AmpliFund

Recipient Training Part 2

Illinois Office of Attorney General

Agenda

AmpliFund

- Understanding AmpliFund Basics
- AmpliFund Navigation
- Creating Users
- Updating Award Details
- Achievements
- Entering Expenses
- Reporting Periods
- Payment Requests
- Cash Receipts
- Managing Your Award
  - Amendments
  - Tools
  - Reports and Analytics
- Support

*Please refer to the AmpliFund Recipient User Guide for more information.

AmpliFund Overview

AmpliFund

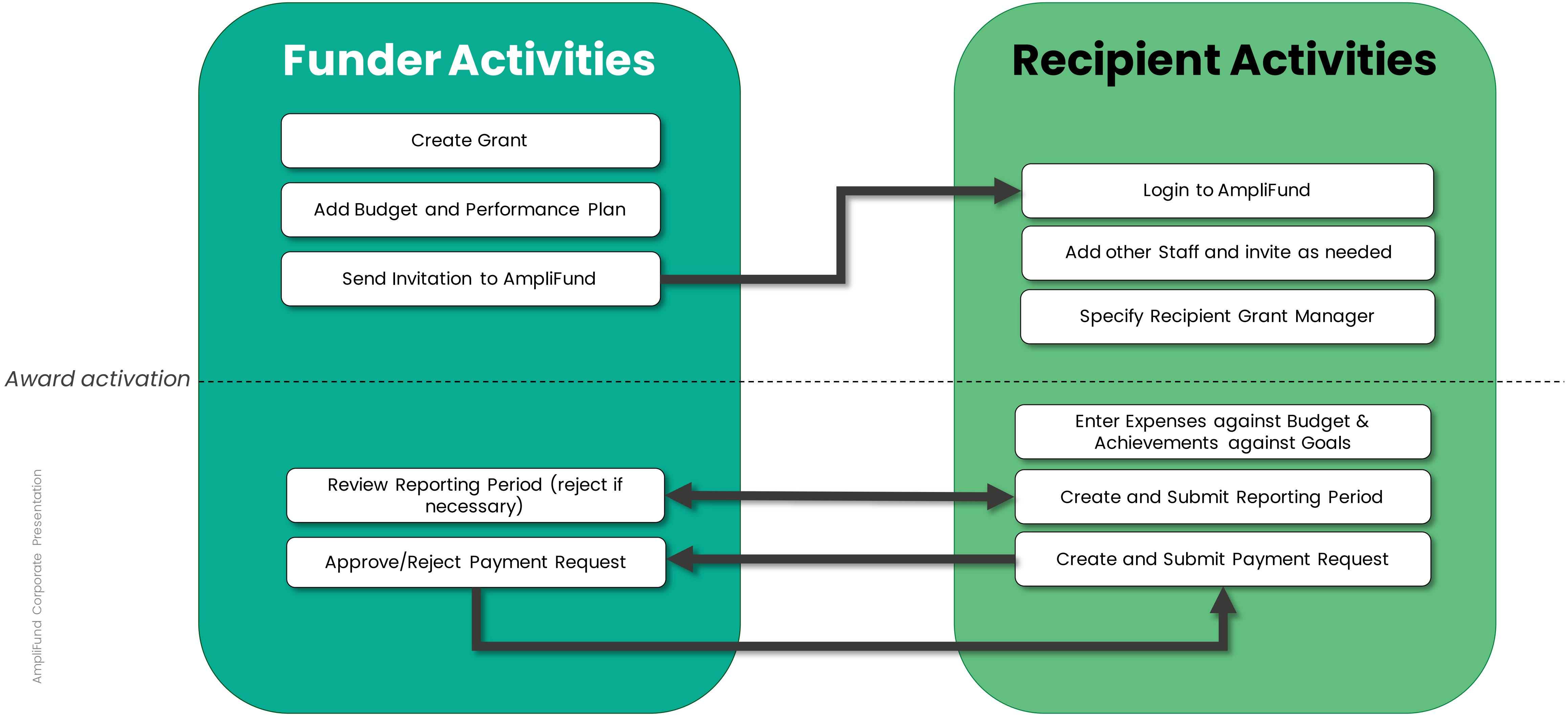
SaaS based grants management solution

- No installation for users
- AmpliFund is accessible anywhere you have an internet connection

AmpliFund provides a recipient organization with the ability to share information and report back to the granting organization

Funder-Recipient Interaction Overview

AmpliFund



Award Activation Email Notification

AmpliFund

AmpliFund

Hello Jane Test,

You are receiving this notification because your organization has been given an award from AmpliFund Training: Lifecycle.

This award of 1 years 0 months 0 days begins on 5/1/2021.

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.

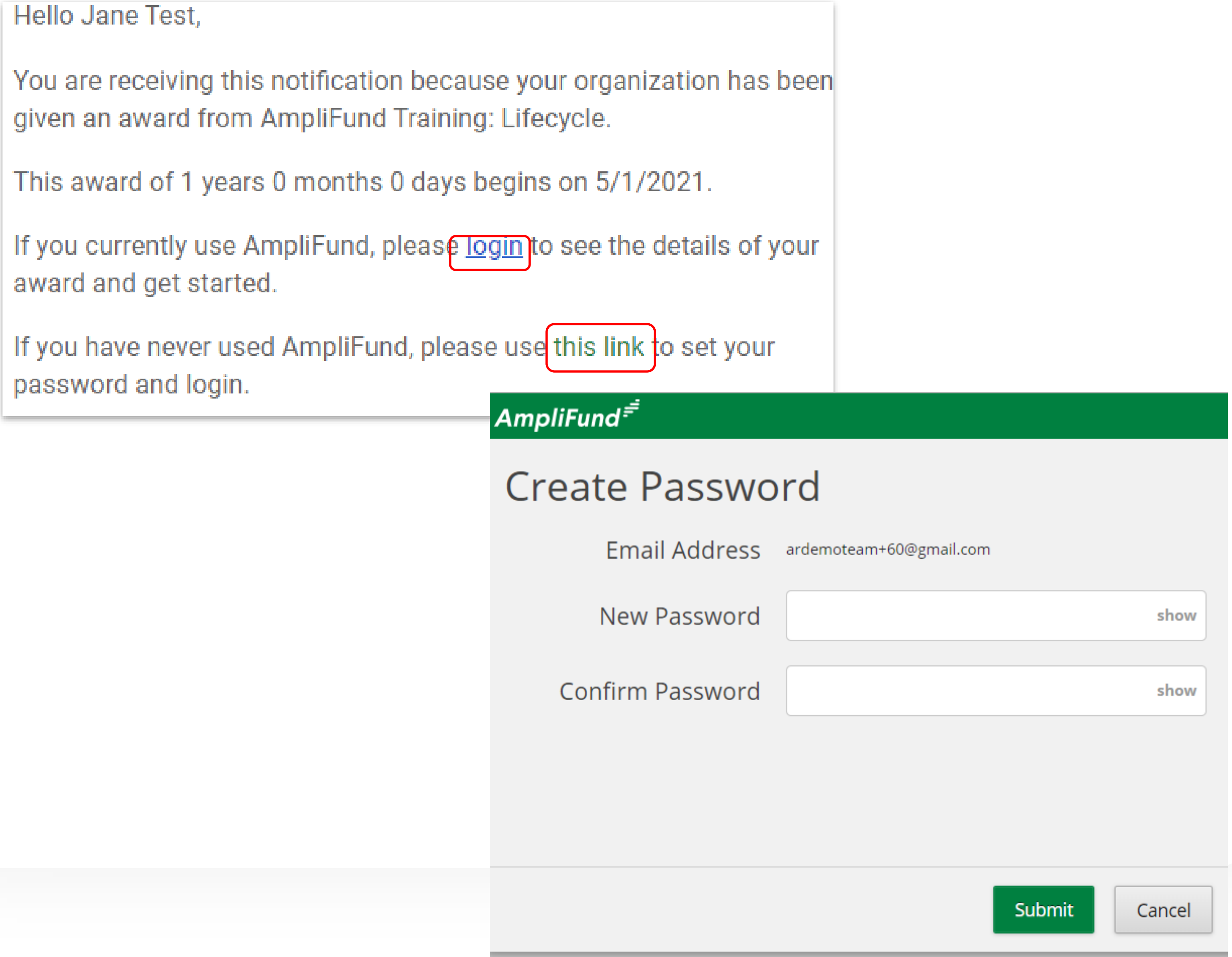
Regards,
AmpliFund Administrator
AmpliFund Training: Lifecycle

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

- AmpliFund generated emails from **no-reply@gotomygrants.com**
- If you used AmpliFund to apply for the award, use the same email address and password used to login to the Applicant Portal
- If you do not receive your Award Activation email, check your spam folder
- Links in AmpliFund emails expire; contact your Grant Monitor if you need to have your Award Activation email resent

