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
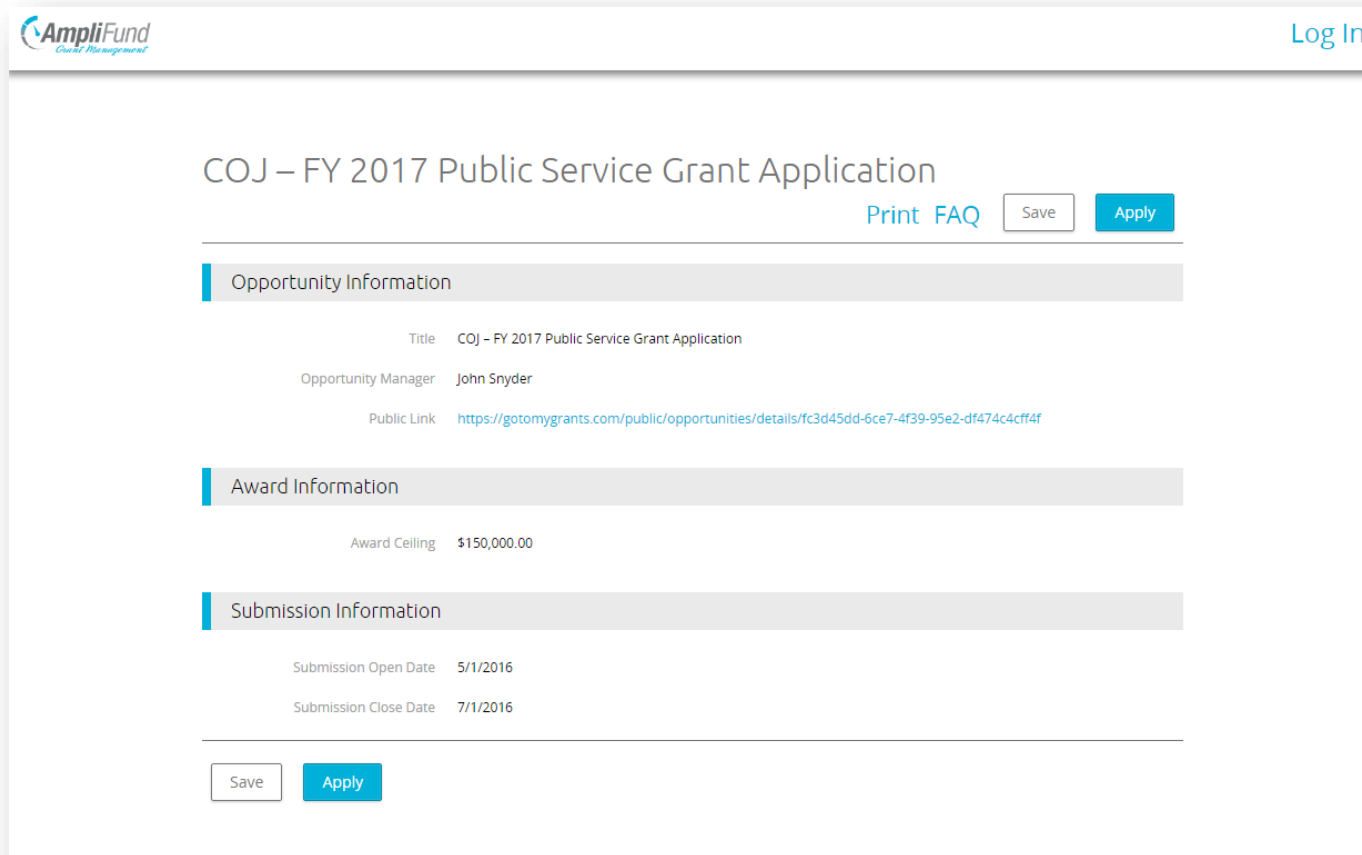 - FAQ

