By Vera Solutions
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Grant Applications and Reviews Module Setup Guide

Version Name: Aristotle | Release Date: August 2020

Overview

The Amp Impact Grant Applications and Reviews Module enables Organizations to implement the Grant Application process. With this extension, Amp Impact can be used to manage the full Grant Lifecycle. Organizations can announce the funding opportunity by publishing a call for proposal, allow grant applicants to submit an application, review the applications, award grant, and monitor the grant.

ⓘ Please note that Amp Impact Grant Applications and Reviews Module should be used as extension of the Amp Impact. Amp Impact (v1.25, Delphinus) should be installed in the org before installing Amp Impact Grant Applications and Reviews Module. To learn more about Installation/ Setup steps required for Amp Impact, please refer to the Amp Impact Installation Guide.

In this installation guide, system administrators will learn how to:

- Install Amp Impact Grant Applications and Reviews Module
- Customize the extension to meet their specific use case

📝 To learn about how to submit an application and report on grants, please refer to the Grant Applicant User Guide and Amp Impact Grantee Reporting User Guide.

👷 To learn about how grantmaking organizations manage the grant application process, please refer to the Grant Coordinator User Guide.

🔍 To learn about how reviewers access and review applications, please refer to the Grant Reviewer User Guide.

Install Amp Impact Grant Applications and Reviews Module

The following installation and configuration instructions are updated as of June 2020 - covering all releases of Amp Impact.

Latest Release Version Name: Aristotle (Summer 2020) | Version Number: 1.1

1. Install the Amp Impact Grant Applications into a developer environment or sandbox using the installation link provided below.
   - Select which users you wish to install the package for (learn more here).
   - Click "Install".
2. Configure user, security, and app settings as required for your specific use-case (see the “Configuration” section in the Amp Impact Installation Guide).
3. Perform your current use cases in the sandbox and ensure that they are operating as expected.
4. When you are ready to deploy to production, use the installation link below.
5. Update your custom settings in Production as these will not "carry over" from your sandbox.

Installation Links:
Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5w000000atqE
Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5w000000atqE

ⓘ **Admin Note:**
If My Domain has already been set up, replace “test” or “login” in the installation links with the specific domain for the org.

System Administration and Setup

ⓘ **Admin Note:**
Enabling Communities should be done prior to installing the Amp Impact Grant Applications and Reviews into a sandbox or production environment.

Enable Communities (Required)

In order to use the Community Template for Grant Applicants, Communities will need to be enabled in system setup.

1. Open *Setup*.
2. Use the Quick Find search to find and open Communities Settings.
3. Select the Enable communities checkbox.
4. In the Domain Name field enter your domain name.
5. Click *Check Availability*.
6. Click *Save*.
7. Click *OK* in the confirmation message.

Enable Path

For Lightning pages in the Amp Impact Grant Applications and Reviews Module to correctly display the Path component, Path must be enabled in the Salesforce org. System Admins can enable Path by following these steps:

1. Open *Setup*.
2. Use the Quick Find search to find and open Path Settings.
3. Click the *Enable* button.
4. Edit the Paths as needed:

Path Name	Object API Name	Picklist Field API Name	Lightning Record Page
Application Review Status	ampgm__xx_Application_Review__c	ampgm__Review_Status__c	Application_Review
Application Stage	ampi__Project__c	ampgm__Application_Stage__c	Application
Grant Status	ampi__Project__c	ampi__Project_Status__c	Grant

Call for Proposals	ampgm__xx_Call_For_Proposals__c	ampgm__Status__c	Call_for_Proposal_Record_Page
Concept Note Stage	ampgm__xx_Concept_Note__c	ampgm__Concept_Note_Stage__c	Concept_Note_Record

Basic User Administration and Permissions

Assign Permission Sets (Required)

Out of the box, the Grant Applications and Review Module includes two permission sets.

Assign the Amp Grant Management Admin Permission Set

This permission set is meant to be assigned to users who will be responsible for creating, assigning, reviewing, and approving/rejecting Call For Proposals, Concept Notes, and Applications.

To assign this permission set:

1. Go to the Setup Quick Search box, and enter “Permission Sets”.
2. Click on the permission set labeled Amp Grants Module Admin.
3. Click on ‘Manage Assignments’.
4. Click on ‘Add Assignments’.
5. Select the user(s) for whom this permission set should be assigned and click on assign.

ⓘ **Admin Note:**
The Amp Grant Management Admin permission set does not contain permissions to either the Project Role or Organization Role objects, as there is a Salesforce limitation in which permission sets in managed packages cannot provide access to custom objects that are “detail” to standard Salesforce objects in a master-detail relationship.

To provide access to either of these objects, create a new permission set (or modify an existing unmanaged permission set) and add both the object and field permissions manually through Object Settings. Assign this new permission set to any users who require access to Project Role and Organization Role.

Assign the Amp Grant Management Community Permission Set

This permission set is meant to be assigned to the users who will fill out and submit Concept Notes or Applications to a Call for Proposals.