Creating a Password & Logging In

AmpliFund



1. Click the **link** in the invitation email
2. Enter and confirm a password
3. Click the **Submit** button
4. Enter email and password in the Login window and click the **Login** button
5. Click the **I Accept** button to accept the AmpliFund terms of use

In-Product Review

www.gotomygrants.com

Post Implementation Support

AmpliFund

Submit a support ticket:

support@amplifund.Zendesk.com

Visit the support portal:

https://amplifund.zendesk.com

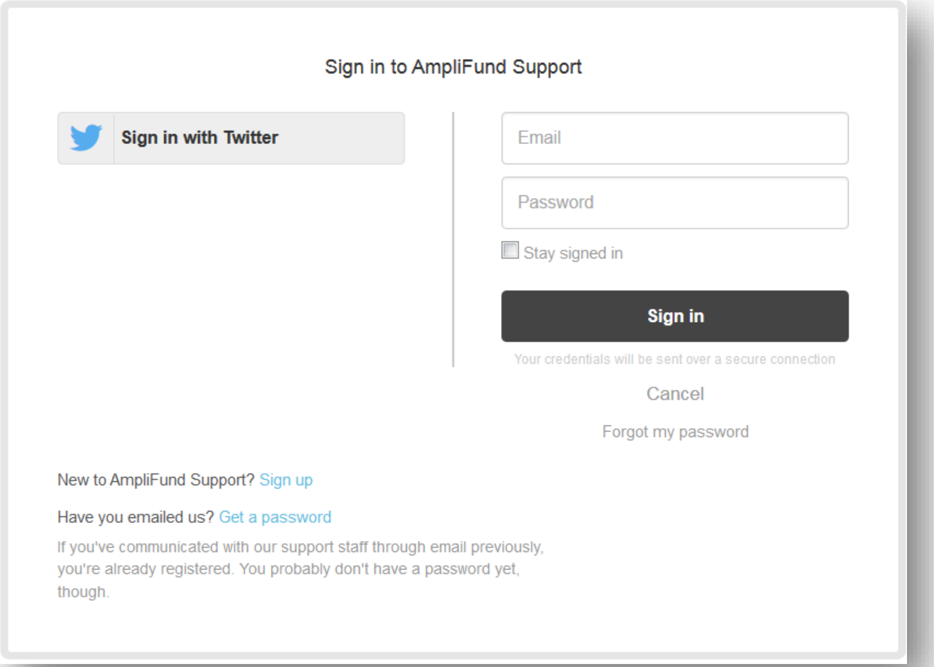
Supported Browsers:

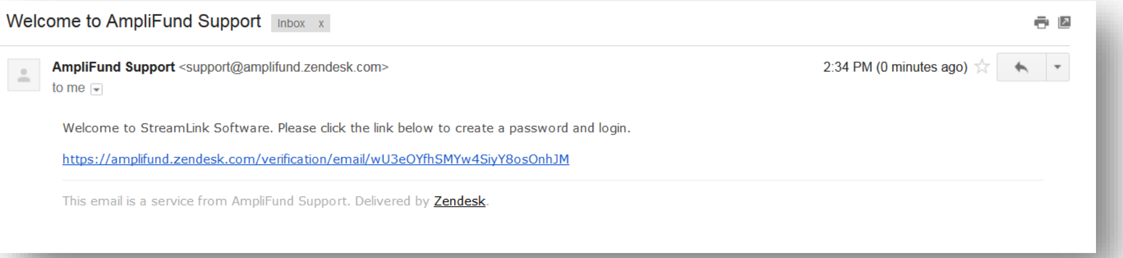
- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Microsoft IE 11 +
- Apple Safari 10+

