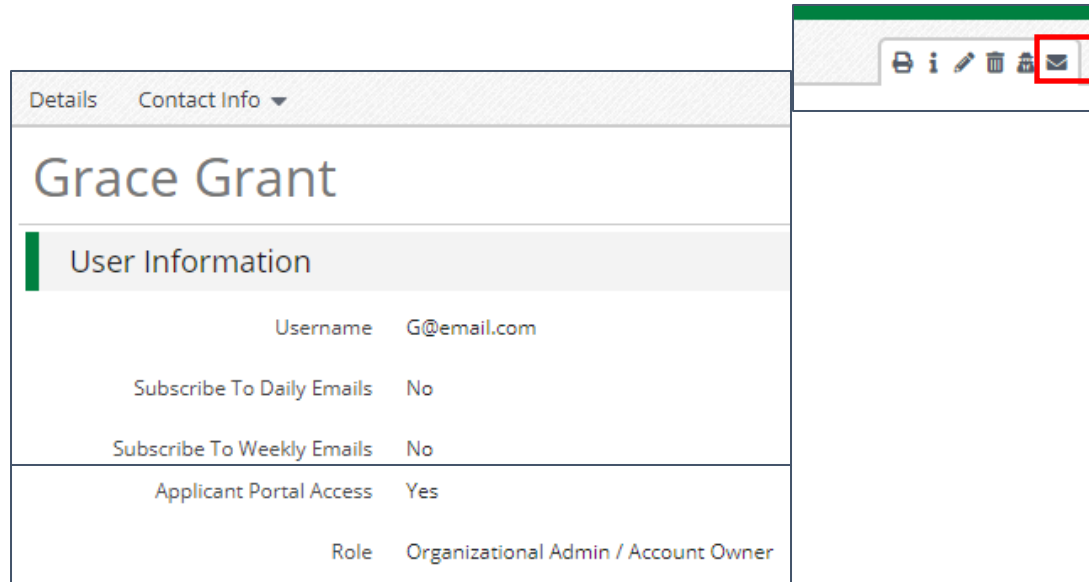
Track Time* Monthly

Primary Address

Address Line 1

Address Line 2


Sending an Invitation to a User



The screenshot shows a user profile for 'Grace Grant'. The profile card includes a 'Details' tab and a 'Contact Info' dropdown. Below the name, there is a 'User Information' section with the following details:

Username	G@email.com
Subscribe To Daily Emails	No
Subscribe To Weekly Emails	No
Applicant Portal Access	Yes
Role	Organizational Admin / Account Owner

To the right of the profile card is an 'Icon Bar' containing several icons: a lock, an information icon, a pencil, a trash can, a refresh icon, and an envelope icon. The envelope icon is highlighted with a red square, indicating it is the 'Send Invitation' button.

1. Click the  in the *Icon Bar*
2. In the confirmation pop-up window, click **Send Invitation**

Link is active for 72 hours

Note: An Organization Administrator can resend the invitation email to a user by going to **Administration > System Security > Users**. Click the envelope icon next to the User's name and confirm.

The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element.

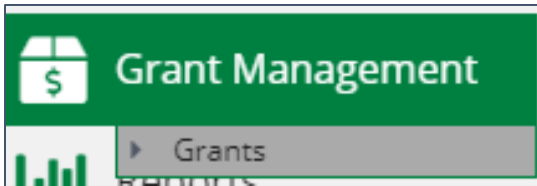
AmpliFund

Updating Grant Award

Updating Grant Award Details

1. Go to **Grant Management > Grants**
2. Click the **'pencil' icon** next to grant name to edit
3. Update the Recipient Grant Manager name & add Recipient award name (optional)
4. Click the **Save** button in the right corner of the screen

1



2

Analytics						
Drag a column header and drop it here to group by that column						
Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status
FY21 Example Award		Approved	\$1.00		3/30/2022	Enabled

