



*AmpliFund*



# Recipient Training

**County of Kaua'i**  
**1/16/2024**

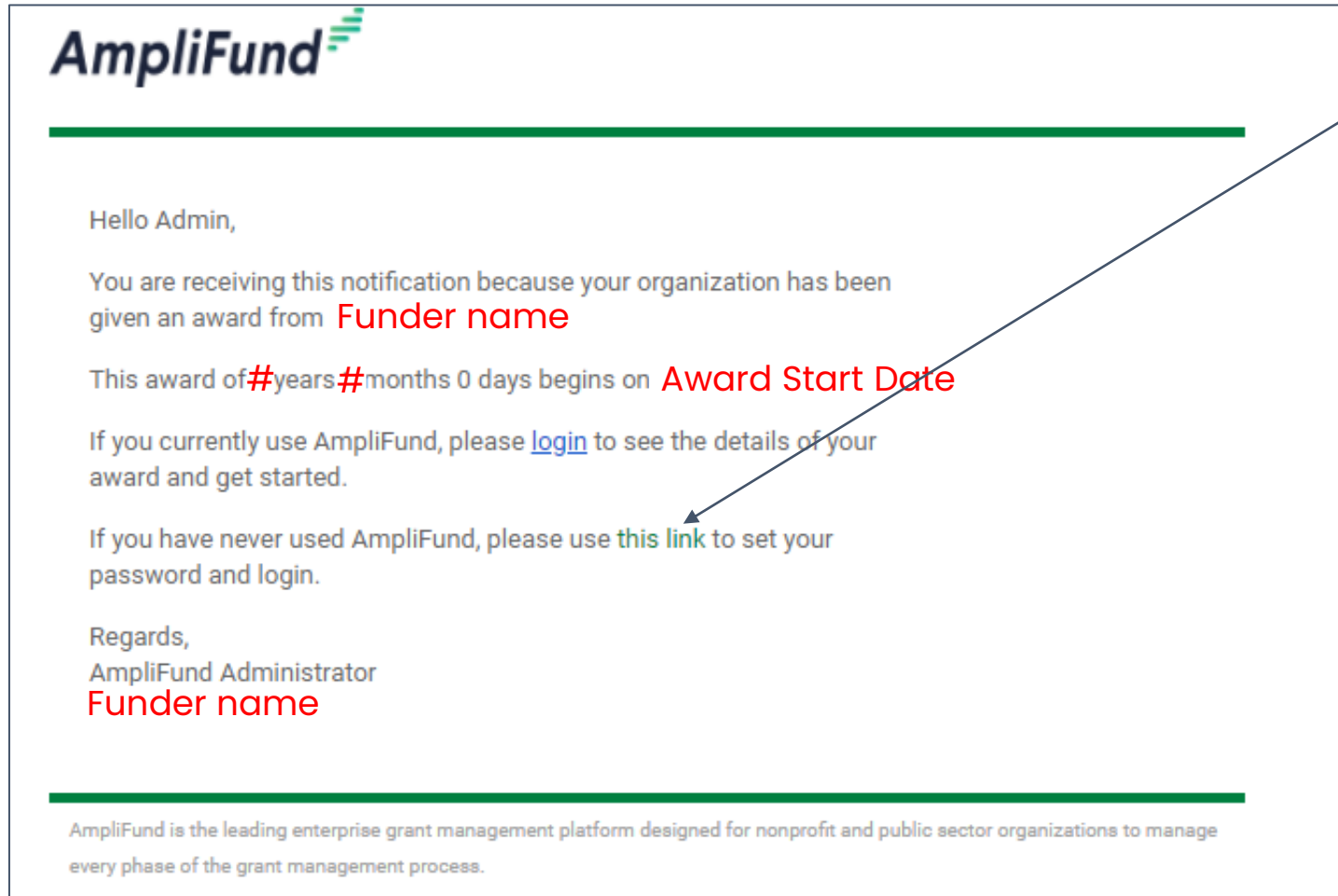
# Agenda

- Welcome & Introductions
- Getting Started with AmpliFund
- AmpliFund Navigation & Account Overview
- Accessing Grant & Updating Budget
- Tasks to Complete
- Expense Entry & Reporting Period
- Invoice Submission
- 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



**AmpliFund**

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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**

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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 in the coming days

# 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: Submit Reporting Period
- Custom: Submit Invoice
- 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 four horizontal lines of increasing length, stacked vertically, resembling a signal or data visualization element.

*AmpliFund*

Support

# AmpliFund Support

## Submit a support ticket:

[support@amplifund.zendesk.com](mailto:support@amplifund.zendesk.com)

