



AmpliFund Applicant Portal Training

Session 1: May 10, 2016

Session 2: May 11, 2016

Disclosure:

Today's session is being recorded.



Session Goal & Agenda

Session Goal: Familiarize attendees with AmpliFund's Applicant Portal

Agenda:

- **Accessing an Online Application**
- **Applying for an Opportunity**
 - Registering on the AmpliFund Applicant Portal
 - Logging into the AmpliFund Applicant Portal
 - Starting an Application After Registering or Logging In
 - Entering Responses on an Application Form
 - Submitting an Application
- **Exploring the Applicant Portal**
 - Application Progress Bar & Other Applicant Portal Icons
 - Application Pages Overview
 - Application Page Buttons
 - Opportunity Details Page
 - Project Information Page
 - Application Forms Page
 - Submit Page
- **Accessing an In Progress Application**
- **Creating Multiple Applications**
- **Reviewing Additional Navigation Elements & Features**
 - User Navigation Menu
 - Logo
 - Applications List
 - Deleting an Application
 - Account Information
 - Users
 - FAQ
- **Support Procedures**

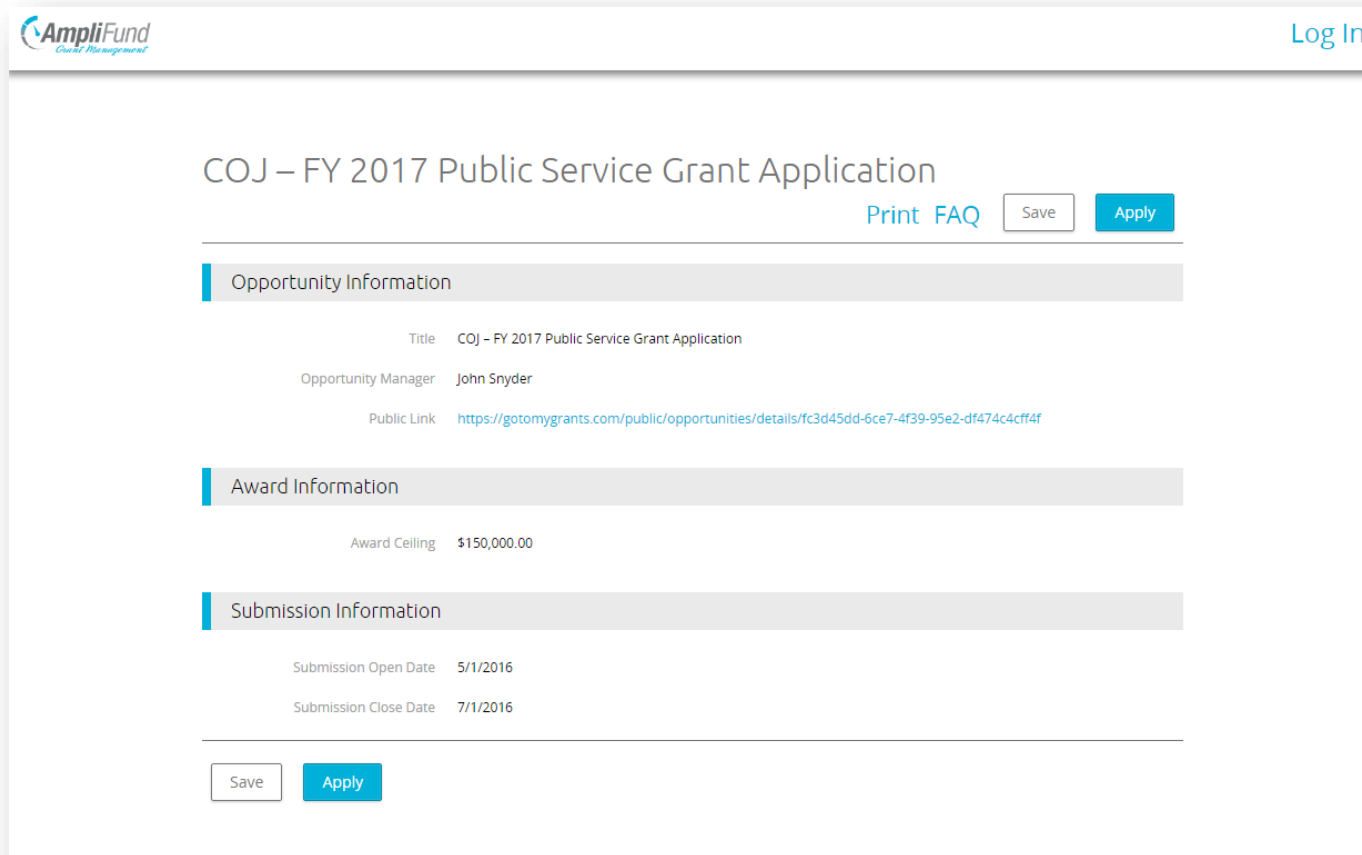


Accessing an Online Application

Accessing an Online Application

COJ - FY 2017 Public Service Grant Application Public Link:

<https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f>



The screenshot shows the AmpliFund Grant Management interface. At the top left is the AmpliFund logo, and at the top right is a "Log In" link. The main heading is "COJ – FY 2017 Public Service Grant Application". To the right of the heading are links for "Print", "FAQ", and buttons for "Save" and "Apply". Below the heading is a section titled "Opportunity Information" which contains the following details:

Title	COJ – FY 2017 Public Service Grant Application
Opportunity Manager	John Snyder
Public Link	https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f

Below this is a section titled "Award Information" which contains:

Award Ceiling	\$150,000.00
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Below that is a section titled "Submission Information" which contains:

Submission Open Date	5/1/2016
Submission Close Date	7/1/2016

At the bottom of the form are "Save" and "Apply" buttons.