3

FY21 Example Award – Award Details

Award Status

Name: FY21 Example Award

Recipient Name: Example Recipient

Recipient Award Name: FY21 Example Award

Award Status: Approved

Grant-Funded Amount ⓘ \$1.00

Match Requirement ⓘ \$1.00

Total Budget ⓘ \$2.00

Expenses To Date ⓘ \$0.00

Match Contributions To Date ⓘ \$0.00

Invoiced To Date ⓘ \$0.00

Pending Invoices ⓘ \$0.00

Approved Invoices ⓘ \$0.00

Cash Received To Date ⓘ \$0.00

Remaining Available Grant-Funded Amount ⓘ \$1.00

Remaining Match Requirement ⓘ \$1.00

Remaining Available Budget ⓘ \$2.00

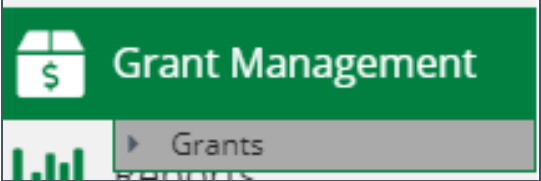
The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of five horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element.

Accessing Budget

Accessing Budget

- 1. Go to **Grant Management > Grants**
- 2. Click the grant name
- 3. Click on Post Award>Financial>Budget

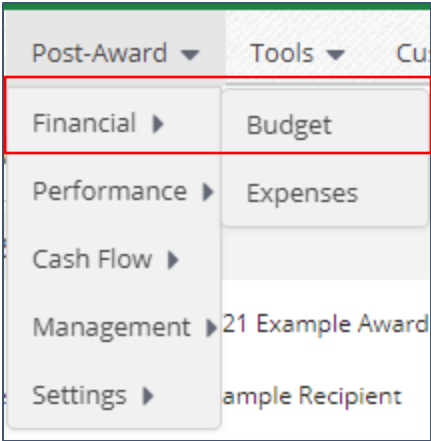
1



2

Analytics							
Drag a column header and drop it here to group by that column							
Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status	
FY21 Example Award	Juvenile Welfare Board of Pinellas County	Approved	\$1.00		3/30/2022	Enabled	