## Visit the support portal:

<https://amplifund.zendesk.com>

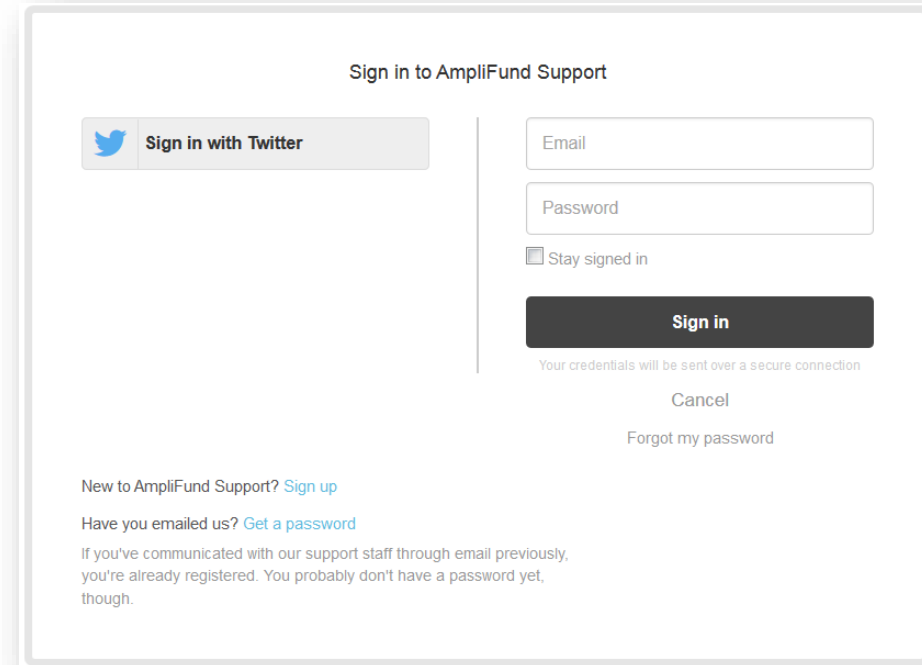
## Supported Browsers:

- 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](mailto: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

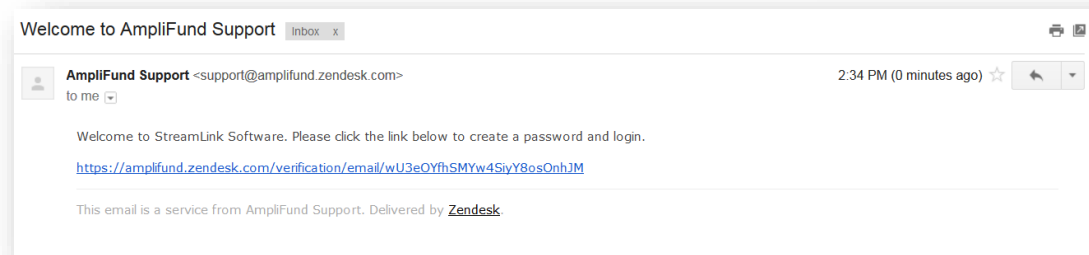
Cancel

[Forgot my password](#)

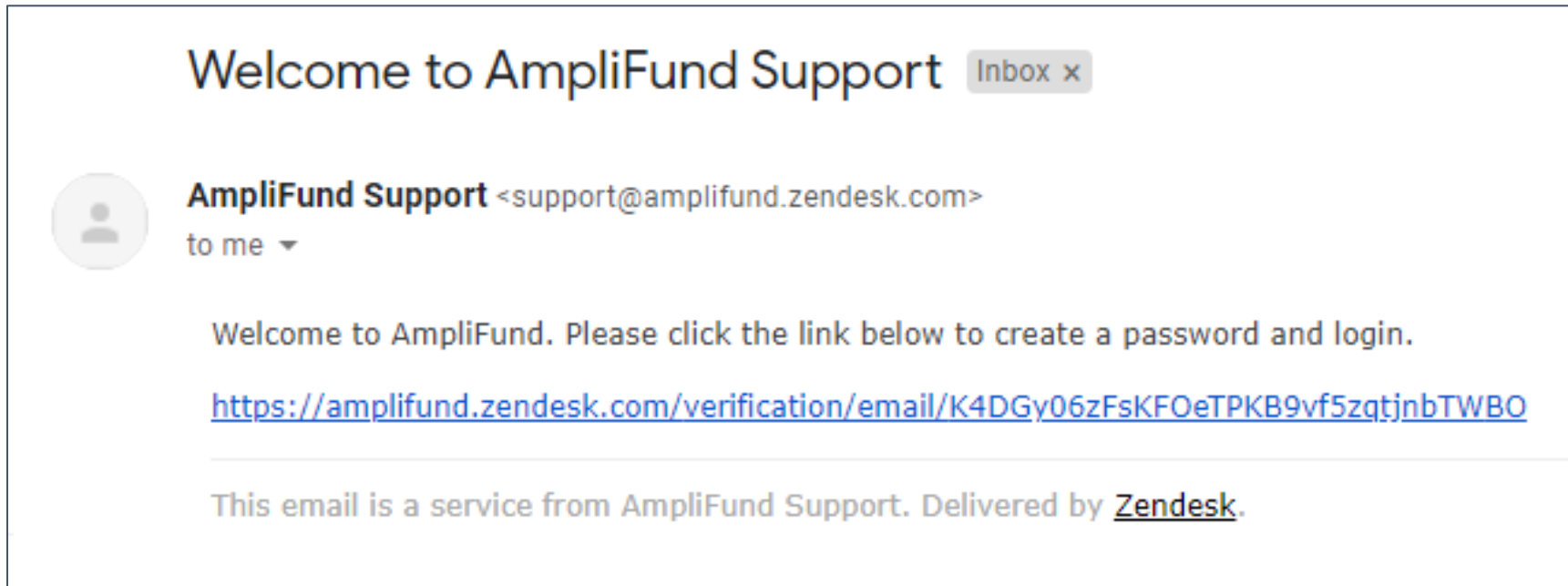
New to AmpliFund Support? [Sign up](#)

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](http://www.gotomygrants.com)

# Appendix

Support Slides

# Navigating AmpliFund

The screenshot displays the AmpliFund web application interface. On the left, a navigation menu (labeled 1) includes links for Activity, Contacts, Grant Management, Reports, Documents, and Administration. At the top right, the user profile 'Joe Test Applicant' (labeled 2) is shown with an options toolbar (labeled 3) containing icons for account management, messages, support, and home. The main content area features a calendar for August 2020 with a legend for 'Past Due', 'Complete', and 'Due' items. A yellow highlight is present on Friday, August 7th, and a green box on Saturday, August 15th, indicating due dates for 'Budgeting Tracking Period Due' and 'Performance Tracking Period Due'.

