



AmpliFund



Recipient Training Part 2

Illinois Office of Attorney General

Agenda

- 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

3

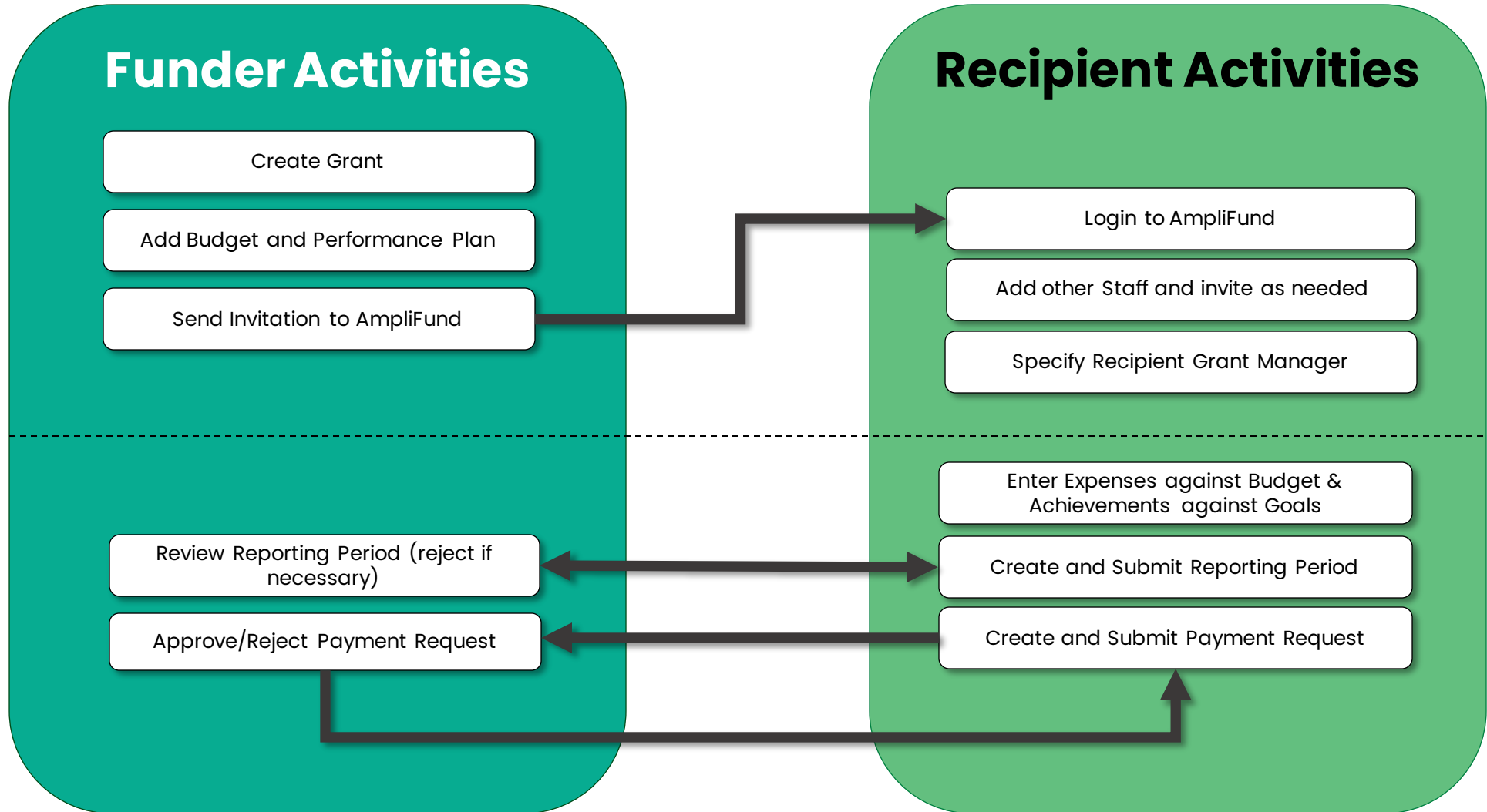
AmpliFund 

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



Award activation

Award Activation Email Notification

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

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.