3



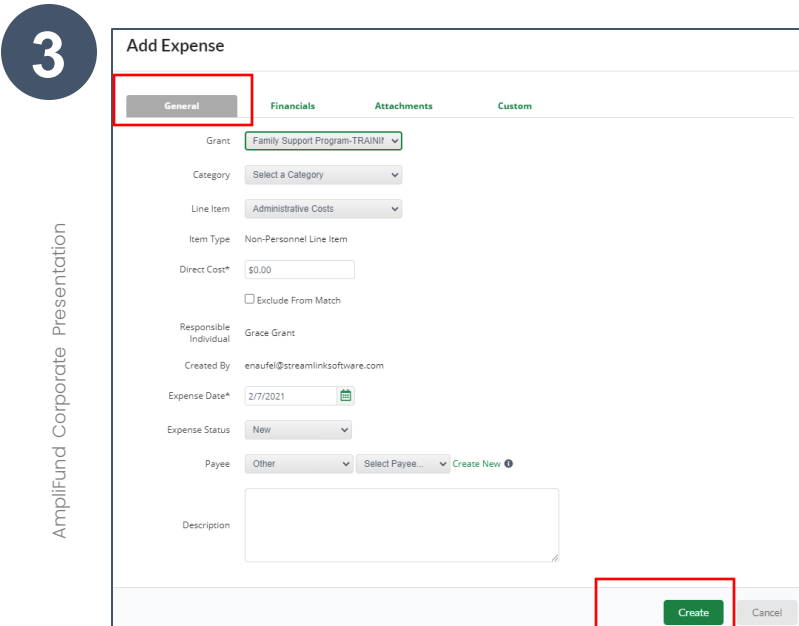
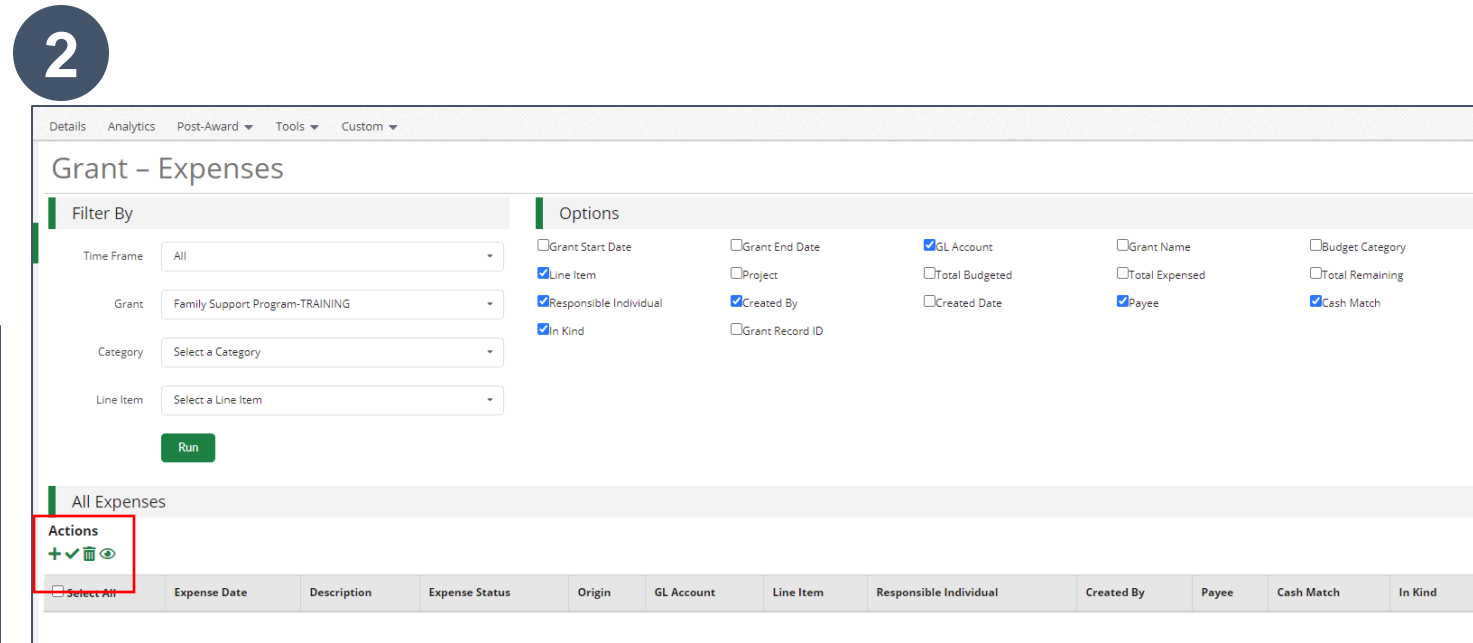
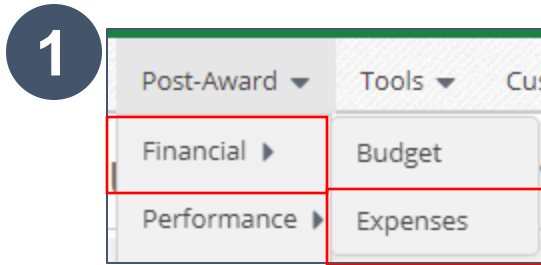
The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, resembling a signal or data visualization.

Expense Entry

Expense Entry

24

1. From the Grant click on Post Award>Financial> Expenses
2. Click on the plus icon to add a new expense
3. Add expense information under expense tab and Custom tab then click Create