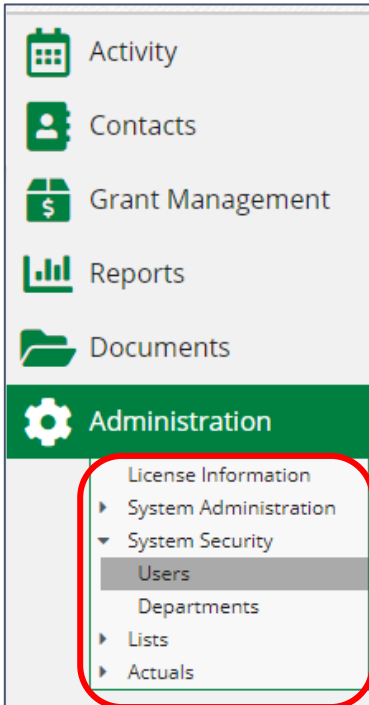
- 1. Left Navigation** – shows on every page
- 2. User Navigation** – includes account information, change password, message center, support, terms and conditions, applicant portal, and logout
- 3. Options Toolbar** – displays icons to perform functions available on the current page, icons vary based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

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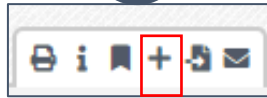
Adding Users

# 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

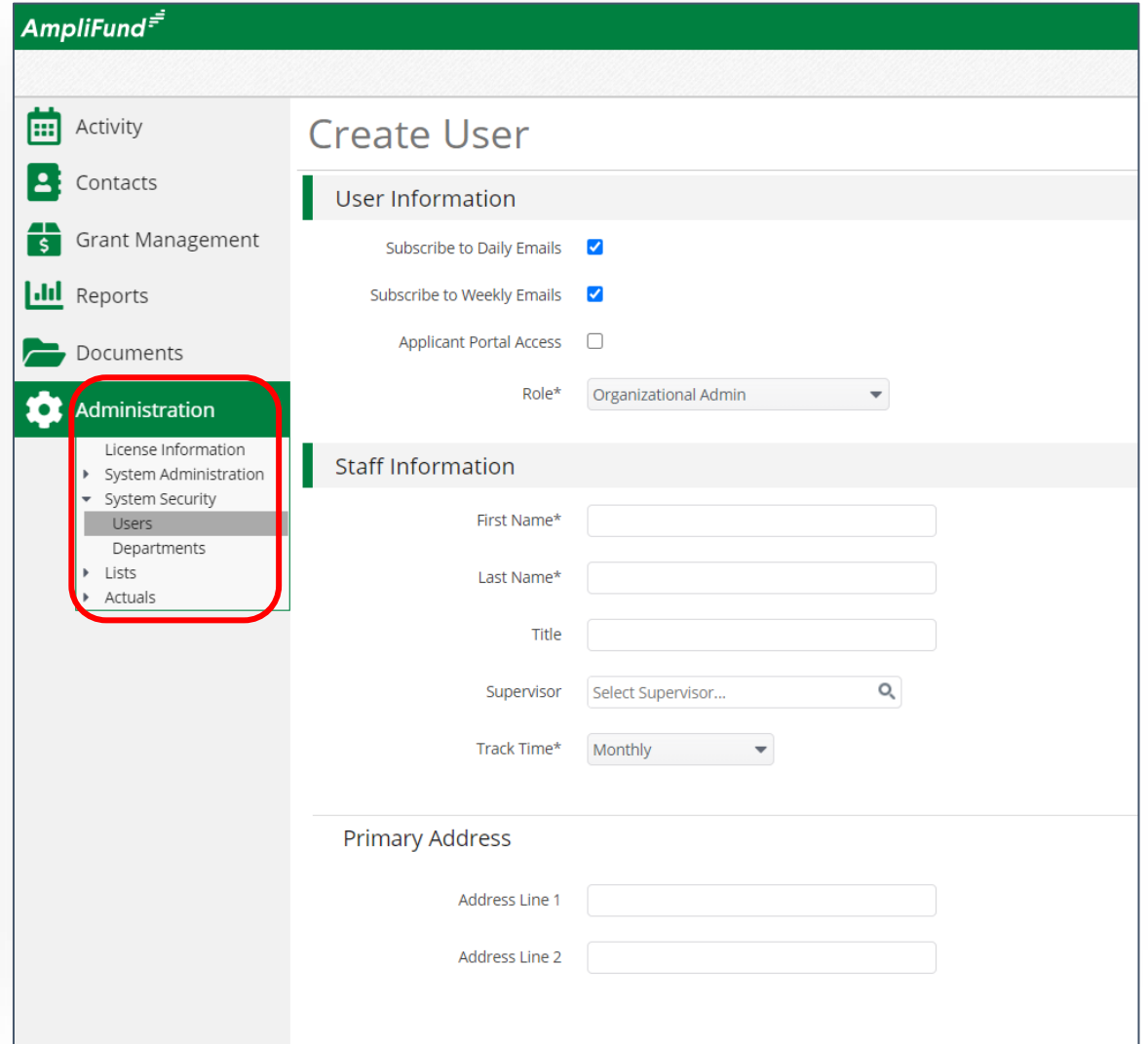
- Set to **Yes** to receive daily and/or weekly emails from AmpliFund with tasks/reminders