To assign this permission set:

1. Go to the Setup Quick Search box, and enter “Permission Sets”.
2. Click on the permission set labeled Amp Grant Management Community.
3. Click on ‘Manage Assignments’.
4. Click on ‘Add Assignments’.
5. Select the user(s) for whom this permission set should be assigned and click on assign.

Create Custom Permission Sets

> ⓘ **Admin Note:**
> This step is optional for any organization in which the previously mentioned permission sets are not sufficient for the business processes.

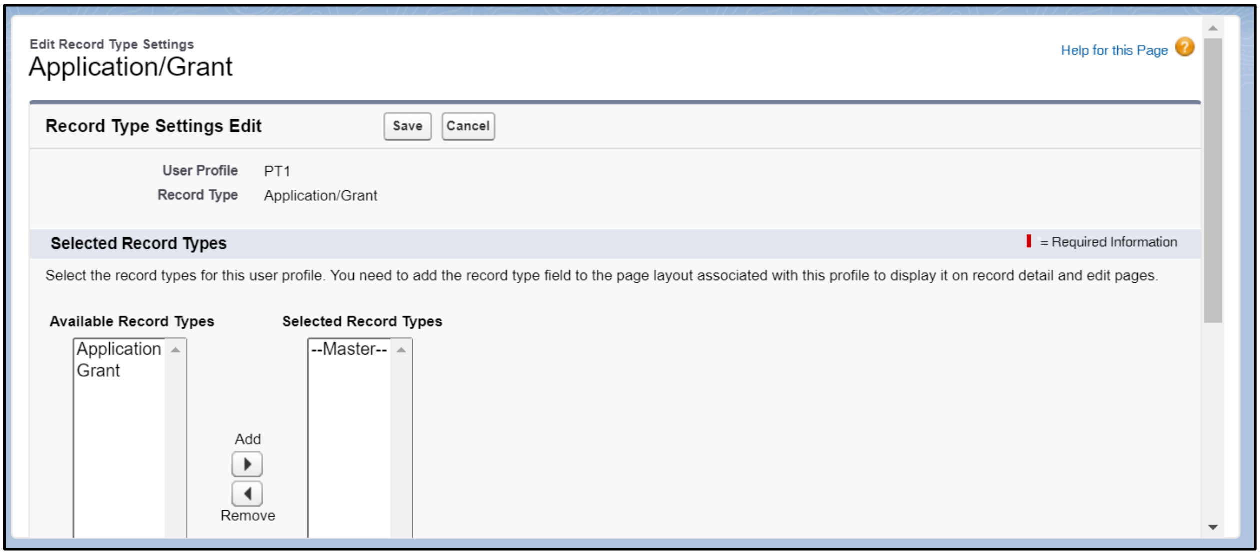
For any users who need access to custom objects and fields that may sit outside the managed package or more limited access to the packaged objects and fields, a custom permission set may be created based on the two permission sets listed above.

1. Navigate to Setup > Permission Sets.
2. Clone the packaged permission set.
3. Based on the user profile, edit the permission set by removing any permissions that are unnecessary for the user to use the Amp Impact Grant Managements Module or adding permissions to custom objects/fields.
4. Once the permission set has been customized per the user profile, assign the permission set to the relevant user(s) by clicking “Manage Assignments”.
5. If specific permission requirements are determined during configuration (e.g., restriction of certain edit privileges), System Admin may need to modify/clone this permission set or modify user permissions on an individual profile level to achieve these requirements.
6. Additionally, certain permission and sharing setups (i.e., restricting “create” access for certain objects for some user groups, make individual tabs available but not the entire app) may require the System Admin to make additional changes to existing user permissions & record sharing setup leveraging the standard Salesforce platform security & sharing features.

Assign Record Types to Profiles (Required)

The Grant Application and Reviews Module introduces two record types to the ampi__Project__c object:

- Application: Assign this record type to any Profile that needs to fill out, submit, revise, or review a Grant Application.
- Grant: Assign this record type to any Profile that needs to report on or monitor the progress and activity of a Grant.



Since the package does not contain any Profiles, these Record Types need to manually be assigned to each Profile that needs access to the Grant Applications and Review Module.

> ⓘ **Admin Note:**
> The Amp Impact main package also contains record types on the ampi__Question__c and ampi__Submission__c objects. To see guidelines on assigning those record types to profiles, please review the *Set Up Submissions* section in the *Amp Impact Installation Guide*.

Customize User Interface

Relabel Project Object

Out of the box, object ampi__Project__c is labelled as 'Project', rename this to 'Application/Grant' to be relevant.