AmpliFund

Create Password

Email Address

New Password [show](#)

Confirm Password [show](#)

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

Submit a support ticket:

support@amplifund.zendesk.com

Visit the support portal:

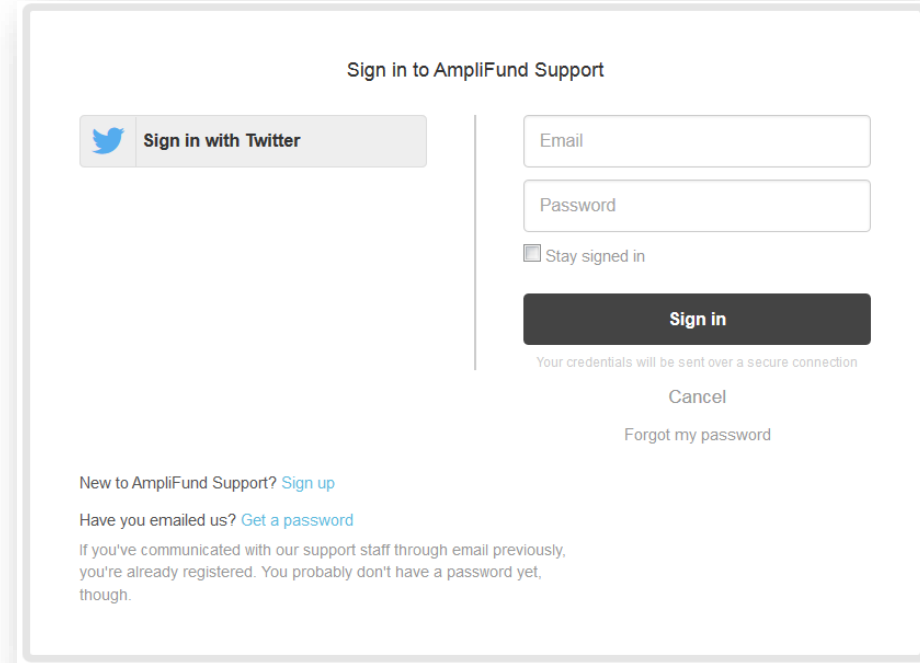
<https://amplifund.zendesk.com>

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

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

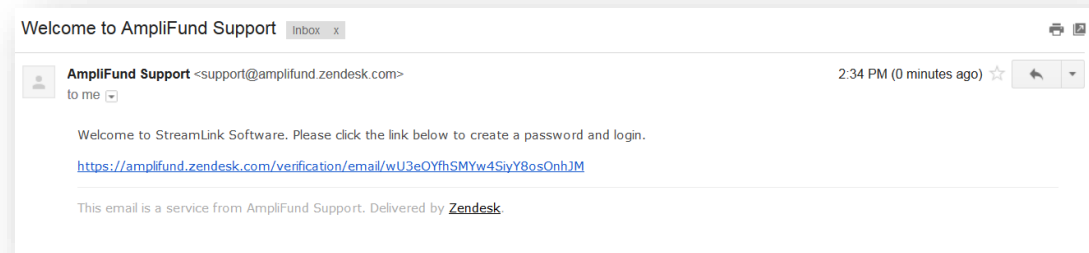
Cancel

[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.



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.

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>



AmpliFund



Question & Answer

Thank You

www.gotomygrants.com

Appendix

www.gotomygrants.com

Appendix Outline

- 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.

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 rounded rectangular background.

