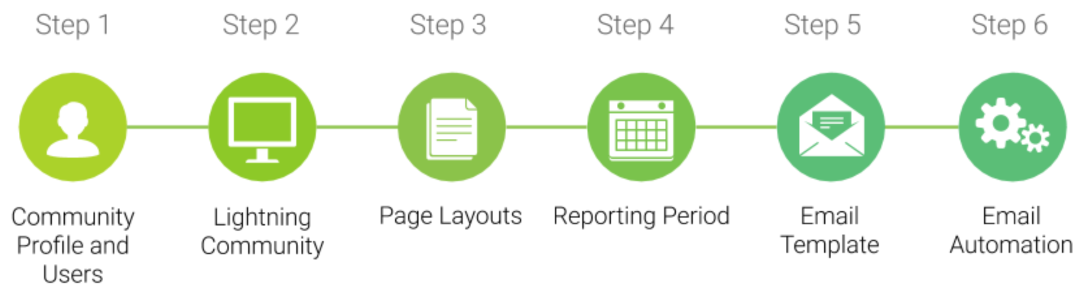
Grantee Reporting Setup Guide

April 2020

Overview



The purpose of this guide is to provide information on how to set up your organization for grantee reporting using Amp Impact in a Salesforce Community. In the following six steps, this guide will walk through the configurations and set up necessary to begin using this feature.

1. Configure community profiles and users
2. Set up Lightning Community
3. Set up page layouts in Community Builder
4. Create a Grant Reporting Period
5. Configure email alerts for grantee access
6. Configure email automation to send to grantees

To get started, first create your community with the following profile and users on the next page.

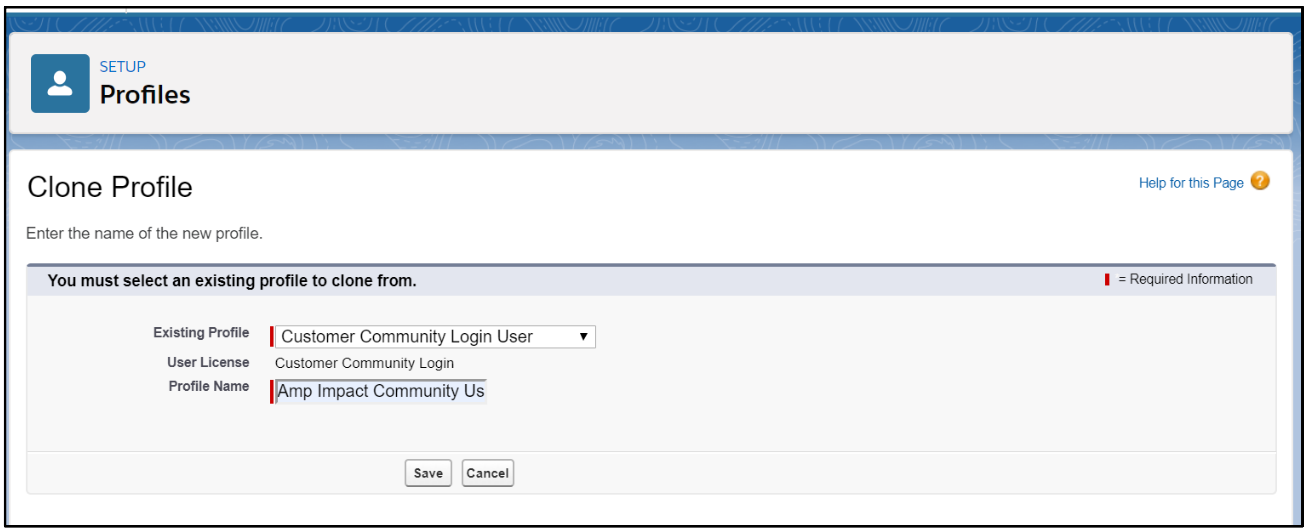
ⓘ Ensure that the Funder profile has proper permission set to review and modify grant reports. Please refer to *Amp Impact Installation Guide* for more information.

Set up a Community

Create Community Profile

ⓘ These steps are an example using the Customer Community Login User license. If you already have a community user profile that you plan to use in a community with Amp Impact, assign the permission set to those users. Otherwise, use the steps below as guidelines to a profile for community users and revise accordingly.

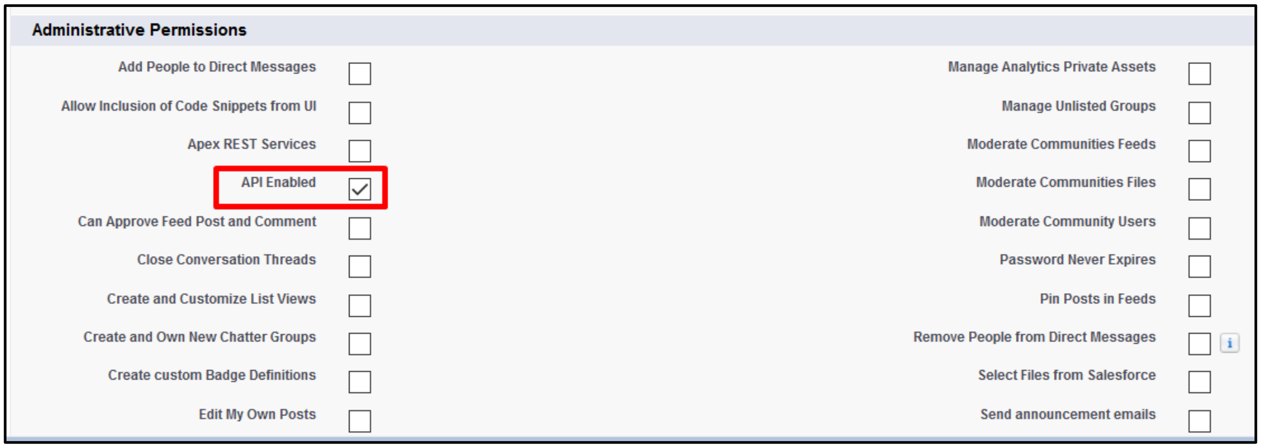
1. Go to Setup.
2. Type “Profiles” in Quick Find and click the result.
3. Click “New Profile”.
    a. For the Existing Profile picklist, select “Customer Community Login User”.
    b. The User License should display “Customer Community Login”.
    c. For the Profile Name field, enter “Amp Impact Community User”.
    d. See screenshot below.



4. Click “Save”.
5. Click “Edit”.

6. Scroll towards the bottom of the page to *Administrative Permissions.*

7. Mark the checkbox next to “API Enabled” as TRUE, and de-select all other checkboxes within *Administrative Permissions,* as per the screenshot below.



ⓘ The Customer Community Login user license does not allow the ability to create reports.

8. Click “Save”.

Create Permission Set for Community Users

ⓘ A **permission set** is a collection of settings and permissions that would give community profile users access to various tools and functions. Note that permission sets extend users' functional access without changing their profiles. To learn more, visit the Salesforce article on permission sets.

Setting up permission sets ensures that community users, i.e. grantees and funders, who will interact with this feature are given access to either read, create, edit, delete, view all, or modify all fields in an object.

Before system admins can create community users, ensure the following custom permission sets have been created.

ⓘ This permission set is an **example** to provide Community Users with access to all Project records and the Activity Tracking, Add Results, and Performance Graphs pages. Permissions should be customised to an organisation's use case.

1. Go to Setup.

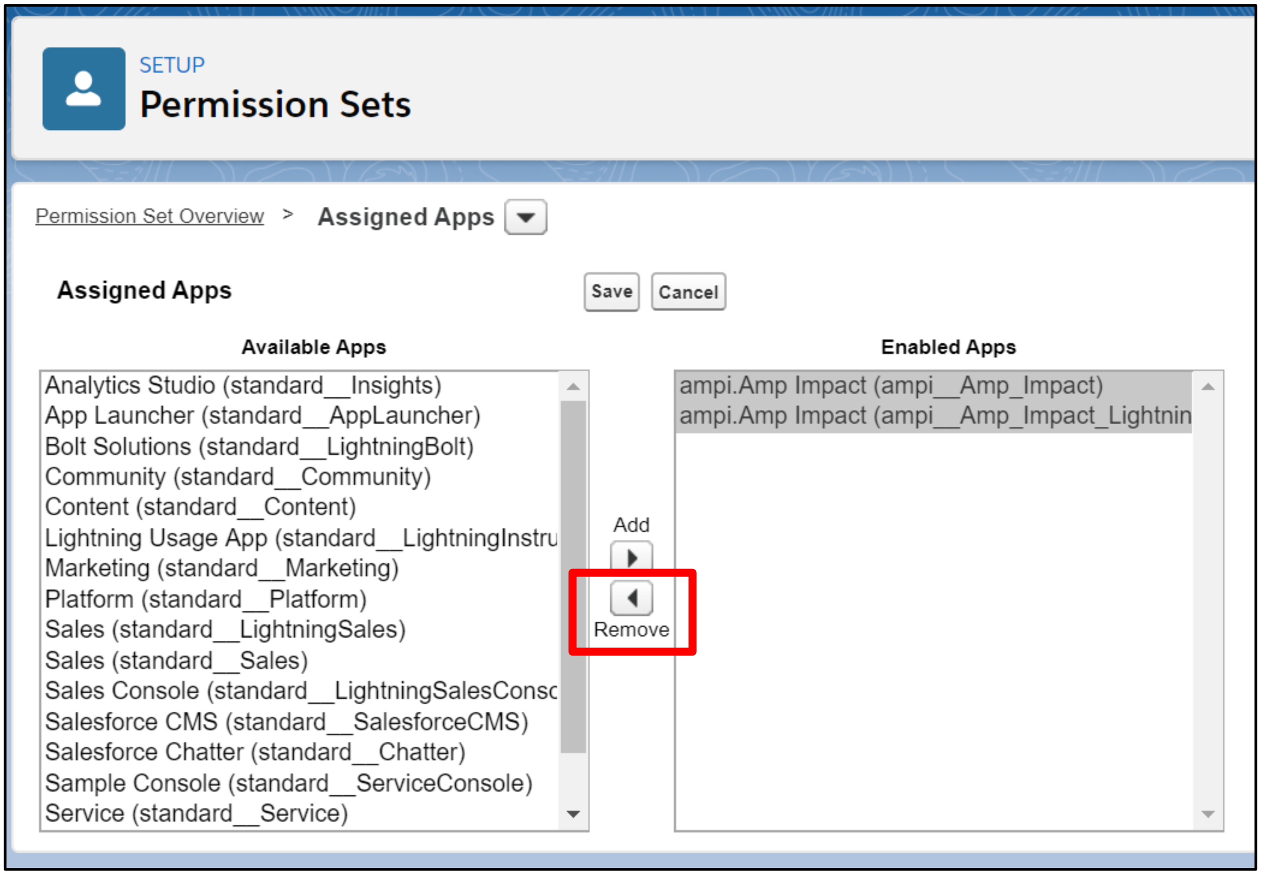
2. Type "Permission Sets" in Quick Find and click the result.

3. Find "Amp Impact Admin" and click "Clone". Set the following:
    a. Label: Amp Impact Community
    b. API Name: Amp_Impact_Community

4. Click "Assigned Apps". In the page that loads, click "Edit".

Amp Impact

5. Remove ampi.Amp Impact (ampi__Amp_Impact) and ampi.Amp Impact (ampi__Amp_Impact_Lightning) from the “Enabled Apps” list to the “Available Apps” list and click “Save”.
    a. Assigned Apps are not allowed for some Community User licenses.
    b. See screenshot below. After clicking Remove, there should be no Enabled Apps.