> ⓘ **Admin Note:**
> For more details on how to customize labels and tabs in Amp Impact,please refer to the Customizing Terminology and Labels section in the Amp Impact Installation Guide

Update Page Layouts

Update Call for Proposals Page Layout per Business Process (Required)

Additionally, depending on whether your organization is using a one- or two-stage application process to Calls for Proposals, the Quick Actions on the ampgm__xx_Call_For_Proposals__c should be added to the page layout to reflect that process:

- ampgm__Start_Application: Add this to the page layout if a one-stage application process is followed (i.e. applicants are immediately invited to submit a full application that includes the narrative application, proposed budget, proposed implementation plan, et al.).
- ampgm__Start_Concept_Note: Add this to the page layout if a two-stage application process is followed (i.e. applicants must first provide some initial narrative information before being invited to submit the full application).

Update Standard Salesforce or Amp Impact Object Page Layouts

Page layouts for standard Salesforce objects and packaged Amp Impact objects cannot be updated by the Grant Applications and Reviews Module. The following page layout updates must be made manually:

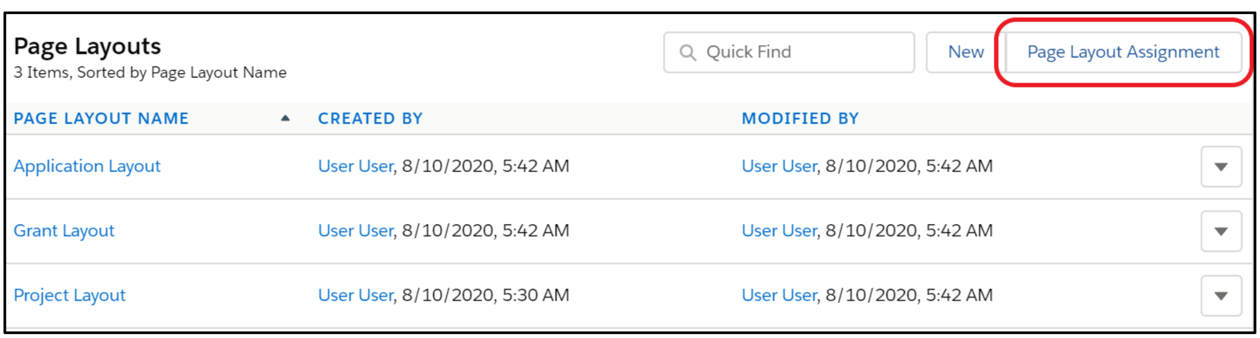
Object API Name	**Update**
Account	Add ampgm__Stakeholder_Type__c to the page layout
Contact	Add ampgm__Designated_Reviewer__c to the page layout[1]
ampi__Organization_Role__c	Add ampgm__Stakeholder_Role__c to the page layout

Assign Page Layouts to Record Types (Required)

Due to the two record types introduced in this module on the ampi__Project__c object, multiple page layouts (in addition to the Amp Impact Project Layout) have been created so that the correct data is displayed and editable depending on the record type:

- Application Layout: Assign this page layout to the Application record type and any profile of users who will be creating, filling out, or reviewing grant applications.
- Grant Layout: Assign this page layout to the Grant record type and any profile of users who will be tracking the progress of the grant, submitting regular grant reports, or monitoring a grant's financials.

On the Project object, scroll to the Page Layouts and click the *Page Layout Assignment* button to customize which page layout is displayed to which user profile and record type.



[1] This field is required to be checked in order to pass the lookup filter on ampgm__xx_Application_Review__c to assign a Contact as the reviewer.

ⓘ **Admin Note:**
The Amp Impact main package also contains page layouts for the ampi__Question__c and ampi__Submission__c objects, which need to be assigned to record types. To see guidelines on assigning those page layouts to record types, please review the *Set Up Submissions* section in the *Amp Impact Installation Guide*.

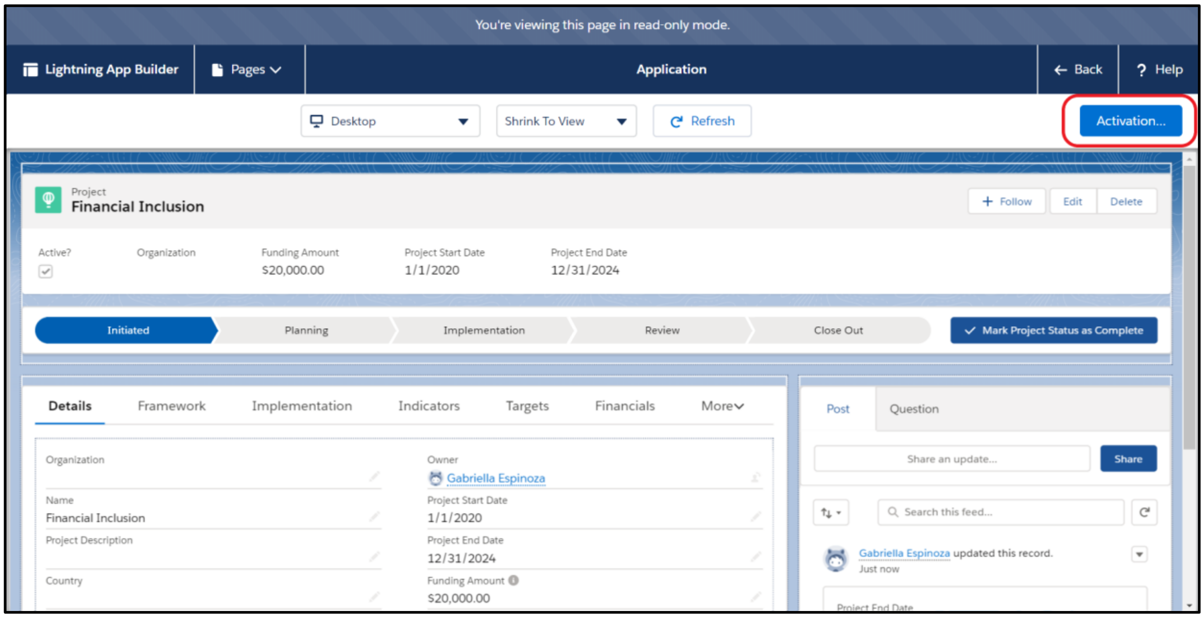
Activate Lightning Pages (Required)

