Tasks

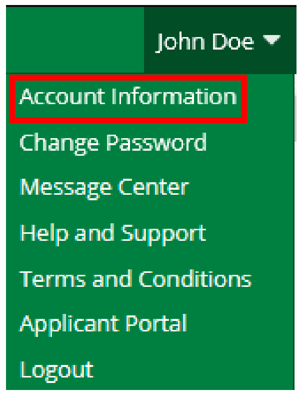
Browser: Log into AmpliFund, https://ne.amplifund.com using Google Chrome, Mozilla Firefox, or Microsoft Edge.

Email Notifications

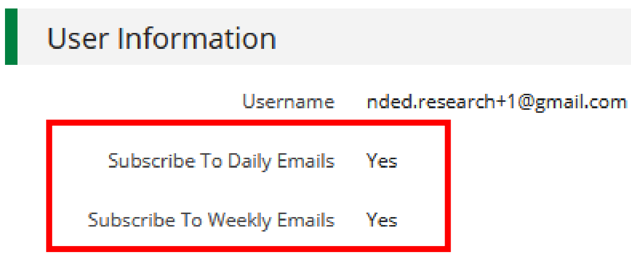
To receive email notifications, including upcoming and past due task reminders, you need to be subscribed to AmpliFund's daily emails. You will not receive an email if you do not have upcoming or past due tasks.

To verify you are subscribed:

Click on your name in the top right corner > Account Information



In the **User Information** section, verify **Subscribe To Daily Emails** is "Yes".



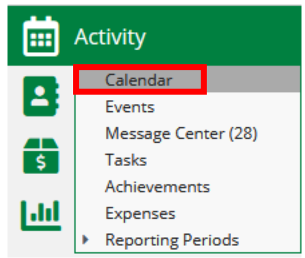
If you are not, click the **Pencil icon** in the top right corner.

Select the subscribed emails boxes, and click **Save**.

Sync Tasks to your Personal Calendar

To add your AmpliFund tasks to your calendar, login into AmpliFund. Verify you are on the home screen with AmpliFund's calendar.

If you are not, click: Activity (left navigation) > Calendar



On AmpliFund's calendar, click the **Subscribe icon** in the top right corner.

On the popup, **Click to Sync Your Calendar** or use the **WebCal URL** to add your AmpliFund calendar to your personal calendar.

Types of Tasks

Automatic

If your Performance or Budget Reporting Periods are turned on in your Award, AmpliFund will automatically create a Task for each one for each period. Not all awards use Performance Tracking Periods or Budget Tracking Periods.

These automatic tasks will default assigned to the **Recipient Grant Manager**. If there is not a Recipient Grant Manager yet, it will default to the Account Owner.

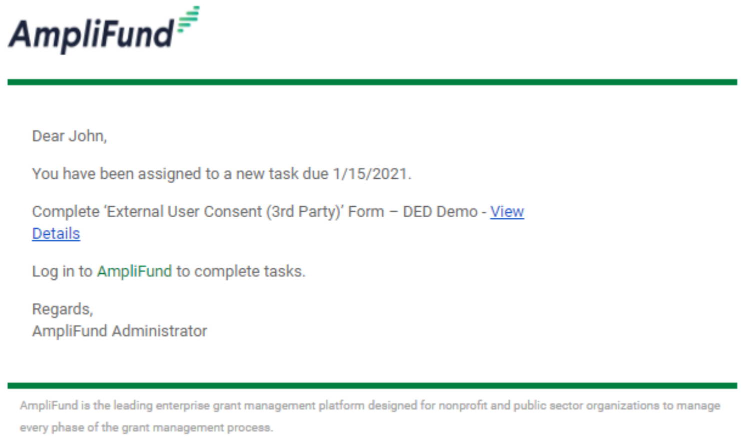
Object Type	Object Name	Name	Responsible Individual	Due Date	Task Status
Grant	DED Demo	Budgeting Tracking Period Due - DED Demo	John Doe	9/30/2020	Not Started
Grant	DED Demo	Performance Tracking Period Due - DED Demo	John Doe	9/30/2020	Not Started
Grant	DED Demo	Budgeting Tracking Period Due - DED Demo	John Doe	10/31/2020	Not Started
Grant	DED Demo	Performance Tracking Period Due - DED Demo	John Doe	10/31/2020	Not Started

Manual

Tasks can also be created by DED users, such as your Program Rep, or other users in your Recipient Portal. Tasks created by DED users are automatically assigned to the **Recipient Grant Manager** if they have been chosen.

Notification of a Task

Except for the automatic tasks, you will receive a **New Task Notification** email when you are assigned a Task.


AmpliFund

Dear John,

You have been assigned to a new task due 1/15/2021.

Complete 'External User Consent (3rd Party)' Form – DED Demo - View Details

Log in to AmpliFund to complete tasks.

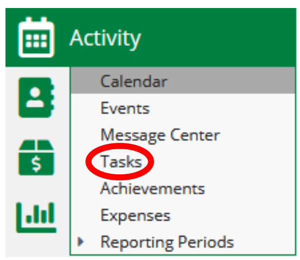
Regards,
AmpliFund Administrator

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

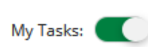
Where To View in AmpliFund

All Tasks

Login to AmpliFund: Activity (left navigation) > Tasks

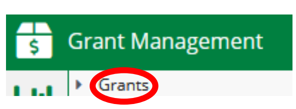


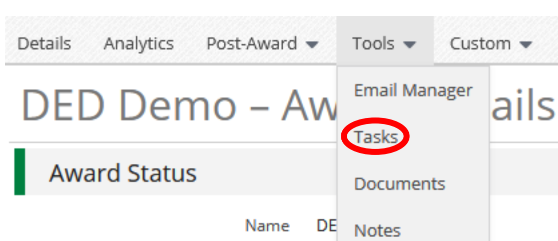
This viewing grid will list all Tasks assigned to the User as the **Responsible Individual** or an **Additional Individual(s)**. If the User logged in has a security role of Organizational Admin, they can toggle the **My Tasks** on the right side off to view all Tasks for all users. If the User is not an Organizational Admin, toggling will allow the User to see the Tasks they have assigned to other users.