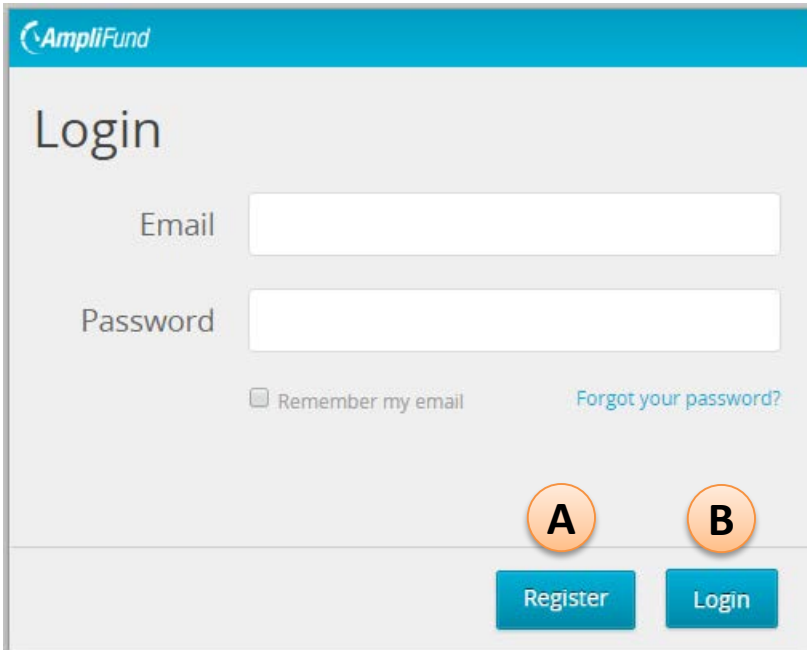
Applying for an Opportunity

Applying for an Opportunity

To apply:

Click the **Apply** button 

The AmpliFund Login window displays



The image shows the AmpliFund Login window. It has a blue header with the AmpliFund logo. Below the header, the word "Login" is displayed. There are two input fields: "Email" and "Password". Below the "Email" field is a checkbox labeled "Remember my email". To the right of the "Password" field is a link that says "Forgot your password?". At the bottom of the window, there are two buttons: "Register" and "Login". Above the "Register" button is a yellow circle with the letter "A", and above the "Login" button is a yellow circle with the letter "B".

A New AmpliFund Users

To register on the AmpliFund Applicant Portal:

 Register




B Existing AmpliFund Users


To login to the AmpliFund Applicant Portal:

 Login

A Registering on AmpliFund Applicant Portal

To register on the AmpliFund Applicant Portal:

1. Click the **Register** button on the **Login** window

2. Complete the **Create New Account** form
 - User Information
 - Contact Information (for individual)
 - Contact Information (for organization)
3. Click the **Register** button located in the lower right-hand corner of the **Create New Account** form

4. Click the **I Accept** button on the license agreement page




Create New Account

If you have already registered, please click [here](#) to login.

User Information

Email Address*

Password*

Confirm Password*

Contact Information

First Name*

Middle Name

Last Name*

Suffix

Title

Address Line 1*

Address Line 2

City*

State*

Postal Code*

Logging into the AmpliFund Applicant Portal



To login to the AmpliFund Applicant Portal:


1. Enter **Email**
2. Enter **Password**
3. Click the **Login** button on the **Login** window



Starting an Application After Registering or Logging In

To start an application after registering or logging in:

1. Click the **Apply** button on the **Opportunity Details** page 
2. Update the **Application Name** and the **Total Amount of Award Requested** on the **Project Information** page
3. Edit the **Primary Contact Information** if needed
4. Click the **Save & Continue** button to move to the **Application Forms** page 



The screenshot shows the AmpliFund Grant Management interface. At the top, the logo "AmpliFund Grant Management" is on the left, and the user "mb_cojapplicant1" is on the right. The main heading is "COJ – FY 2017 Public Service Grant Application". Below this is a progress bar with four steps: "Opportunity Details" (checked), "Project Information" (active), "Application Forms", and "Submit". The "Project Information" section is active, showing a "Save" button and a "Save & Continue" button. Below this is a section titled "Application Information" with a yellow border. It contains two fields: "Application Name*" with the value "Helping Way - Food Assistance for Homeless" and a dropdown arrow, and "Total Amount of Award Requested" with the value "\$5,000.00". Below this is a section titled "Primary Contact Information".

Entering Responses on an Application Form

To enter responses on an application form:



1. Click on the form name on the **Application Forms** page
2. Enter your question responses and upload documents
3. To save progress and stay on the form, press the **Save** button
4. To save progress and continue to the next application section, press the **Save & Continue** button

The screenshot shows the AmpliFund Grant Management web application. At the top, the logo is on the left and the user ID 'mb_cojapplicant1' is on the right. The main heading is 'COJ – FY 2017 Public Service Grant Application'. Below this is a progress bar with four steps: 'Opportunity Details' (checked), 'Project Information' (checked), 'Application Forms (1)' (active), and 'Submit' (disabled). A 'Save & Continue' button is in the top right. The 'Forms' section contains a table with one row: '2017 Public Service Grant Application Template' with a status of 'New' and a print icon. The table has columns for Name, Status, and Print. Below the table is a pagination bar showing '1' of 1 items and a '25 items per page' dropdown. A 'Save & Continue' button is at the bottom.

