

Euna Grants: Recipient Training

Restore America's Estuaries

Agenda

Goal: Understand how to view your budget, create expense records and submit Payment Requests.

1. **Logging into Euna Grants**
2. **Adding Users**
3. **Navigating to your Award**
4. **Budget Navigation and Expense Tracking**
5. **Payment Request**
6. **Editing a Rejected Payment Request**

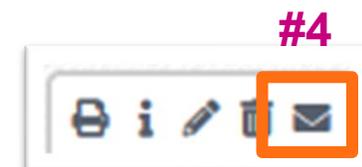
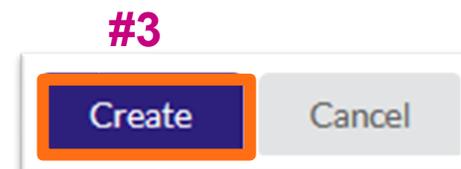
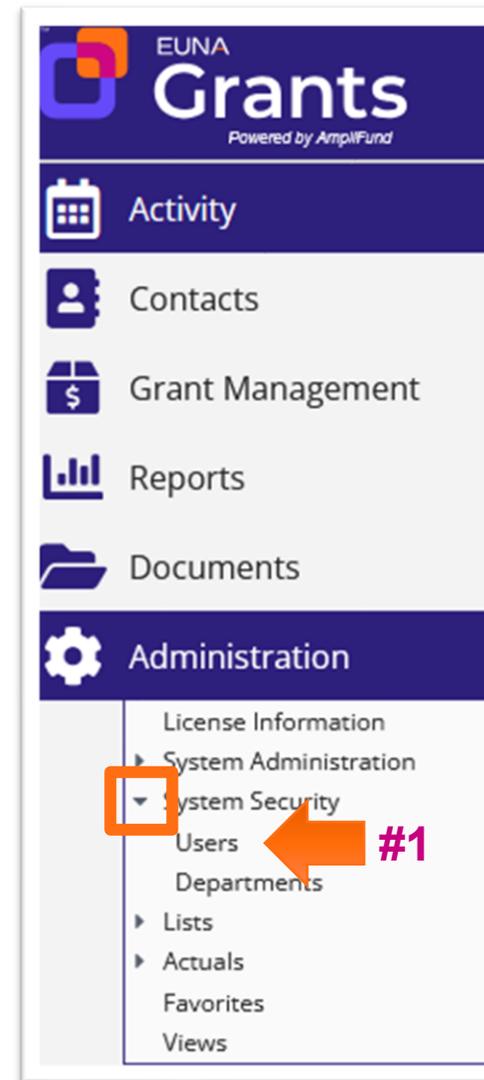
Logging into Euna Grants

- Award Activation Email – Account Owner
 - Award Activations will be issued after training and will come from **no-reply@gotomygrants.com**
- All Users with a Security Role of ‘Account Admin’ can add Users
- Update Recipient Portal **Account Owner** or **Organization Address**
 - Administration (left module) > License Information > Edit Pencil icon > [update information] > Update

The screenshot displays the EUNA Grants interface. The top navigation bar includes 'EUNA Grants' and 'Powered by AmpliFund'. The main menu on the left lists 'Activity', 'Contacts', 'Grant Management', 'Reports', 'Documents', and 'Administration'. The 'Administration' menu is expanded, showing 'License Information', 'System Administration', 'System Security', 'Lists', 'Actuals', 'Favorites', and 'Views'. An orange arrow labeled '#1' points to 'License Information'. A secondary window shows a grid of icons: a printer, an information 'i' icon, and a pencil icon. An orange box around the pencil icon is labeled '#2'. Below this, a form titled 'Primary Admin User' has a field for 'Account Owner*' with a dropdown menu. The dropdown is open, showing 'Owen Owner' (highlighted), 'Adam Account', and 'Rachel Recipient'. A red '#3' is next to the 'Account Owner*' label. To the right of the dropdown is a blue 'Update' button and a grey 'Cancel' button, with a red '#4' above them.