6. Open “Object Settings”.

7. For each object in the table below, set the following permissions by clicking each object and then clicking “Edit”.

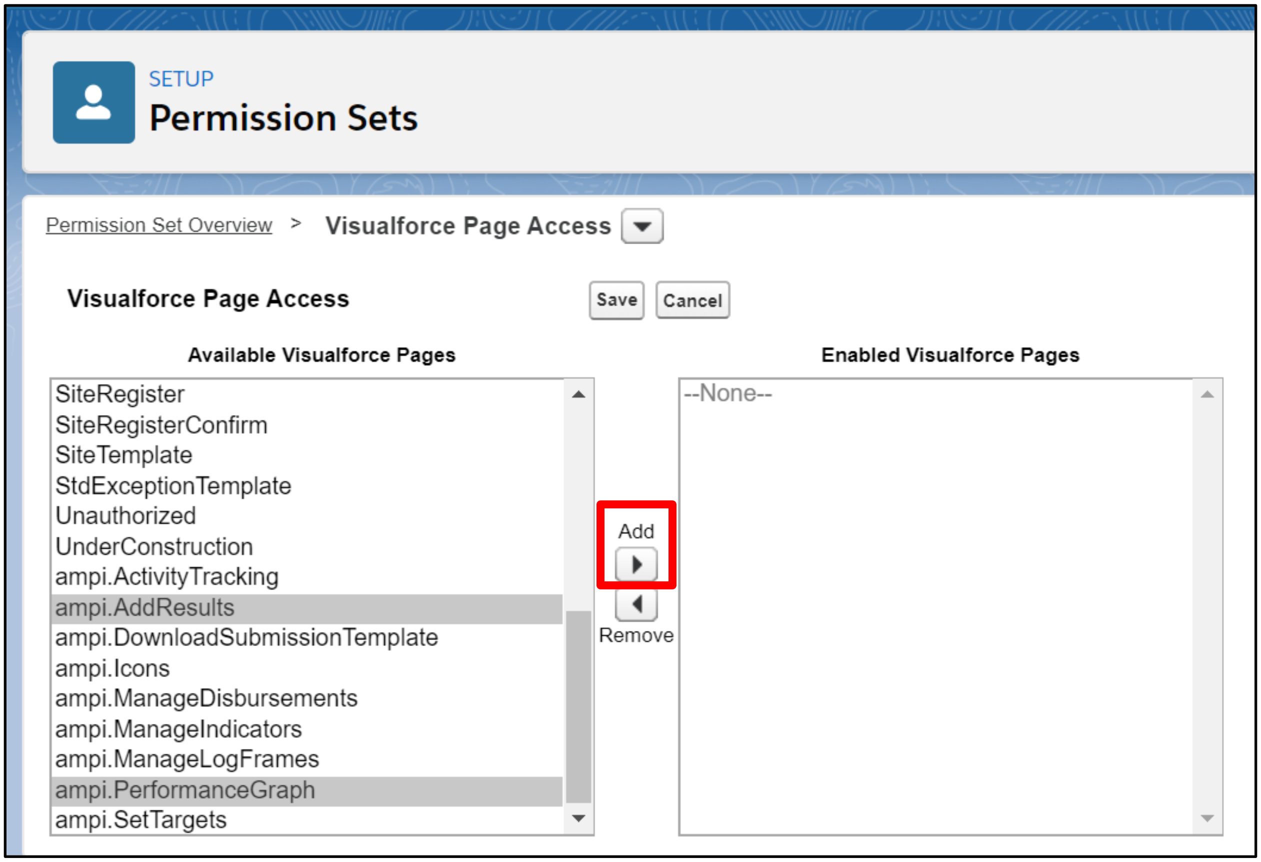
VERASOLUTIONS

Object Permissions

Object	Read	Create	Edit	Delete	View All	Modify All
Activities	X	X	X	X		
Budgets	X	X	X	X		
Disaggregated Indicators	No access					
Disaggregated Project Indicators	X	X	X		X	
Disaggregation Groups	X	X	X		X	
Disaggregation Values	X	X	X	X	X	X
Disbursements	No access					
Financials	X	X	X	X		
Geographic Areas	X					
IATI Policies	No access					
IATI Sectors	No access					
Implementation Plans	X	X	X			
Indicators	X	X	X		X	
Indicator Thematic Areas	No access					
Objectives	X					
Organization Roles	X					
Project Geographic Areas	No access					
Project IATI Policies	No access					

Project IATI Sectors	No access					
Project Indicator Geographic Areas	X	X	X		X	
Project Indicator Objectives	No access					
Object *(continued)*	**Read**	**Create**	**Edit**	**Delete**	**View All**	**Modify All**
Project Indicator Reporting Periods	X	X	X		X	
Project Indicators	X	X	X		X	
Project Indicator Thematic Areas	No access					
Project Objectives	X					
Project Roles	X					
Projects	X	X			X	
Project Thematic Areas	No access					
Questions	No access					
Reporting Periods	X	X	X		X	
Results	X	X	X	X	X	X
Sections	No access					
Submissions	No access					
Thematic Areas	X					
Visualforce Updates	X	X				

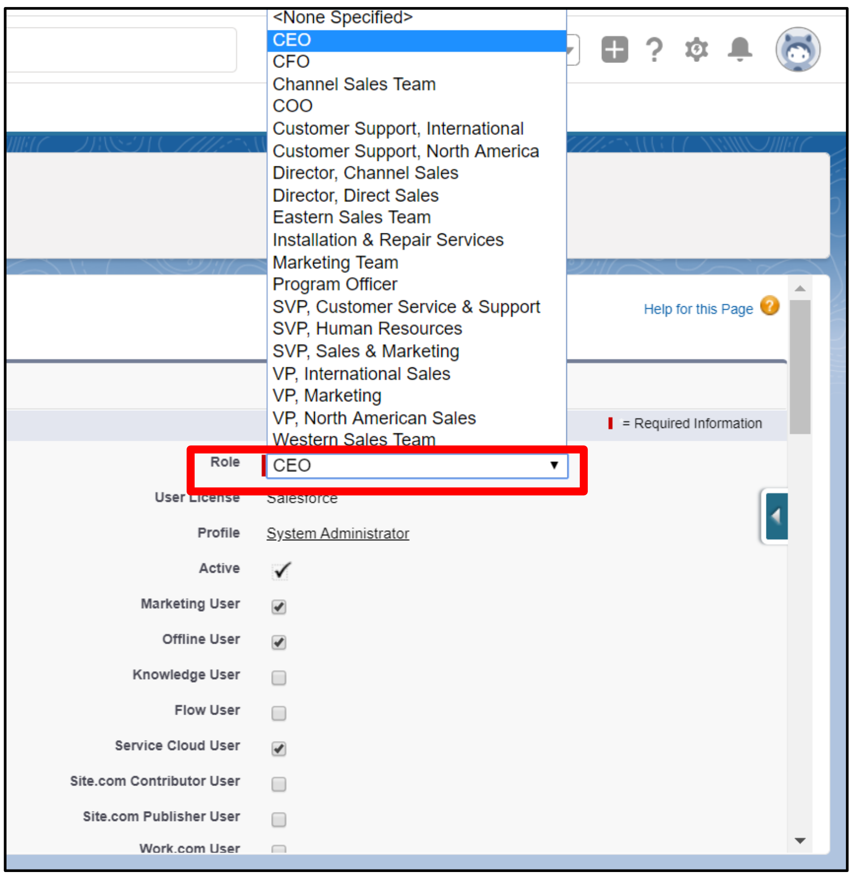
8. Navigate to Visualforce Page Access. Add “ampi.AddResults” and “ampi.PerformanceGraphs” to the Enabled Visualforce Pages list, as shown in the screenshot below. Click “Save”.



Create Community Users

ⓘ The Contact record must have a parent Account in order to be able to follow the next steps listed below. Contacts that are not linked to an Account are always private, and would not be visible to anyone except for the Contact owner and system admin.

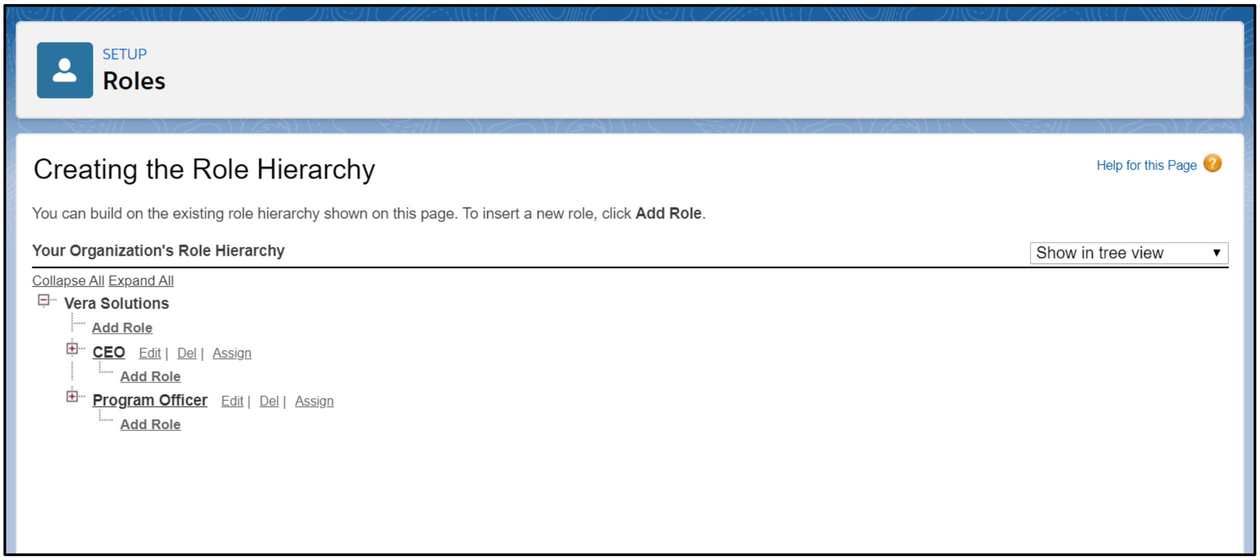
1. Navigate to Setup.
2. In Quick Find, type “Users”.
3. Identify the user with the System Administrator profile, and click *Edit*.
4. In the Role dropdown, select the System Administrator’s role in the organization, as shown below.



   a. An account owner must be associated with a role to enable portal users or transfer portal users to his or her account.

b. The actual role itself may be customized and will vary from organization.

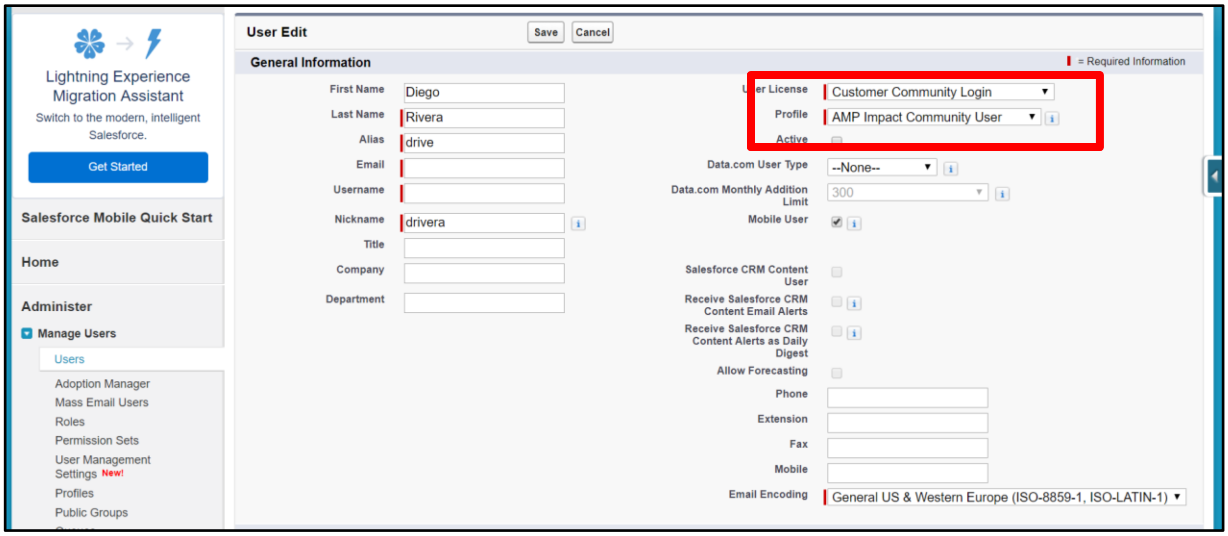
c. To set up unique Roles, type “Roles” in Quick Find. See screenshot below.
   i. Click Set up New Role.
   ii. Click Add Role according to the role hierarchy of the organization.



ⓘ For **sandbox environments only**, please be sure to click “Enable as Partner” on the Account record related to the Contacts. To do this, click on the dropdown located at the top right of the Account record.

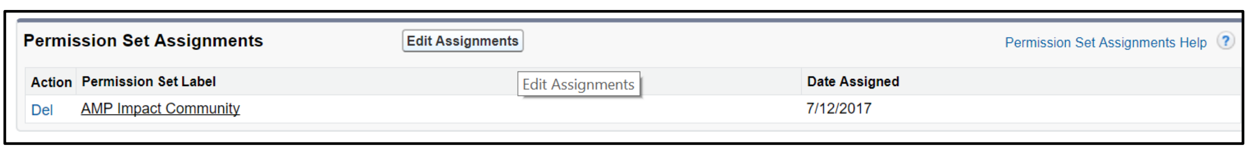
5. Open a Contact record detail.
   a. Ensure the Contact is connected to an Account.