## 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

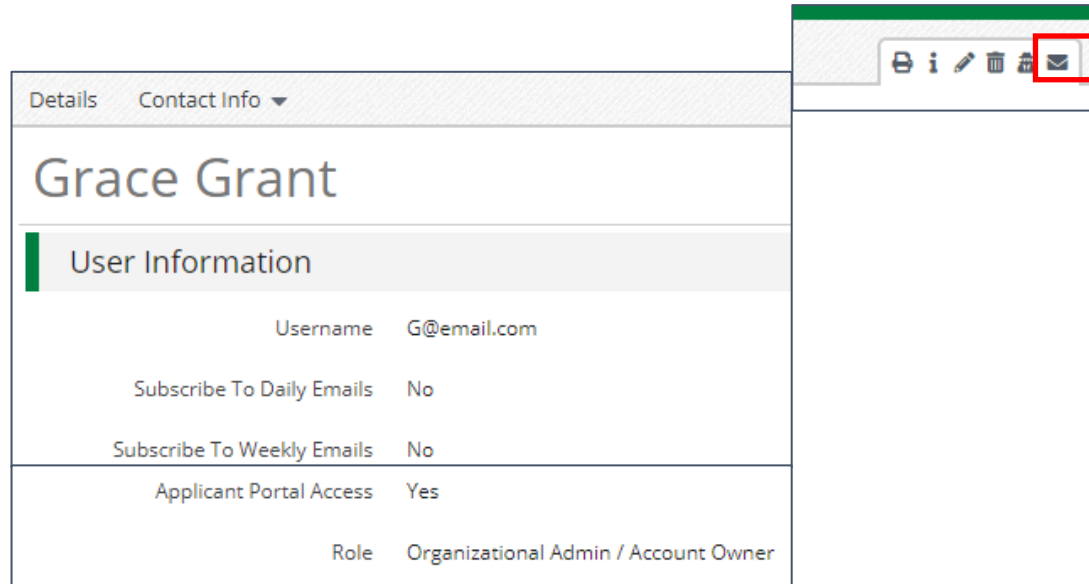
Track Time\* Monthly

### 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 includes 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

At the top right of the profile card, there 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' icon mentioned in the instructions.

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.

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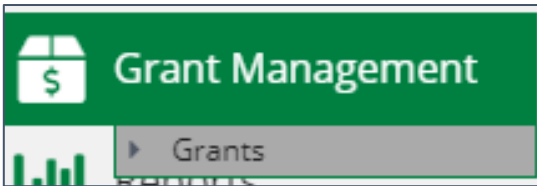
*AmpliFund*

# Updating Grant Award

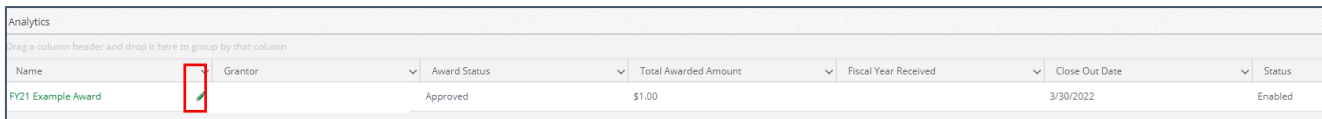
# Updating Grant Award Details

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

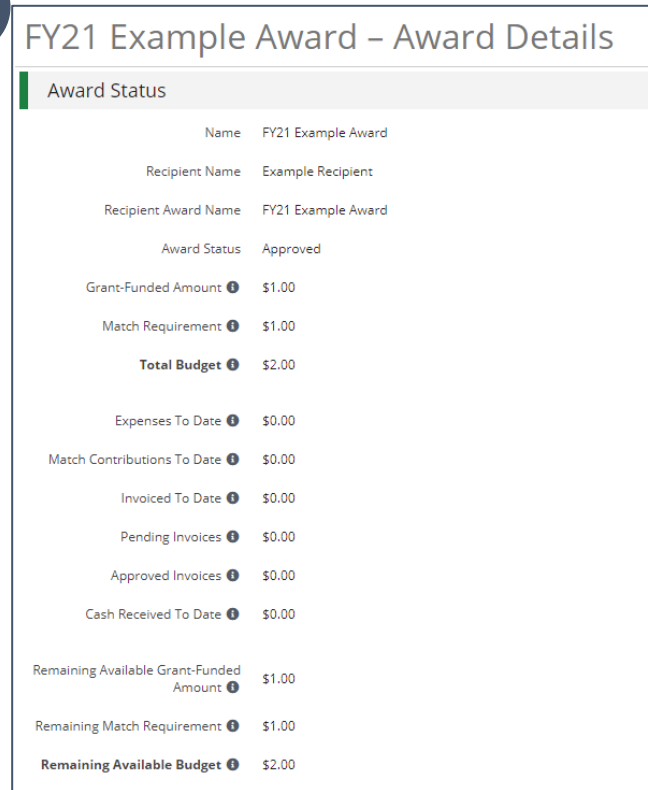


2

A screenshot of an 'Analytics' table. The table has columns for Name, Grantor, Award Status, Total Awarded Amount, Fiscal Year Received, Close Out Date, and Status. The row for 'FY21 Example Award' has a red box around a pencil icon in the Grantor 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

A screenshot of the 'FY21 Example Award - Award Details' page. It shows a list of metrics and their values.