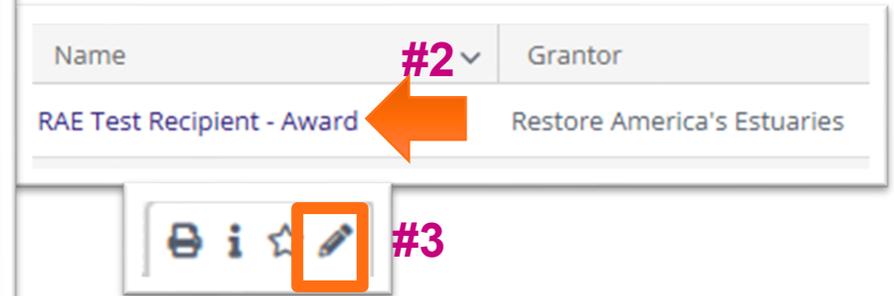
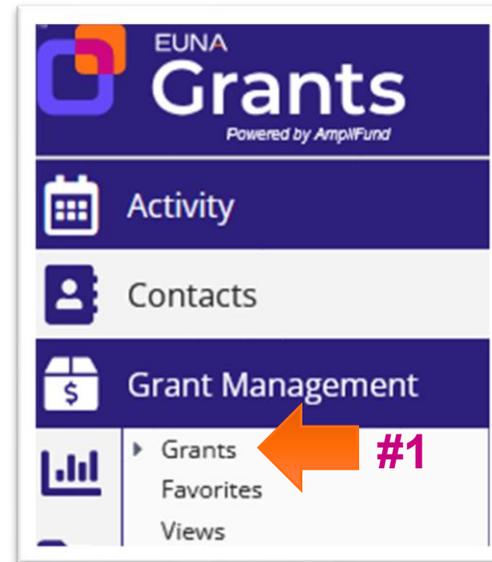
Adding Users

- Administration > System Security > Users > + icon (top right) > [complete required fields] > Create
- 'Security' section:
 - Being assigned to a Grant will override the access selected except for the Advanced Restrictions information selected.
- 'Staff Information' section (required fields noted with an asterisk)
 - First Name / Last Name
 - Email Address
- Send Email Invite to User (Send Invitation icon)
- **Best Practice Recommendation:** Have at least two 'Account Admin' Users in your Recipient Portal

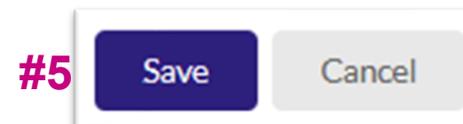


Navigating to your Award & Assigning Recipient Manager

- Navigate to your Award
 - Grant Management (left navigation) > Grants > Click on Grant Name
- Assign Recipient Manager
 - From the Award Details Page > Pencil icon (top right) > [update award details] > Save



A screenshot of the 'Post-Award Information' form. It has a light gray header with the title 'Post-Award Information'. Below the header, there are three rows of information: 'Funder Manager' with the value 'Fred Funder', 'Funder Additional Users' with the value 'Aaron Additional', and 'Recipient Manager' with a dropdown menu showing 'Select grant manager...'. The 'Recipient Manager' dropdown is highlighted with an orange box and labeled '#4'. Below it is another dropdown for 'Recipient Additional Users' with the value 'Select additional users...'.



Viewing Budget and Grant Tools

- Post-Award management modules can be accessed from the award details page, via the tabs along the top
- Post-Award will lead you to the following:
 - Budget and Expense
 - Payment Requests
 - Grant Tools
 - Email manager
 - Notes
 - Tasks

The screenshot displays the 'Award Information and Status' page for 'RAE Test Recipient - Award - Award De'. The top navigation bar includes 'Details', 'Analytics', 'Post-Award', and 'Tools'. The 'Post-Award' and 'Tools' tabs are highlighted with orange arrows pointing to their respective dropdown menus. The 'Tools' menu lists 'Email Manager', 'Tasks', 'Documents', 'eSignature', and 'Notes'. The 'Post-Award' menu lists 'Financial', 'Performance', 'Cash Flow', 'Management', and 'Settings'. The main content area shows a table of financial metrics.

