AmpliFund

Training Session 1: AmpliFund Overview

Vermont Public Service Department   **7/10/24**

Agenda

AmpliFund

Goal: *Understand how to navigate through AmpliFund, edit your account, edit a grant, and run reports.*

1. Activation Email
2. General Navigation
3. Updating your Account
4. Adding Users
5. **Understanding a Grant Record**
   1. Grid
   2. Create a View
   3. Grant Details
   4. Edit a Grant
6. Reports
7. Support
   1. Resource Center
   2. Customer Support

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Activation & Account

Activation Email

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- When you receive an award, your funder will send you an email notification inviting you into AmpliFund.
  - no-reply@gotomygrants.com

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Name of Account Owner

Hello Admin,

You are receiving this notification because your organization has been given an award from [Funder Name]

Funder

This award of 1 years 0 months 0 days begins on 4/4/2023.

Period of Performance

If you currently use AmpliFund, please login to see the details of your award and get started.

Link if you have an account

If you have never used AmpliFund, please use this link to set your password and login.

Link to register

Regards,
AmpliFund Administrator
Idaho Department of Environmental Quality

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

Register
(First time in AmpliFund)

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1. Click on second link in Activation Email

AmpliFund

Hello Admin,

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

This award of 1 years 0 months 0 days begins on 4/4/2023.

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
Idaho Department of Environmental Quality

Link to register

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

2. Create a password

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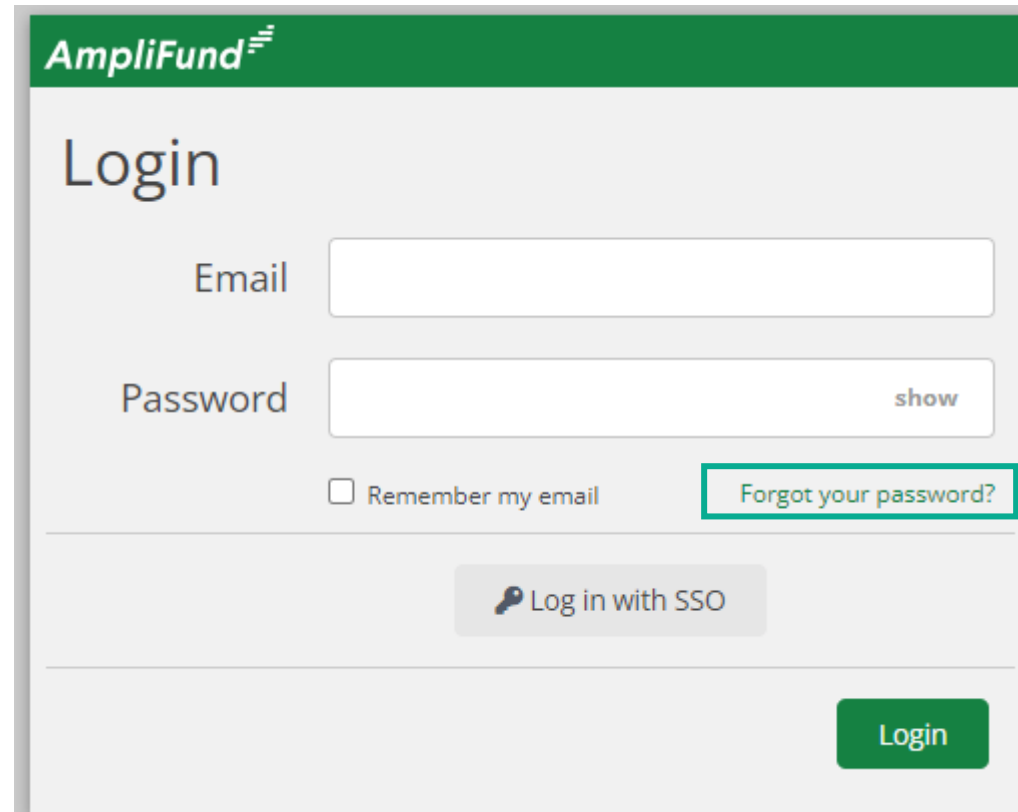## Create Password