6. Enable the Contact as a Customer user by:
   a. (Lightning) Click “Enable Customer User” button.
   b. (Classic) Click “Manage External User” at the top of the record. Select “Enable Customer User” from the dropdown.
   c. In the User record page, select User License as “Customer Community Login” and Profile as “Amp Impact Community User” (or the Profile created in the earlier section on customising Community Profiles) as shown in the screenshot below.
   d. Fill out Email, username, and nickname, as these are mandatory fields.

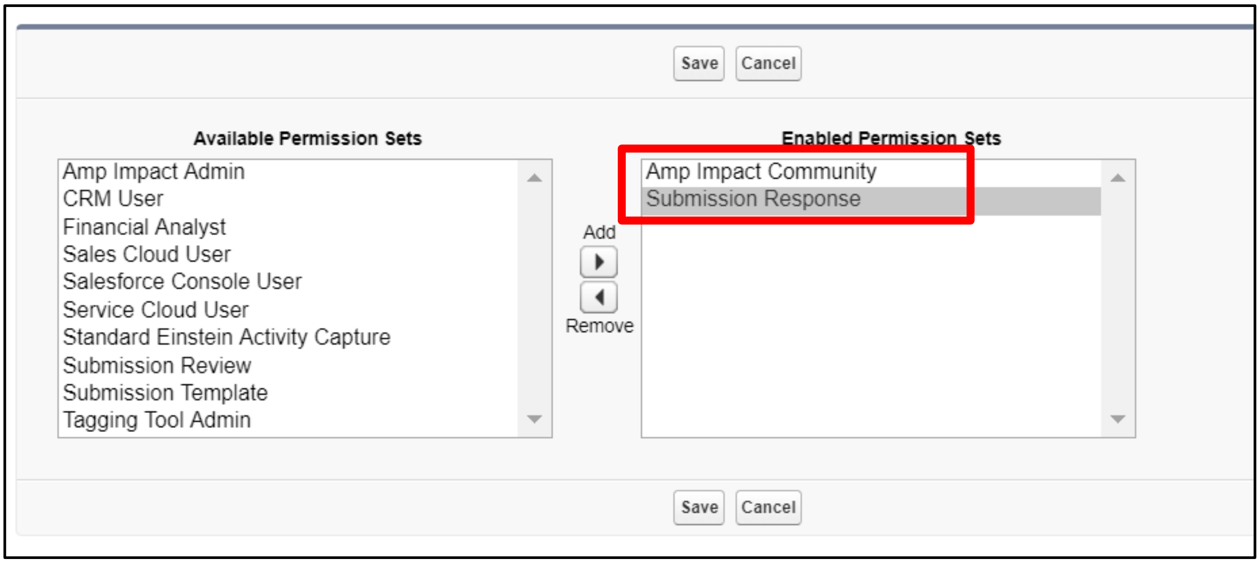


7. Click “Save”.
    a. The user will receive an auto-generated email to reset their password.

8. Scroll down the User record page to the first related list (Permission Set Assignments). Click “Edit Assignments”. See screenshot below.



9. Add **"Amp Impact Community"** and **"Submission Response"** in the multi-select picklist, as shown below.



10. Click "Save".

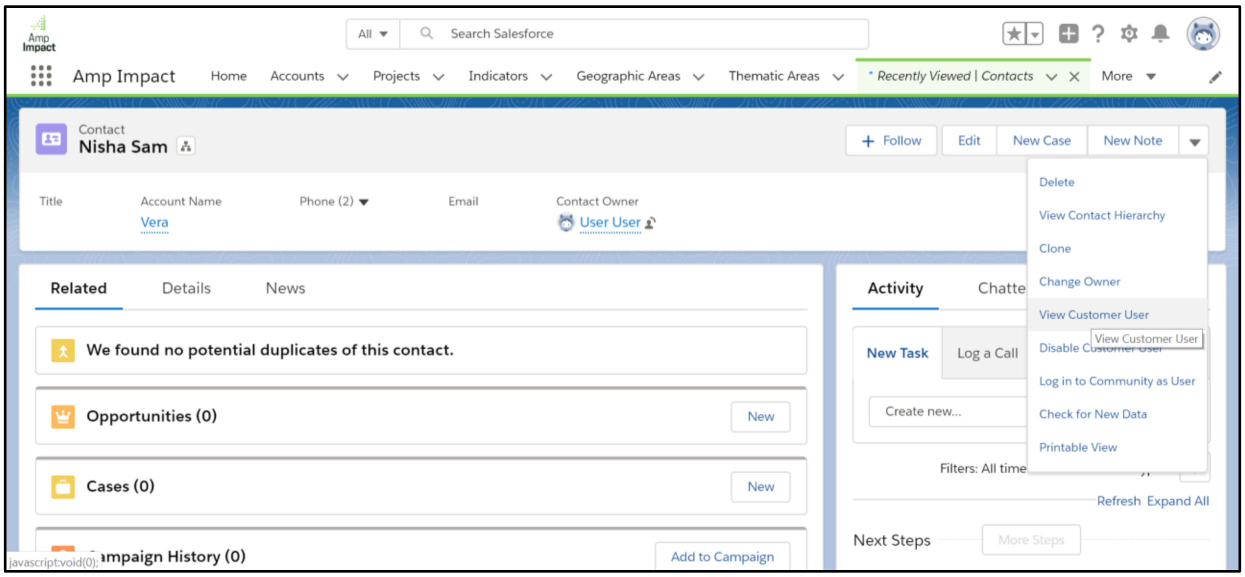
Assign Amp Impact Community User Permission Set to Grantee

After creating permission sets for community users, the admin may then assign the permission set to grantee users.

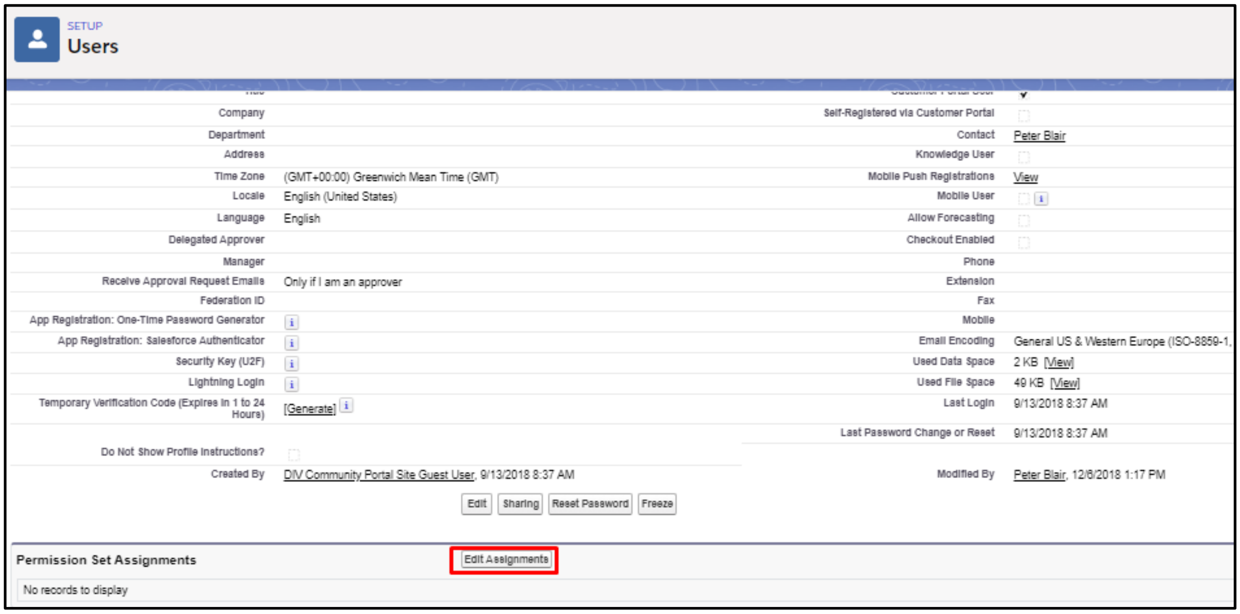
> ⓘ If this step is not completed, the Grantee will see an error message in the Community and be unable to report on the Grant.

1. Navigate to the Contacts object and select a grantee name to view the record.

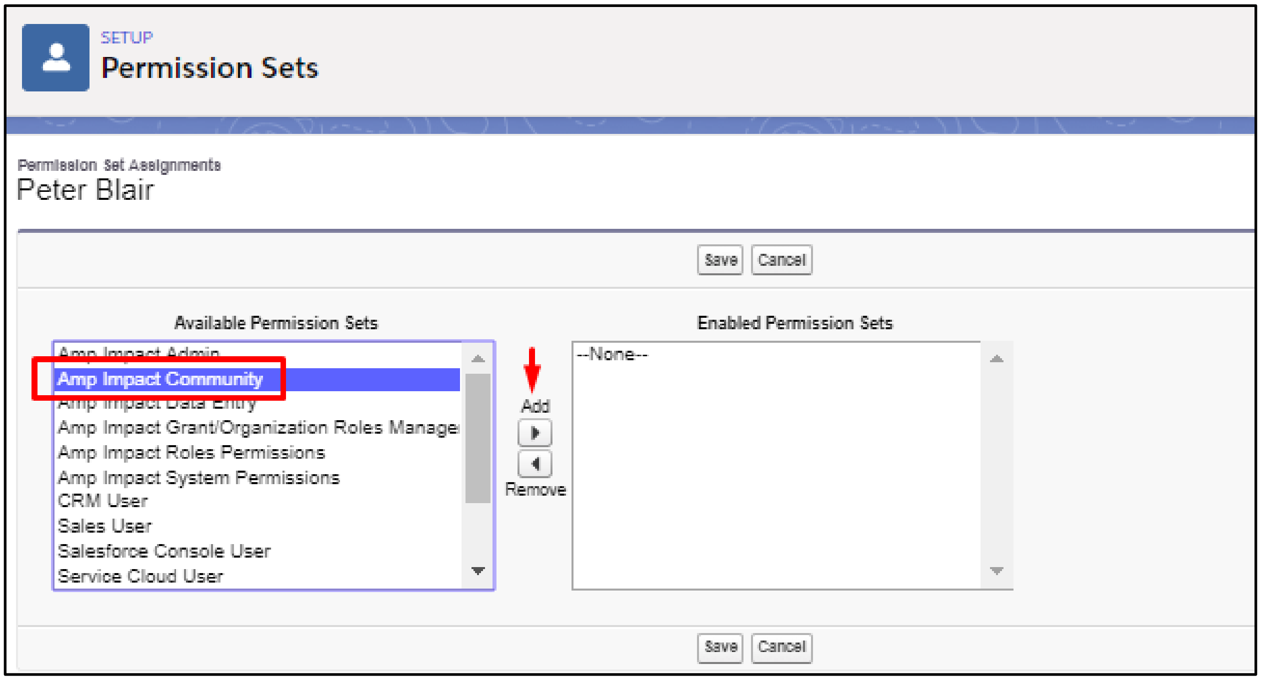
2. On the grantee record, click on the “View Customer User” button on the top-right corner. See screenshot below.



3. Scroll down to the Permission Set Assignments section, and click “Edit Assignments”. See screenshot below.



4. Select the **“Amp Impact Community”** Permission Set from the table on the left-hand side, and use the “Add” arrow in the center to move it to the Assigned table on the right. See screenshot below.



5. Click “Save” to enable this change.

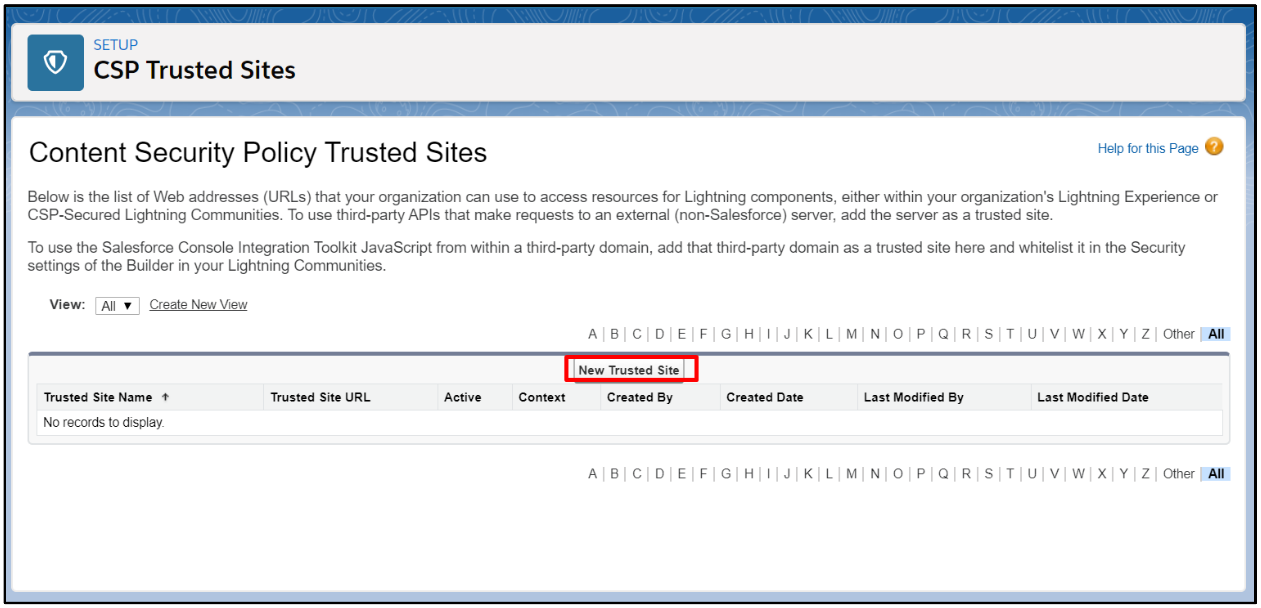
Enable Performance Graphs Download

To allow Community users to download and export performance graphs successfully, an additional step is required for setup.