- **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

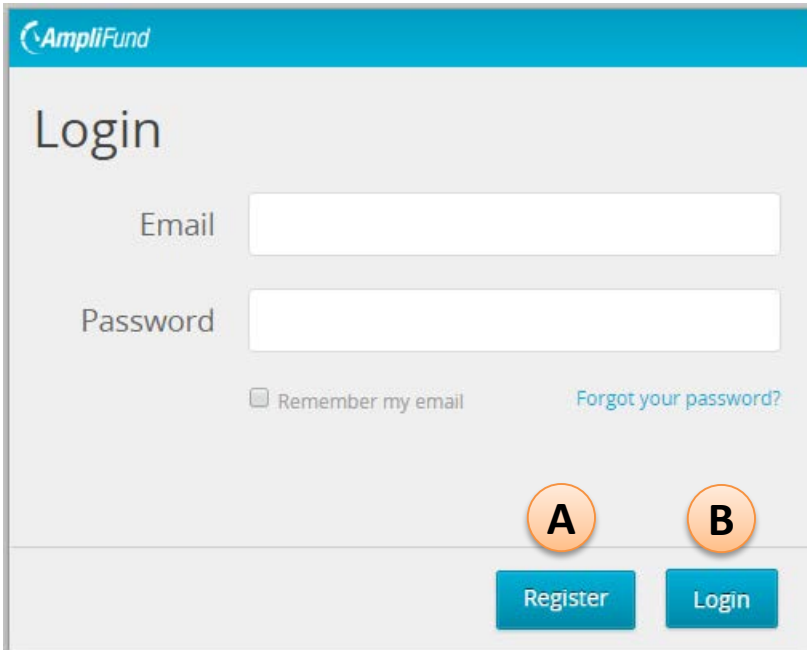# Applying for an Opportunity

Applying for an Opportunity

To apply:

Click the **Apply** button `Apply`

The AmpliFund Login window displays

A **New AmpliFund Users**
To register on the AmpliFund Applicant Portal:

`Register`

B **Existing AmpliFund Users**
To login to the AmpliFund Applicant Portal:

`Login`

Registering on AmpliFund Applicant Portal

To register on the AmpliFund Applicant Portal:

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

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 [Register]

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

AmpliFund
Grant Management

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 ![Apply]

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 ![Save & Continue]

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 [Save]

4. To save progress and continue to the next application section, press the **Save & Continue** button

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
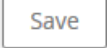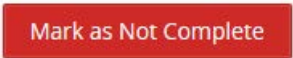
The following pages are accessible from the Application Progress Bar:

- **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** `Save`
  To save progress and stay on the current page

- **Save & Continue** `Save & Continue`
  To save progress and move to the next page

- **Mark as Complete** `Mark as Complete`
  To mark the page as complete

- **Mark as Not Complete** `Mark as Not Complete`
  To mark the page as not complete

- **Submit** `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

Project Information Page

Application Forms Page

Submit Page

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
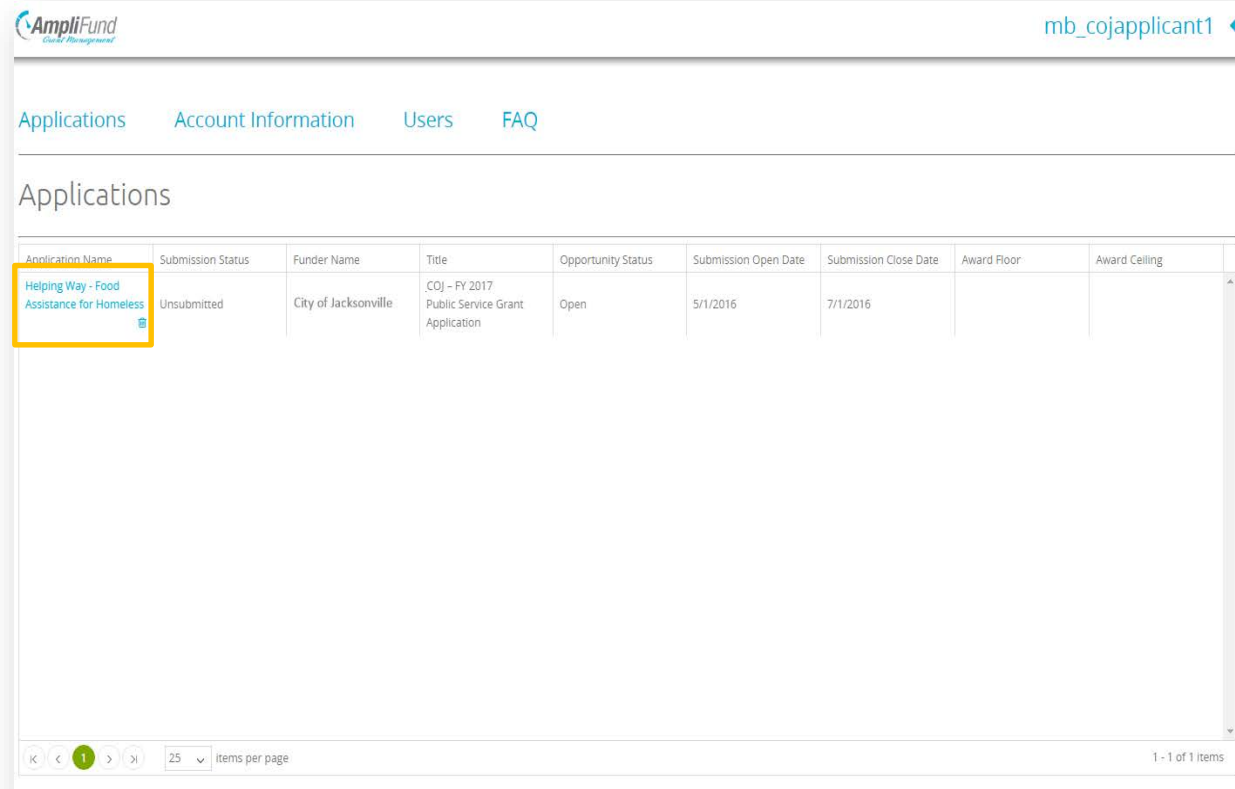
Accessing an In Progress Application