Name	Status	Print
2017 Public Service Grant Application Template	New	

Submitting an Application

To submit an application:

1. Review all areas of the application including **Project Information** and **Application Forms** to confirm that your application is complete and that you are ready to submit your application
2. Click the **Submit** icon  on the application progress bar to access the **Submit** application page
3. Review information on the **Submit** application page including any warning messages about **New** or **In Progress** forms and make edits to your forms as needed
4. When all forms are complete and you are ready to submit your application, click the **Submit** button on the **Submit** application page 

IMPORTANT NOTE:

Once you submit your application, you will not be able to edit your responses.



Exploring the Applicant Portal

Application Progress Bar & Other Applicant Portal Icons

Application Progress Bar



Application Progress Bar Icons	
	Incomplete Step
	Current Step
	Saved Step
	Completed Step
	Current step and saved or completed

Other Applicant Portal Icons

Other Applicant Portal Icons	
	Create
	Edit
	Delete
	Print

Application Pages Overview



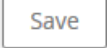


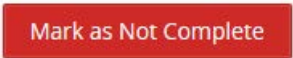

The following pages are accessible from the Application Progress Bar:

- **Opportunity Details** – Page provides basic information about the opportunity. No action is required by the applicant on this page.
- **Project Information** – Page allows applicants to define the Application Name and Amount of Award Requested. By default, the Application Name displays as the Opportunity Name as defined by the funder, and the Primary Contact as the user who started the application process.
- **Application Forms** – Page provides access to the customized application forms created by the funder.
- **Submit** – The Submit page is the final step in returning your organization application to the funder. Once your application has been submitted, you cannot edit your application. Clicking the Submit button notifies the funder that your organization has submitted an application.

Application Page Buttons

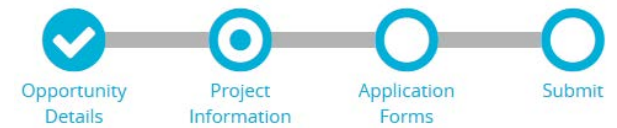



The buttons that display on the application page vary based on the page:

- **Save** 
To save progress and stay on the current page
- **Save & Continue** 
To save progress and move to the next page
- **Mark as Complete** 
To mark the page as complete
- **Mark as Not Complete** 
To mark the page as not complete
- **Submit** 
To submit the application to the funder

Page	Application Page Buttons				
	Save	Save & Continue	Mark as Complete	Mark as Not Complete	Submit
Opportunity Details		X			
Project Information	X	X	X	X	
Application Forms	X	X	X	X	
Submit					X

Opportunity Details Page



mb_cojapplicant1

COJ – FY 2017 Public Service Grant Application

Opportunity Details

Project Information

Application Forms

Submit

Opportunity Details ✓

Save & Continue

Opportunity Information

Title

COJ – FY 2017 Public Service Grant Application

Opportunity Manager

John Snyder

Public Link

<https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f>

Award Information

Submission Information

Submission Open Date

5/1/2016

Submission Close Date

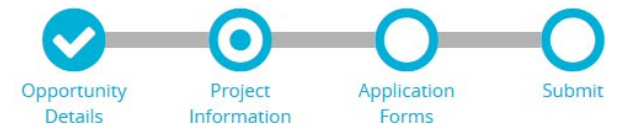
7/1/2016

Submission Timeline Type

One-Time

Save & Continue

Project Information Page



mb_coapplicant1

COJ – FY 2017 Public Service Grant Application



Project Information

Save

Save & Continue

Application Information

Application Name* ✓

Total Amount of Award Requested

Primary Contact Information

Application Forms Page



mb_coapplicant1

COJ – FY 2017 Public Service Grant Application



Forms

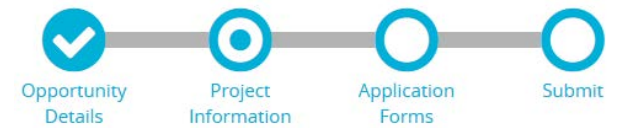
Save & Continue

Name	Status	Print	
2017 Public Service Grant Application Template	New		

1 25 items per page 1 - 1 of 1 items

Save & Continue

Submit Page



mb_cojapplicant1 ◀

COJ – FY 2017 Public Service Grant Application



You are about to submit your application, **Helping Way - Food Assistance for Homeless**, to **City of Jacksonville**

Take the time to review your application by using the timeline above. You can select any section and jump to that page.

When the application is fully complete, please select the "Submit button". This will submit your final application to the funder.

You have forms that are either "New" or "In Progress" for this application!