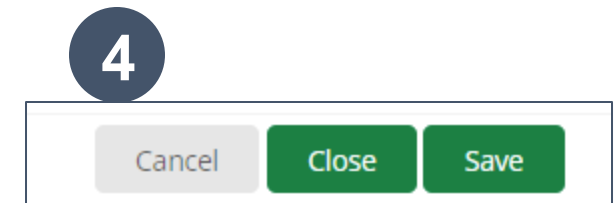
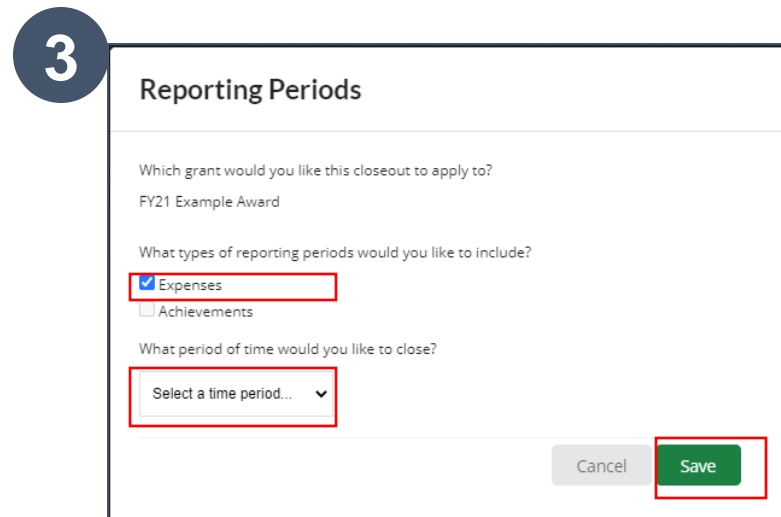
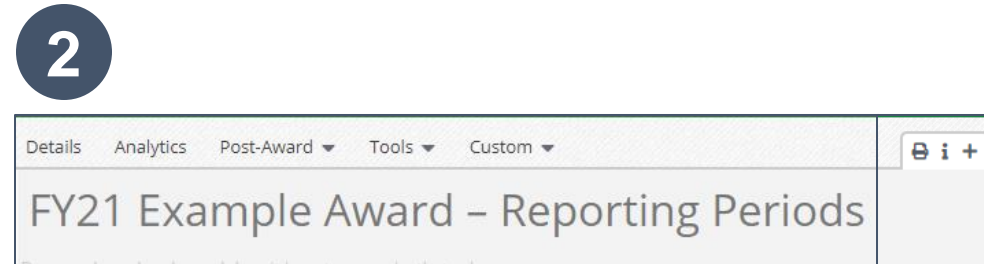
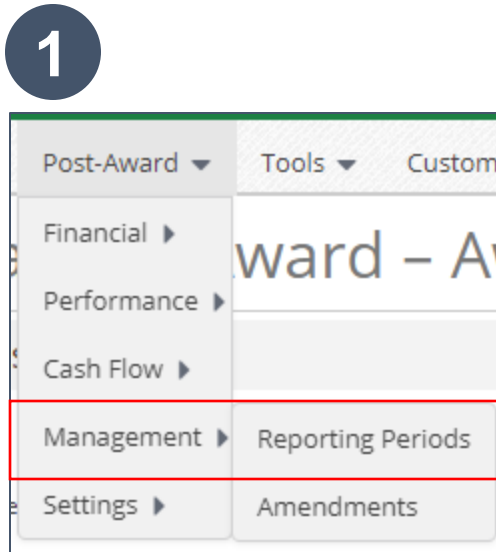


The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element. The logo is positioned on a dark blue background with several rounded rectangular shapes in various shades of blue and green.

Submitting a Reporting Period

Generating a Reporting Period

1. From the Grant click on Post Award>Management>Reporting Periods
2. Click on the plus icon in the upper right hand corner
3. Select Expenses and Time Period then click Save
4. Review expenses & details, click Close to send completed reporting period to Funder