The Amp Impact Grant Applications and Reviews Module includes several Lightning pages in the package:

Lightning Page API Name	Function	Related Object API Name	Example User
Application	Enables the user to fill out, monitor, submit, or review all aspects of the grant application process.	ampi__Project__c (Application RecordType)	Grant Applicant
Application_Review	Enables the user to fill out and submit a review of a concept note or application.	ampgm__xx_Application_Review__c	External Application Reviewer
Call_for_Proposal_Record_Page	Enables the user to set up and manage a call for proposals, and to monitor the concept notes and applications submitted for a particular call for proposals.	ampgm__xx_Call_For_Proposals__c	Grant Coordinator
Concept_Note_Record	Enables the user to fill out, monitor, submit, or review all aspects of the concept note process.	ampgm__xx_Concept_Note__c	Grant Applicant
Grant	Enables the user to track progress, submit regular reports, and monitor financials throughout a grant's life cycle.	ampi__Project__c (Grant RecordType)	Grantee

If your organization is already on Lightning and using custom Lightning pages, the Grant Applications and Reviews Module Lightning pages may not display automatically if your custom Lightning pages are activated as the org default.

To display any of the Lightning pages, you will need to adjust the Activation settings either on your custom Lightning pages by removing them as the org or app default, or on the Amp Lightning pages by setting them as the app/profile defaults. You can access the Activation settings in the Lightning App Builder.



ⓘ **Admin Note:**
The Amp Impact main package also contains several Lightning Pages for ampi__Submission__c, which are required to use the Grant Applications and Reviews Module. To see guidelines on assigning those Lightning Pages to record types and profiles, please review the *Set Up Submissions* section in the *Amp Impact Installation Guide*.

Customize Reports

Report Charts for Review Scores

ⓘ This step is optional and only required if the grant coordinator has created review templates with number type questions that collect any other information than review or section scores.

To view review scores on the Application or Concept Note record, grant coordinators need to customize the report charts based on the review templates specified on the call for proposal. Out of the box, the report charts display the sum of number type responses by sections (this is based on the assumption that number type questions are used only to collect scores by reviewers).

To customize the report charts:

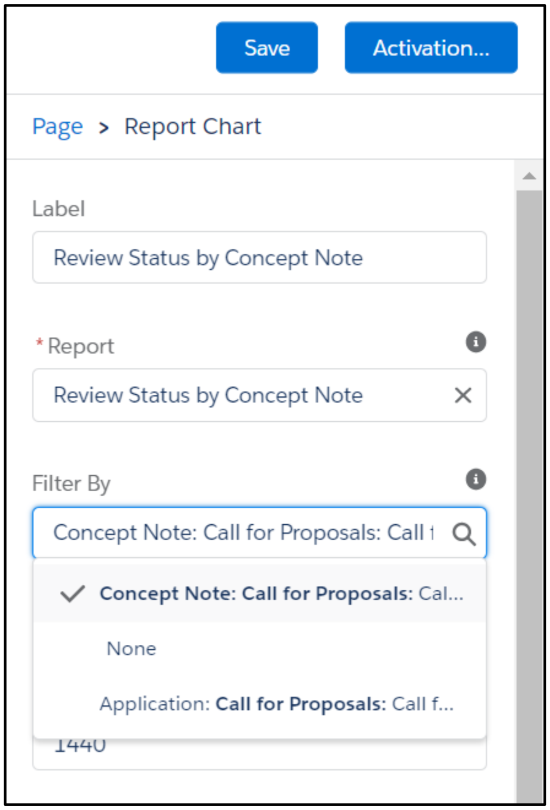
- Navigate to the ‘Reports’ object tab.
- Edit the reports ‘Review Scores by Concept Note’ and ‘Review Scores by Application’ as per the review templates.
- Save the reports.

Filter the Report Charts for the current record

ⓘ **Admin Note:**
Due to a Salesforce limitation, Report Charts are not filtered to the current record out of the box. The system administrator needs to configure the filter for each report to show only data associated with the current record.