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
<b>Total Budget</b>	<b>\$2.00</b>
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
<b>Remaining Available Budget</b>	<b>\$2.00</b>

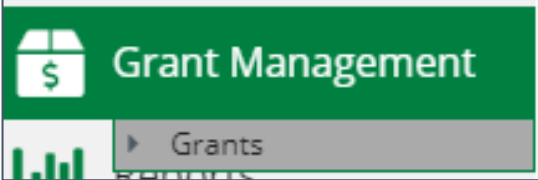
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Accessing Budget

# Accessing Budget

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

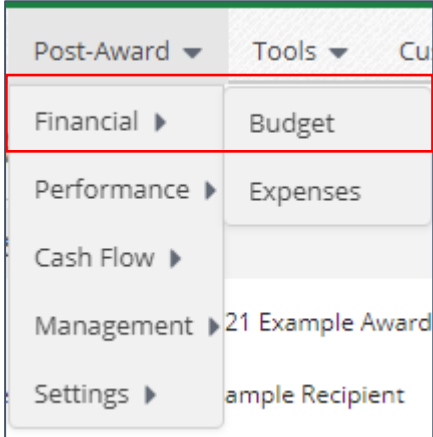
1



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



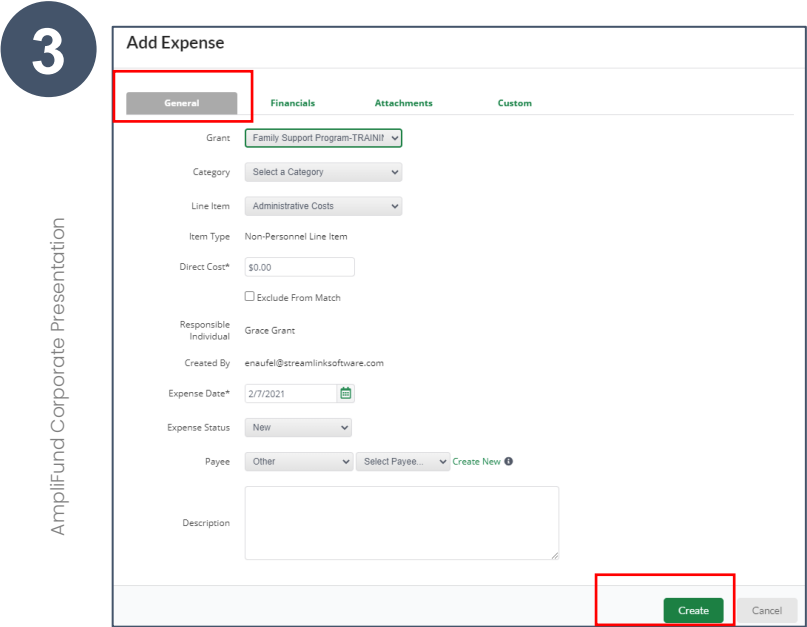
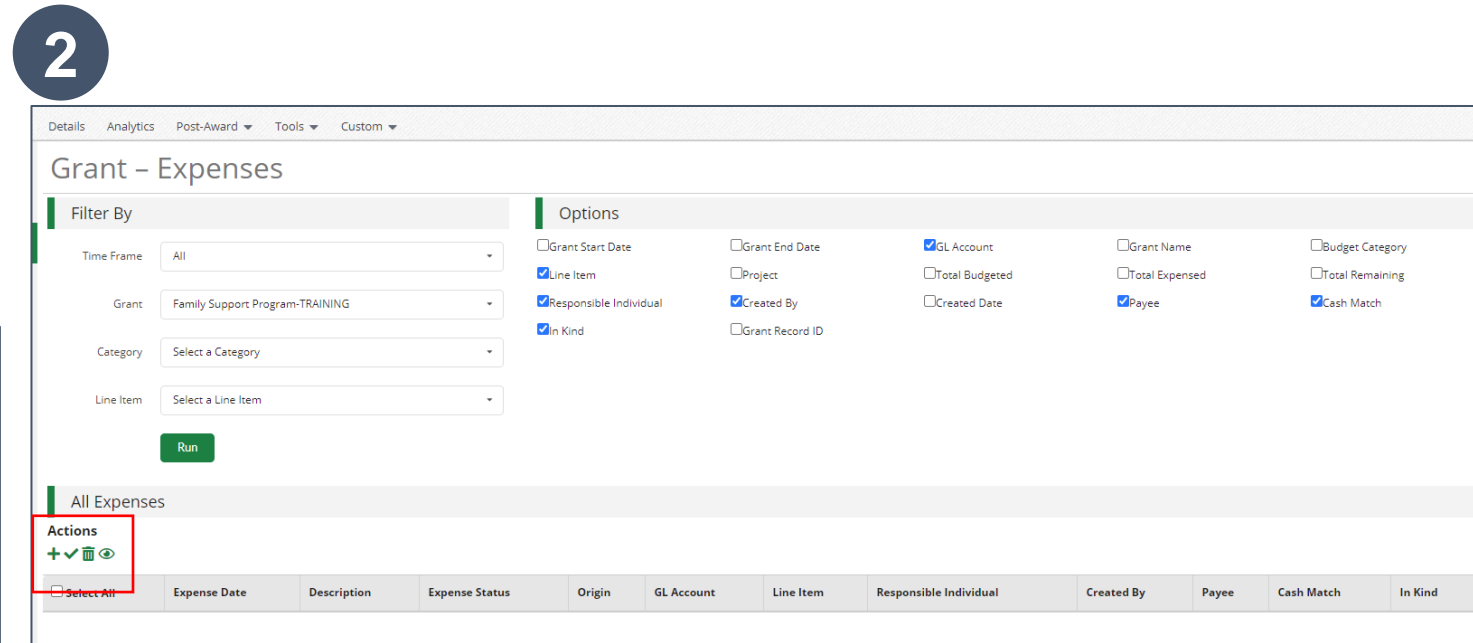
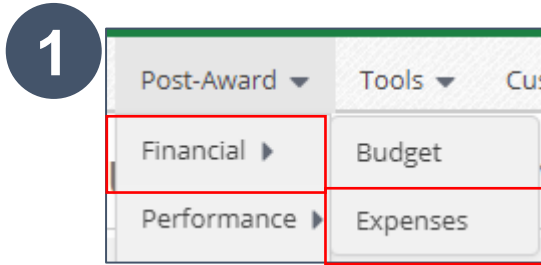
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Expense Entry