Submit

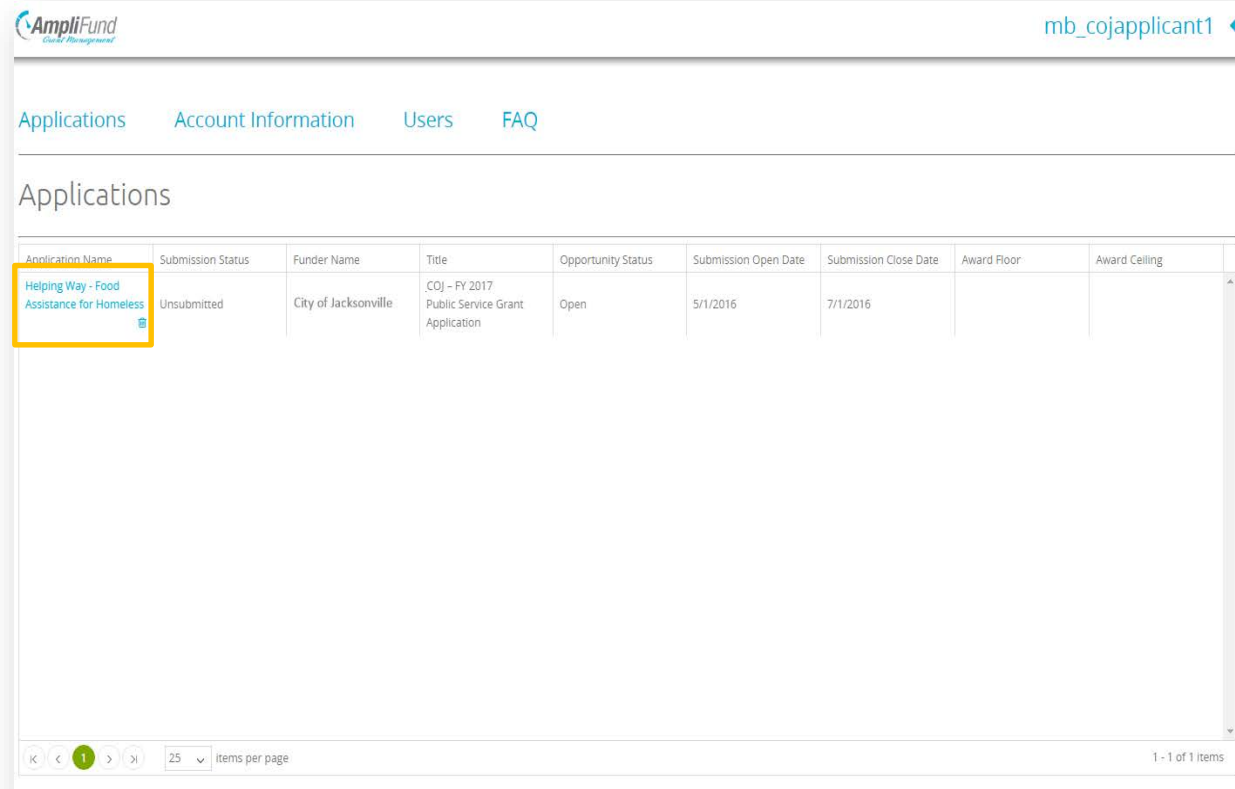


Accessing an In Progress Application

Accessing an In Progress Application

To access an in progress application:

1. Go to gotomygrants.com
2. Enter **Email**
3. Enter **Password**
4. Click **Login**
5. Click on the **Application Name** link in the application grid to access the application



Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		



Creating Multiple Applications

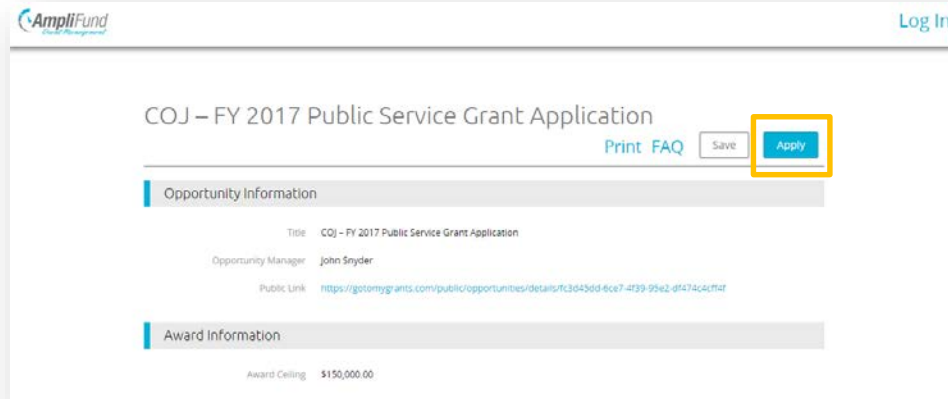
Creating Multiple Applications

To create an application for another program:

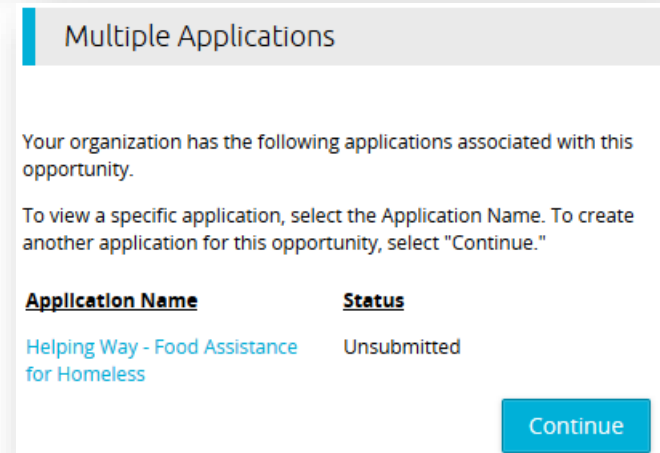
1. Go to the **COJ - FY 2017 Public Service Grant Application Public Link:**
<https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f>
2. Click the **Apply** button
3. Enter **Email**
4. Enter **Password**
5. Click the **Login** button on the **Login** window

*Note: After logging in, the **Opportunity Information** page will display again.*

6. Click **Apply**
7. Click the **Continue** button in the **Multiple Applications** window to create another application



The screenshot shows the 'COJ - FY 2017 Public Service Grant Application' page. At the top right, there is a 'Log In' link. Below the title, there are links for 'Print', 'FAQ', 'Save', and a blue 'Apply' button which is highlighted with a yellow box. The page is divided into two main sections: 'Opportunity Information' and 'Award Information'. Under 'Opportunity Information', the title is 'COJ - FY 2017 Public Service Grant Application', the Opportunity Manager is 'John Snyder', and the Public Link is 'https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f'. Under 'Award Information', the Award Ceiling is '\$150,000.00'.