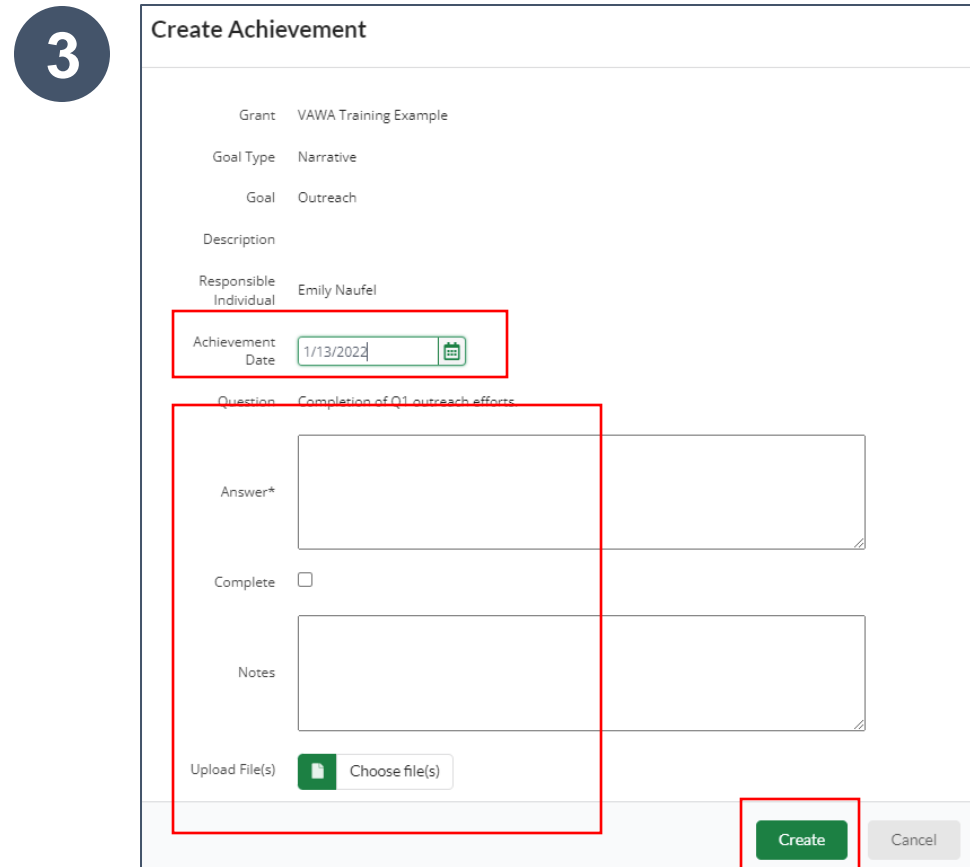
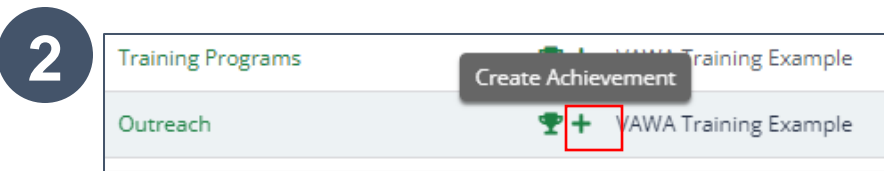
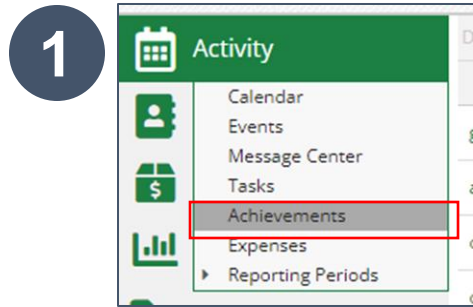
The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, stacked vertically, resembling a signal or a bar chart. The logo is positioned on a dark blue background with several rounded rectangular shapes in various shades of blue and green.