1. Navigate to Setup.

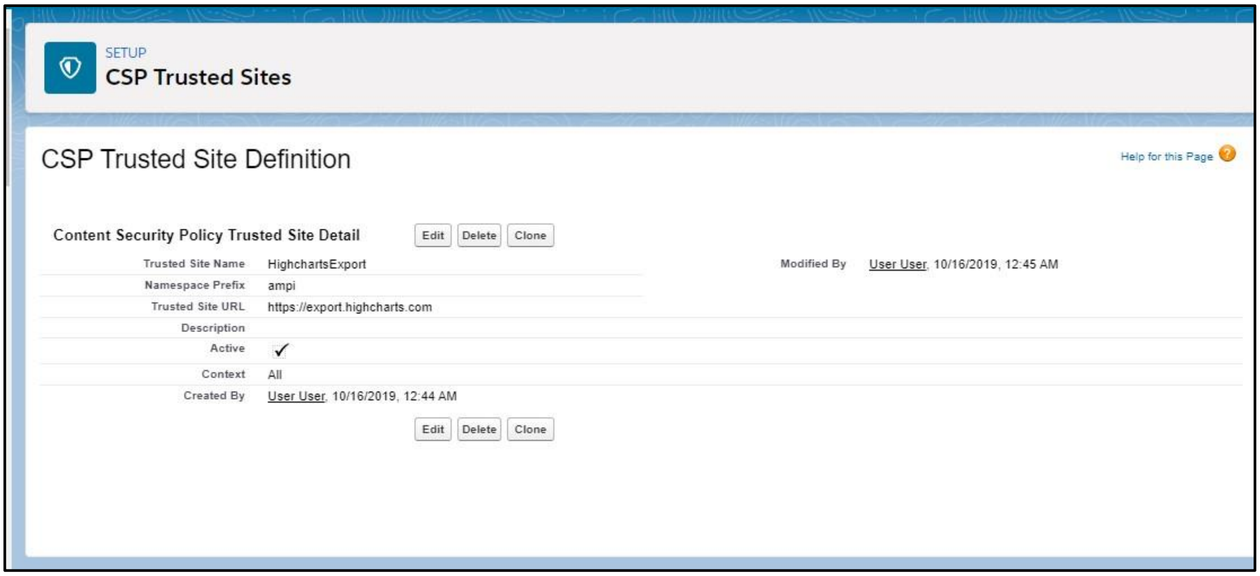
2. Using the Quick Find bar, search for “CSP Trusted Sites”.

3. Click “New Trusted Site” as shown below.



4. On the next screen, ensure the following fields are populated:
    a. <u>Trusted Site Name:</u> HighchartsExport
    b. <u>Trusted Site URL:</u> https://export.highcharts.com
    c. <u>Context:</u> All

5. Click Save, record should look similar to the screenshot below.



Set up Lightning Community

After setting up Community profiles, users and permission sets, admins can now set up the Lightning Community using lightning components. After configuring the Community, funders will be able to set up reporting periods and invite grantees to report, which they can later review. Grantees will be able to fill out reports including adding results, visualizing targets vs. results, narrative reporting and financials. To learn more, view Grantee Reporting User Guide.

In Setup

1. Open Setup.
2. If communities are not yet enabled, enable Communities.
    a. Type “Communities Settings” in Quick Find and click the result.
    b. Select “Enable Communities”.
3. Type “All Communities” in Quick Find and click the result.
4. Click the “New Community” button.

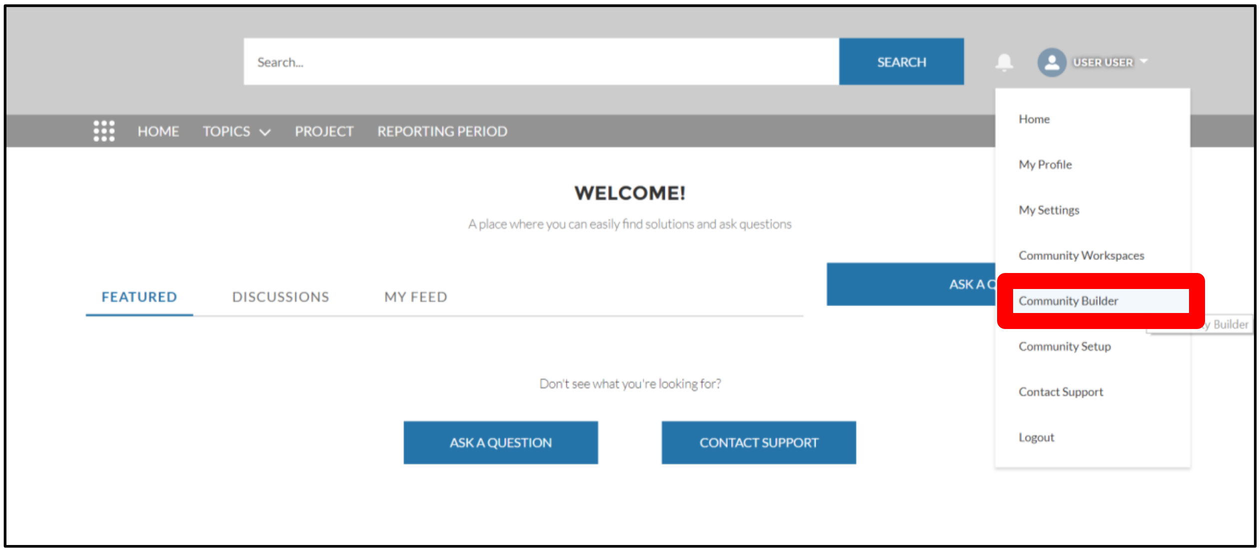
In Lightning Bolt Page

1. Select “Customer Service”.
2. Click “Get Started”.
3. Name your community and (optional) set a URL. Click “Create”. You will be taken to the Community Workspaces.

In Community Builder

Set Up Reporting Periods

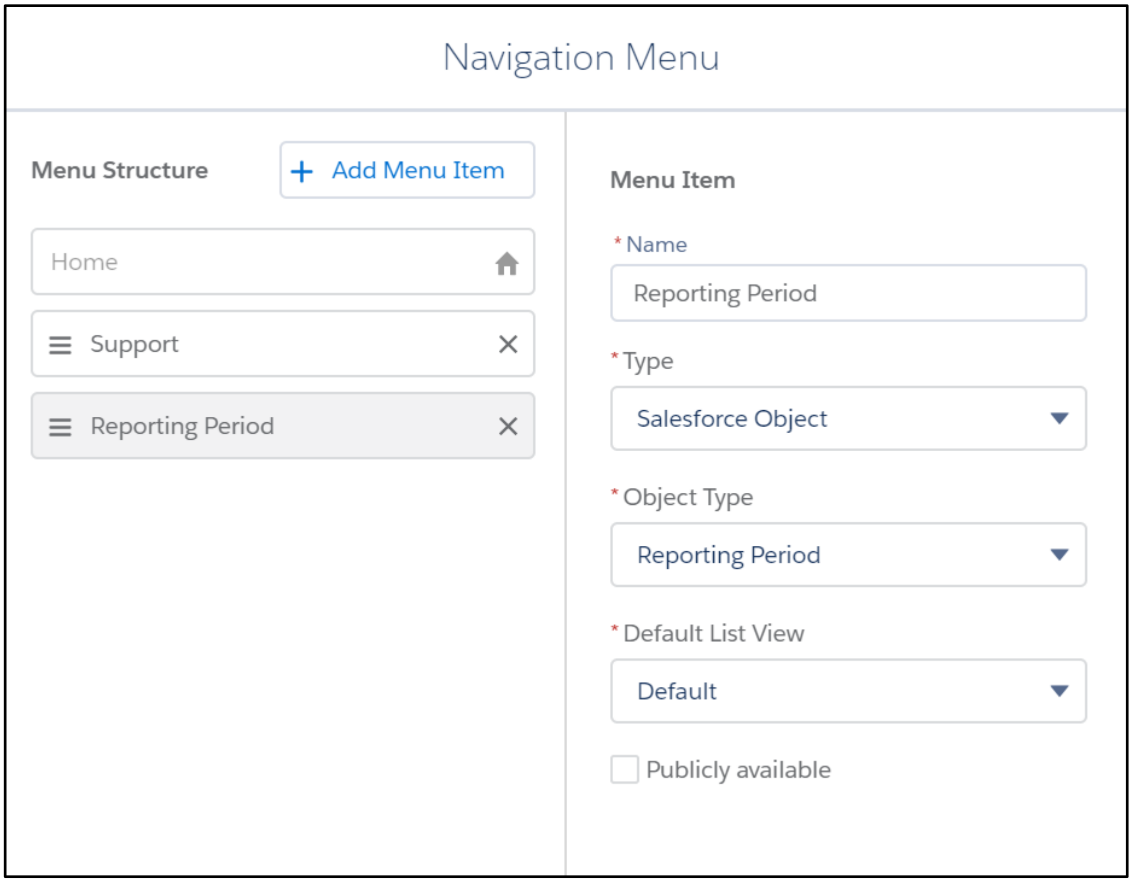
1. Click on User profile icon on the top-right corner. From the dropdown, select “Community Builder”.



2. Click “Navigation Menu” button. Another popup will appear.

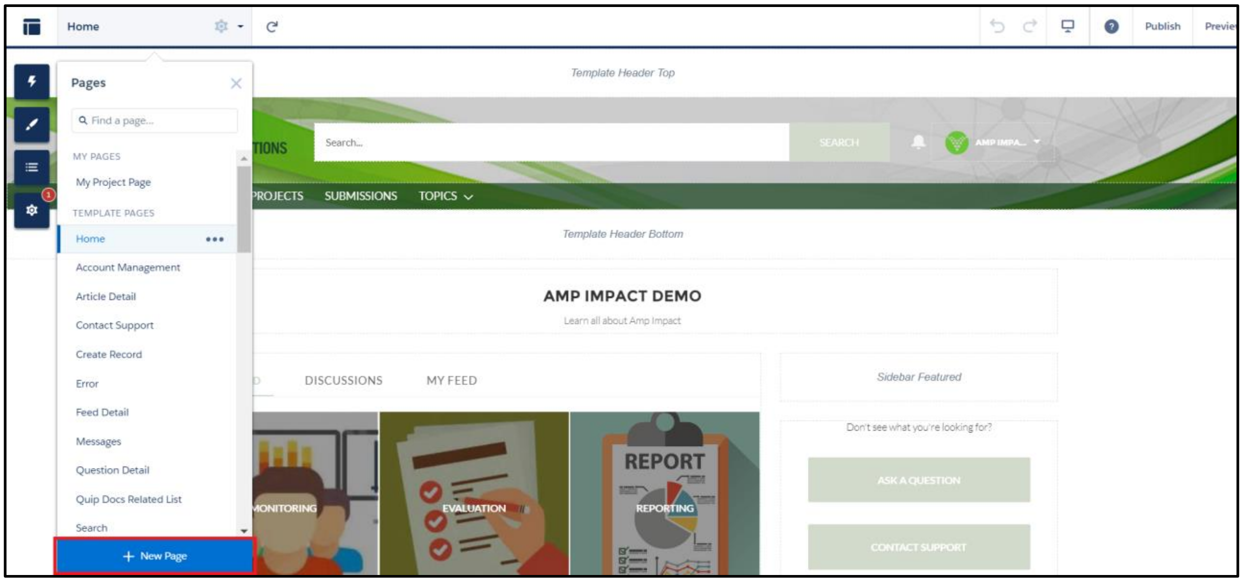
3. Click “+ Add Menu Item” button.