Award Information and Status	
Name	RAE Test Recipient - Award
Recipient Name	RAE Test Recipient
Recipient Award Name	RAE Test Recipient - Award
Award Status	Approved
Grant-Funded Amount	\$25,000.00
Match Requirement	\$0.00
Total Budget	\$25,000.00
Expenses To Date	\$5,526.00
Match Contributions To Date	\$75.00
Invoiced To Date	\$14,876.00
Pending Invoices	\$10,842.00
Approved Invoices	\$500.00
Cash Received To Date	\$0.00
Remaining Available Grant-Funded Amount	\$13,658.00
Remaining Match Requirement	(\$75.00)
Remaining Available Budget	\$13,583.00

Budget Overview

- Post-Award (top tab) > Financial > Budget
- 'Show Actuals From' date range defaults to Award Start/End Date, but can be updated
- Select 'Options' to show/hide budget areas.

Test Award – Budget

📅 Start: 1/1/2025 📅 End: 6/30/2027

Budget View Settings

Actuals

Show Actuals From 📅 To 📅

Options

Show/Hide

Grant Year Line Items Assignee(s) GL Accounts Match Actuals ⓘ Remaining

- Select 'Line Item' to view:
 - General tab
 - Financials tab (Grant Funds/Cash Match/In Kind Match/Other Funding Sources amounts)
 - Configuration tab (Expense/Indirect Caps/Thresholds)
- The **Actuals** displayed on the budget page include all expenses in the following statuses: **Reviewed, Closed, Payment Requested, or Paid**

Options

Show/Hide

Grant Year
 Line Items
 Assignee(s)
 GL Accounts
 Actuals ⓘ
 Remaining

Budget						
Expense Budget	Grant-Funded Budgeted	Grant-Funded Actuals	Total Budgeted	Total Actuals	Grant-Funded Remaining	Total Remaining
Consultants/Contracts						
Project Consultant \$	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00
Subtotal	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00
Personnel						
Full Time Project Manager \$	\$10,000.00	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
Subtotal	\$10,000.00	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$10,000.00
Supplies						
Field Supplies \$	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00
Subtotal	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00
Travel						
Conference Fees \$	\$1,500.00	\$0.00	\$1,500.00	\$0.00	\$1,500.00	\$1,500.00
Travel Expenses (Lodging, Airfare) \$	\$3,500.00	\$0.00	\$3,500.00	\$0.00	\$3,500.00	\$3,500.00
Subtotal	\$5,000.00	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00
Total Expense Budget Cost	\$25,000.00	\$0.00	\$25,000.00	\$0.00	\$25,000.00	\$25,000.00
Revenue Budget	Grant-Funded Budgeted	Grant-Funded Actuals	Total Revenue	Total Actuals	Grant-Funded Remaining	Total Remaining
Grant Funding						
Awarded Amount	\$25,000.00		\$25,000.00			\$25,000.00
Subtotal	\$25,000.00		\$25,000.00		\$25,000.00	\$25,000.00

Expense Overview

- View All Expenses
 - Post-Award (top tab) > Financial > Expenses > Run
- All expenses with an Edit Pencil icon are editable
 - Editable expenses can be selected and 'Marked as Reviewed' or 'Deleted' (using the Actions and Select boxes)