To configure the filters in report charts, follow the steps below:

1. Navigate to the Call For Proposal record
2. Click on the Review Status tab
3. Click on "Edit Page" option in the Setup
4. Click on the Report Chart component in the Lightning App Builder
5. Click on the "Filter By" to specify the current Call For Proposal record



6. Repeat this process for Report Charts on the Review Score tabs on Concept Note record and Application record.

Customize Email Automation

Email Templates

Classic Email Templates

- ampgm__Application_Review_Review_not_submitted
- ampgm__Disbursement_Initiation_Notification

Import Lightning Email Templates

Due to a Salesforce limitation on deploying Lightning Email Templates, these are not provided out of the box in the Grant Applications and Reviews Module. However, these can be imported via Data Loader. Download this spreadsheet as a CSV and use it to insert the Lightning Email Templates. The spreadsheet contains the following Lightning Email Templates:

- Remind Reviewer To Submit the Concept Note Application Review
- Remind Reviewer To Submit the Application Review
- Notify Grantees To Revise Application
- Notify Grantees To Revise Concept Note

Note that any customizations to these templates can be made directly in the CSV or in the

Email Alerts

To send each of the Classic Email Templates, two Email Alerts have been created:

Email Alert API Name	Function	Customization Required
ampgm__Application_Review_submission_reminder	This email alert sends an email to the Reviewer Contact on the Application review record using email template ampgm__Application_Review_Review_not_submitted. It is called by the process ampgm__Notify_Reviewer_to_Submit	N/A
ampgm__Notify_Accounting_Team_to_Initiate_Disbursement	This email alert sends an email to the accounting team using email template ampgm__Disbursement_Initiation_Notification. It is called by the process ampgm__Disbursement_Send_Email_To_Accounting_Team	Create a public group “Accounting Team” consisting of Users/ Roles belonging to the accounting team and add that group to the Selected Recipients.

Customize Process Automation

Flows

The following flows are included in the module:

Flow API Name	Function
ampgm__Auto_Setup_Application_Flow	This flow creates related Implementation Plan, Budget, Application Review, Child Application Review Submission, Child Application Submission, Project Geographic Area, and Project Thematic Area(s) for the new Application. This is called from the process ampgm__Auto_Setup_Application when an Application is created, and from the process ampgm__Concept_Note_Auto_Setup_Concept_Note when a Concept Note is approved.
ampgm__Auto_Setup_Application_Review	This flow sets up the related Application Review record and its child Submission record. This is called by the process ampgm__Auto_Setup_Application when an Application is submitted
ampgm__Auto_Setup_Concept_Note_Review	This flow sets up the related Application Review record and its child Application Review Submission record. It's called by the process ampgm__Concept_Note_Auto_Setup_Concept_Note when a Concept Note is submitted.
ampgm__Update_Application_To_Grant	This flow updates the Application record type to a Grant record type. This is called by the process ampgm__Auto_Setup_Application when an Application is approved

The flows have been enabled as a template, and hence if you want to edit it to meet your organization's specific use case, you can clone the flow, make the required changes in the cloned flow, and activate the cloned flow.

Process Builder

The following processes are included in the module:

Process API Name	Function
ampgm__Auto_Setup_Application	This process sets up the new Application with related records, creates an Application Review and updates the Date Submitted when the Application is submitted and updates the record type to Grant when Application is approved

ampgm__Concept_Note_Auto_Setup_Concept_Note	This process sets up the new Concept Note with narrative reporting, creates an Application Review and when the Application is submitted and creates a new Application when Concept Note is approved
ampgm__Submit_Related_Records	This process updates the related Concept Note or Application Review record to submitted when the narrative report on those records is submitted
ampgm__Disbursement_Send_Email_To_Accounting_Team	This process sends an email to accounting team with Disbursement details when a Disbursement record is Approved
ampgm__Notify_Reviewer_to_Submit	This process informs the application Reviewer to submit the Application Review by sending an email 3 days before the Review Due Date

The process builders have been enabled as a template, and hence if you want to edit it to meet your organization's specific use case, you can clone the process, make the required changes in the cloned process, and activate the cloned process.

ⓘ Please note that processes ampgm__Auto_Setup_Application and ampgm__Concept_Note_Auto_Setup_Concept_Note require the grant applicant to have an associated contact and account (this requirement is fulfilled by all community users). If you want users without an associated contact and account to launch these processes, clone and edit these processes as per your requirement.

