**Core Concept: Grant Import File**

|  |
| --- |
| Script |
| Welcome to the AmpliFund Core Concept video focused on the grant import file. |
| If you have numerous historical grants or current grants that you are loading into AmpliFund, the import file can be a more expedient way of transferring data.  However, we highly recommend going through the process of manually inputting at least 1 or 2 grants into AmpliFund first. |
| The grant import file template is always available on the AmpliFund support site, it is an excel file that has a tab to enter grant information and has many columns where you can enter grant details.  To ensure a smooth import, it is important you not adjust the order of columns, number of columns or drop down options.  As this information will be directly imported to AmplIFund use caution when entering data to ensure accuracy including checking spelling.  If you have a grant entered in AmpliFund and include it in your import file, all fields except the name will update.  Use caution when trying to update existing grants, as the name in AmpliFund and the name in your file must match exactly. |
| Let’s look at a blank grant import template file and then we’ll walk through a few examples. |
| When you receive or download the grant import file it will look like this!  As we scroll across you can see there are many columns you can enter data into.  While few are required, remember that the more detailed information you enter into AmpliFund, the more actionable and insightful the analytics and reporting will be in the future! |
| Now, let’s hop over to this example file where we’ve entered a few grants and walk through some key pieces of information we recommend entering and checking as you go through the file.  As you look at the file, the red triangles indicate there is a comment about the cell, which we recommend you review before entering any data.  Fields with an asterisk are required. |
| Let’s go column by column through this file.  The first column is the name of your grant.  The second column is your grantor, this must be an entity that you’ve already entered as an organization in AmpliFund.  As you enter a grantor, be sure to match the spelling exactly as you entered for your organizations.  The next field is the grant type, this is a drop down so you must select one of the options on the list. |
| The next field is the award status.  The status you enter for each grant dictates which fields are required later in the form.  As a reminder, Internal review and to be submitted are pre-award statuses.  Denied are grants you applied for but did not receive and approved are grants you received.  To see the full list of drop down options for any column, click on the arrow next to the column.  If you are unsure what a particular field means, you can reference our support site for definitions of each data component.  The next field is denied date, if you enter any grants as denied this becomes a required field. |
| The next field are the first and last name for your grant manager.  This pulls from you list of staff and must match the exact spelling in your staff list.  For fields such as this one where you are pulling from a master data component it’s often helpful to have the list pulled up so you can confirm spelling. |
| The next field is the grant writer.  This also pulls from you list of staff and the spelling match must be exact.  A grant writer is not required so you can leave this field blank or you can enter one or multiple grant writers.  Here you see I have Sydney’s name in red, this is because her last name I forgot the “s”, if I try to import the file with this error the grants will not import. |
| The next field is department or program.  Departments are not required so you can leave this field blank or you can enter one or multiple departments.  If you are entering multiple, they should be comma separated with no space.  For our last grant I have an error of using a semi colon, if I don’t fix that and change it to a comma my file will not properly import.  Our next field is subject, this is again an optional field.  If you enter multiple subjects be sure to comma separate them with no space.  The subjects also must be entered into AmpliFund already.  Here I have Park, which Is not on my list of subjects in AmpliFund.  I’ll need to delete that to import this file. |
| Next in the file is additional staff, anyone you edit here must be in AmpliFund as a staff record.   If you purchased the advanced subscription and are leveraging the project module, you can add project name as applicable in the project column. The description, award details, eligibility requirements, additional information and unique identifier are all optional fields.  In here are some examples of ways you could use those fields. |
| The next field in the file is status, this must be either enabled or disabled.  Disabled records are in AmpliFund but will not appear in lists of available grants.  Then we start to see the preaward fields.  The first few are optional fields, such as RFP ID number or Assistance Listing Number which is formerly CFDA number. |
| The letter of intent field is required and is a drop down where you select yes or no.  If you select yes then, column X, letter of intent due date is required and must be populated with a date. |
| The proposal open, closed and submitted dates are all optional, but if populated they will appear as dates on your calendar. |
| The receipt date and length of award are required for all grants in a pre-award status.  Remember that the months column must be filled out even if you are entering 0.  The requested amount and match are optional fields.  In the requested amount field be sure to enter just the number.  In red here there is a field with a dollar sign which will cause an error on import. |
| Next we move into the post award grant details, this will have required fields for any grant in a post award status.  The awarded date is required for any post award grant.  The extended date is required if your grant is in an extended status. |
| The start date, year 1 end date and end date are required for any post award grants. |
| The next few columns have numerous optional fields for storing additional information with your grant. |
| The final fields in our file are the awarded amount, which is required for all post award grants and then any match requirements.  Remember these fields should be entered without dollar signs, so I’ll need to fix the cell in red before importing. |
| Now that you’ve learned about the grant import template file, start entering your grants onto the excel template file.  We recommend you carefully review the template file for accuracy and completion.  Once you’ve completed the file, send to [support@amplifund.zendesk.com](mailto:support@amplifund.zendesk.com).  AmpliFund will review the file to confirm there are no issues that would cause an import error.  During our activating advanced features consultation call we will review the import results together. |
| Through this video you’ve learned how to update the grant import file to prepare grant data to be imported into AmpliFund.  Should you have additional questions, please visit our support site.  Thank you! |