4. Name Menu Item as "Reporting Period", select Type as "Salesforce Object", and select Object Type as "Reporting Period". You can leave the Default List View at "Default".

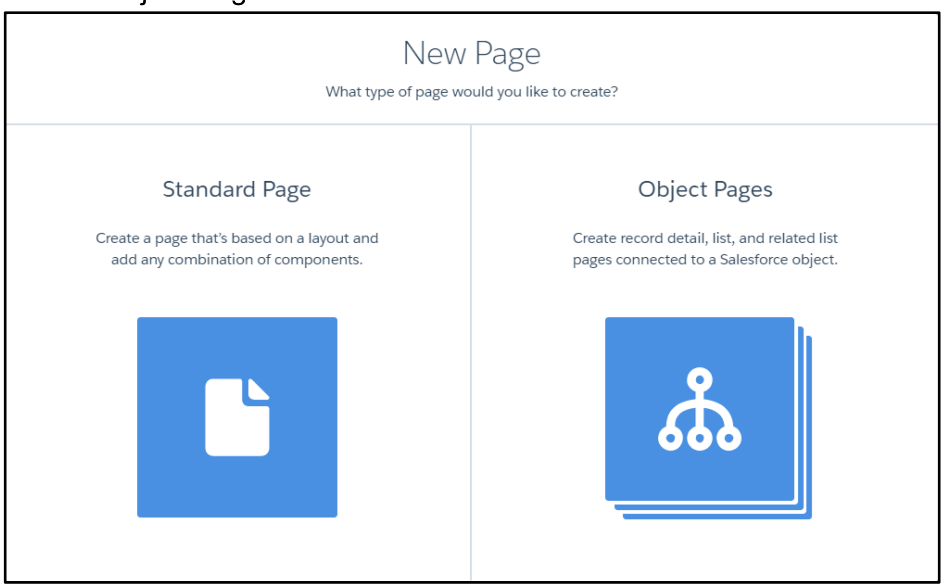


5. Click "Save Menu".

6. Create a Reporting Period record page in the Community Builder.
    a. Click the dropdown in the top left corner.
    b. Scroll to the bottom of the Picklist and click the "+ New Page" button. A pop-up will appear.



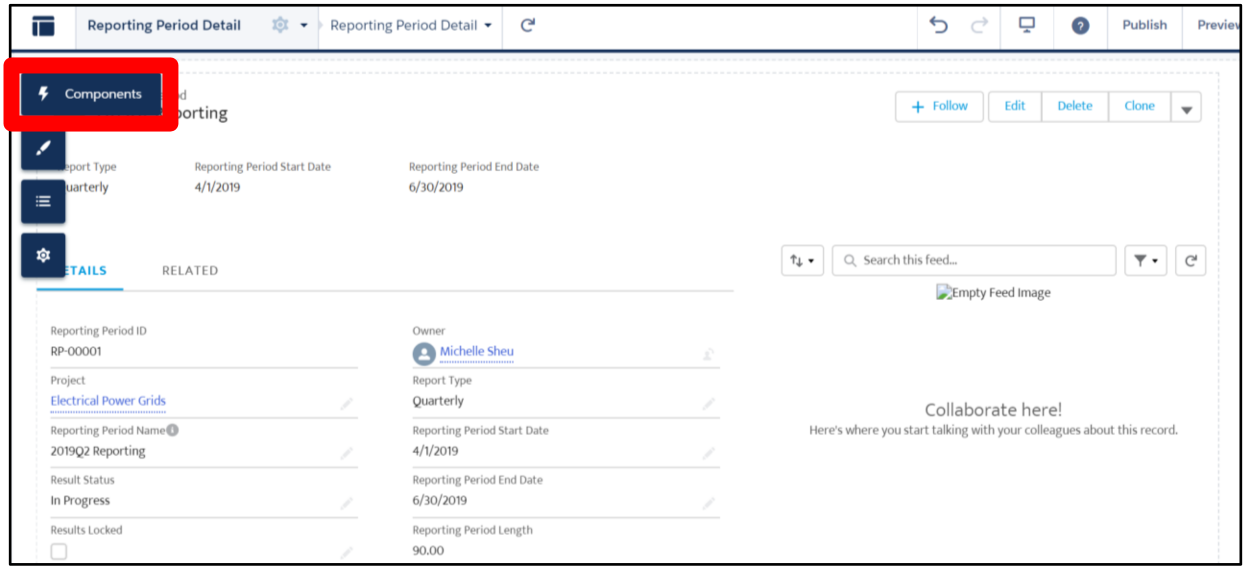
c. Select "Object Pages"



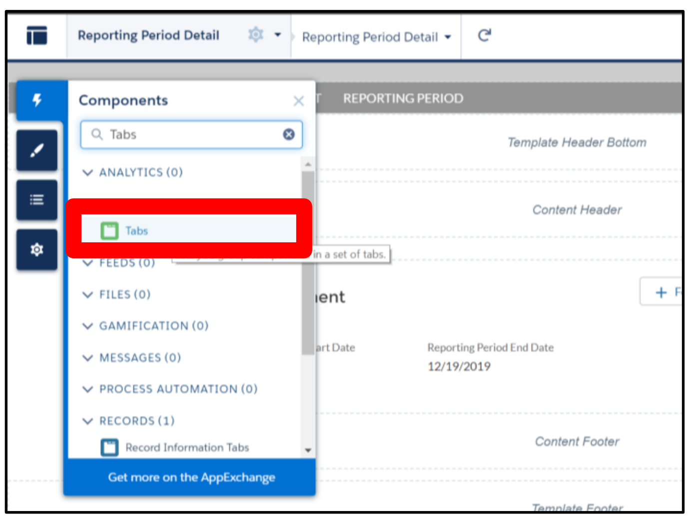
d. Find and select "Reporting Period" in the list of Objects.

e. Click "Create". You will be navigated to the new Reporting Period Detail Page.

7. On the Reporting Period detail page, click on “Components” icon on the left hand navigation panel, as shown in the screenshot below.



8. Search for “Tabs” component. Drag and drop it into between the Record Banner and Content Footer. See below for screenshot.



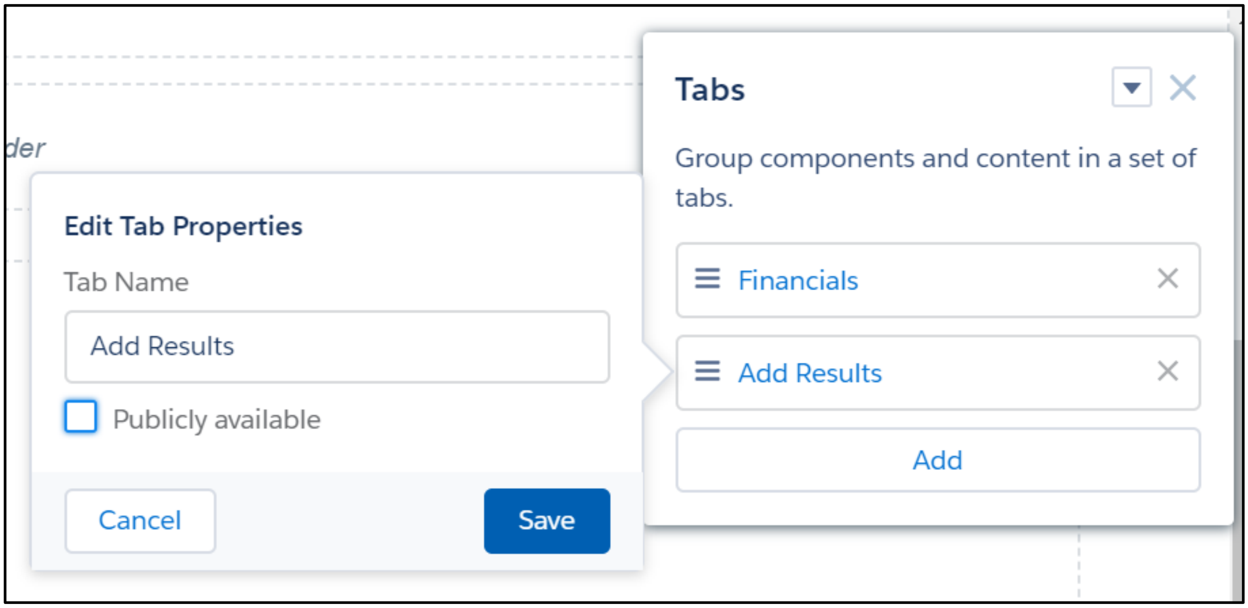
9. If desired, click “Preview” to review changes before clicking “Publish” to save.

Set Up Add Results

1. Navigate to Community Builder on Reporting Period object.

2. Click on the Tabs editor in the right-hand side and add a new tab.

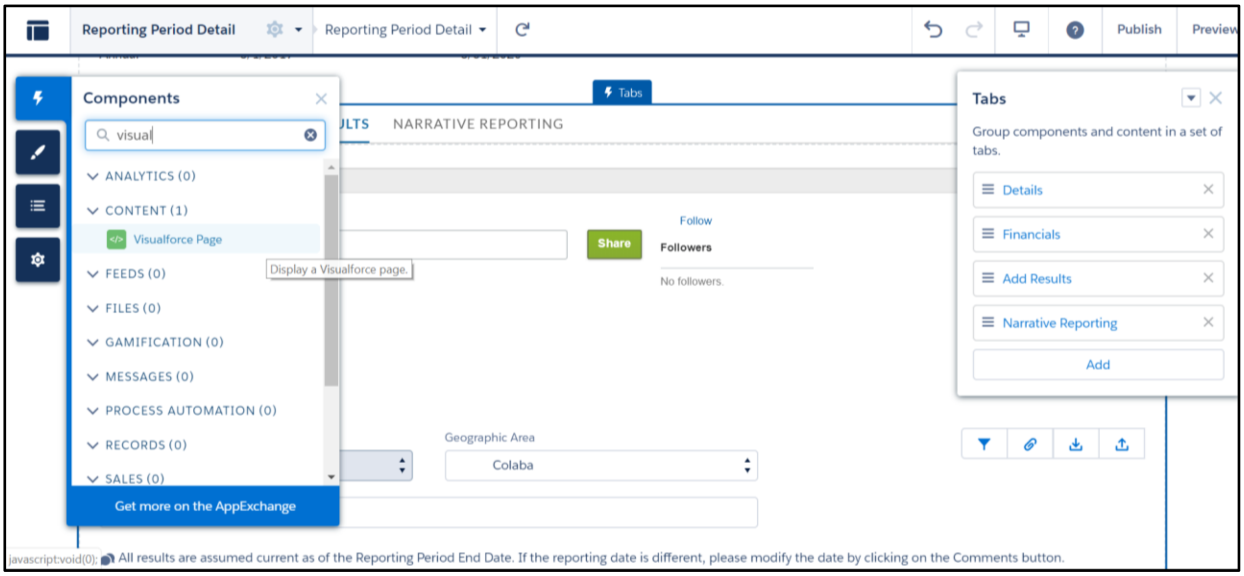
3. Click on the new tab and rename it to “Add Results”, as shown in the screenshot below.



4. Click “Save.”

5. Add a Visualforce Page component to the Add Results tab.

    a. Find the Visualforce Page component in the Custom Components section of the list, see the screenshot below.



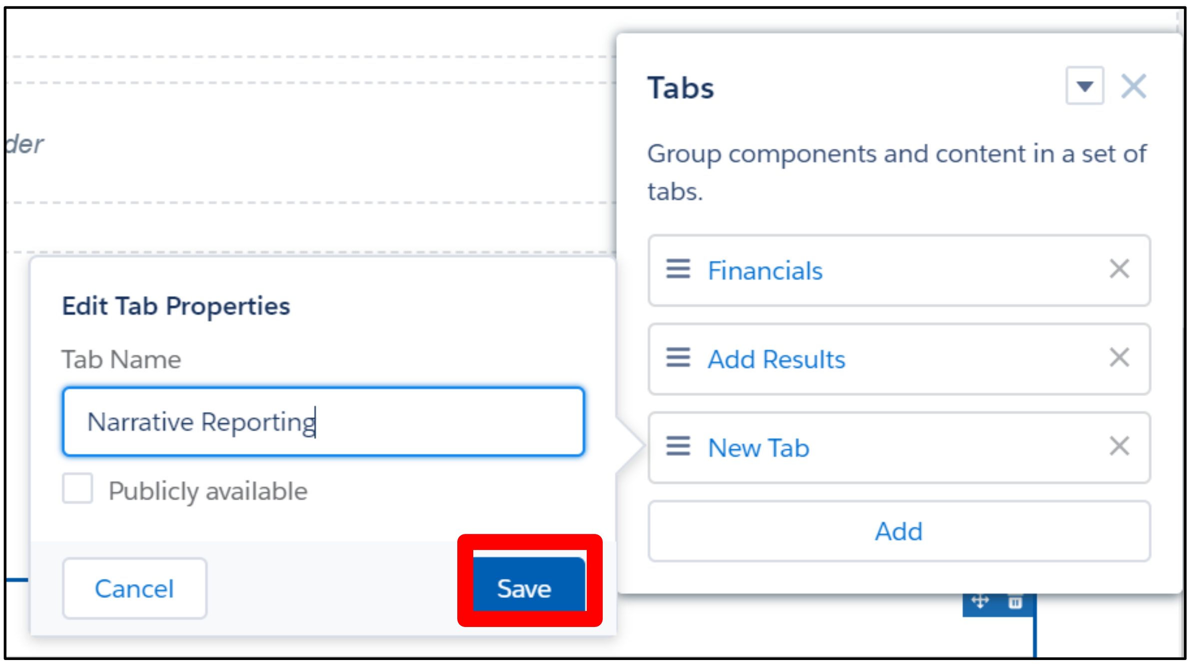
    b. Drag and drop the Visualforce Page component above the footer.

    c. A pop-up will display on the right-hand side. Select AddResults from the dropdown for the Visualforce Page Name. Leave all other fields same.