AmpliFund

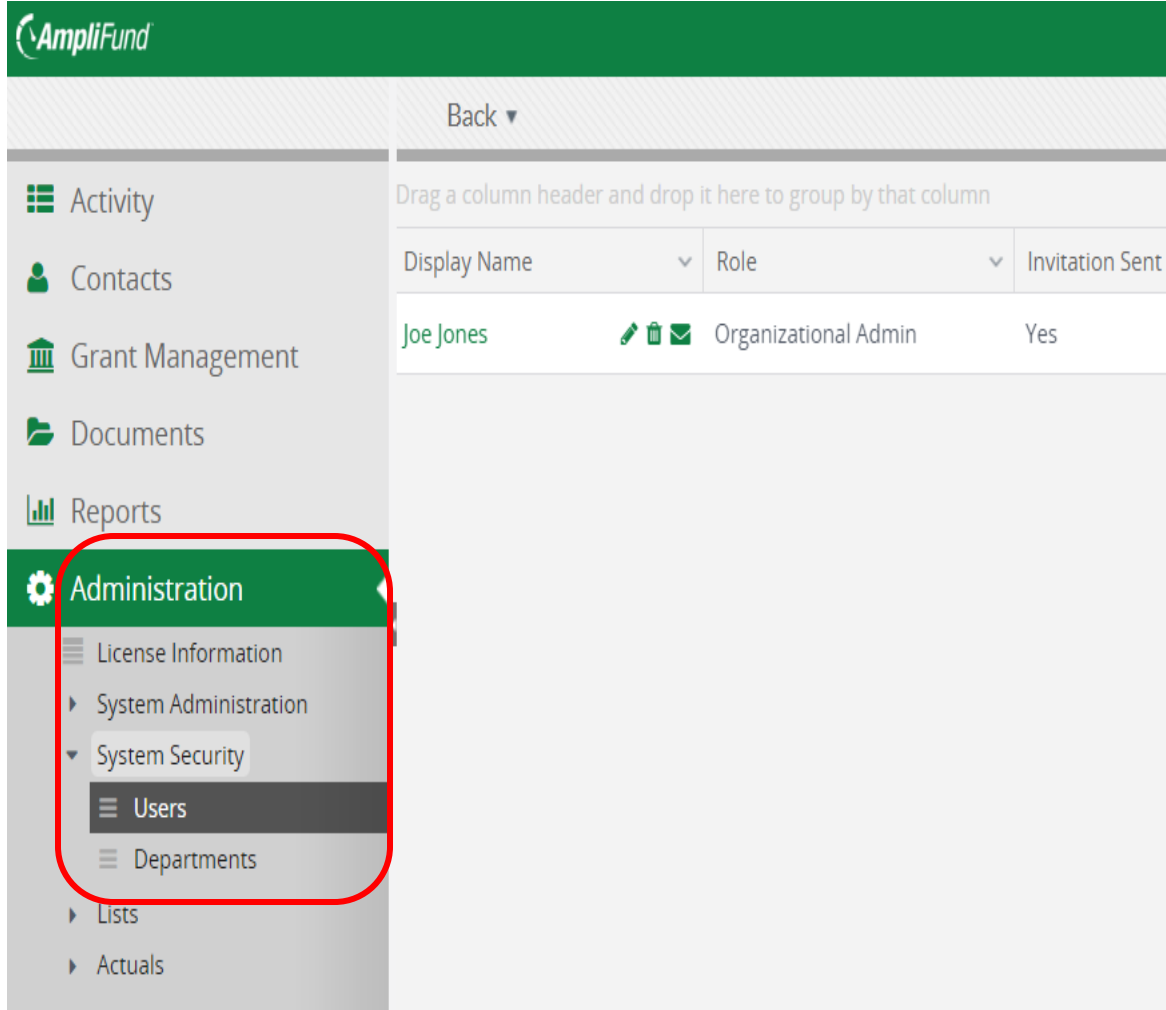
Understanding AmpliFund Basics

Navigation Elements

The screenshot displays the AmpliFund interface. On the left, a navigation menu is highlighted with a red box and labeled '1'. The menu items are: 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, an options toolbar with icons for account, message center, support, and terms is highlighted with a red box and labeled '3'. The main content area shows a calendar for August 2020 with a yellow highlight on Friday, August 7th. The calendar includes a legend for 'Past Due', 'Complete', and 'Due' items, and a 'My Events and Tasks' toggle.

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

Creating Users



The screenshot shows the AmpliFund web interface. On the left is a navigation menu with items: Activity, Contacts, Grant Management, Documents, Reports, Administration, License Information, System Administration, System Security, Users, Departments, Lists, and Actuals. The 'Administration' menu item is highlighted with a red rounded rectangle, and the 'Users' sub-item is also highlighted. The main content area shows a table with columns: Display Name, Role, and Invitation Sent. A row is visible with the name 'Joe Jones', role 'Organizational Admin', and 'Yes' for 'Invitation Sent'. Above the table is a 'Back' button and a prompt to drag a column header for grouping.

| Display Name | Role | Invitation Sent |
|--------------|----------------------|-----------------|
| Joe Jones | Organizational Admin | Yes |

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

Creating Users

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

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 Select Supervisor...