Quick Actions

The following Quick Actions are included in the module:

Object API Name	**Quick Action API Name**	**Function**
ampgm__xx_Call_For_Proposals__c	ampgm__Start_Application	Launches an Application (ampi__Project__c record) from the Call for Proposals page. Auto-populates the primary contact field based on the details of the user launching the Application.
ampgm__xx_Call_For_Proposals__c	ampgm__Start_Concept_Note	Launches a Concept Note (ampgm__xx_Concept_Note__c record) from the Call for Proposals page. Auto-populates the primary contact field based on the details of the user launching the Application.
ampgm__xx__Concept_Note__c	ampgm__Create_Narrative_Report_On_Concept_Note	Generates a Submission (ampi__Submission__c record) when a Concept

		Note is created. This is referenced in the Process ampgm__Concept_Note_Auto_Setup_Concept_Note.
ampgm__xx__Concept_Note__c	ampgm__Start_Application_From_Concept_Note	Generates an Application (ampi__Project__c record) when a Concept Note is approved. This is referenced in the Process ampgm__Concept_Note_Auto_Setup_Concept_Note.

Since these actions are packaged, they cannot be directly updated. To customize these actions, first copy the action (note that Salesforce does not allow for cloning Actions, so this must be done manually by creating a new action), make the required changes in the new action and replace the packaged action on the relevant page layout(s) with the new action.

Setup Submissions

ⓘ To learn more details about how to set up Submissions in the org, please refer to the Set Up Submissions section of the Amp Impact Installation Guide.

Create Custom Setting Records

The Grant Applications and Reviews Module introduces three out-of-the-box relationship fields on the ampi__Submission__c object. In order to use the SubmissionResponseForm that has been added to the Lightning Pages of those parent objects, Submission Relationship custom setting records for each of these relationships need to be created:

Name (Parent Object API Name)	Child Relationship Field Name (on ampi__Submission__c)
ampi__Project__c	ampgm__Project__c
ampgm__xx_Application_Review__c	ampgm__Application_Review__c
ampgm__xx_Concept_Note__c	ampgm__Concept_Note__c

To create each custom setting record in the above table, follow these steps:

1. Go to Custom Settings in Setup.
2. Click “Manage” next to Submission Relationship.
3. Click the “New” button.
4. Fill out the *Name* field with the API name of the parent object.

5. Fill out the *Child Relationship Field Name* field with the API name of the relationship field on ampi__Submission__c.

Setup Grantee Community

Create a New Community

1. Click on New Community
2. Choose ‘Grant Applicant Community Template’
3. Click on ‘Get Started’
4. Enter a Name and URL
5. Click on Builder

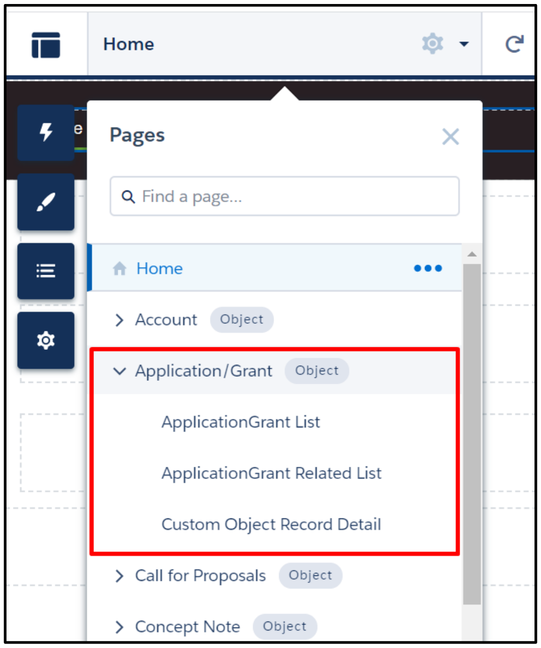
Setup Navigation Menu

1. Click on Navigation Menu
2. Click on the Edit Default Navigation
   a. Add a Menu Item with the Name as “My Accounts”
      i. Specify the Type as “Salesforce Object”
      ii. Specify the Object Type as “Accounts”
   b. Add a Menu Item with the Name as “My Call For Proposals”
      i. Specify the Type as “Salesforce Object”
      ii. Specify the Object Type as “Call For Proposal”
   c. Add a Menu Item with the Name as “My Concept Notes”
      i. Specify the Type as “Salesforce Object”
      ii. Specify the Object Type as “Concept Note”
   d. Add a Menu Item with the Name as “My Applications”
      i. Specify the Type as “Salesforce Object”
      ii. Specify the Object Type as “Application/Grant”
      iii. Choose the default list view as “My Applications”
   e. Add a Menu Item with the Name as “Grant Reports”
      i. Specify the Type as “Salesforce Object”
      ii. Specify the Object Type as “Application/Grant”
      iii. Choose the default list view as “My Grants”
3. Save the Menu

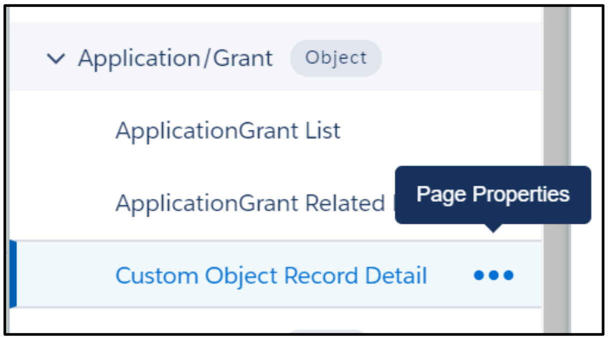
> ⓘ To follow the steps above, please make sure that the list views ‘My Applications’ and ‘My Grants’ exist for Application/Grant (ampi__Project__c) object.