6. If desired, click “Preview” to review changes before clicking “Publish” to save.

Set Up Narrative Reporting

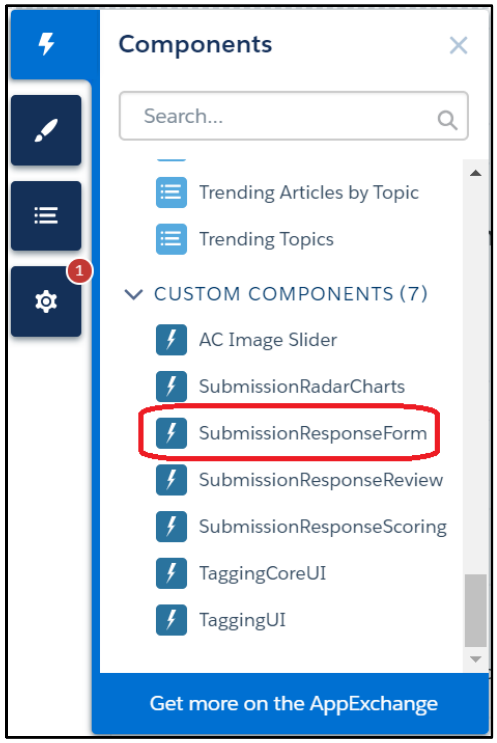
1. Ensure steps from [Set Up Add Results] have been completed.
2. Click on the Tabs editor in the right-hand side and add a new tab.
3. Click on the new tab and rename it to “Narrative Reporting”.
4. Click “Save” as shown below.



5. Add the SubmissionResponseForm component to the Narrative Reporting tab.

    a. Find the SubmissionResponseForm component in the Custom Components section of the list.
    b. Drag and drop the SubmissionResponseForm below the Record Detail component.

6. If desired, click “Preview” to review changes before clicking “Publish” to save.

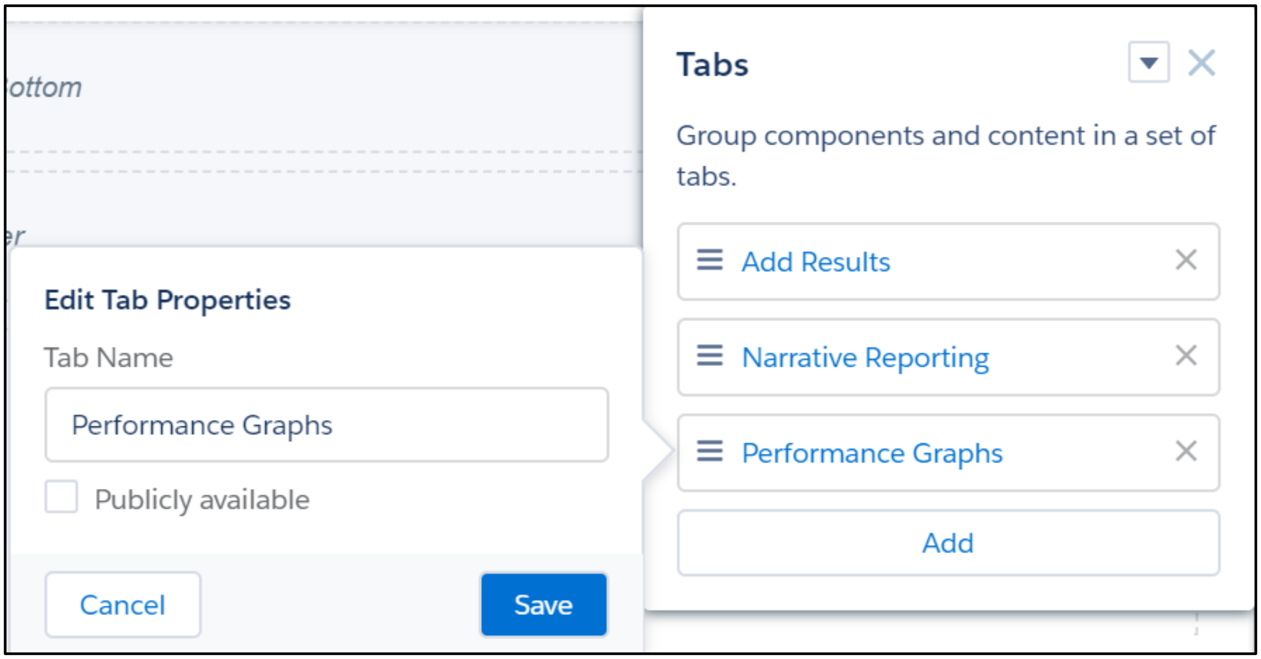


Set Up Performance Graphs

1. Ensure steps from [Set Up Add Results]() and [Set Up Narrative Reporting]() have been completed.

2. Open up the tab editor, and click Add. Edit the tab name to “Performance Graphs”.

3. Click “Save” as shown below.

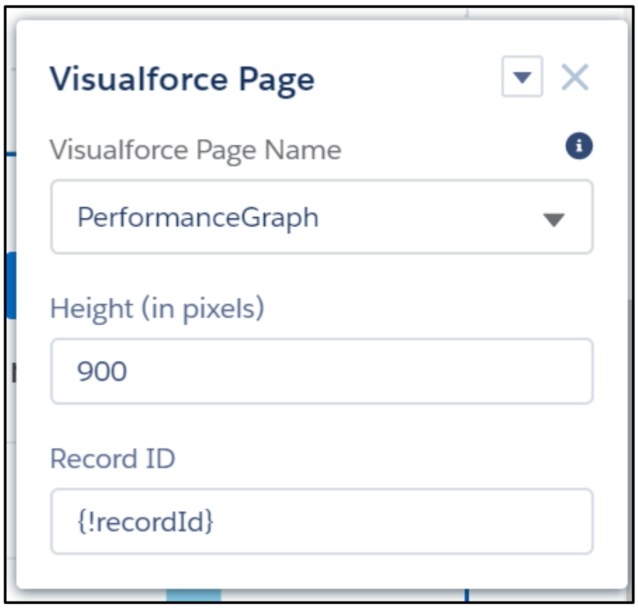


4. Add a Visualforce Page component to the Performance Graphs tab.

    d. Find the Visualforce Page component in the Custom Components section of the list.

    e. Drag and drop the Visualforce Page component above the footer.

    f. A pop-up will display on the right-hand side. Select Performance Graphs from the dropdown for the Visualforce Page Name. Leave all other fields same.



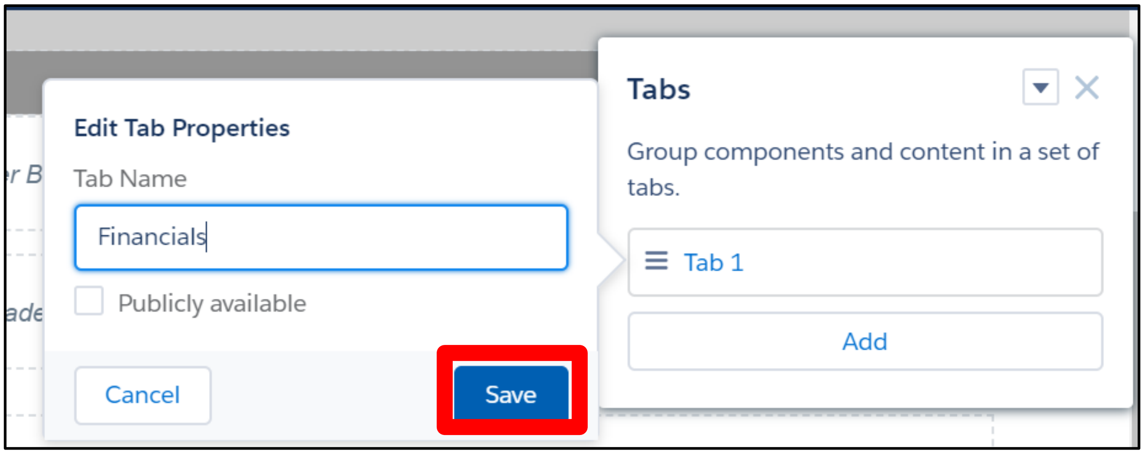
5. If desired, click “Preview” to review changes before clicking “Publish” to save.

Set Up Financial Reports

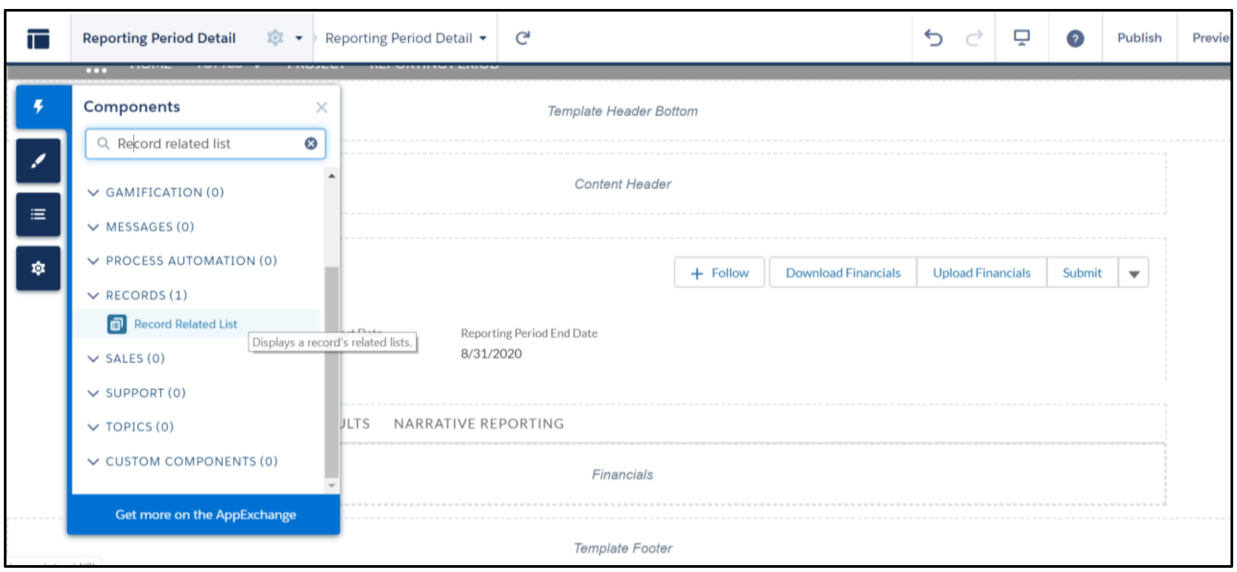
1. Navigate to Community Builder on Reporting Period object.

2. Click on the Tabs editor in the right-hand side and edit the name to “Financials”.

3. Click “Save” as shown below.



4. Add the ‘Record Related List’ component to the Financials tab.
   a. Search for the Record Related List component in the Components section of the list.



   b. Drag and drop the Record Related List component where it says “Financials” in italics, right above the template footer.