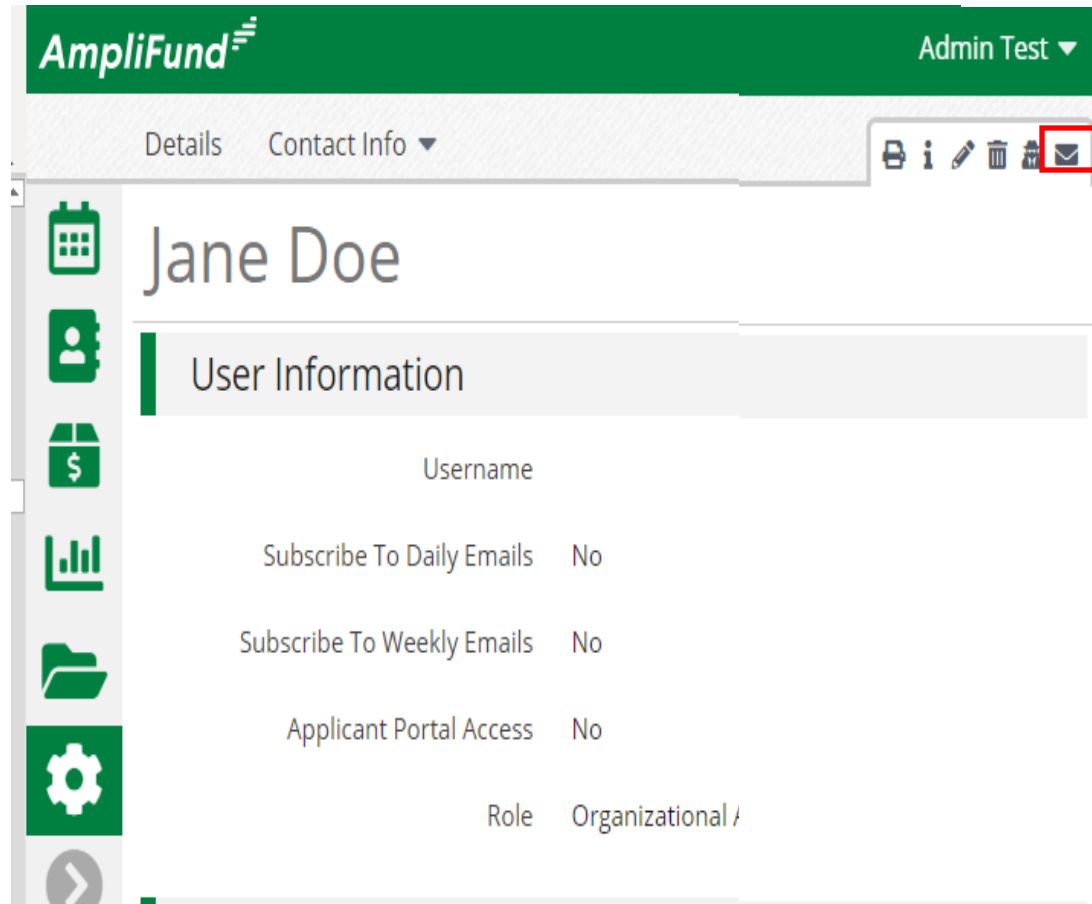
Track Time* Monthly

Primary Address

Address Line 1

Address Line 2

Sending an Invitation to a User



The screenshot shows the AmpliFund user management interface. At the top, there is a green header with the AmpliFund logo and the user name 'Admin Test'. Below the header, there are tabs for 'Details' and 'Contact Info'. A toolbar contains several icons: a printer, an information icon, a pencil, a trash can, and an envelope icon, which is highlighted with a red box. The main content area displays the user profile for 'Jane Doe'. On the left, there is a vertical sidebar with icons for calendar, user profile, money, bar chart, folder, and settings. The user profile section is titled 'User Information' and contains the following details:

| | |
|----------------------------|------------------|
| Username | |
| Subscribe To Daily Emails | No |
| Subscribe To Weekly Emails | No |
| Applicant Portal Access | No |
| Role | Organizational / |

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.