The screenshot shows the 'Multiple Applications' window. It contains the following text: 'Your organization has the following applications associated with this opportunity. To view a specific application, select the Application Name. To create another application for this opportunity, select "Continue."' Below this is a table with two columns: 'Application Name' and 'Status'. The first row shows 'Helping Way - Food Assistance for Homeless' under the Application Name column and 'Unsubmitted' under the Status column. At the bottom right of the window is a blue 'Continue' button.

Application Name	Status
Helping Way - Food Assistance for Homeless	Unsubmitted

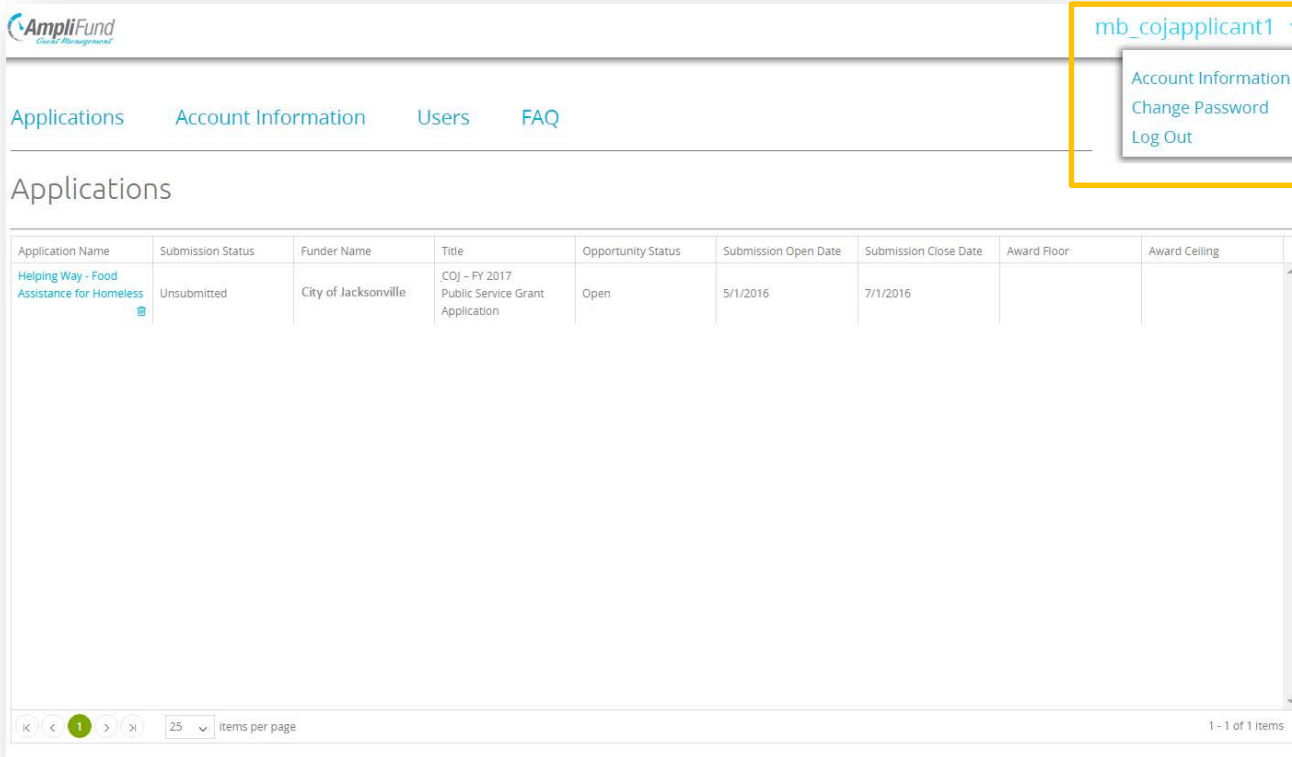


Reviewing Additional Navigation Elements & Features

User Navigation Menu

To access the User Navigation menu:

1. Click the arrow next to your user name in the upper right corner of the screen to display the **User Navigation** menu



The screenshot shows the AmpliFund Grant Management interface. In the top right corner, the user name "mb_cojapplicant1" is displayed with a dropdown arrow. A yellow box highlights the dropdown menu, which contains the following options: "Account Information", "Change Password", and "Log Out". Below the navigation bar, there is a section titled "Applications" with a table of application data.