# 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 then click Create



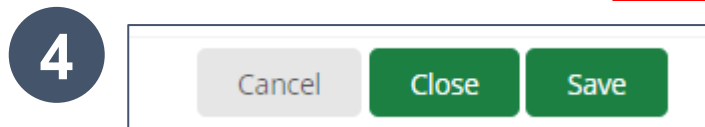
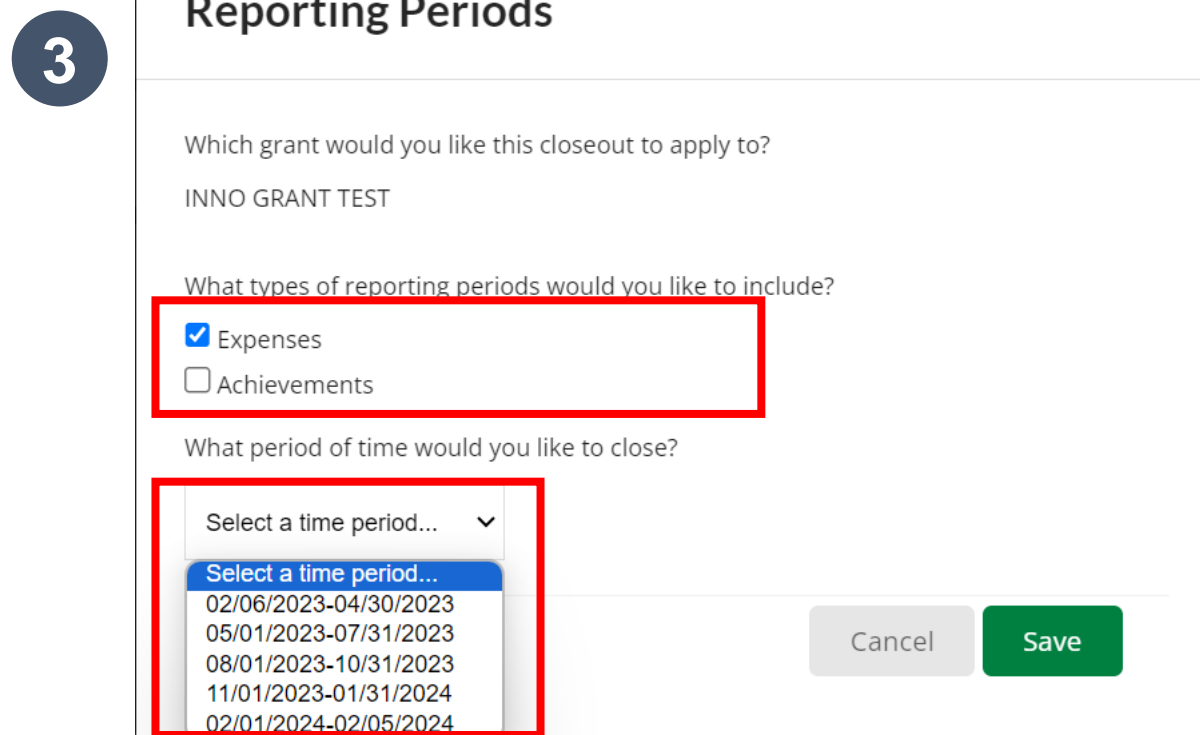
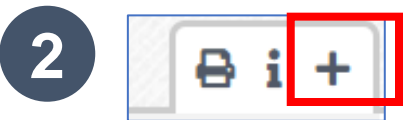
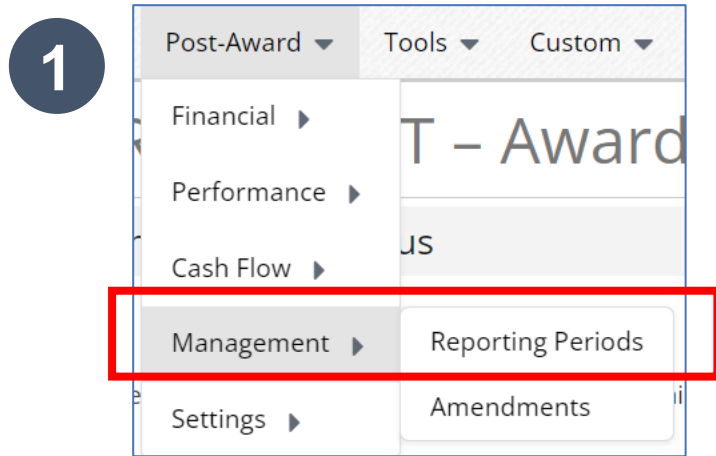


The logo for AmpliFund, featuring the word "AmpliFund" in a white, sans-serif font. To the right of the text is a green icon consisting of four horizontal bars of increasing length, stacked vertically, resembling a staircase or a signal strength indicator.