AmpliFund Support Site

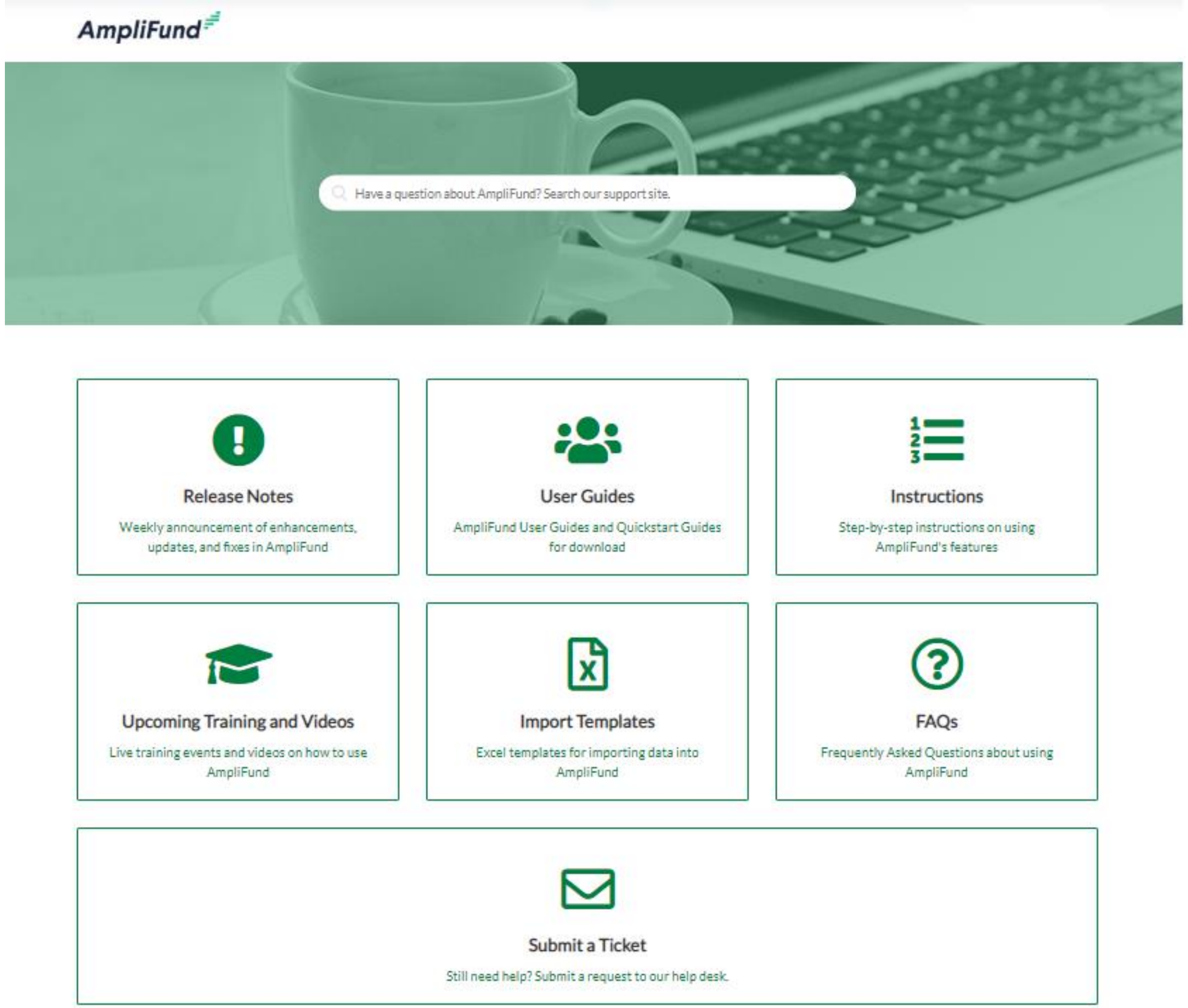
AmpliFund

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





AmpliFund Support Site



Reference Materials & URLs

Reference Materials

- Recipient User Guide
- Recipient Step by Step Guide
- Today's Recording

AmpliFund URLs

- www.gotomygrants.com
- https://amplifund.zendesk.com

Question & Answer

AmpliFund

Thank You

www.gotomygrants.com

AmpliFund

Appendix

www.gotomygrants.com

Appendix Outline

AmpliFund

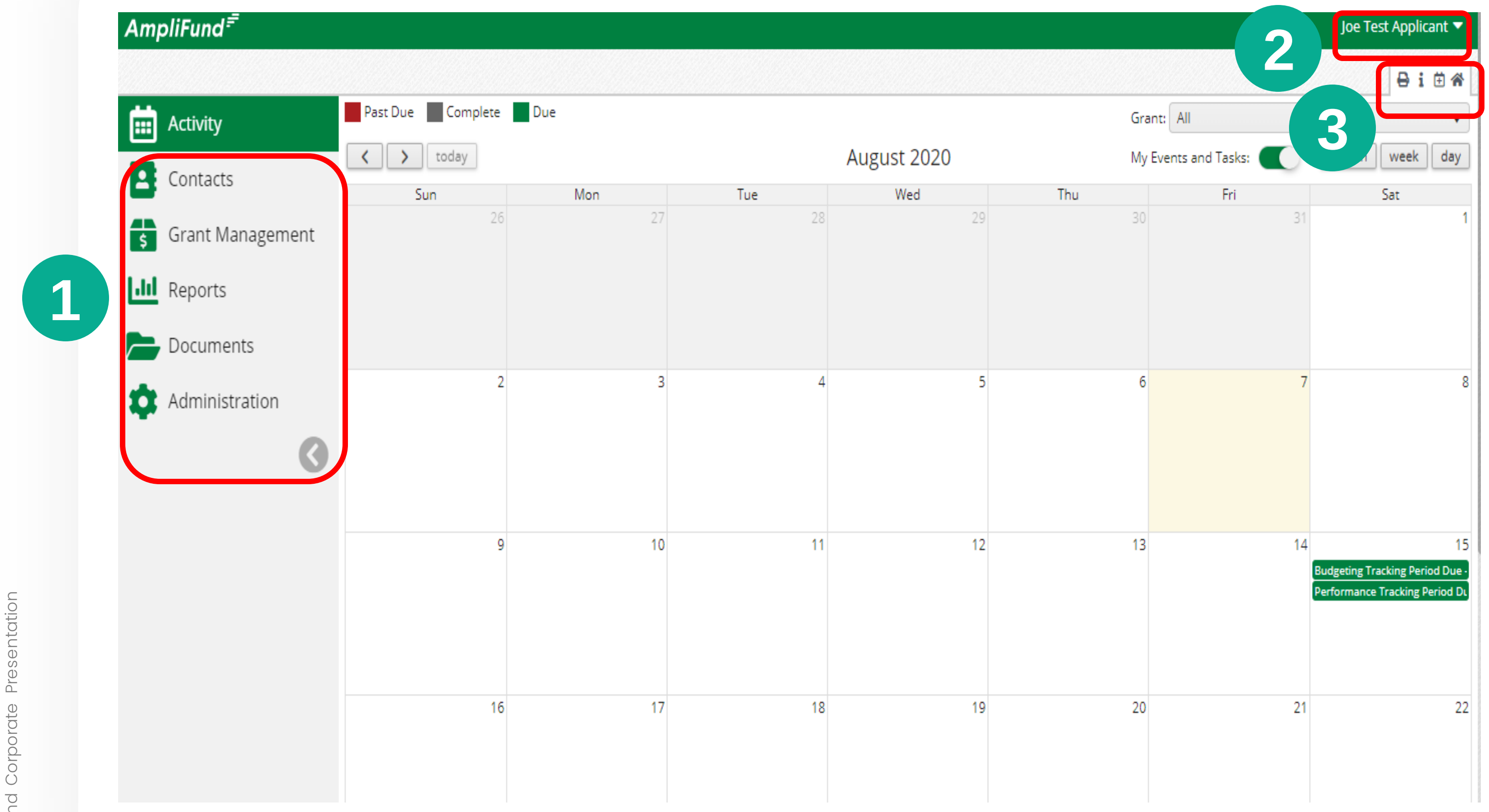
- Understanding AmpliFund Basics
- AmpliFund Navigation
- Creating Users
- Updating Award Details
- Managing Your Award
  - Amendments
  - Tools
  - Reports and Analytics
- Entering Expenses
- Reporting Periods
- Payment Requests
- Cash Receipts
- Support

*Please refer to the AmpliFund Recipient User Guide for more information.

Understanding AmpliFund Basics

Navigation Elements

AmpliFund

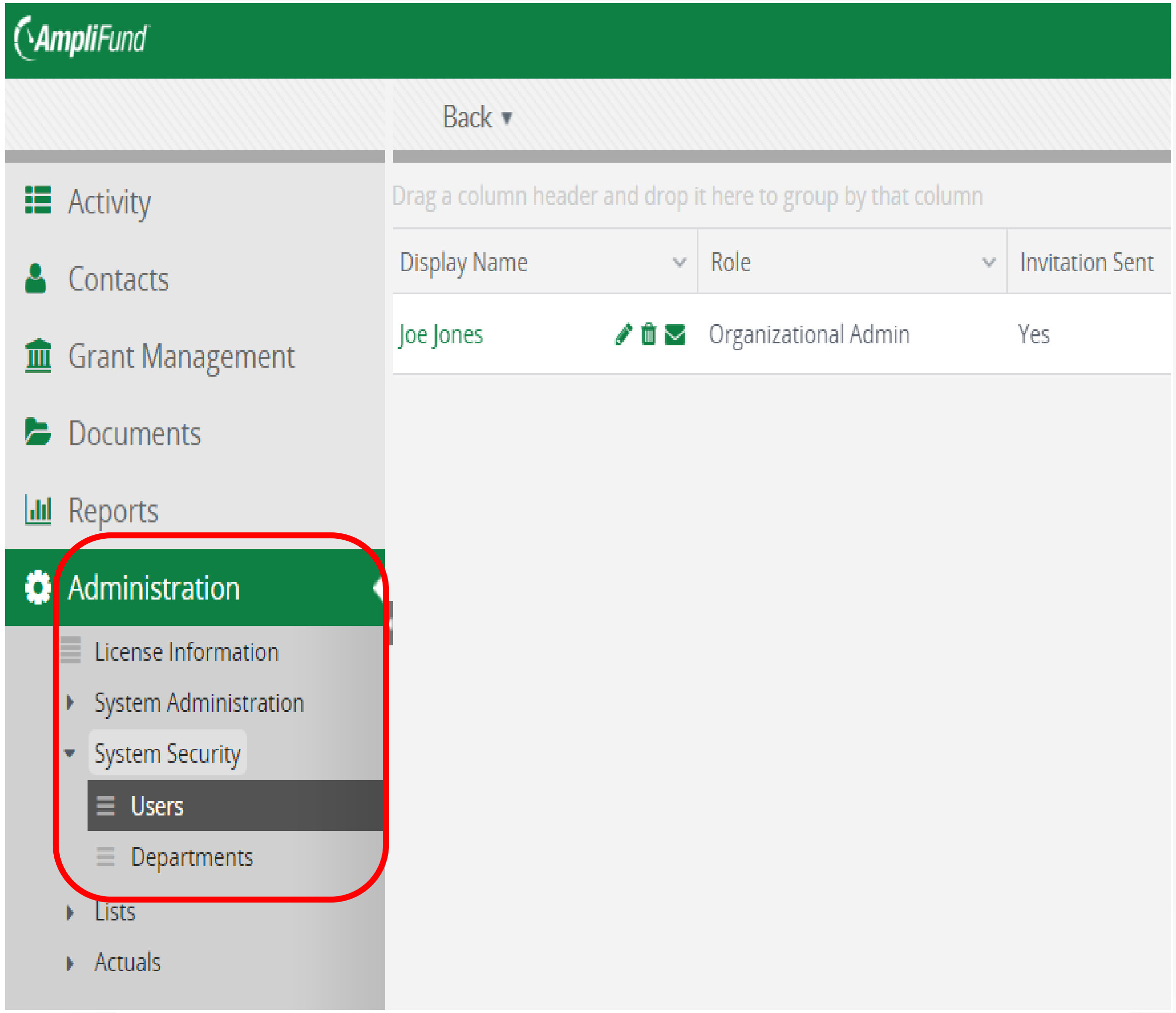


1. **Left Navigation–shows on every page**
2. **User Navigation – dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal (if applicable), and logout**
3. **Options Toolbar – displays icons to perform functions available on the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