Creating & Submitting Performance Achievements

Creating Performance Achievements

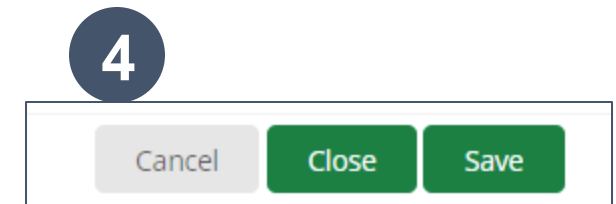
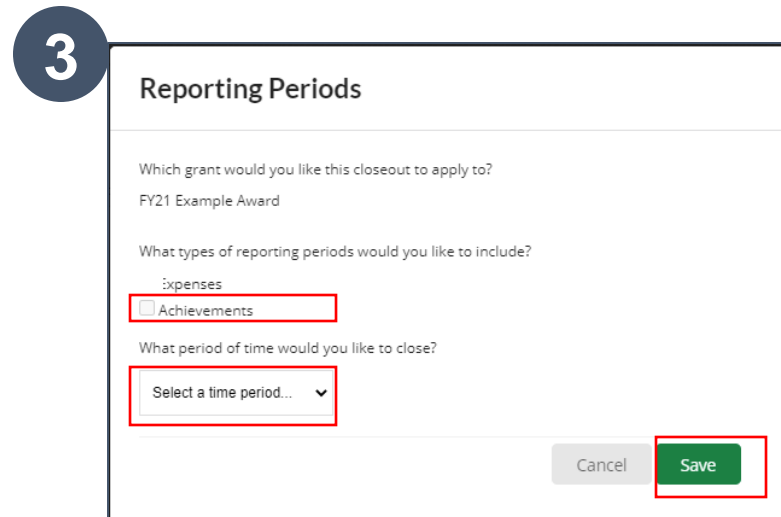
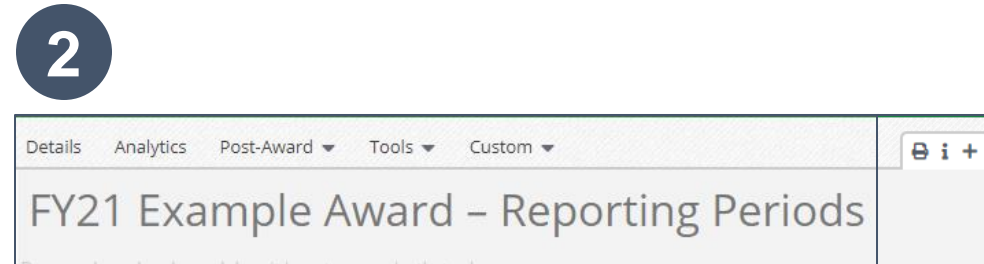
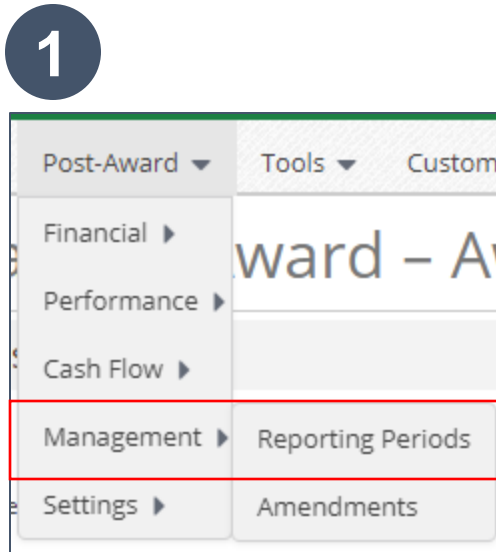
1. Click on Activity then Achievements
2. Click on the plus icon next to the goal
3. Enter information about performance achievement and click Create

Repeat for each relevant goal



Generating a Performance Reporting Period

1. From the Grant click on Post Award>Management>Reporting Periods
2. Click on the plus icon in the upper right hand corner
3. Select Achievements and Time Period then click Save
4. Review achievements & details, click Close to send completed reporting period to Funder



The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, resembling a signal or a bar chart, in a light green color.

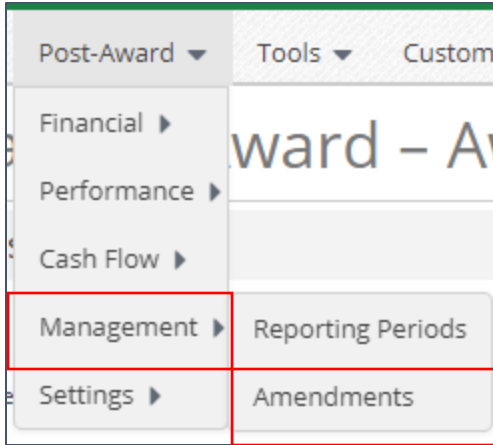
AmpliFund

Submitting an Amendment Request

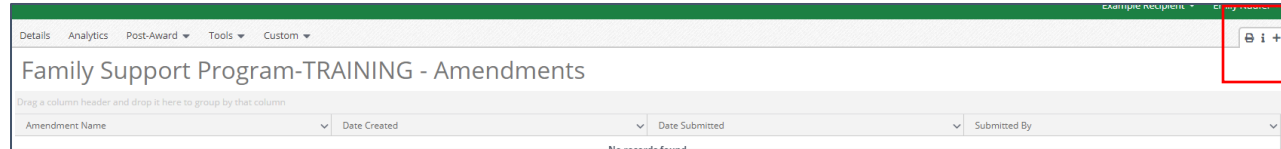
Generating an Amendment

1. From the Grant click on Post Award>Management>Amendments
2. Click on the plus icon in the upper right hand corner
3. Click on circle then text of amendment type
4. Enter amendment Information
5. Click **Submit** to Submit request to Funder