# Submitting a Budget Reporting Period

# Submitting Budget Reporting Period

1. Post Award>Management>Reporting Period
2. Click on the plus icon
3. Select Expenses & Time Period
4. Click Close



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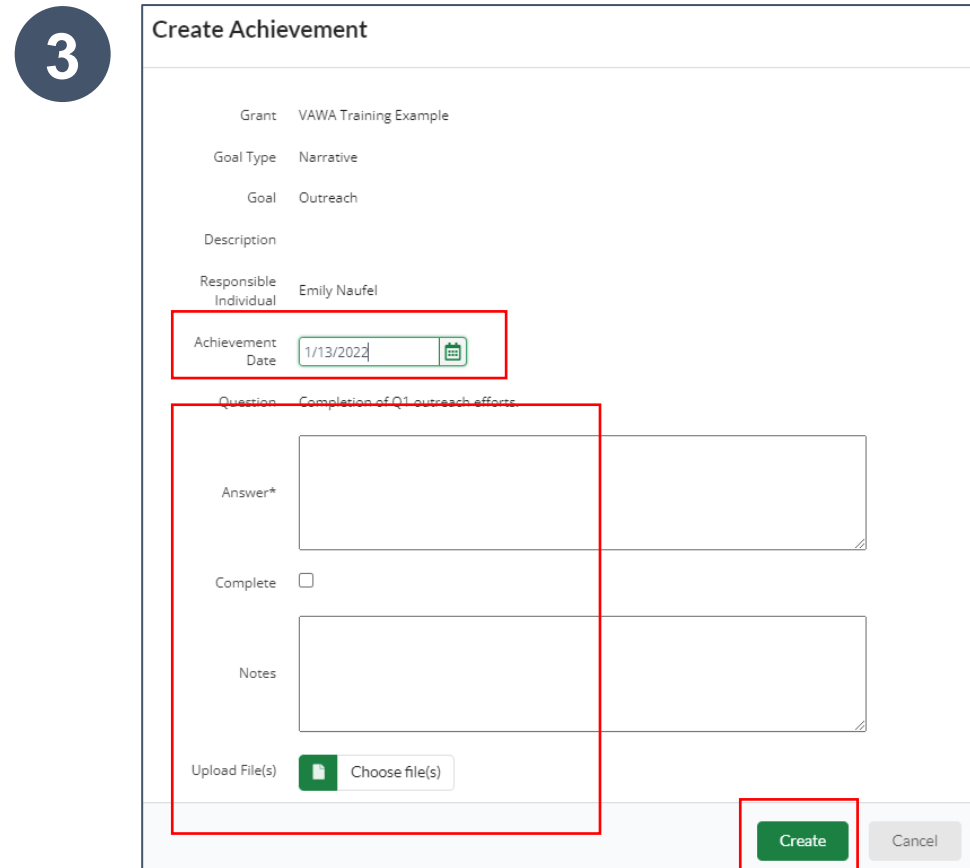
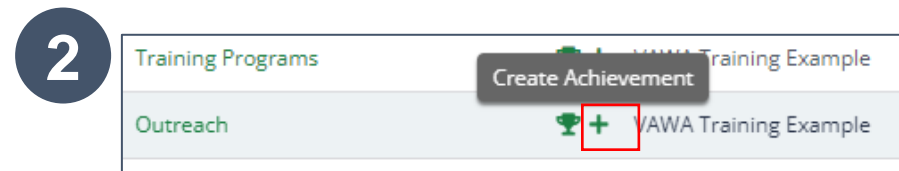
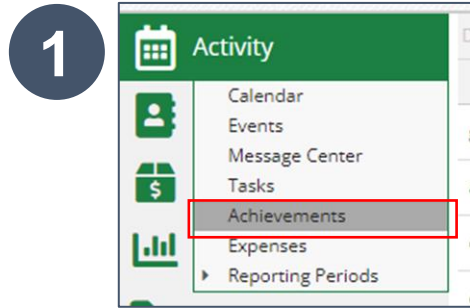
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# Creating & Submitting Performance Achievements