*Page 5 of the AmpliFund Recipient User Guide

Creating Users

AmpliFund



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

*Page 8 of the AmpliFund Recipient User Guide

Creating Users

AmpliFund

Subscribe to Daily Emails

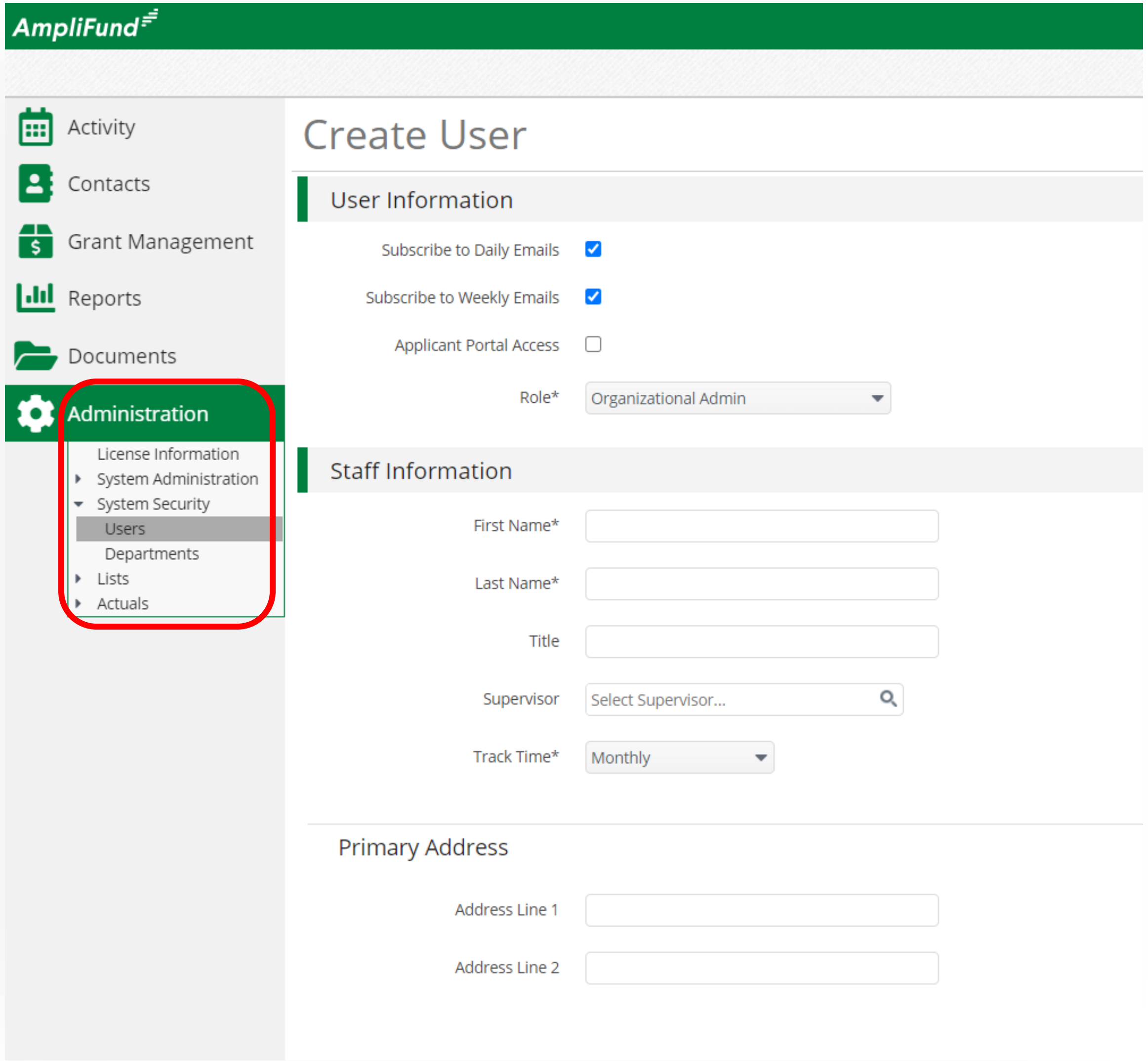
Subscribe to Weekly Emails

Applicant Portal Access

- Set to **Yes** to provide a user in your organization with access to the application(s) submitted by your organization

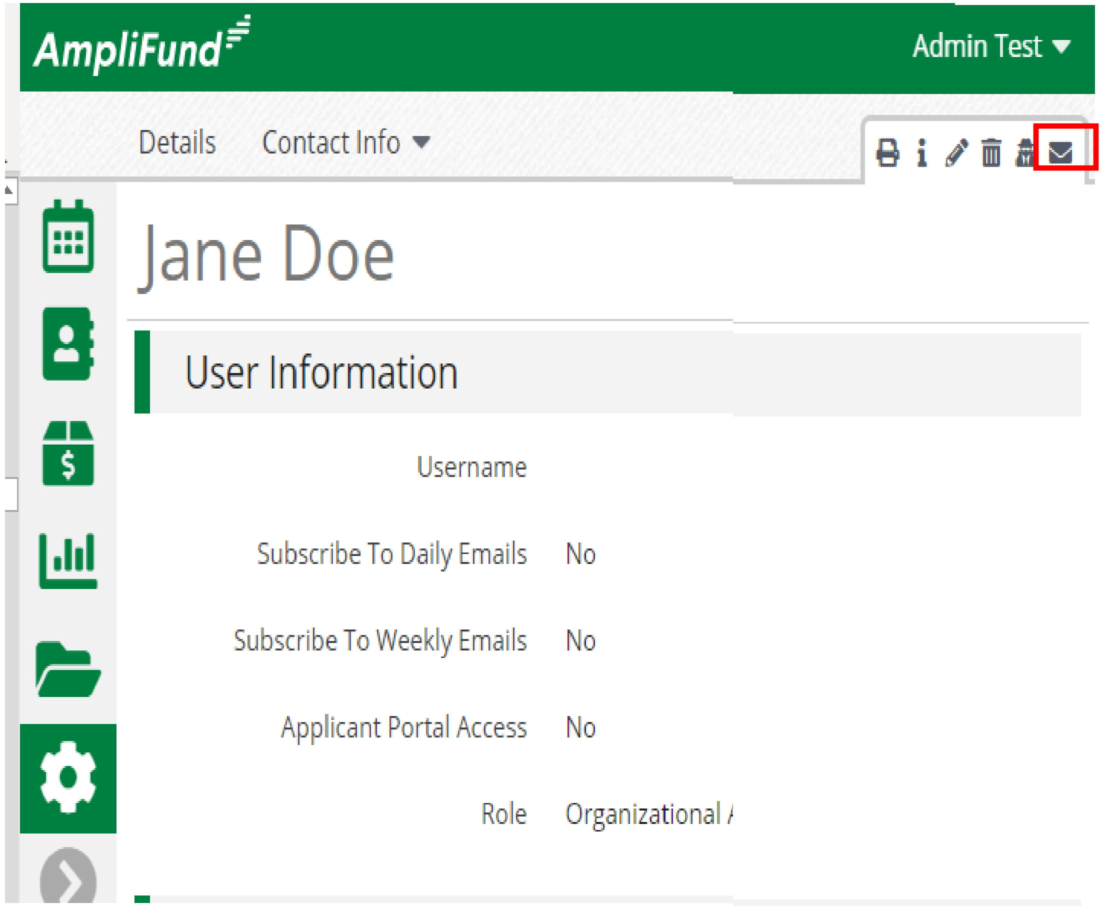
Role*

- **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 (Salary OR No Salary)**
  - Only has access to budget or performance plan items to which you assign the user as the Responsible Individual



Sending an Invitation to a User

AmpliFund



1. Click the in the *Icon Bar*

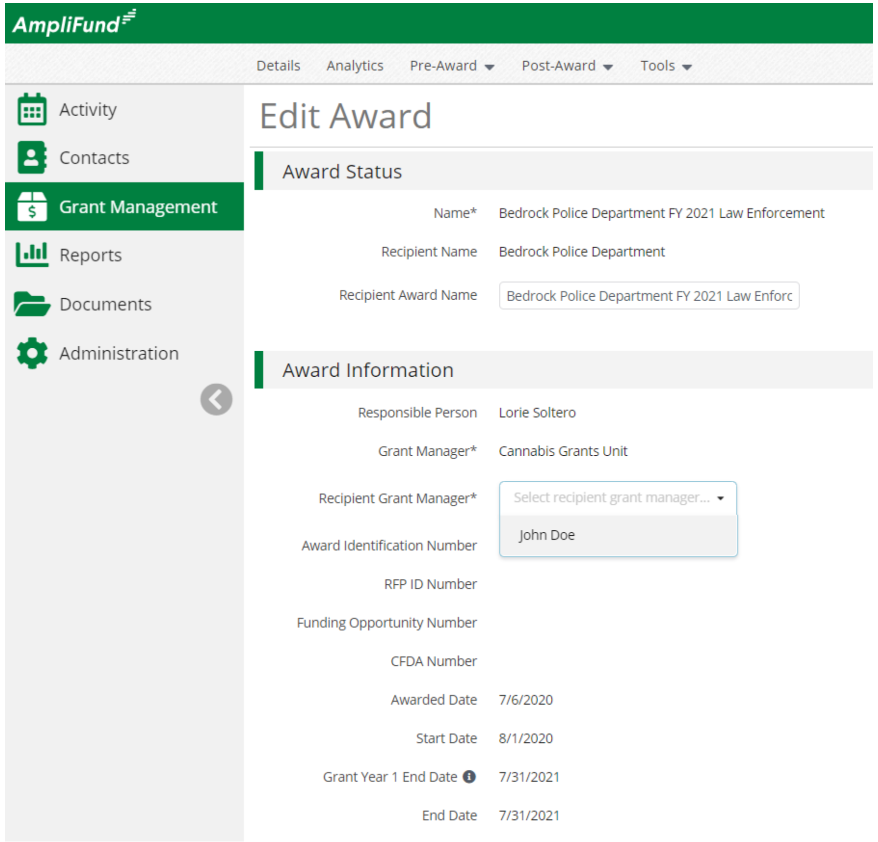
2. In the confirmation pop-up window, click Send Invitation

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.