Email Address   MainContact@noemail.com

New Password   [   ] show

Confirm Password   [   ] show

Submit   Cancel

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Login

1. Log-in at: https://www.gotomygrants.com/
2. Enter your Email
3. Enter your Password
4. Click **Login**

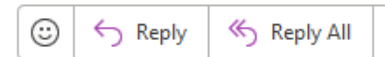Send reset link from: no-reply@gotomygrants.com

Password Reset

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- Email from AmpliFund Administrator (no-reply@gotomygrants.com)
    - Need to add as safe sender
    - Check Junk, if not received

AmpliFund Password Reset

AA AmpliFund Administrator <no-reply@gotomygrants.com>
To

(i) If there are problems with how this message is displayed, click here to view it in a web browser.

☺ ↩ Reply   ↩↩ Reply All -

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Dear Jennifer ,

A request has been received to reset your password.

Please click the link below and follow the instructions to create a new password.
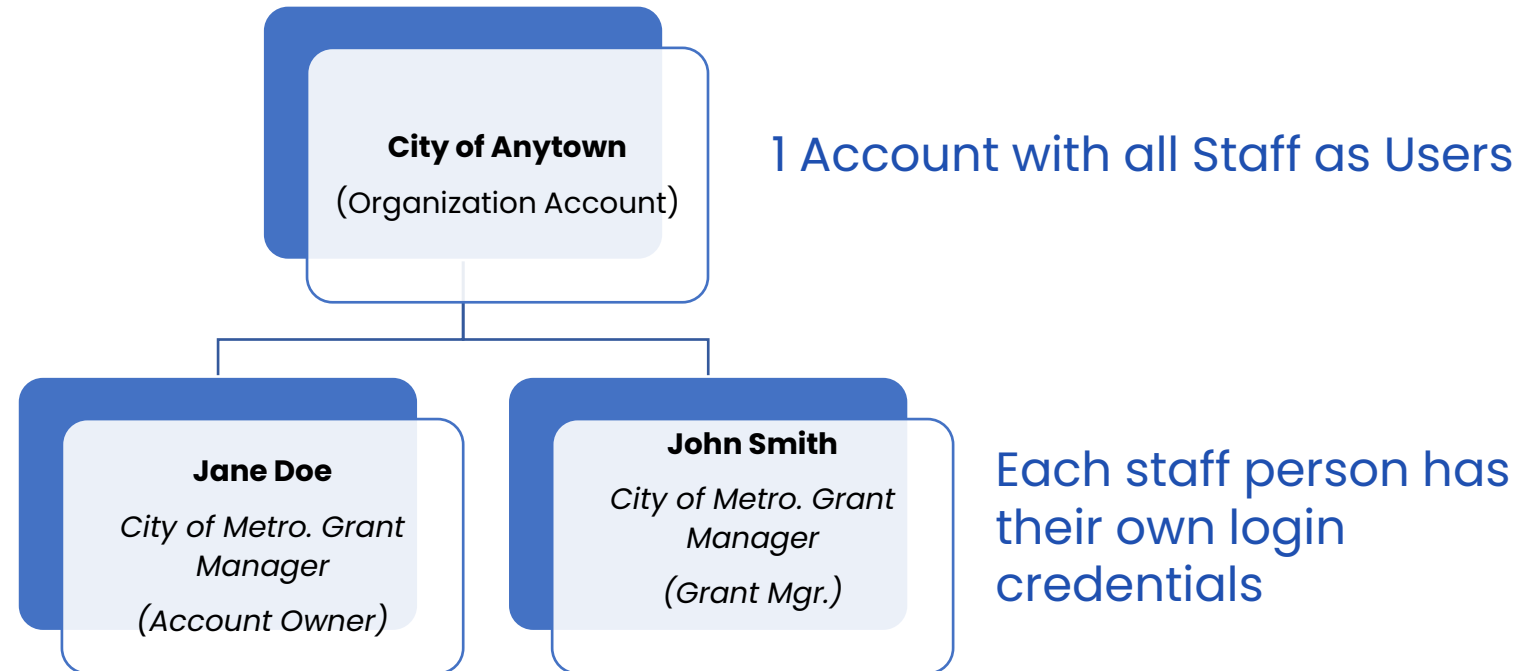
Create New Password