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

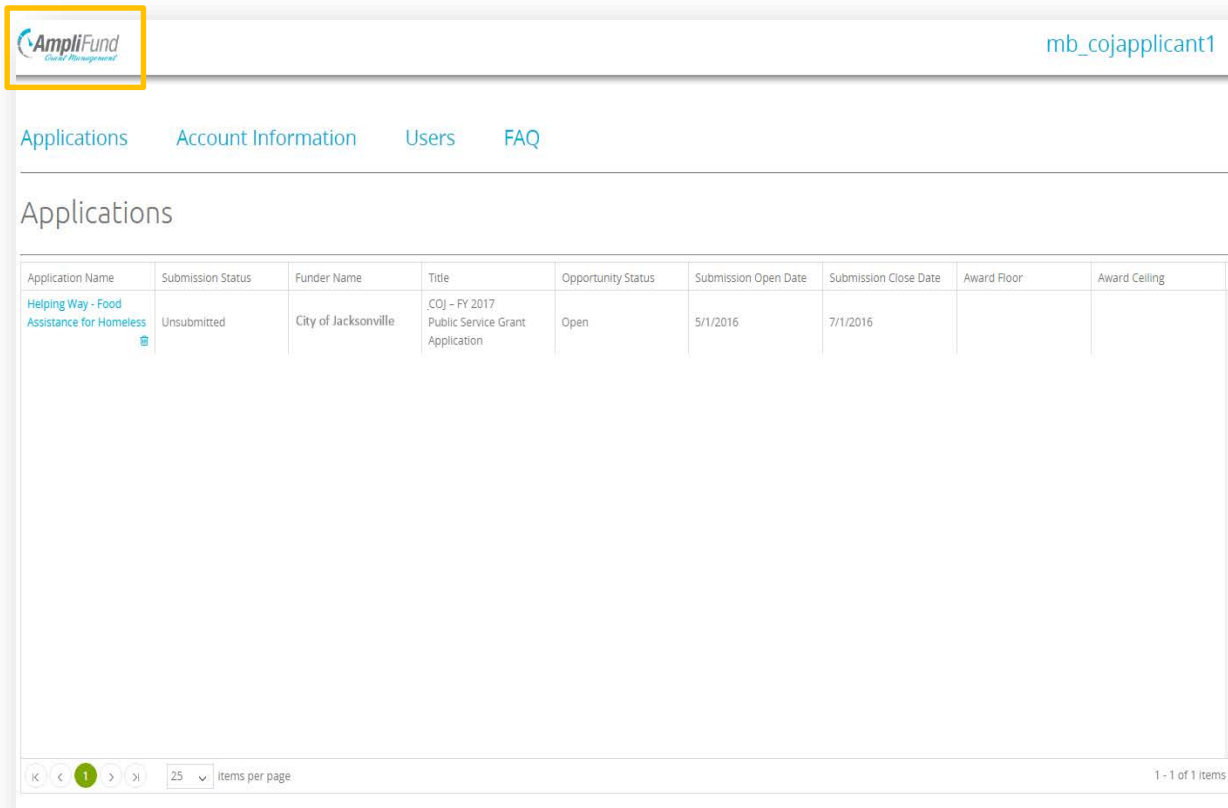
At the bottom of the page, there is a pagination bar showing "1 - 1 of 1 items" and a "25 items per page" dropdown.

From the **User Navigation** menu, users may update **Account Information**, **Change Password**, or **Log Out** of the Applicant Portal.

Logo

To return to the Applications List:

1. Click on the **logo** in the upper left corner of the screen



The screenshot shows the AmpliFund Grant Management Applicant Portal. The logo is highlighted with a yellow box in the top left corner. The user is logged in as mb_cojapplicant1. The main navigation bar includes Applications, Account Information, Users, and FAQ. The Applications section is active, displaying a table of applications.

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

At the bottom of the page, there is a pagination control showing 1 - 1 of 1 items and a dropdown menu for items per page set to 25.

Clicking on the **logo** in the top left corner of any page in the Applicant Portal navigates the user back to the list of applications. The **logo** is available from every page in the Applicant Portal.

Applications List

To return to the Applications List:

1. Click on the **logo** in the upper left corner of the screen

The screenshot displays the AmpliFund Grant Management interface. At the top left is the AmpliFund logo, which is highlighted with a yellow box. To its right is the user identifier 'mb_cojapplicant1'. Below the header is a navigation menu with 'Applications' highlighted in a yellow box, alongside 'Account Information', 'Users', and 'FAQ'. The main content area is titled 'Applications' and contains a table with the following data:

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

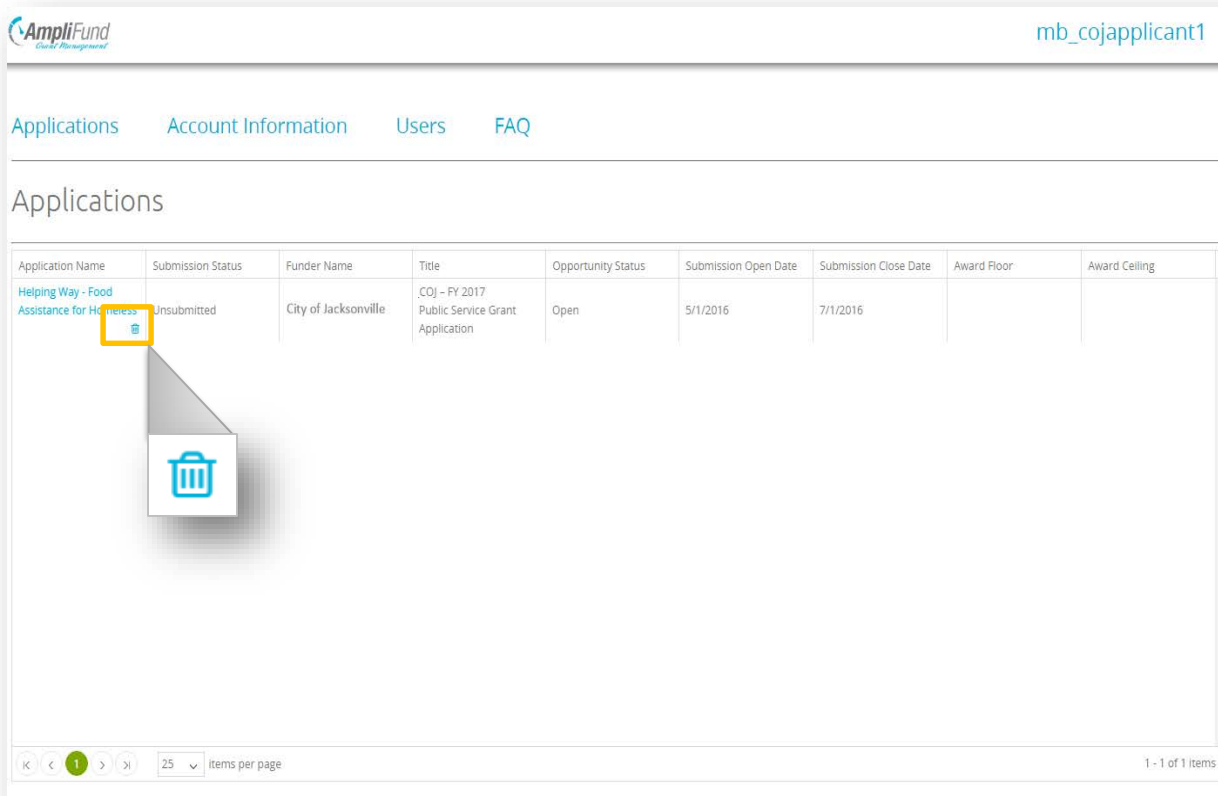
At the bottom of the page, there are pagination controls showing '1' of 1 items and a dropdown for 'Items per page' set to 25.