Updating and Managing Your Award

Viewing and Editing Award

1. Go to **Grant Management > All Grants**
2. Click the **Name** of the grant
3. On the **Details** tab, click the 'pencil' icon to edit
4. Update the Recipient Grant Manager name
5. Click the **Save** button in the right corner of the screen

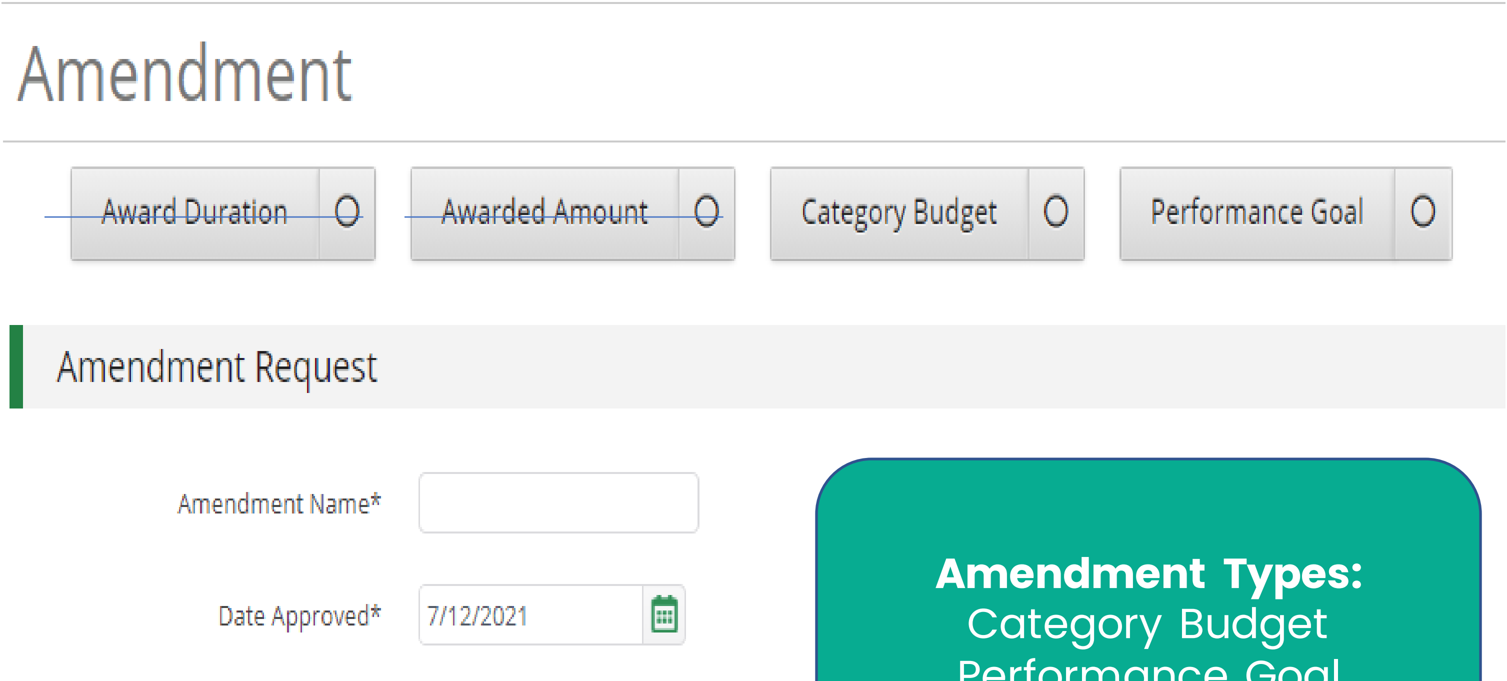


Grant Budgets have already been created in your account.

*Page 10 of the AmpliFund Recipient User Guide

Amendments

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Amendments**
2. Click the Create icon in the Icon Bar
3. Select the **Category Budget**
4. Complete the dynamic fields based on type of amendment
5. Complete and attach the **Amendment Request Forms**
6. Click the **Save** button