Setup Pages for Application and Grant Record Type

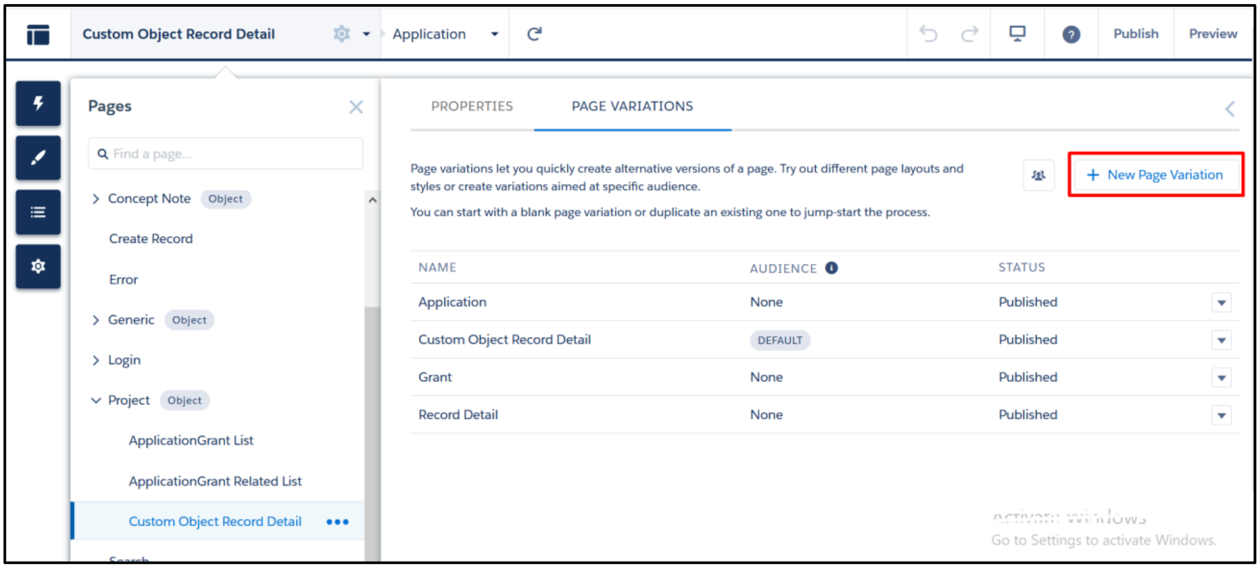
1. Navigate to the 'Pages' section in the top bar
    a. Navigate to Application/Grant object page



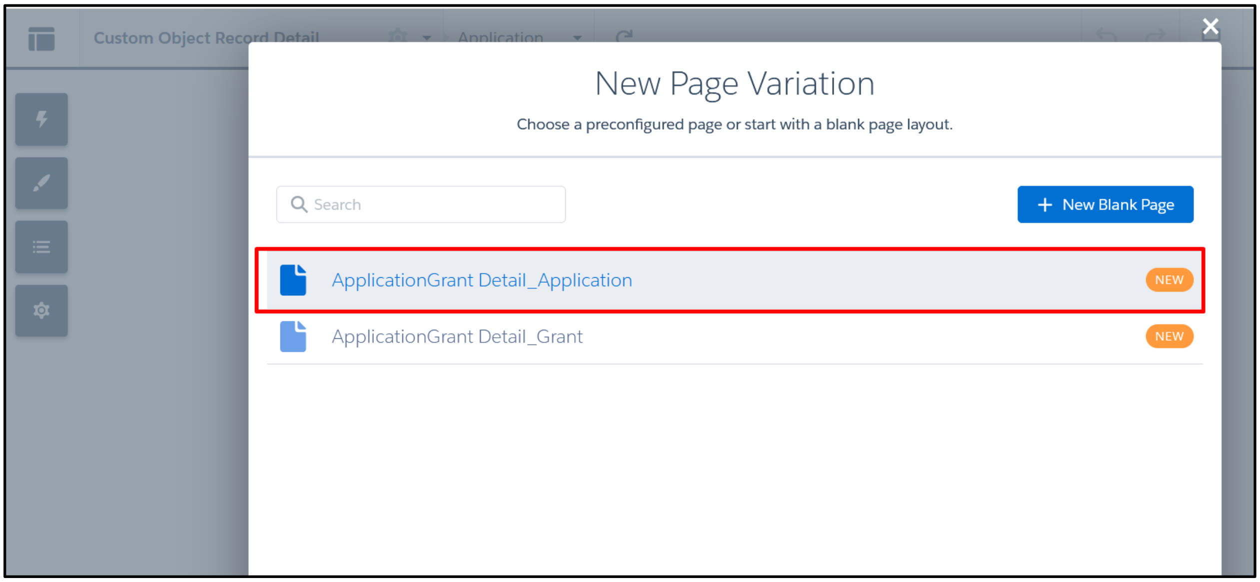
    b. Navigate to the Page Properties of Custom Object Record Detail/ ApplicationGrant Record Detail



    c. Add a Page variation for the Application Record page
        i. Navigate to the Page Variation tab
        ii. Click on 'New Page Variation' button