5. If desired, click “Preview” to review changes before clicking “Publish” to save.

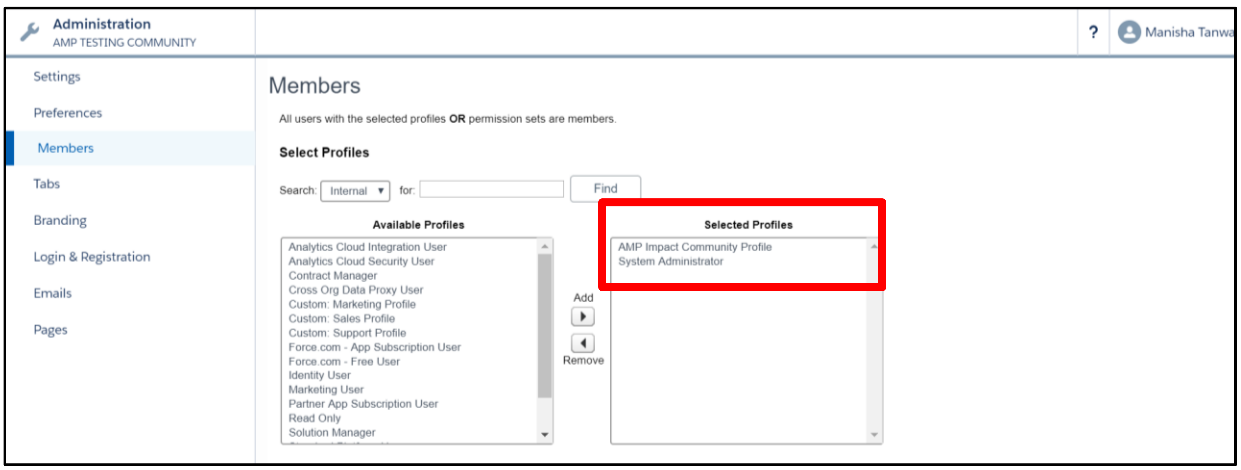
Activate Community

After successfully setting up the community with users, be sure to activate the community and ensure the right profiles are granted access.

1. Navigate to Community Workspace by clicking on the profile

2. In “Administration”, click “Members”.

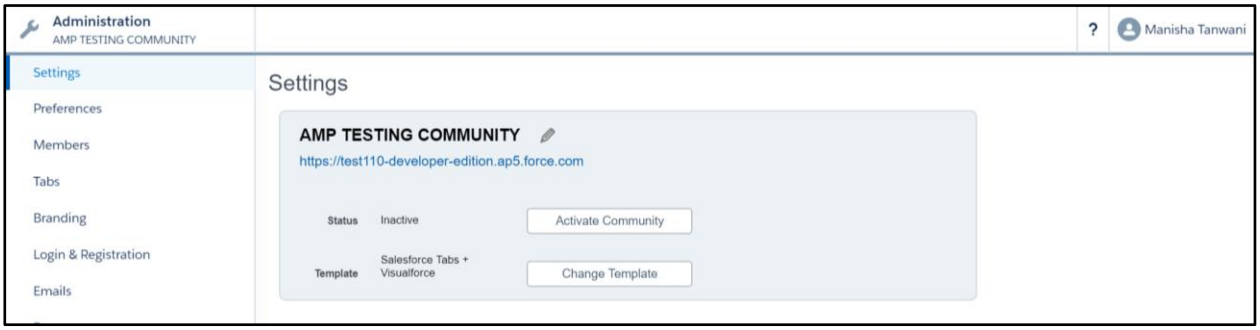
3. Add the “Amp Impact Community Profile” to the multi-select picklist.



4. Click “Save”. See screenshot below.

5. Click the icon in the top left corner to bring down the sidebar.

6. Click “Settings”, and click “Activate Community”. See screenshot below.

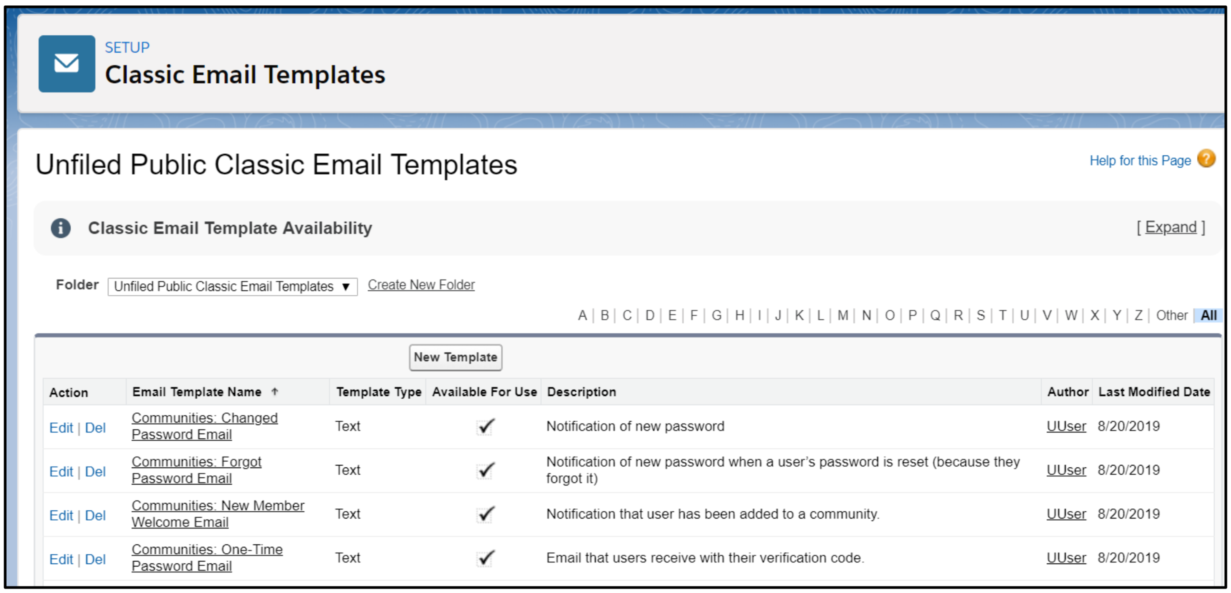


Set up Emails for Grantees to Access Reports

System admins can configure an email alert to send to grantees the link of a grant report according to the start and end dates.

Create an Email Template

1. Navigate to Setup, and using the Quick Find search for Classic Email Templates.



2. Click on New Template, refer to the screenshot below.

3. In Step 1, select Custom (without using Classic Letterhead), as shown in the screenshot below.

4. In Email Template Name, input ‘Remind Grantees to Report’. Template unique name should auto-populate to ‘Remind_Grantees_to_Report’.

5. Input the subject line.

6. Below is a suggested template, and users can additionally customize per your organization’s needs. Be sure to specify Reporting Period and Community link using merge fields.

   The below text is for HTML formatting:

```
<p>Dear Grantee, </p>

<p>Please treat this mail as a reminder to submit your results and
report for <b>reporting period:
{!ampi__Reporting_Period__c.ampi__Label__c} </b></p>

<p>Please go to the following link to submit your report:
```

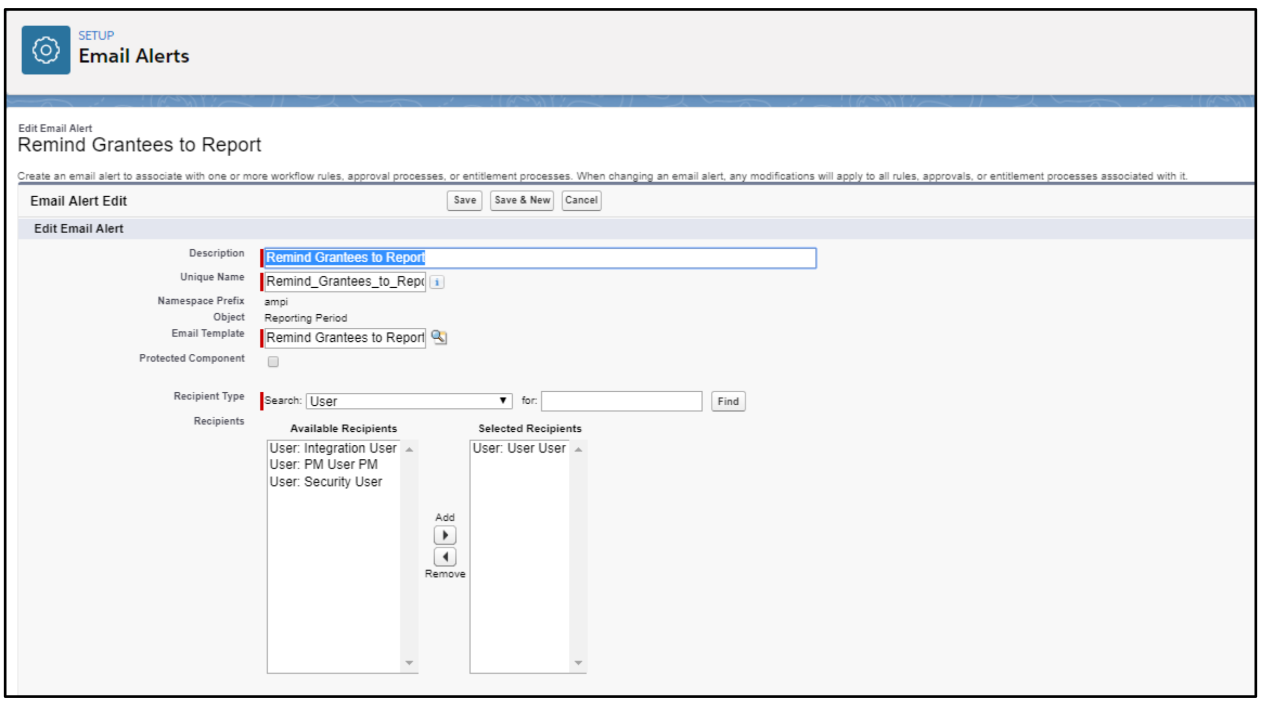
```
https://sandbox-app-energy-6958-dev-ed-
16cb293fa53.cs78.force.com/test/s/detail/{!ampi__Reporting_Period__c
.Id} </p>

<p>If you are facing problems in accessing the above link, kindly
contact system admin. </p>

<p>Regards, </p>
<p>Grant Maker</p>
```

7. Complete plain text version of the HTML email.
    a. Remove HTML markup including `<p></p>` and `<b></b>`.

8. Return to Setup.

9. Using Quick Find, navigate to Email Alerts.

10. Create an email alert using email template and specify contacts (Salesforce/External) to whom email should be sent, shown in the screenshot below.



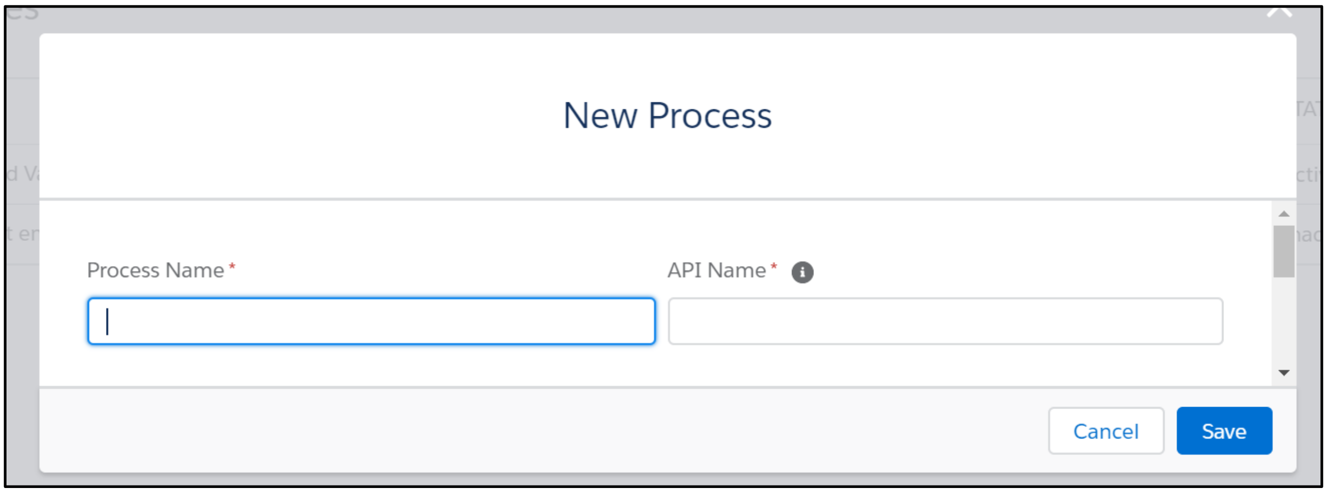
11. Click Save.

Configure Email Automation

Now that the email template and alert is set up, system admins will need to configure the email trigger and automation, known as Process in Salesforce.