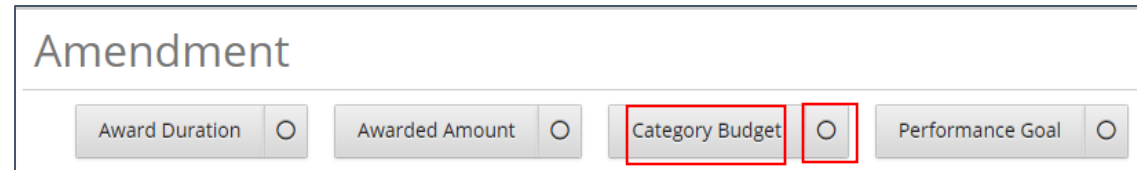
1



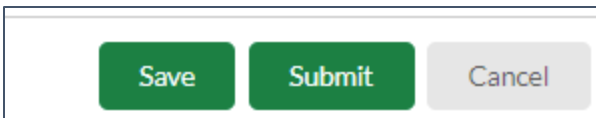
2



3



4



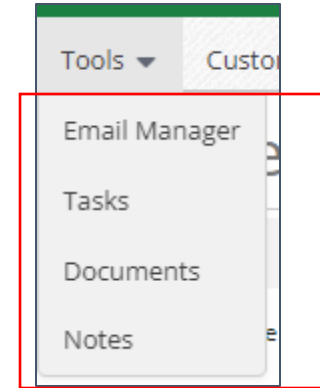
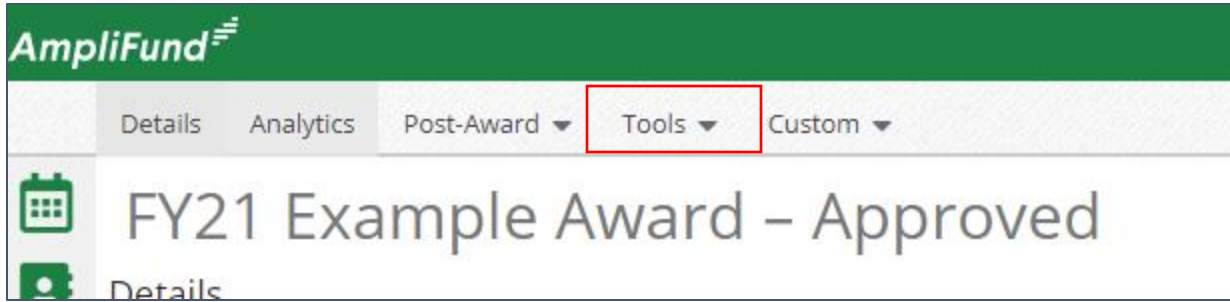


AmpliFund

Available Tools

Available Tools

From Grant Record Select Tools

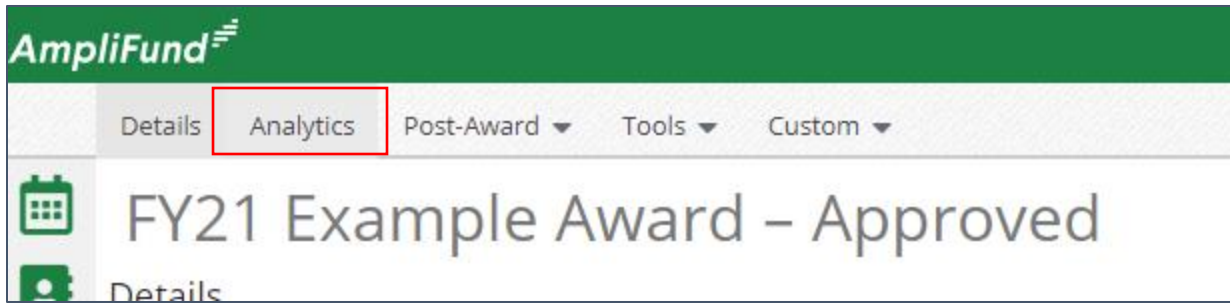


The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a small icon consisting of four horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element.

Available Reporting

Available Reporting

Grant Dashboard



Other Reports