Regards,
AmpliFund Administrator

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage

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In-System Demo

General Navigation & Updating Your Account

Your Account

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- City of Anytown receives a grant
- Jane Doe is the account owner for the City of Anytown .
  - Jane receives the Activation email
  - Jane needs to update the City of Anytown's account information
  - Jane needs to add other users to the City of Anytown's account

City of Anytown

(Organization Account)

1 Account with all Staff as Users

Jane Doe

City of Metro. Grant Manager

(Account Owner)

John Smith

City of Metro. Grant Manager

(Grant Mgr.)

Each staff person has their own login credentials

Update your Account

- Administration > License Information > Edit icon (pencil)
- Update the following fields:
  - ❑ Name
  - ❑ Primary Address
  - ❑ Unique Entity Identifier
  - ❑ EIN/Federal Task ID
  - ❑ Account Owner *(optional)*
- Click **Update**

Example of Daily/Weekly Email

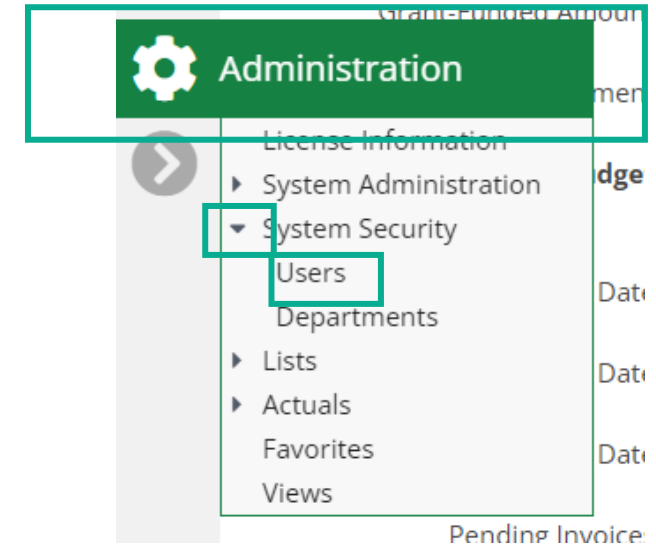List of Assigned Tasks

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Adding Users

Adding Users

- **Best practice is to have at least two users in your account**

- **To Add Users:**
  - Go to: Administration > System Security > Users > +
  - Roles:
    - > Organizational Admin: Access to everything
    - > Department Admin: Access to only assigned grants
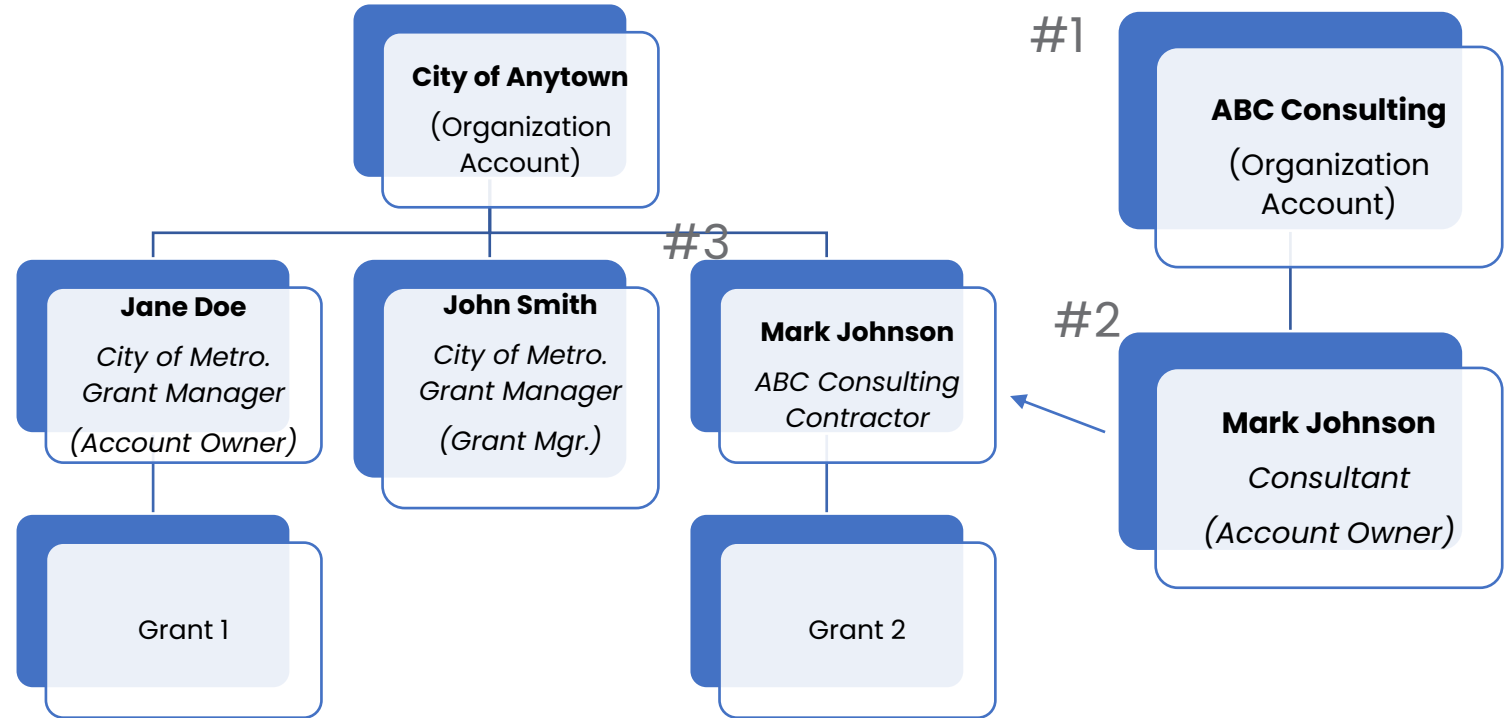   - > Executive: View-only access

- **Adding a Contractor to your Account**
  - Contact AmpliFund Support
    - > AmpliFund Support will work with Contractor to create their own account
    - > AmpliFund Support will add the Contractor as a user to your account
      - Role = Department User (No Salary)

Contractor Account