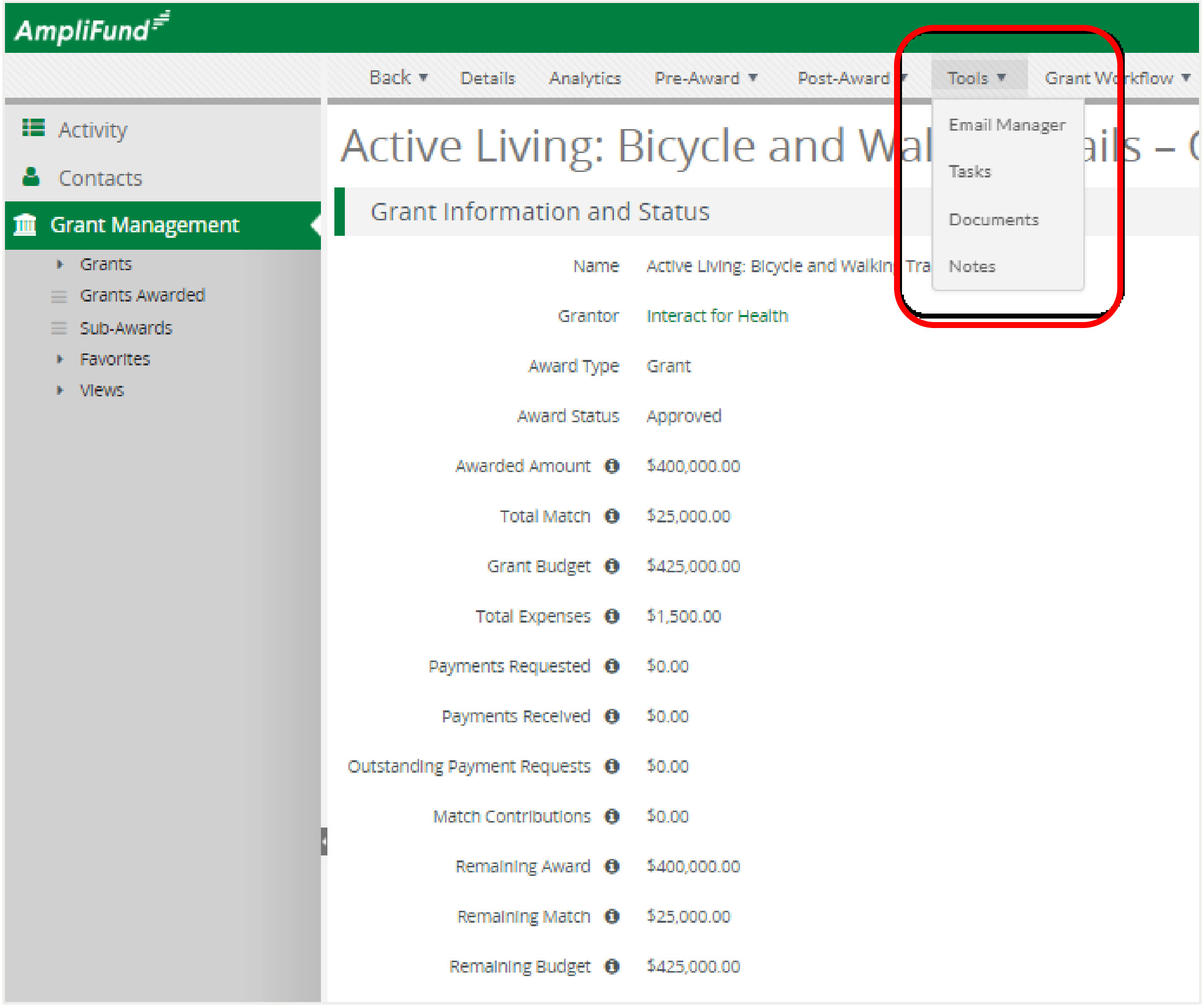


Amendment Types:
Category Budget
Performance Goal

Tools

- Email Manager
- Tasks
- Documents
- Notes

***Tools* are available on several record types:**
Organizations
Individuals
Staff
Grants/Awards



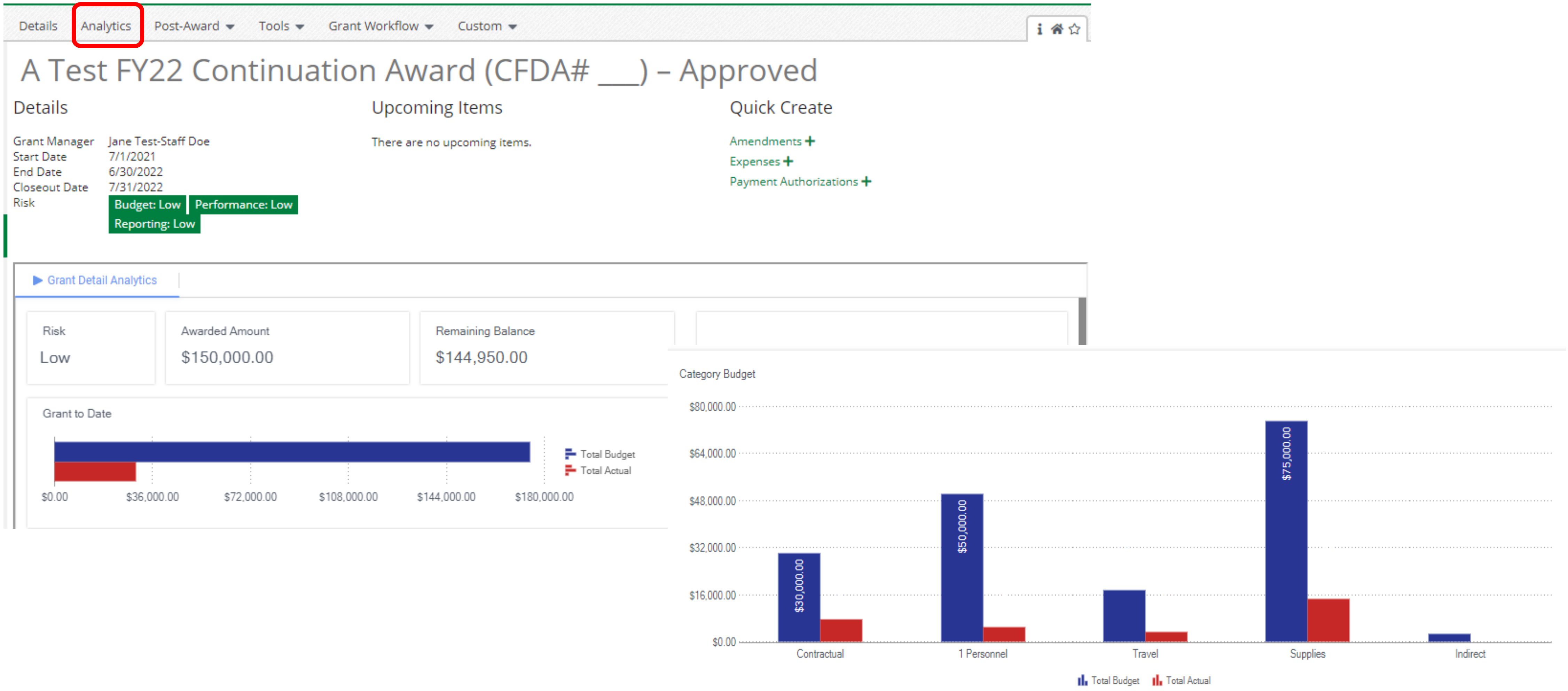
Reports

AmpliFund

Post-Award Reports	Description
Grant Budget Variance	Provides a grant’s variance between the planned grant budget and submitted expenses for a specified time period
Grant Expense Detail	Provides visibility into expenses entered against a specified grant

Analytics

AmpliFund

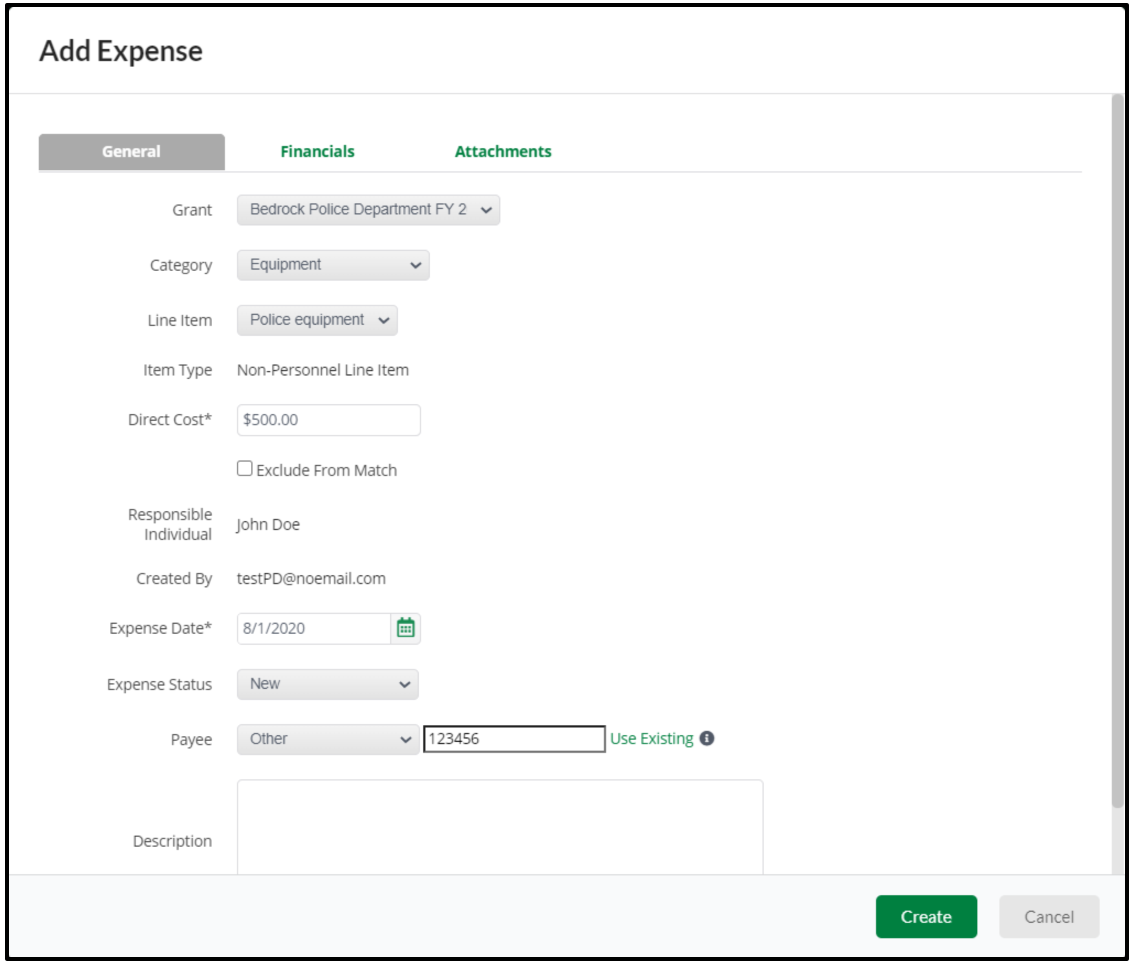


Expenses, Reporting Periods and Payment Requests

Tracking Expenses on Budget Line Items

AmpliFund

1. Go to **Activity > Expenses**
2. Click the **Create Expense (+)** icon
3. Select the **Category** and **Line Item** to add expense to
4. Add the **Direct Cost** and **Expense Date** (date on invoice)
5. Mark the **Expense Status** as **Reviewed**
6. Add the **Description** (optional but required if a corrected expense)
7. **Upload File(s)** (optional)
8. Click the **Create** button