# 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

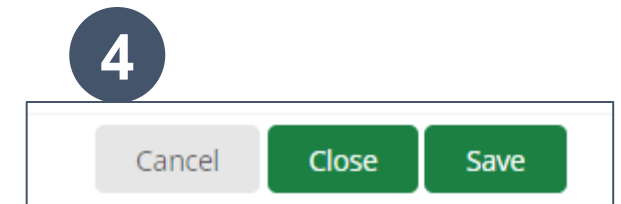
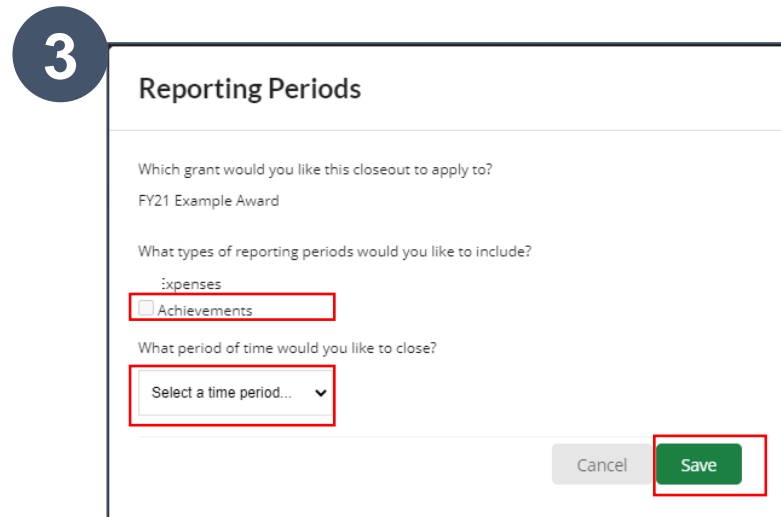
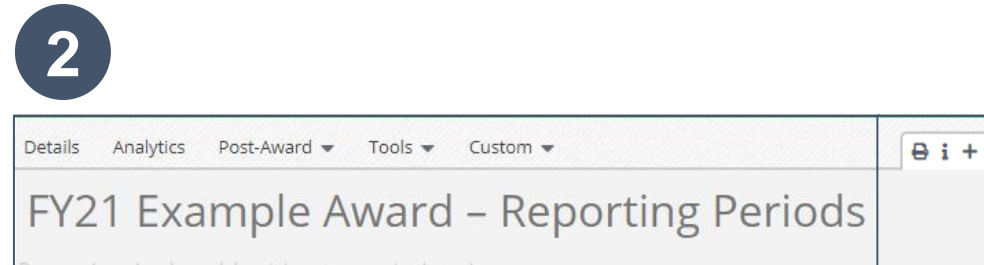
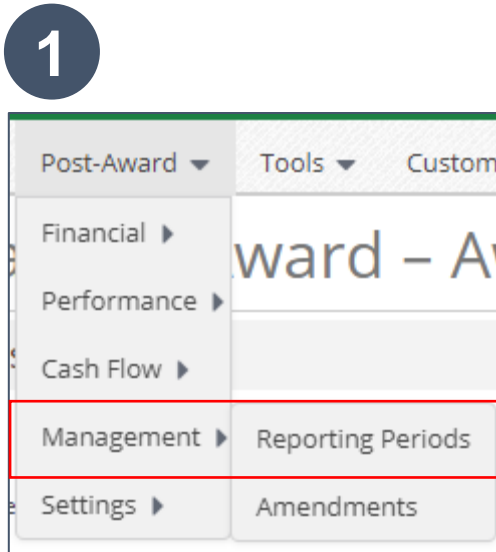


A screenshot of the 'Create Achievement' form. The form contains the following fields and options:

- Grant: VAWA Training Example
- Goal Type: Narrative
- Goal: Outreach
- Description:
- Responsible: Individual Emily Naufel
- Achievement Date: 1/13/2024 (with a calendar icon)
- Question: Completion of Q1 outreach efforts
- Answer\*: (text input field)
- Complete:
- Notes: (text input field)
- Upload File(s): Choose file(s) (with a file upload icon)
- Buttons: Create (highlighted with a red box) and Cancel

# 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



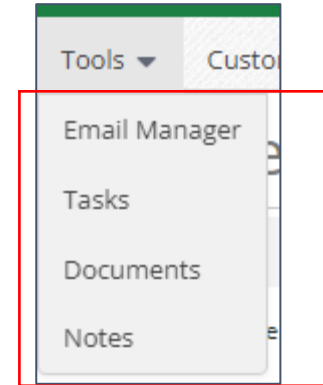
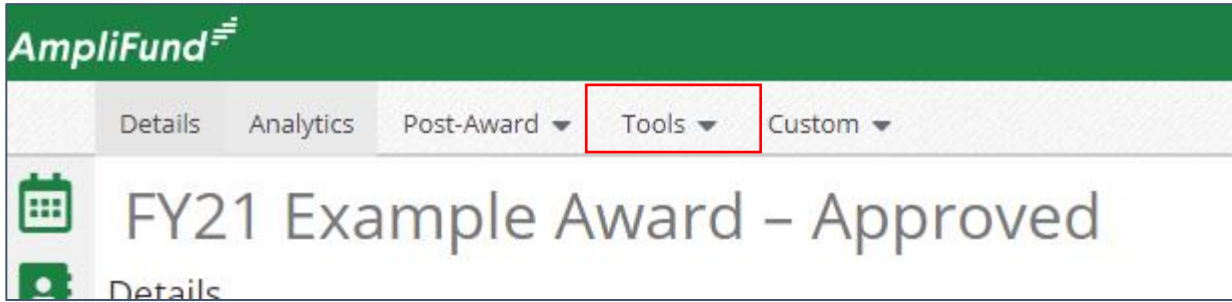


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Available Tools

# Available Tools

From Grant Record Select Tools



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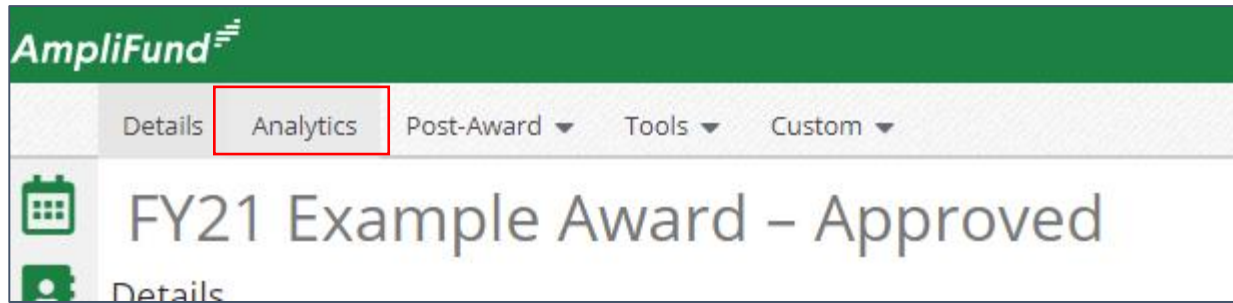
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Available Reporting



# Available Reporting

## Grant Dashboard



## Other Reports