Tasks on Awards

Login to AmpliFund: Grant Management (left navigation) > Grants > [Choose Your Grant] > Tools (tab) > Tasks





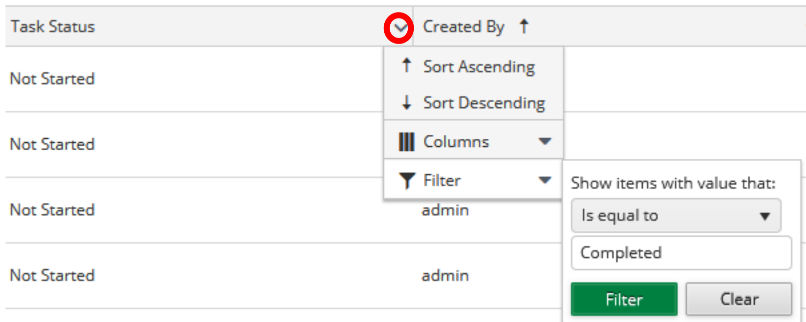
This viewing grid will list all Tasks assigned to the specific Award.

Filtering Tasks/Adding Columns in the Viewing Grid

On both viewing grids, Users can add columns and add filters to the Tasks.

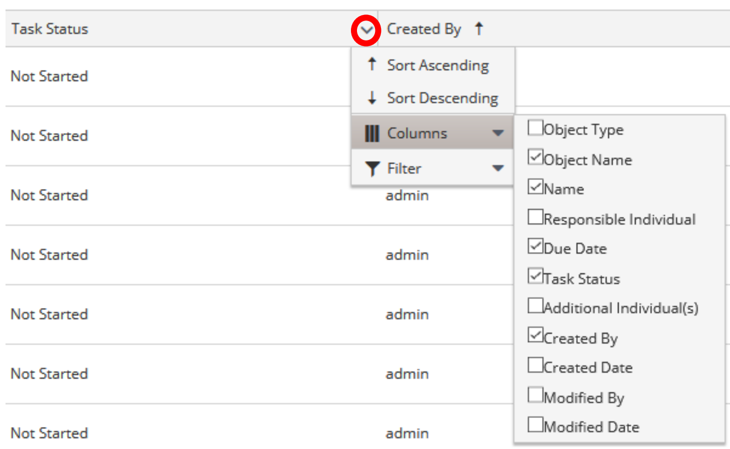
Filtering Tasks

Left click on the down arrow in the column header that you want the filter on > Filter > [Choose and enter your filter criteria]



Adding Columns

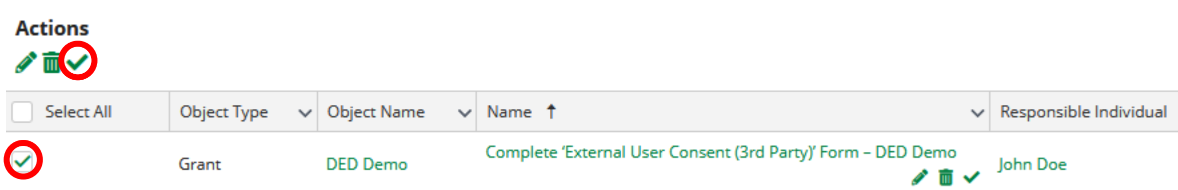
Left click on the down arrow in any of the column headers > Columns > [Select columns to add or deselect to remove]



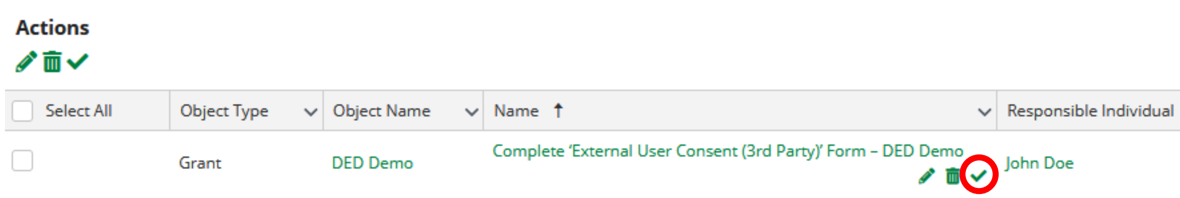
Completing Tasks

There are 3 ways to mark a Task as complete:

1. Select the specific Task and use the **Mark as Complete** checkmark icon under **Actions**.



2. Click the **Checkmark icon** on the Task row.



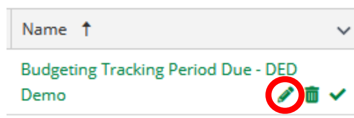
3. Click into the Task Name to see the description, and click the **Mark as Complete** checkmark icon in the top right corner.

After marking the Task as complete, the **Task Status** will be "Completed".

Assigning Tasks (Editing Tasks)

The Recipient Grant Manager or an Organizational Admin user for the Recipient Account can edit Tasks including who it is assigned to. The Responsible Individual or Additional Individual(s) can also edit the Task.

To edit a Task, click the edit pencil icon.



You can assign 1 user as the **Responsible Individual**, and multiple users as **Additional Individuals**.

Click **Save** when you are complete.

NOTE: *Assigning a different user to a Task that has already been created will not send a notification email.*