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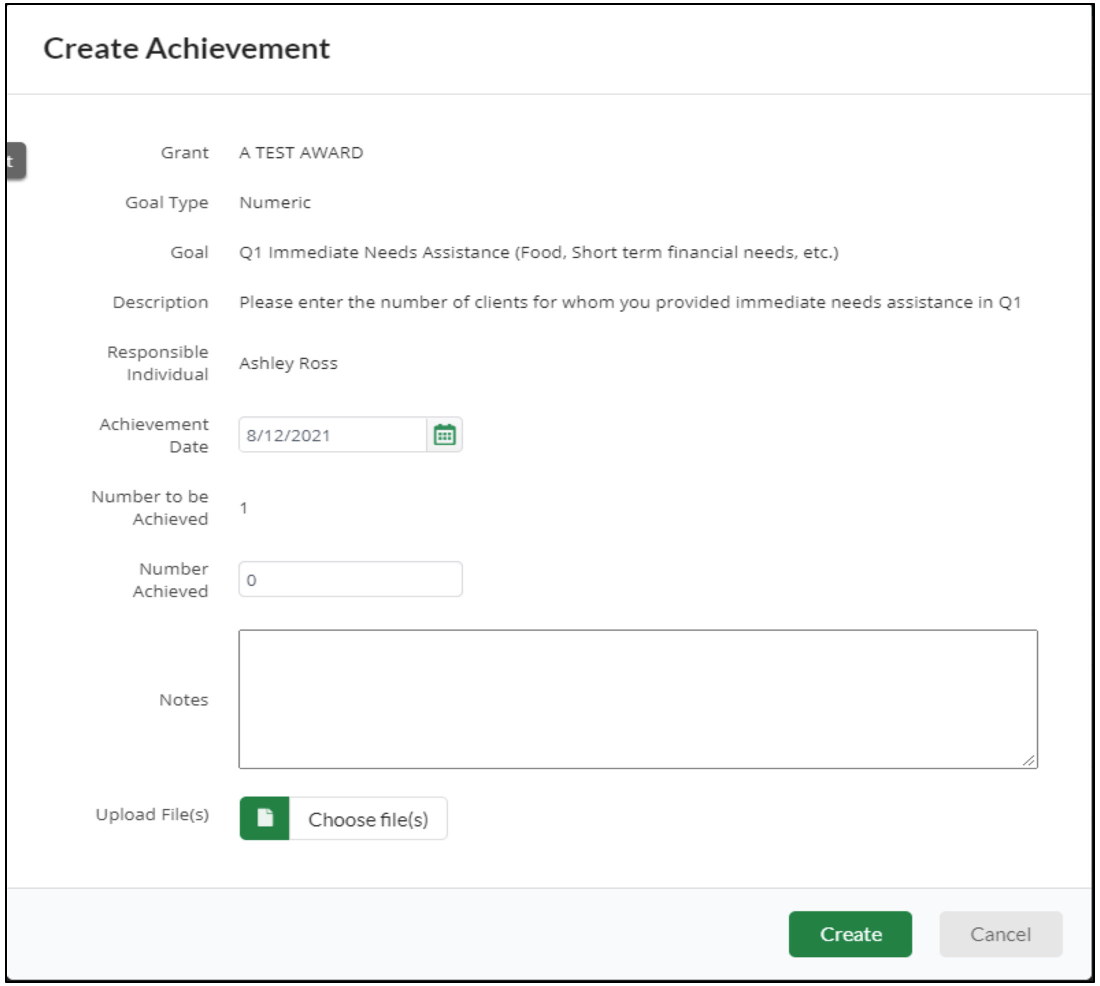
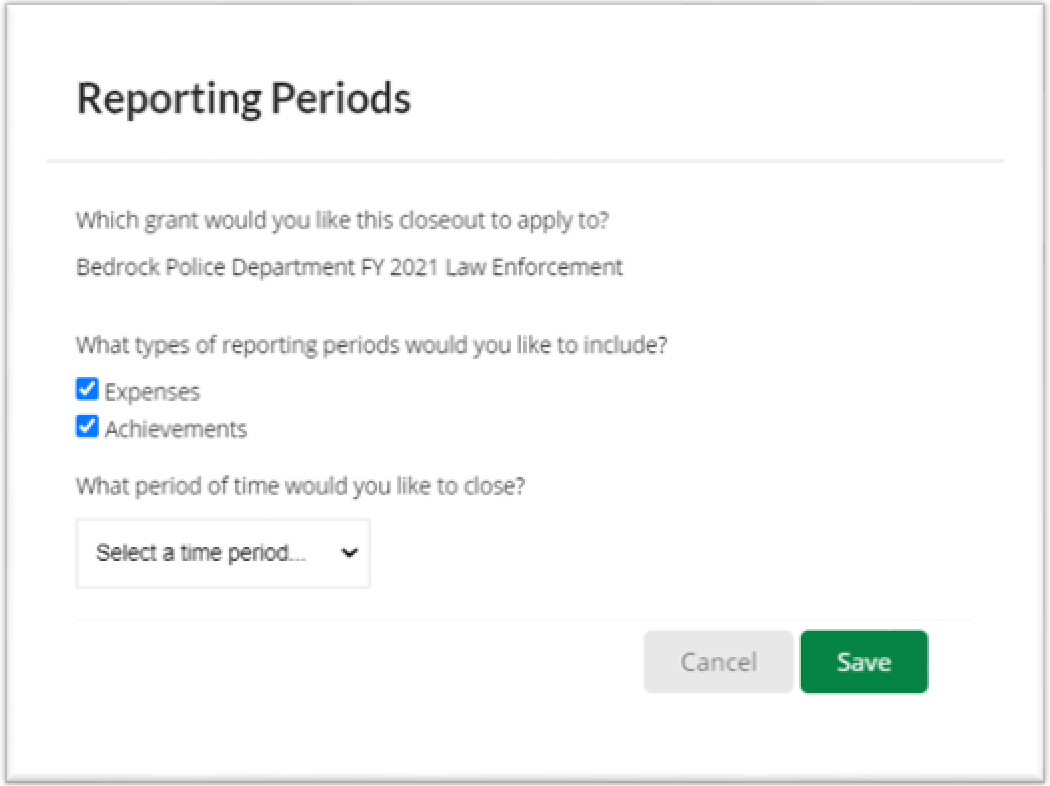
Tracking Achievements on Performance Goals

1. Go to **Activity > Achievements**
2. Click the **Create Achievement (+)** icon
3. Add the **Date** and **Number Achieved**
4. Add the **Notes** (optional)
5. **Upload File(s)** (optional)
6. Click the **Create** button



Creating Reporting Periods

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Reporting Periods**
2. Click the Create icon in the Icon Bar
3. Select the **Expenses** checkbox under Types of Reporting Periods to include
4. Choose the **Period of Time**
5. Click the **Save** button