Filter By

Grant Time Frame ←

Category

Line Item

All Expenses

Actions
+ ✓ 🗑

- Create Expenses
 - Post-Award (top tab) > Financial > Expenses > Run > + icon (under Actions) > [complete General tab] > [complete Financials tab] > [complete Attachments tab] > Create
- **Generals** tab
 - Select: Category, Line Item
 - Direct Cost = Grant Funds + Cash Match + In Kind Match + Other Funding Amounts
 - Expense Date
 - Expense Status = **Reviewed**
 - Description
- **Financials** tab
 - If applicable, enter Match amounts (Cash Match, In Kind Match, Other Funding Amounts)
- **Attachments** tab
 - Choose File(s) and **attach supporting documentation for each expense**

All Expenses

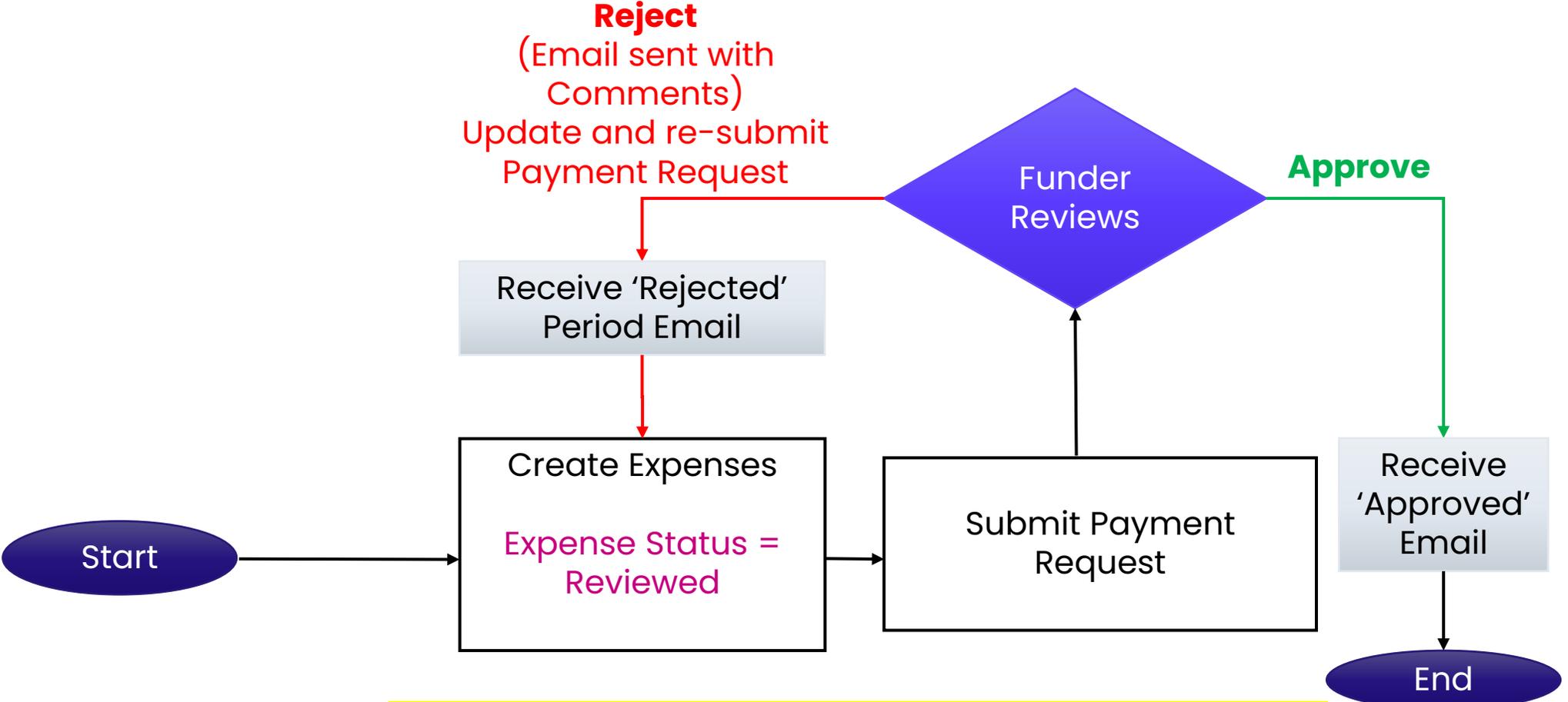
Actions



In-System Training

- Adding Users
- Navigating to your Award
- Assigning Recipient Manager
- Award Sections: Details, Tasks, Documents
- Viewing & Understand the Budget

Creating a Payment Request



NOTE: Recipient Manager receives all Email Notifications

Where to attach documentation?