- City of Anytown's receives a grant
- City of Anytown hires ABC Consulting to manage grant
- Mark Johnson works for ABC Consulting and manages the City's grant.
  - Mark (or the City) contacts AmpliFund Support
  - AmpliFund Support creates an account for ABC Consulting, with Mark as a user
  - AmpliFund Support (or the City) adds Mark as a user in the City's account

City of Anytown
(Organization Account)

Jane Doe
City of Metro. Grant Manager
(Account Owner)

John Smith
City of Metro. Grant Manager
(Grant Mgr.)

Mark Johnson
ABC Consulting Contractor

Grant 1

Grant 2

#3

#1

ABC Consulting
(Organization Account)

#2

Mark Johnson
Consultant
(Account Owner)

In-System Demo

Adding Users

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In-System Demo

Understanding a Grant Record

Views, Grant Details, Adding a Grant Manager

In-System Demo

Reports

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In-System Demo

Customer Support

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Questions?

Next Steps

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Updates in AmpliFund

❑ Login to AmpliFund

❑ Update your Account Information

❑ Add at least 2 users

❑ Assign a Recipient Grant Manager to each Grant

Upcoming Training

❑ Attend Reimbursement Payment Training
   ❑ 7/12/24 @ 2 PM ET

References

References

- **Account**
  - [How to Change your Password](#)
  - [How to Edit account Details](#)
  - [How to Add a New User](#)
  - [How to Edit a User](#)

- **Navigation**
  - [Navigation Video](#)
  - [Navigation Guide](#)

- **Grant**
  - [How to Edit a Grant](#)

- **Reports**
  - [Report user guides](#)

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Grants

Saving a Grants View

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1. Navigate to the grants grid: *Left Menu > Grant Management > Grants*