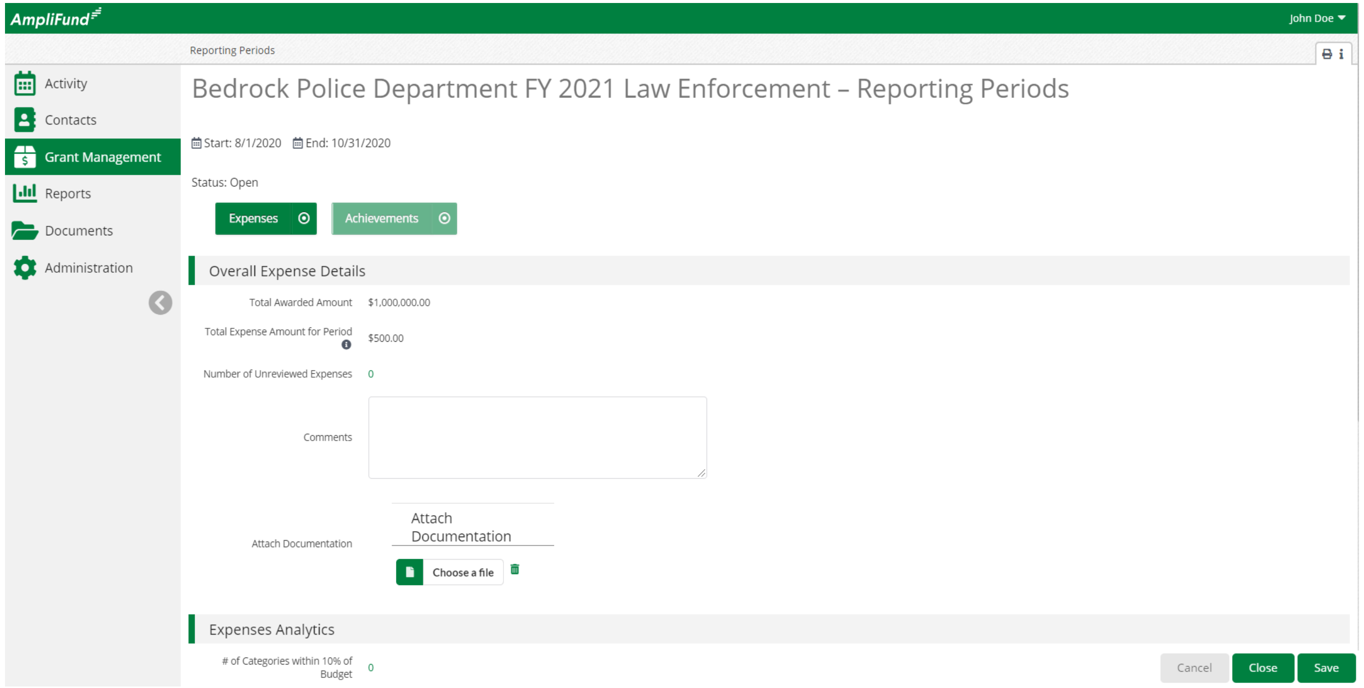


*Page 38 of the AmpliFund Recipient User Guide

Closing Reporting Periods

AmpliFund

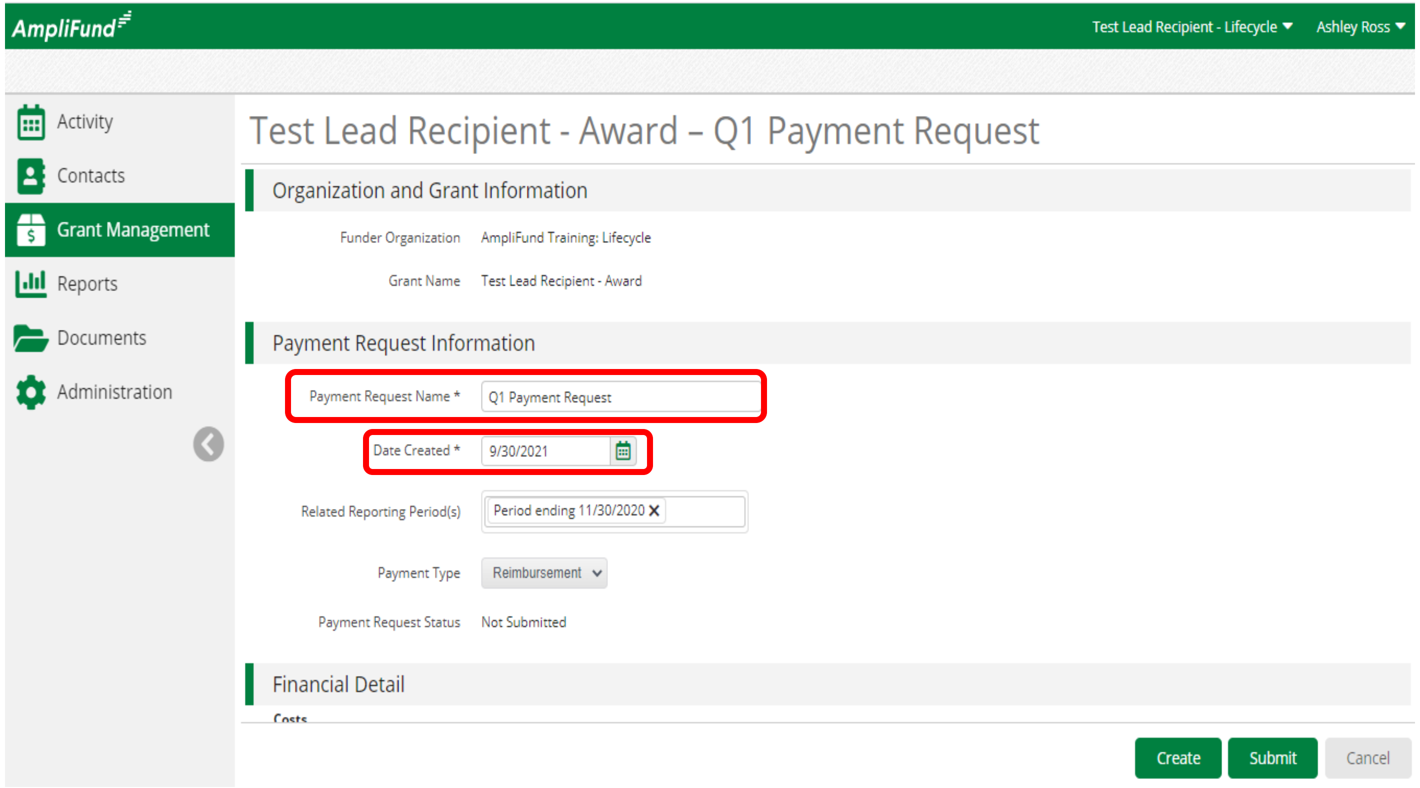
1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Reporting Periods**
2. Verify Expenses are correct
3. Click the Close button
4. At the confirmation pop-up window, click **Close**



Creating Payment Requests

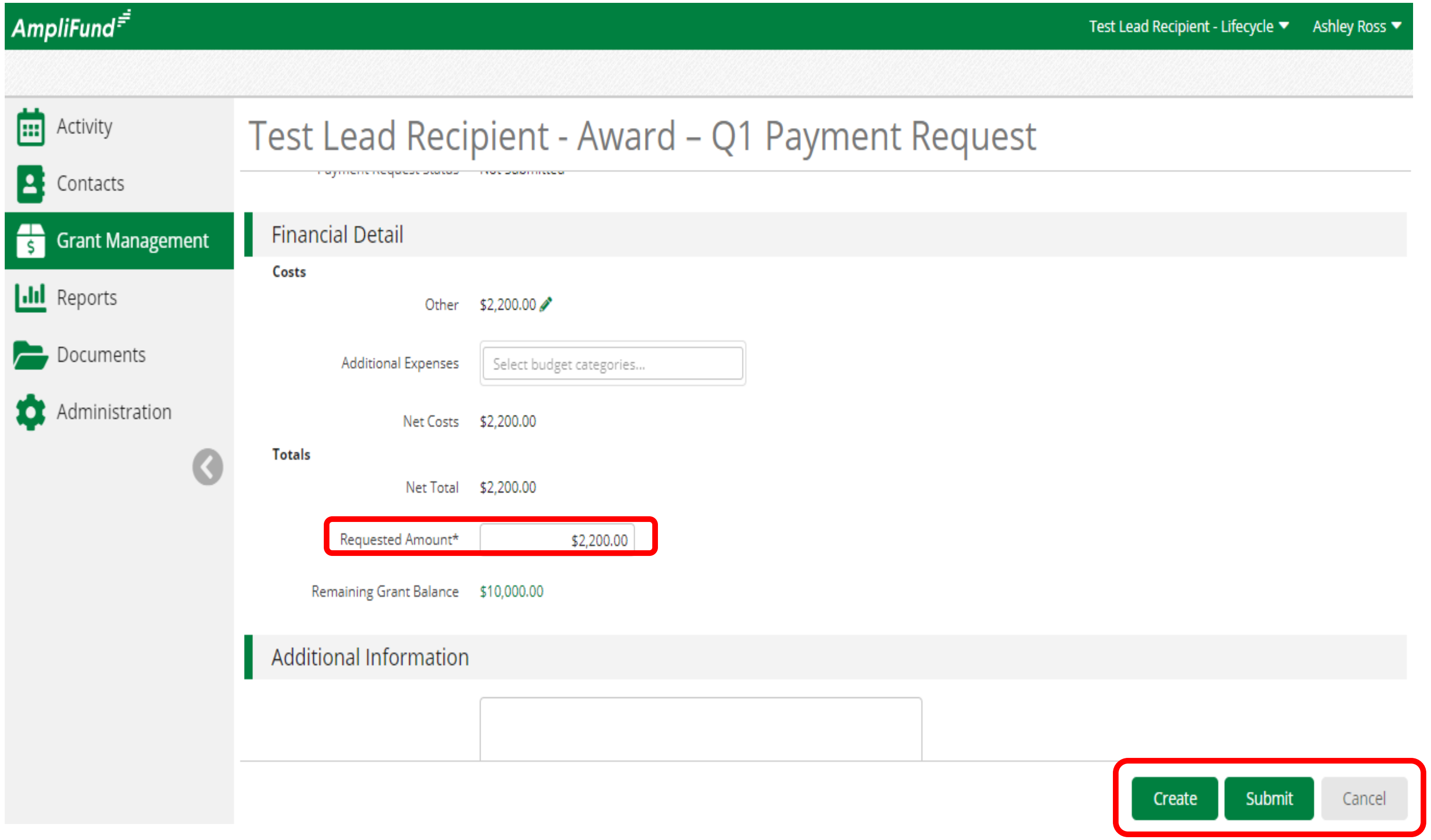
AmpliFund

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Reporting Periods**
2. Click on the Create Payment Request icon next to the corresponding **Closed Reporting Period**
3. Add a Payment Request Name.
4. Enter Date Created – today's date



Creating Payment Requests

7. Verify information is correct
8. Enter **Requested Amount**
   – Must match Net Total
9. Click the **Create/Submit** button



Creating Cash Receipts

1. Go to Grant Management > Grants > select Grant > Post-Award > Management > **Cash Receipts**
2. Click the **Create** icon in the Icon Bar
3. Enter Required Fields
   - Receipt Name
   - Amount
   - Related Payment Request
4. Click **Create**