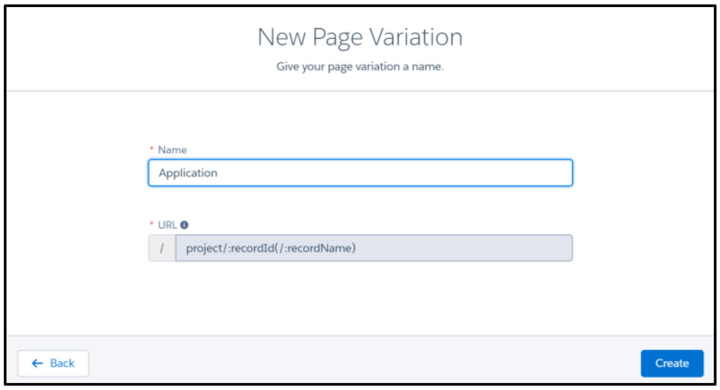


iii. Select ApplicationGrant Detail_Application



iv. Click on Next

vi. Enter Application in Name Field



vii. Click on Create

d. Repeat the process to create page variation for the Grant Record page
   i. Navigate to the Page Properties of Custom Object Record Detail/ ApplicationGrant Record Detail
   ii. Navigate to the Page Variation tab
   iii. Click on 'New Page Variation' button
   iv. Select ApplicationGrant Detail_Grant
   v. Click on Next
   vi. Enter Grant in Name Field
   vii. Click on Create

e. Assign page variation 'Application' to Record Type 'Application'
   i. Navigate to the Page Variation tab
   ii. Click on list menu dropdown next to Application page variation, and click on Assign
   iii. Click on 'New Audience' button
   iv. Specify the Audience name as 'Application Record Type'
   v. Expand the Advanced chevron
   vi. Select the Record Type as 'Application/Grant', Operator as 'Equals', and Value as 'Application'
   vii. Click on 'Save & Assign' button

f. Repeat the process to assign page variation 'Grant' to Record Type 'Grant'
   i. Navigate to the Page Variation tab
   ii. Click on list menu dropdown next to Grant page variation, and click on Assign
   iii. Click on 'New Audience' button
   iv. Specify the Audience name as 'Grant Record Type'
   v. Expand the Advanced chevron
   vi. Select the Record Type as 'Application/Grant', Operator as 'Equals', and Value as 'Grant'
   vii. Click on 'Save & Assign' button

> ⓘ The concept note detail page should be setup out of the box, but If the correct lightning community page is not being displayed for Concept Notes, please follow the same process as for Application/Grants

to create a new page variation based on lightning community page ‘Concept Note Applicant Concept Note’ and assign it as the default page variation for Custom Object Record Detail/ Concept Note Detail page.

Assign Community Members

1. Navigate to the ‘Administration’ workspace
2. Navigate to ‘Members
3. Add the Grant Applicant Profile from Available Profiles to Selected Profiles OR
4. Add the Amp Grant Management Community Permission Set from Available Permission Sets to Selected Permission Sets
5. Click on the ‘Save’ button

Create Sharing Sets

ⓘ These steps are an example to create a sharing set for the Grant Applicant profile, enabling users with that profile to have read/write access to Concept Notes, and Applications, Grants on which they are the primary contact. Please read here for more information about Sharing Sets. Sharing Rules can also be used to provide this level of access, depending on the organization’s use case.

1. Go to Setup.
2. Type “Communities Settings” in Quick Find and click the result.
3. In the Sharing Sets related list, click “New”.
    a. Label: Amp Impact Grant Applicant
    b. API Name: Amp_Impact_Grant_Applicant
    c. Selected Profiles: [Select the Profile created for Grant Applicants]
    d. Selected Objects: Concept Note
4. Click Set Up in the Configure Access table.
    a. Grant access where the User.Contact matches Target Concept Note.ampgm__Grant_Applicant_Primary_Contact__c
    b. Access Level: Read/Write
5. Click Update.
6. Click Save.
7. Repeat the process for Application/Grant

Import Geographic Areas

When an Application record is created, a related Project Geographic Area is also created based on the selection made in the Country picklist by the grant applicant while creating the Application/Concept Note. If a Geographic Area with the same name doesn’t exist in the org, then a new Geographic Area record is created too. To avoid duplicate data to be created, we recommend importing this spreadsheet via Dataloader. It contains the Geographic Area records corresponding to the Country picklist on the Application/Grant object.