2. Arrange the grid:
   1. Add columns (dropdown arrows on the column)
   2. Filter (dropdown arrows on the column)
      1. Best practice: 'Contains'
   3. Re-order columns by dragging
   4. Create groups by dragging a column to the header
      1. E.g. Group by 'Fiscal Year Received'
   5. Change number of records per page

3. Click **Save Current View**

4. Name your view
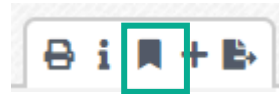
5. Enter a Description (optional)

6. Check **Private View** to create a view for yourself. Leave unchecked to create a view for your organization.

7. Click **Create.**

8. Views are saved here: *Left Menu > Grant Management > Views*

Edit Grant – Assign a Recipient Grant Manager

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- *Left Menu > Grant Management > Grants > [Name] >* **Edit (pencil icon)**

- To Do:

  ❑ Assign a Recipient Grant Manager *(**Required**)*

Post-Award Information

Responsible Person	Test User
Grant Manager*	
Recipient Grant Manager*	Select recipient grant manager... ▾
	Admin User
Award Identification Number	
RFP ID Number	

  ❑ Other Details *(optional)*
  - ❑ Recipient Award Name
  - ❑ Recipient Description
  - ❑ Unique Identifier

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Reports

Reports

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- *Left Menu > Reports*

▶ Post-Award Status

❌ Export **PDF** ▼   Export report using dropdown arrow   Filter data   *Find...* ∧ ∨

▼   Filters   ✚

Award Status ✕
Approved

Risk ✕

Post-Award Status ✕

Awarded Date
02/15/2023 - 08/01/2023

Status	Risk	Grant	Grantor	Departments	Subjects
Approved		ID DEQ Test Award	Idaho Department of Env	ARPA, ARPA	
Approved		TEST Award 2	Idaho Department of Env		
Total					

Departments ✕
All ▼

Subjects ✕

▼   Columns

Toggle columns off and on

⋮ Status ☑
   Risk ☑
   Grant ☑
   Grantor ☑
   Departments ☑
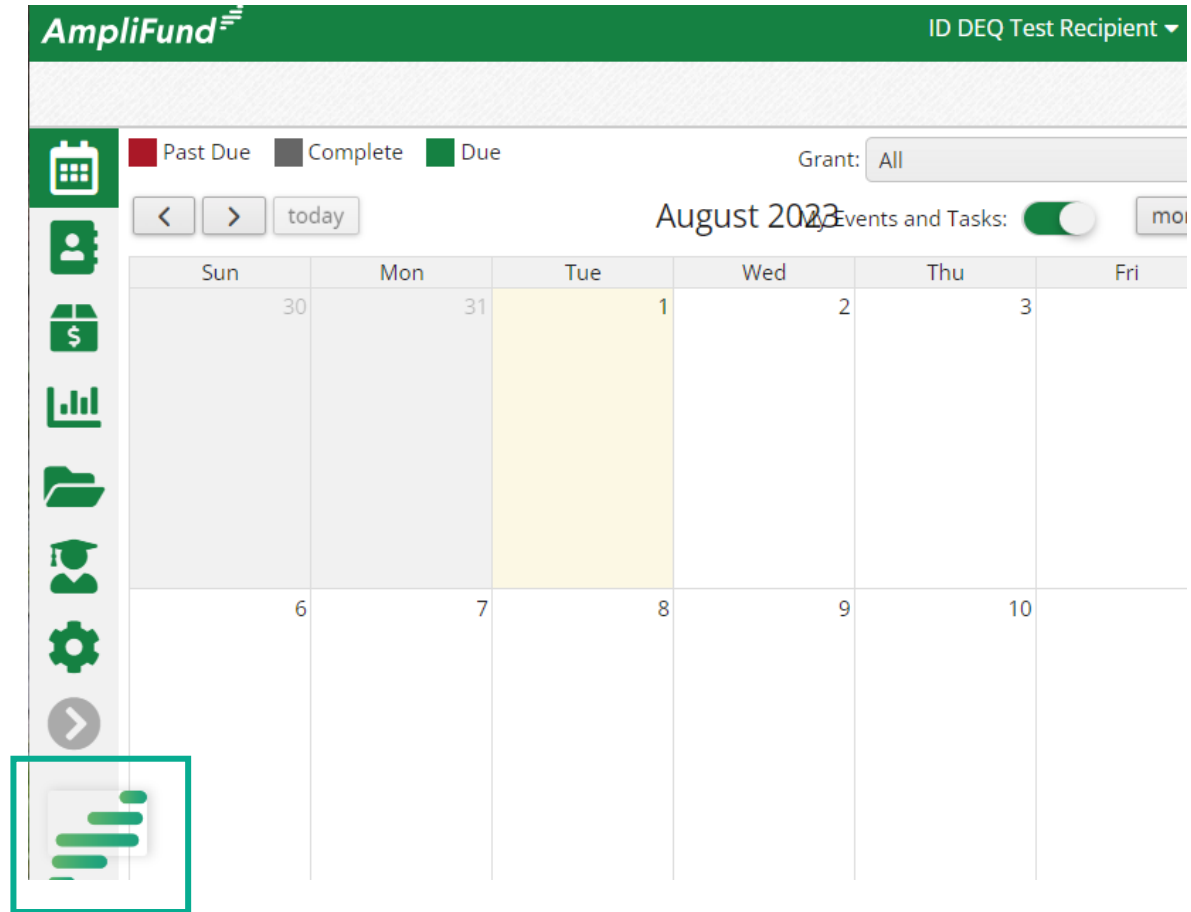
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Support