The **Applications List** contains all applications that an applicant organization has saved, started, or submitted. Applications will appear on the list between the opportunity's **Posted Date** and **Archive Date**. After the **Archive Date** occurs, the application will no longer appear on the listing page.

Deleting an Application

To delete an application:

1. On the **Applications List**, Click the **Delete** icon  next to the name of the application you wish to delete



The screenshot shows the AmpliFund Grant Management interface. The top navigation bar includes the AmpliFund logo, the user name 'mb_cojapplicant1', and tabs for 'Applications', 'Account Information', 'Users', and 'FAQ'. The 'Applications' tab is active, displaying a table of applications. The first application is highlighted, and a tooltip showing the 'Delete' icon is visible. The table has columns for Application Name, Submission Status, Funder Name, Title, Opportunity Status, Submission Open Date, Submission Close Date, Award Floor, and Award Ceiling.

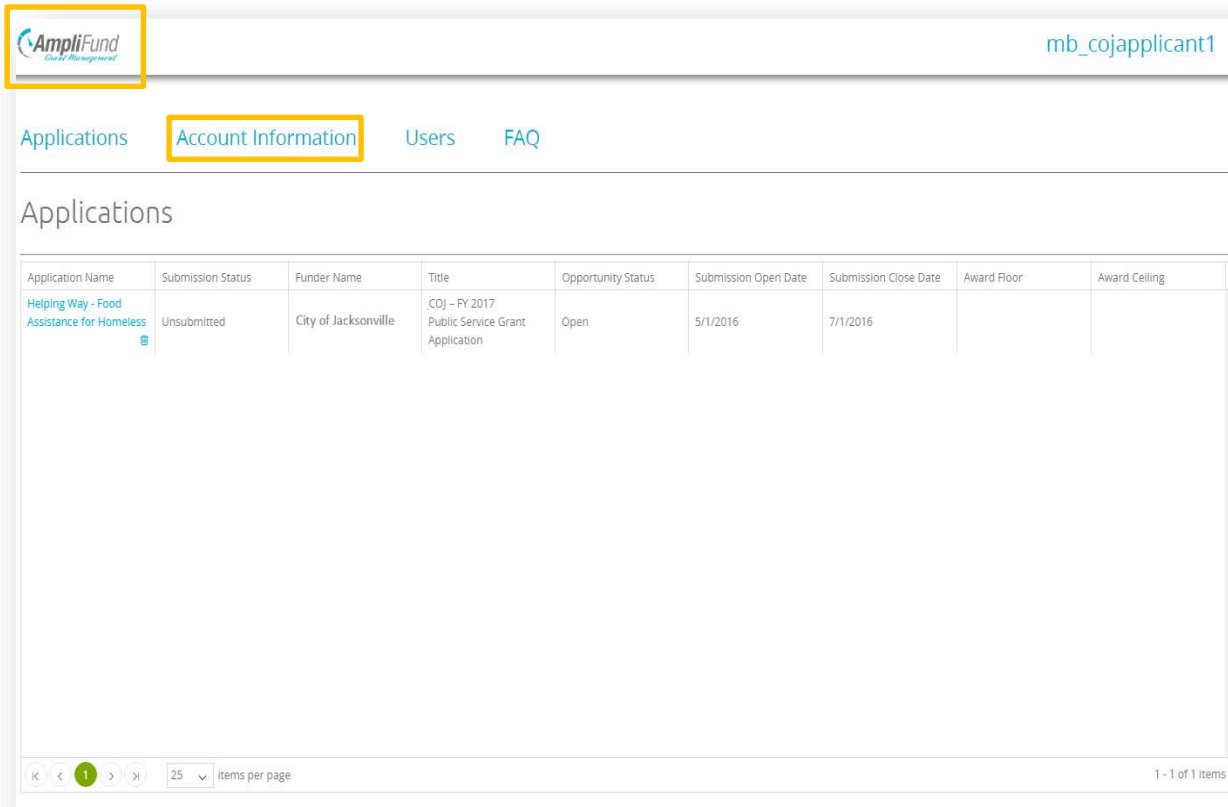
Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

Un-submitted applications may be deleted by the applicant to remove them from the applicant portal. Once deleted, the application is no longer accessible.

Account Information

To access Account Information:

1. Click on the **logo** in the upper left corner of the screen
2. Click on **Account Information**



The screenshot displays the AmpliFund Grant Management interface. The top navigation bar includes the AmpliFund logo (highlighted with an orange box), the user name 'mb_cojapplicant1', and a dropdown arrow. Below the navigation bar, a secondary menu contains 'Applications', 'Account Information' (highlighted with an orange box), 'Users', and 'FAQ'. The main content area is titled 'Applications' and features a table with the following data:

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

At the bottom of the page, there is a pagination control showing '1' of 1 items and a '25 items per page' dropdown.

On the **Account Information** page, a user may update contact information.