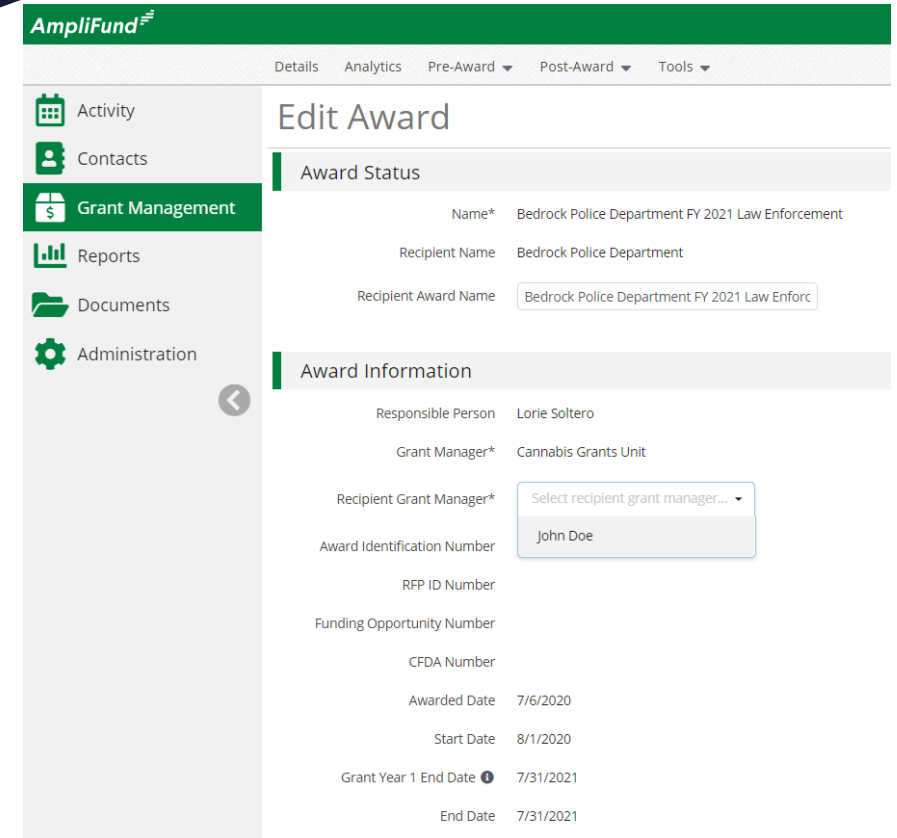
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AmpliFund

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



AmpliFund

Details Analytics Pre-Award Post-Award Tools

Activity
Contacts
Grant Management
Reports
Documents
Administration

Edit Award

Award Status

Name* Bedrock Police Department FY 2021 Law Enforcement

Recipient Name Bedrock Police Department

Recipient Award Name Bedrock Police Department FY 2021 Law Enforc

Award Information

Responsible Person Lorie Soltero

Grant Manager* Cannabis Grants Unit

Recipient Grant Manager* Select recipient grant manager...
John Doe

Award Identification Number

RFP ID Number

Funding Opportunity Number

CFDA Number

Awarded Date 7/6/2020

Start Date 8/1/2020

Grant Year 1 End Date 7/31/2021

End Date 7/31/2021

Grant Budgets have already been created in your account.

*Page 10 of the AmpliFund Recipient User Guide

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

| | | | | | | | |
|----------------|-----------------------|----------------|-----------------------|-----------------|-----------------------|------------------|-----------------------|
| Award Duration | <input type="radio"/> | Awarded Amount | <input type="radio"/> | Category Budget | <input type="radio"/> | Performance Goal | <input type="radio"/> |
|----------------|-----------------------|----------------|-----------------------|-----------------|-----------------------|------------------|-----------------------|

Amendment Request

Amendment Name*

Date Approved*

Amendment Types:
Category Budget
Performance Goal

Tools

- Email Manager
- Tasks
- Documents
- Notes

Tools are available on several record types:

Organizations
Individuals
Staff
Grants/Awards

The screenshot displays the AmpliFund web application interface. The top navigation bar includes 'Back', 'Details', 'Analytics', 'Pre-Award', 'Post-Award', 'Tools', and 'Grant Workflow'. The 'Tools' dropdown menu is highlighted with a red box and contains the following items: Email Manager, Tasks, Documents, and Notes. The main content area shows 'Grant Information and Status' for a grant titled 'Active Living: Bicycle and Walking Trails'. The grant details include:

| Field | Value |
|------------------------------|---|
| Name | Active Living: Bicycle and Walking Trails |
| Grantor | Interact for Health |
| Award Type | Grant |
| Award Status | Approved |
| Awarded Amount | \$400,000.00 |
| Total Match | \$25,000.00 |
| Grant Budget | \$425,000.00 |
| Total Expenses | \$1,500.00 |
| Payments Requested | \$0.00 |
| Payments Received | \$0.00 |
| Outstanding Payment Requests | \$0.00 |
| Match Contributions | \$0.00 |
| Remaining Award | \$400,000.00 |
| Remaining Match | \$25,000.00 |
| Remaining Budget | \$425,000.00 |

Reports

| 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 |

A Test FY22 Continuation Award (CFDA# __) - Approved

Details

Grant Manager Jane Test-Staff Doe
 Start Date 7/1/2021
 End Date 6/30/2022
 Closeout Date 7/31/2022
 Risk

Budget: Low | Performance: Low
 Reporting: Low

Upcoming Items

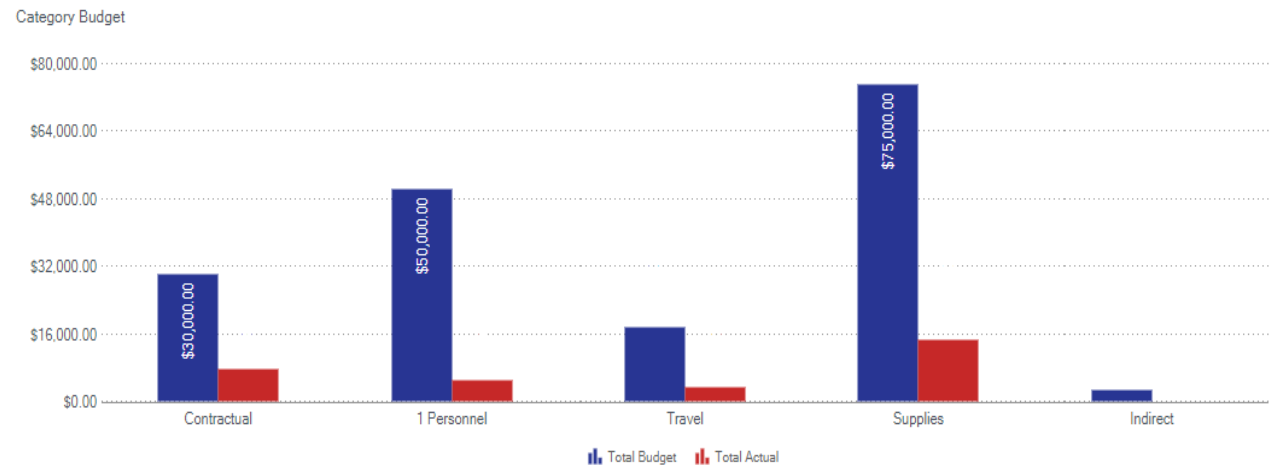
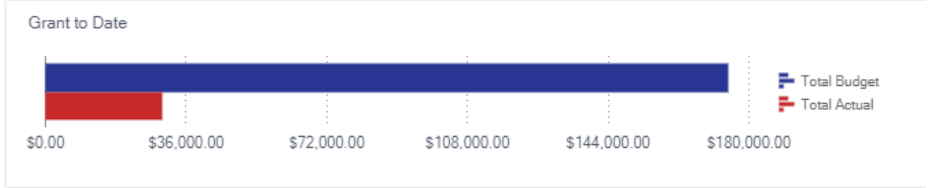
There are no upcoming items.