Resource Center

- Bottom-left corner
- Guides and Walkthroughs

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Customer Support

Access Customer Support

Visit the support portal

https://amplifund.zendesk.com

Submit a support ticket

support@amplifund.zendesk.com or in product

Call the help desk
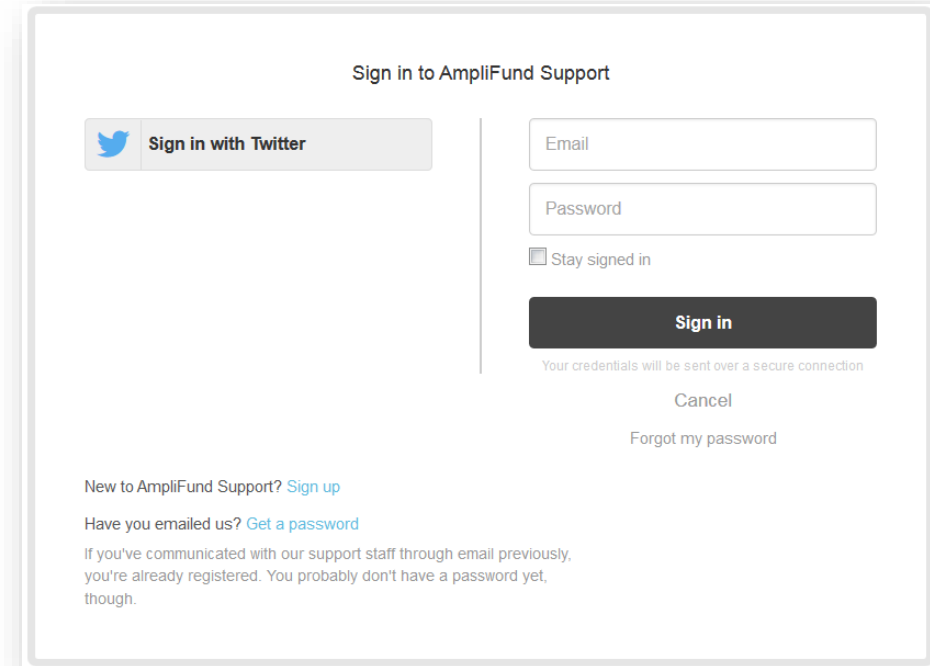
(844) 407-3572

Customer Support Hours

8:00am – 8:00pm ET, Monday through Friday, excluding holidays

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

AmpliFund Support Site