- Individual Expense **(Required)**
 - Attachments tab – ‘Attachments’ field
- Payment Request
 - Additional Information section - ‘Attachments’ field
- Budget Reporting Period
 - Overall Expense Details section - ‘Attach Documentation’ field
- **What do I need to attach?**
 - Source Documentation
 - Proof of Payment

Scenario #1 – Create & Submit Payment Request

- Recipient Manager will:
 - Track expenses to the budget, with supporting documentation attached to each
 - Ensure expense dates align with the payment request timeframe
 - Submit a Payment Request with Expenses

Expense Date	Category	Line Item	Description	Grant Funds	Cash Match
1/14/25	Consultants/ Contracts	Contract B	Invoice ABC	\$500	\$0
2/25/25	Construction	Construction	Invoice 123	\$1200	\$300

Scenario #2 – Update & Re-Submit Payment Request

- Recipient Manager will:
 - Receive email communication with funder decision
 - Correct and re-submit a Payment Request

- Items to Correct:
 - Missing Documentation
 - Incorrect Line Item chosen
 - Line-Item overdrawn Grant Funds

Approvals and Rejections

- When a ruling is made on a payment request and tracking period, communication will come from no-reply@gotomygrants.com

Payment Request Rejection

User First Name

Funder Name has rejected your payment request, **Payment Request Name**

For **Award Name**

Rejection Reason

Please [log in to Euna Grants](#) to view the payment request.

Regards,
Euna Grants Administrator

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

Payment Request Approval



Org_admin,

Funder Name has approved your payment request,
Payment Request Name for **Award name**

Funder comments

Please [log in to Euna Grants](#) to view the payment request.

Regards,
Euna Grants Administrator
Funder Name

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

In-System Training

- Creating Expenses & Submitting Payment Request
- Updating Expenses & Re-submitting Rejected Payment Request

A blue-tinted photograph of a cable-stayed bridge at dusk. The bridge's structure, including its cables and a large pylon, is visible in the foreground. In the background, the London skyline is visible across a body of water, featuring the Big Ben clock tower and the Houses of Parliament. The sky is a deep blue with some clouds. The overall mood is serene and modern.

Questions?

Customer Support

Access Customer Support

Visit the support site:

<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:

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

Support Site – View/Create Support Tickets

1. Go to <https://amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Click the **Sign up** button
6. A welcome email from support@zendesk.com will be sent to you
7. Click **the link in the email** to set your password and activate your account

Sign in to Euna Grants Support

[Switch to agent sign-in >](#)

Email

Password

[Forgot password?](#)

Sign in

Emailed us for support? [Get a password](#)

New to Euna Grants Support? [Sign up](#)

Resources – Support Site

Amplifund.Zendesk.com

[Euna Grants Recipient Series](#)



 Release Notes and Resources Announcements and resources for enhancements, updates, and fixes	 User Guides Euna Grants User Guides and Quickstart Guides for download	 Instructions Step-by-step instructions on using Euna Grants' features
 Upcoming Training and Videos Live training events and videos on how to use Euna Grants	 Import Templates Excel templates for importing data into Euna Grants	 FAQs and Best Practices Frequently Asked Questions and best practices for using Euna Grants
 Grant Seeker Training Training material for Grant Seeker customers	 Grant Maker Training Training material for Grant Maker customers	 Recipient and Applicant Training Training material for Recipients and Applicants
 Submit a Ticket Still need help? Submit a request to our help desk.		