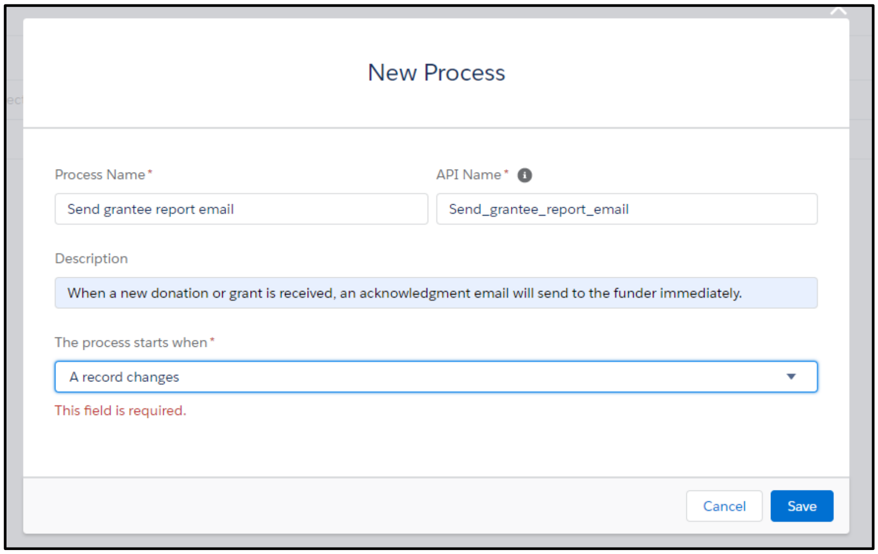
1. From Setup, navigate to Process Builder through Quick Find.

2. Click New. A pop-up will appear.



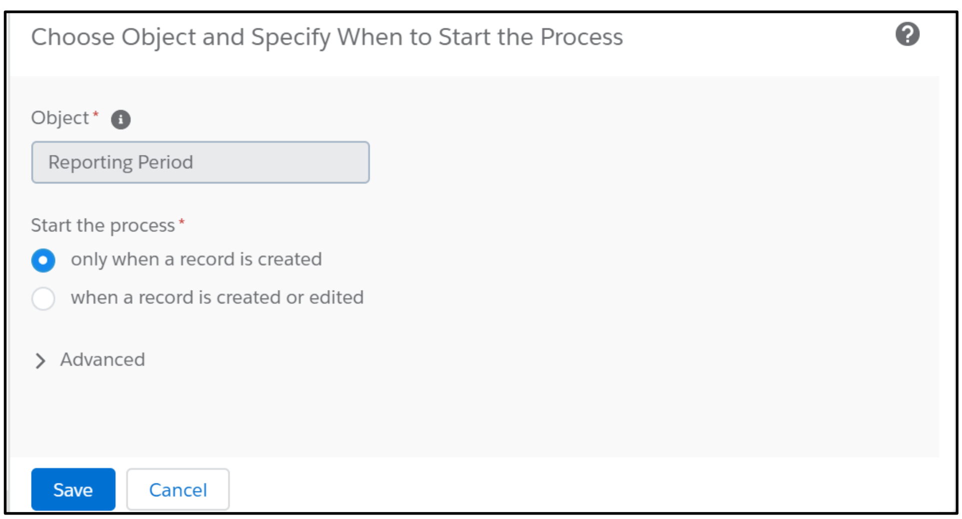
3. Input 'Send grantee report email' under Process Name.

4. Under the dropdown, select that this process starts when “A record changes”. Click Save.

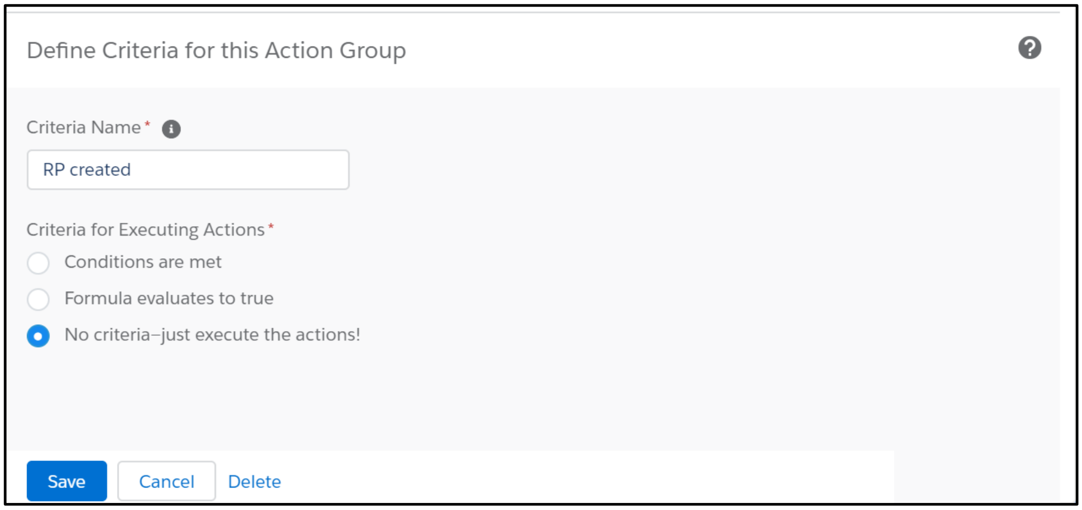


5. Right under start, click on + Add Object.

6. In the Object dropdown, select Reporting Period. Start the process ‘only when a new record is created’, as shown below.



7. From Reporting Period, set criteria for an action group as shown below.

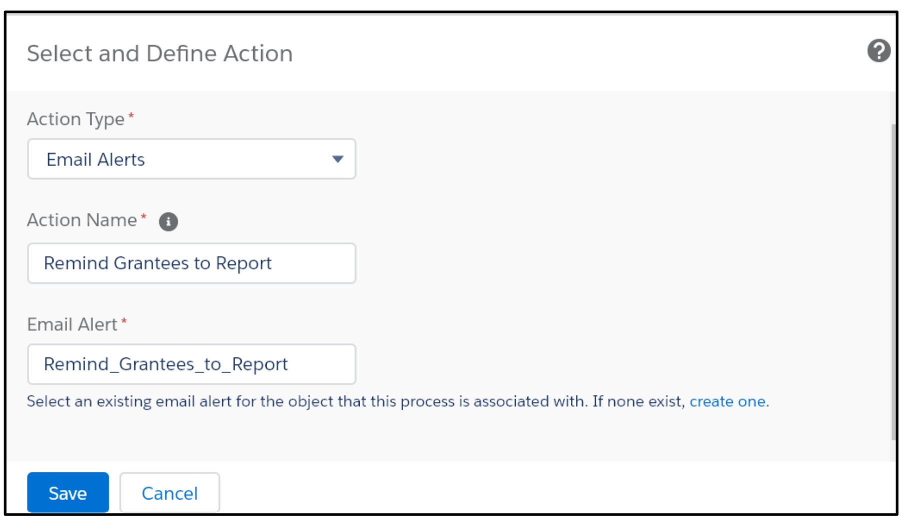


8. Set the immediate action to follow from if RP is created=='TRUE'.

9. Set up an email alert to notify grantees 10 days in advance of a reporting period.

10. Using the Time Lapse feature of Process Builder, set the immediate action to Email Alerts using the dropdown.

11. In Action Name, input Remind Grantees to Report. The Email Alert name is Remind_Grantees_to_Report, as shown in the screenshot below.



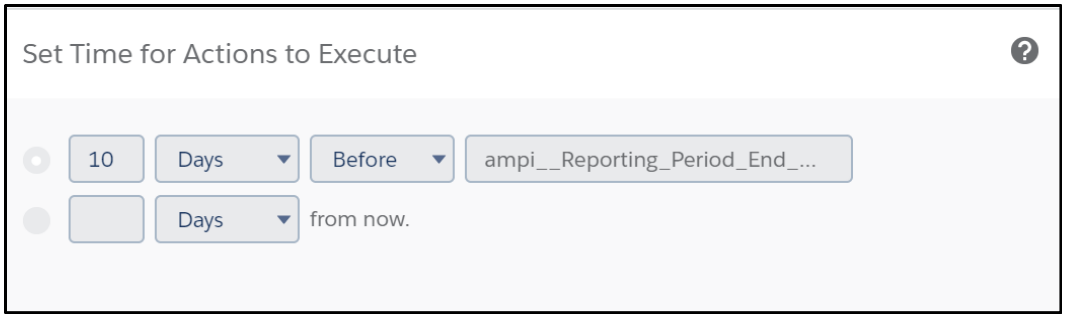
12. Click Save.

13. To schedule the email, stay on Process Builder.

Schedule the Email

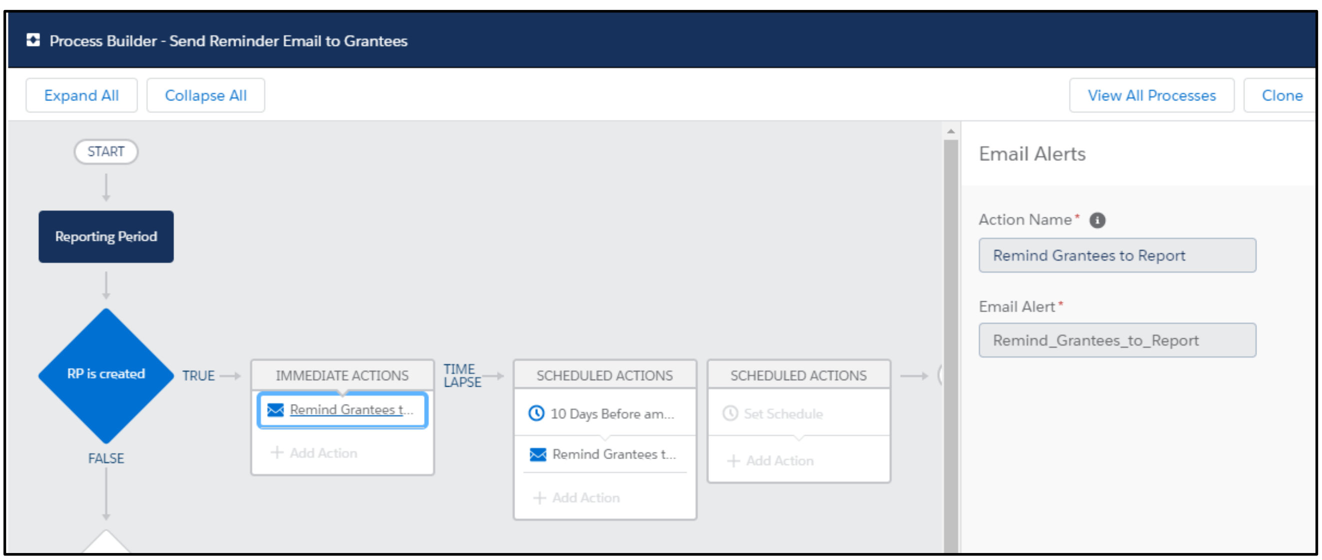
1. Ensure steps from [Configure Email Automation]() have been completed. Remain in Process Builder.

2. Set a scheduled action to trigger the immediate action 10 days before the end of a Reporting Period.

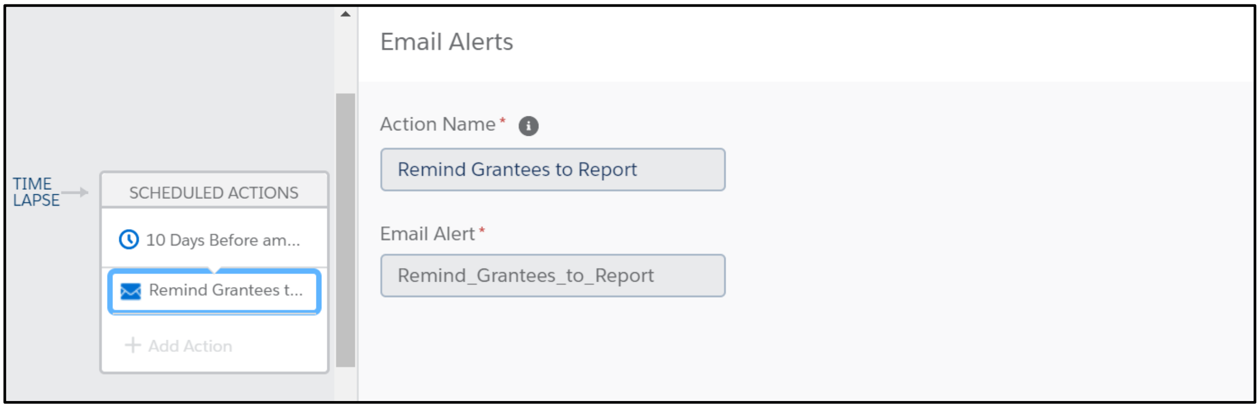


3. Click Save.

4. Double check that your process builder looks like the screenshot below.



5. Add another scheduled action for email trigger under the scheduled action, as shown below.



🛈 Ensure all information is accurately filled out, as once you activate the process it is no longer editable.

6. Click Activate.