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

Creating Multiple Applications

Creating Multiple Applications

To create an application for another program:
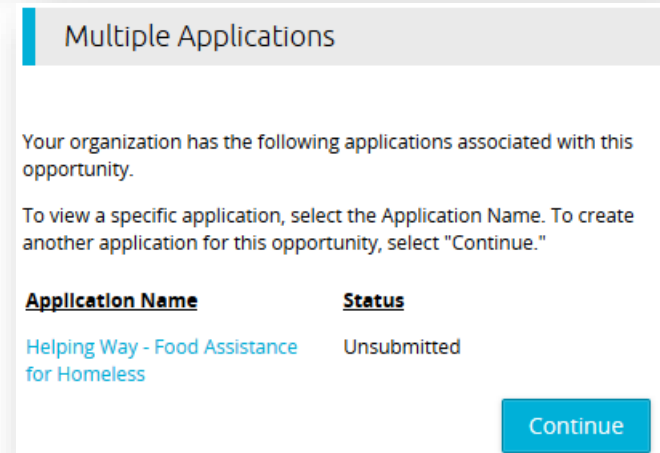
1. Go to the **COJ - FY 2017 Public Service Grant Application Public Link**:
   https://gotomygrants.com/public/opportunities/details/fc3d45dd-6ce7-4f39-95e2-df474c4cff4f

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

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

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

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 **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

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**

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
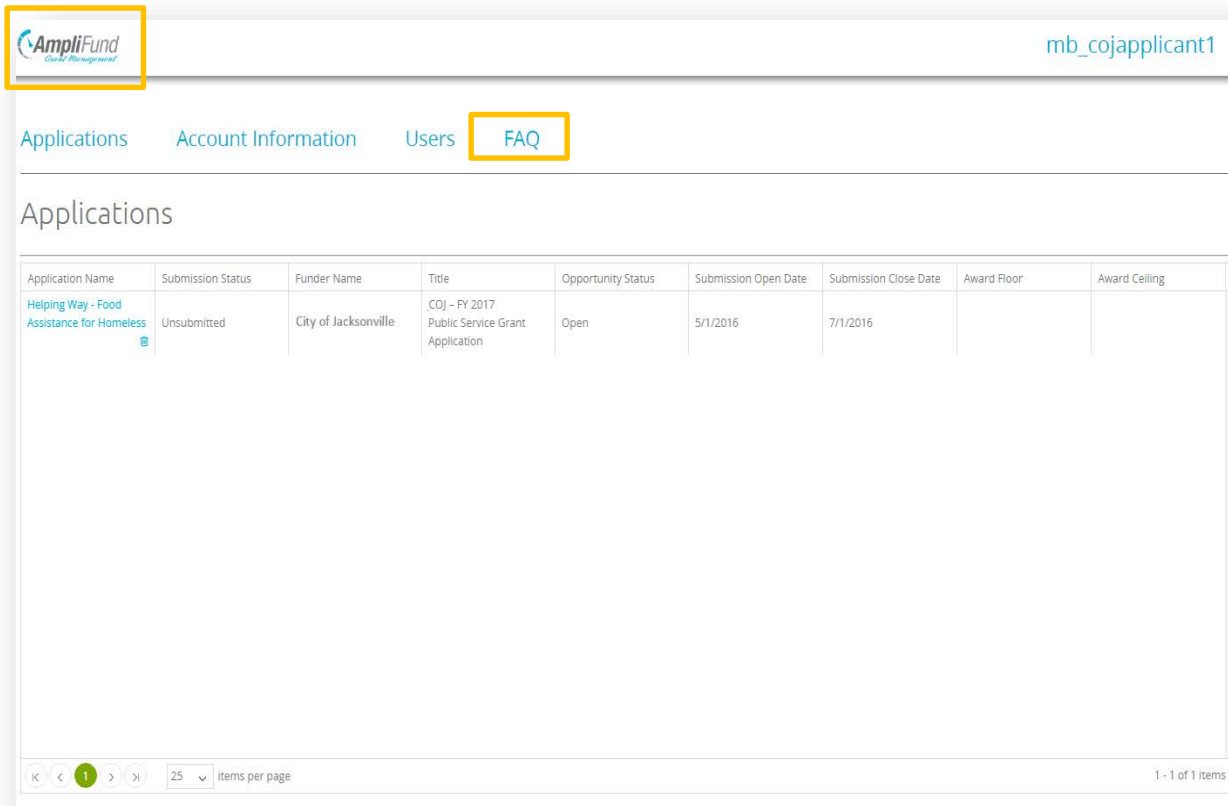2. Click on **Users**

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 **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