Users

To add additional Users:

1. Click on the **logo** in the upper left corner of the screen
2. Click on **Users**

The screenshot shows the AmpliFund Grant Management Applicant Portal. The top navigation bar includes the AmpliFund logo (highlighted with an orange box), the user name 'mb_cojapplicant1', and navigation links for 'Applications', 'Account Information', 'Users' (highlighted with an orange box), and 'FAQ'. Below the navigation bar, the 'Applications' section is displayed, featuring a table with the following data:

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

At the bottom of the page, there is a pagination control showing '1 - 1 of 1 items' and a dropdown menu for 'Items per page' set to '25'.

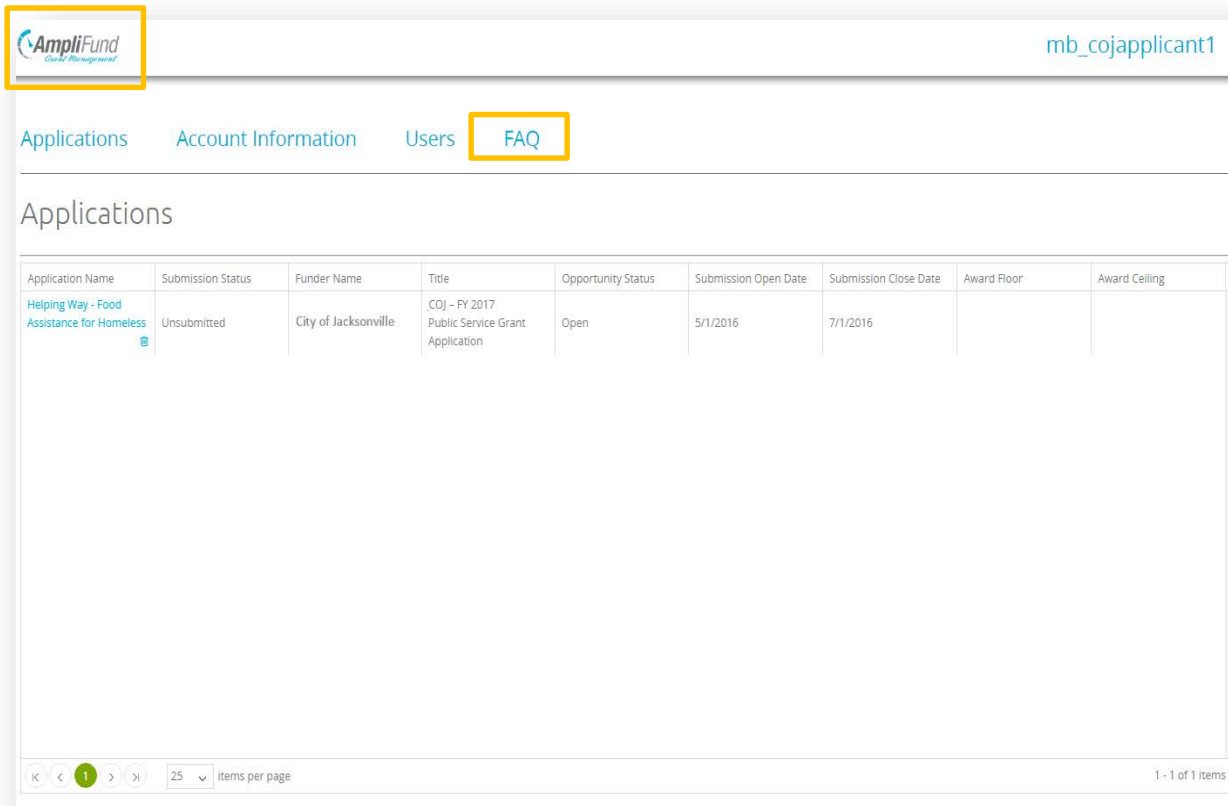
When applications involve collaboration amongst multiple people, additional **users** may be created within one organization's applicant organization

Note: When adding additional users to the Applicant Portal, you need to communicate the login credentials to the users so that they are able to login.

FAQ

To access the FAQ page:

1. Click on the **logo** in the upper left corner of the screen
2. Click on **FAQ**



The screenshot shows the AmpliFund Applicant Portal interface. The top navigation bar includes the AmpliFund logo (highlighted with a yellow box), the user name 'mb_cojapplicant1', and a navigation menu with links for 'Applications', 'Account Information', 'Users', and 'FAQ' (highlighted with a yellow box). Below the navigation bar, the 'Applications' section is displayed, featuring a table with the following data:

Application Name	Submission Status	Funder Name	Title	Opportunity Status	Submission Open Date	Submission Close Date	Award Floor	Award Ceiling
Helping Way - Food Assistance for Homeless	Unsubmitted	City of Jacksonville	COJ - FY 2017 Public Service Grant Application	Open	5/1/2016	7/1/2016		

At the bottom of the page, there is a pagination control showing '1' of 1 items and a dropdown menu for 'Items per page' set to '25'.

The **FAQ** page provides access **AmpliFund Applicant Portal** documentation.

Note: The **AmpliFund Applicant Portal** documentation accessible from the **FAQ** page is not customer specific. Therefore, your funding organization may not be utilizing all of the features discussed in this document.



Support Procedures

Support Procedures

- **John Snyder**, City of Jacksonville, is the primary point of contact for all questions related to the application process and requirements
- **John Snyder** will contact StreamLink's Customer Success Team via the AmpliFund Support Portal (<http://amplifund.zendesk.com>) if he determines that a question requires technical assistance from StreamLink
- StreamLink Software's support hours are 8:00 AM – 8:00 PM (Monday – Friday)
- **John Snyder** will be available until 7:00 PM on July 1, 2016

Phone Contact Information:

- John Snyder: 904.255.8202
- StreamLink Software Support: 216.377.5500
 - Dial 2 for customer support; then dial 1 for AmpliFund Customer Success