Quick Create

- Amendments +
- Expenses +
- Payment Authorizations +

Grant Detail Analytics

| | | |
|------|----------------|-------------------|
| Risk | Awarded Amount | Remaining Balance |
| Low | \$150,000.00 | \$144,950.00 |



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Expenses, Reporting Periods and Payment Requests

Tracking Expenses on Budget Line Items

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

Add Expense

General **Financials** **Attachments**

Grant: Bedrock Police Department FY 2

Category: Equipment

Line Item: Police equipment

Item Type: Non-Personnel Line Item

Direct Cost*: \$500.00

Exclude From Match

Responsible Individual: John Doe

Created By: testPD@noemail.com

Expense Date*: 8/1/2020

Expense Status: New

Payee: Other 123456 Use Existing ⓘ

Description:

Create **Cancel**

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

Create Achievement

| | |
|------------------------|---|
| Grant | A TEST AWARD |
| Goal Type | Numeric |
| Goal | Q1 Immediate Needs Assistance (Food, Short term financial needs, etc.) |
| Description | Please enter the number of clients for whom you provided immediate needs assistance in Q1 |
| Responsible Individual | Ashley Ross |
| Achievement Date | <input type="text" value="8/12/2021"/> |
| Number to be Achieved | 1 |
| Number Achieved | <input type="text" value="0"/> |
| Notes | <div style="border: 1px solid #ccc; height: 80px;"></div> |
| Upload File(s) | <input type="button" value="Choose file(s)"/> |

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

Reporting Periods

Which grant would you like this closeout to apply to?
Bedrock Police Department FY 2021 Law Enforcement

What types of reporting periods would you like to include?

Expenses
 Achievements

What period of time would you like to close?

Select a time period... ▼

Cancel Save

Closing Reporting Periods

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**

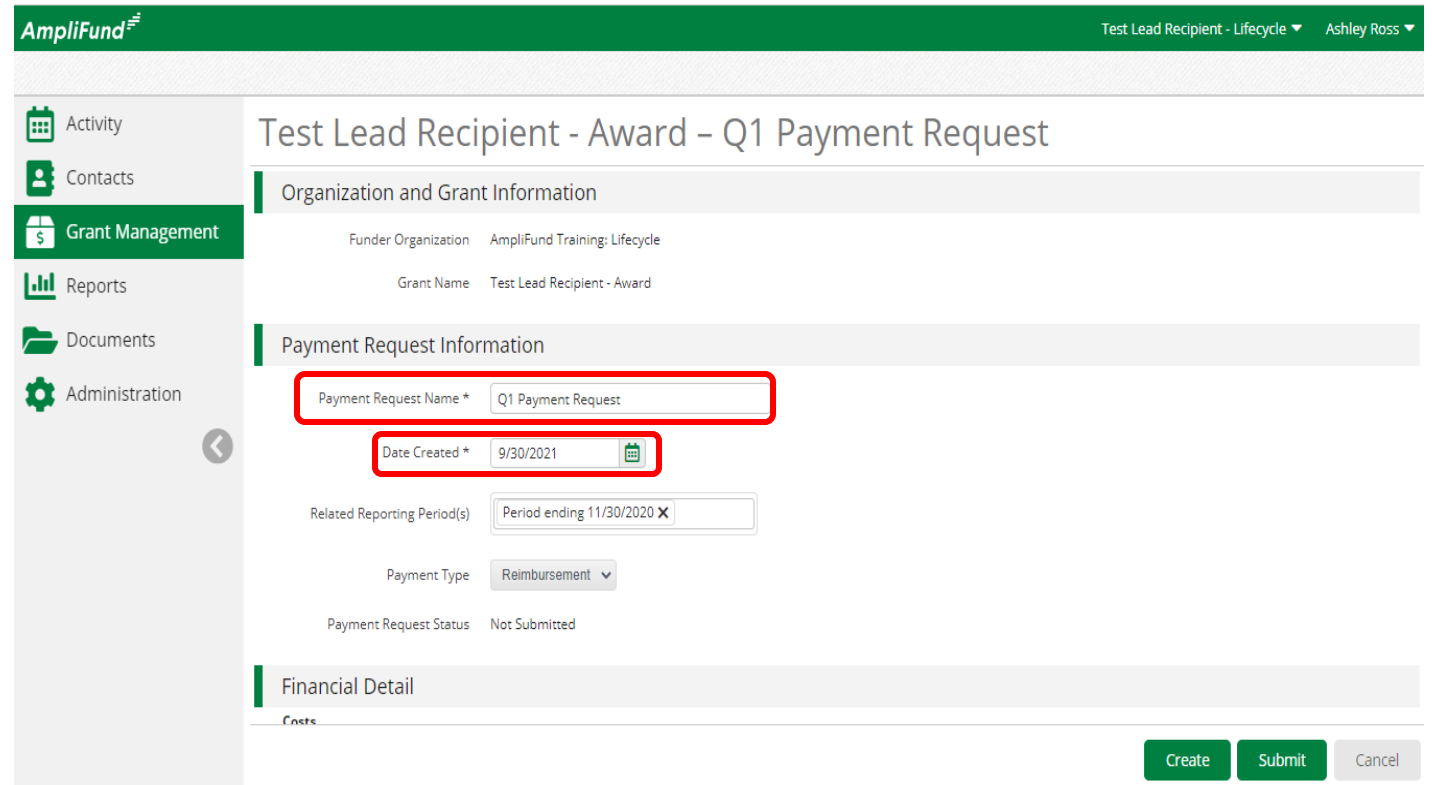
The screenshot shows the AmpliFund web application interface. The top navigation bar is green with the AmpliFund logo and the user name 'John Doe'. The main content area is titled 'Reporting Periods' and displays details for a specific grant: 'Bedrock Police Department FY 2021 Law Enforcement - Reporting Periods'. The grant start date is 8/1/2020 and the end date is 10/31/2020. The status is 'Open'. There are two buttons: 'Expenses' and 'Achievements'. Below this is the 'Overall Expense Details' section, which includes a table with the following data:

| | |
|---------------------------------|----------------|
| Total Awarded Amount | \$1,000,000.00 |
| Total Expense Amount for Period | \$500.00 |
| Number of Unreviewed Expenses | 0 |

There is a 'Comments' text area and an 'Attach Documentation' section with a 'Choose a file' button. At the bottom, there is an 'Expenses Analytics' section showing '# of Categories within 10% of Budget' as 0. The bottom right corner has 'Cancel', 'Close', and 'Save' buttons.

Creating Payment Requests

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



AmpliFund

Test Lead Recipient - Lifecycle Ashley Ross

Test Lead Recipient - Award - Q1 Payment Request

Organization and Grant Information

Funder Organization AmpliFund Training: Lifecycle

Grant Name Test Lead Recipient - Award

Payment Request Information

Payment Request Name * Q1 Payment Request

Date Created * 9/30/2021

Related Reporting Period(s) Period ending 11/30/2020 X

Payment Type Reimbursement

Payment Request Status Not Submitted

Financial Detail

Costs

Create Submit Cancel

Creating Payment Requests

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

The screenshot displays the AmpliFund web interface for creating a payment request. The page title is "Test Lead Recipient - Award - Q1 Payment Request". The left sidebar contains navigation options: Activity, Contacts, Grant Management (selected), Reports, Documents, and Administration. The main content area shows the "Financial Detail" section with the following data:

| Costs | |
|---------------------|--|
| Other | \$2,200.00 |
| Additional Expenses | <input type="text" value="Select budget categories..."/> |
| Net Costs | \$2,200.00 |

Totals

| | |
|-------------------------|-------------|
| Net Total | \$2,200.00 |
| Requested Amount* | \$2,200.00 |
| Remaining Grant Balance | \$10,000.00 |


The "Requested Amount*" field is highlighted with a red box. Below the financial details is the "Additional Information" section, which is currently empty. At the bottom right, there are three buttons: "Create", "Submit", and "Cancel", all of which are highlighted with a red box.

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**

Add Cash Receipt

Cash Receipt Information

| | |
|--------------------------|--|
| Receipt Name* | <input type="text" value="Cash Receipt Quarter 1"/> |
| Organization* | <input type="text" value="Test"/> |
| Payment Date | <input type="text" value="5/28/2021"/>  |
| Amount* | <input type="text" value="\$2,500.00"/> |
| Payment Method | <input type="text" value="ACH/EFT"/> |
| Payment Reference Number | <input type="text" value="12345-56"/> |
| GL Account | <input type="text" value="Select General Ledger Account..."/> |
| Related Payment Request | <input type="text" value="Select payment request..."/> |