

Budget Management Updates

Training 1: Administration & Contact Management Updates

Agenda

- Introductions
- Budget Management Updates
- Training Schedule & Office Hours
- Available Materials & Support
- Administration Updates
- Contact Management Updates
- Questions

Introductions



- Jillian Neimeister, Product Trainer
- Christy Pellegrino, Product Trainer
- Kevin French, VP of Customer Success

Budget Management Updates

Administration Updates

- Budget Categories List
- Benefit Types List

Contact Management Updates

- Staff Compensation History
-

Grant Management Updates

- Left Navigation Update
- Budget Settings
- Budget Creation and Management

Training Schedule & Office Hours

Training 1: Administration & Contact Management Updates

- July 21, 11:00 am – 12:00 pm (EDT)
- July 26, 2:00 pm – 3:00 pm (EDT)
- July 28, 11:00 am – 12:00 pm (EDT)

Training sessions will be recorded and accessible on demand on the support site.

Training 2: Grant Management Updates

- July 21, 2:00 pm – 3:00 pm (EDT)
- July 26, 11:00 am – 12:00 pm (EDT)
- July 28, 2:00 pm – 3:00 pm (EDT)

Office Hours

- July 26 – 29, 9:00 am – 5:00 pm (EDT)

Available Materials & Support

Updated Documentation

- Administration Guide
- Contact Management Guide
- Grant Management Guide
- Changes Matrix

Customer Support

- Office Hours: July 26 – 29, 9:00 am – 5:00 pm (EDT)
- Support Hours: Monday – Friday, 8:00 am – 8:00 pm (EDT)
- Support Site and Tickets

Administration & Contact Management Updates

Administration



Administration → Lists → Categories

The screenshot shows the AmpliFund software interface. The top navigation bar includes the AmpliFund logo, 'StreamLink Software', and 'Demo User'. The left sidebar contains a navigation menu with 'Administration' selected and highlighted. Under 'Administration', the 'Lists' sub-menu is expanded, and 'Categories' is highlighted with a red box. The main content area displays a list of categories under the heading 'Administration Costs'. The categories listed are: Administration Costs, Agency Rent, Benefits, Business and Commerce, Capital Expenses, Capital Outlay (Equipment), Communications, Community Outreach, Compensation, Conferences/Workshops, Confidential Expenditures, Construction, and Consultant. At the bottom of the interface, there is a pagination control showing '1' of 5 items per page, and a total of '1 - 25 of 113 items'.

Administration

Updated View

Administration → Lists → Budget Categories

The screenshot displays the AmpliFund software interface. The top navigation bar includes the AmpliFund logo, a 'Back' button, and user information: 'StreamLink Software' and 'Demo User'. The left sidebar contains a menu with categories: Activity, Contacts, Grant Management, Project Management, Fund Management, Documents, Reports, Knowledge Center, and Administration. The Administration menu is expanded, showing sub-items: License Information, System Administration, System Security, Object Definition, Lists, Subjects, Budget Categories (highlighted with a yellow box), Fund Family Categories, Benefit Types, GL Accounts, Note Types, and Actuals. The main content area is titled 'Categories' and features a 'Back' button. It is divided into two sections: 'Federal Category Information' with a list of categories (- Construction, - Consultants/Contracts, - Equipment, - Fringe Benefits, - Personnel, - Supplies, - Travel) and 'Custom Category Information' with a list of categories (Administration Costs, Agency Rent, Benefits, Business and Commerce, Capital Expenses, Capital Outlay (Equipment), Communications, Community Outreach, Compensation). Each category in the Custom section has a blue pencil icon and a trash can icon. At the bottom right, there are 'Update' and 'Cancel' buttons.

Administration

Updated View

Administration → Lists → Benefit Types

The screenshot displays the AmpliFund software interface. The top navigation bar includes the AmpliFund logo, a 'Back' button, and user information: 'StreamLink Software' and 'Demo User'. The left sidebar contains a navigation menu with the following items: Activity, Contacts, Grant Management, Project Management, Fund Management, Documents, Reports, Knowledge Center, Administration (highlighted), License Information, System Administration, System Security, Object Definition, Lists (expanded), Subjects, Countries, Budget Categories, Fund Activity Categories, Benefit Types (highlighted with a yellow box), Note Types, and Actuals. The main content area is titled 'Benefits' and features a 'Benefit Type Information' section with a list of benefit types, each accompanied by an edit icon: FICA Rate Benefit, Fringe Benefit, Medical Benefit, Other Benefit, and Retirement Benefit. At the bottom right of the interface, there are 'Update' and 'Cancel' buttons.

Contact Management

Current View

Staff → Salary Tab

AmpliFund StreamLink Software Demo User

Back Details Contact Info **Salary** Relationships Tools

Lauren Austin - Salary History

Drag a column header and drop it here to group by that column

Compensation Type	Start Date	End Date	Position Type	Rate per Hour	Compensation Amount
Salary	1/1/2012	12/31/2013	Full Time	0.00	35,000.00
Salary	1/1/2014	12/31/2014	Full Time	0.00	42,000.00
Salary	1/1/2015	6/30/2015	Full Time	0.00	45,000.00
Salary	7/1/2015	12/31/2015	Full Time	0.00	50,000.00
Salary	1/1/2016	6/7/2016	Full Time	0.00	60,000.00
Salary	6/8/2016		Full Time	0.00	120,000.00

25 items per page 1 - 6 of 6 items

Contact Management



Staff → Salary History Entry

AmpliFund StreamLink Software ▾ Demo User ▾

Back ▾ i

Lauren Austin - Salary History

Start Date*	<input type="text" value="7/12/2016"/>	<input type="button" value="Calendar"/>
End Date	<input type="text" value="MM/DD/YYYY"/>	<input type="button" value="Calendar"/>
Position Type*	<input type="text" value="Part Time"/>	
Compensation Type*	<input type="text" value="Salary"/>	
Annual Salary	<input type="text" value="\$0.00"/>	
Status*	<input type="text" value="Enabled"/>	

Contact Management

Updated View

Staff → Compensation Tab

AmpliFund StreamLink Software Demo User

Back Details Contact Info **Compensation** Relationships Tools

Lauren Austin – Compensation History

Drag a column header and drop it here to group by that column

Compensation Type	Start Date	End Date	Position Type	Rate Per Hour	Benefits	Benefit Amount	Total Compensation
Salary	1/1/2012	12/31/2013	Full Time			\$0.00	\$35,000.00
Salary	1/1/2014	12/31/2014	Full Time			\$0.00	\$42,000.00
Salary	1/1/2015	6/30/2015	Full Time			\$0.00	\$45,000.00
Salary	7/1/2015	12/31/2015	Full Time			\$0.00	\$50,000.00
Salary	1/1/2016	6/7/2016	Full Time			\$0.00	\$60,000.00
Salary	6/8/2016		Full Time			\$0.00	\$120,000.00

25 items per page 1 - 6 of 6 items

Contact Management

Updated View

Staff → Compensation History Entry

AmpliFund StreamLink Software Demo User

Back

Lauren Austin - Compensation History

Compensation Details

Start Date*

End Date

Position Type **Full Time** ▼

Compensation Type **Salary** ▼

Annual Salary*

Benefit Type **FICA Rate Benefit** ?

Benefit Type	Amount	Benefit Amount
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Questions

