**Supplemental Video: Importing Master Data**

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| Script  |
| Welcome to the AmpliFund Training video focused on importing master data to AmpliFund.  |
| During this video we will review how to import 2 examples of master data using organizations and staff.  If you need instruction on how to complete the master data excel template file, please reference the applicable videos on our support site. Before you move forward we recommend checking the file for accuracy and completion as any information in your file will be reflected in your AmpliFund account.  Now let’s log into AmpliFund and together we will import organizations and staff.  |
| First from the calendar screen navigate to Organizations by navigating to Contacts then Organizations.  |
| After clicking on organization, you can then click on the import icon in the top right of the organization page.  |
| This will prompt you to select your import file.  Navigate to the appropriate file on your desktop.  |
| After you select your file, this screen will appear.  So long as you used the organization template import file from the support site, you should not have to map any fields.  The file will match on name, so if you’ve included any organization names for organizations you already have in AmpliFund those will match on import and all other fields will be updated based on what you have in the excel file.  Review each column to ensure it is mapped to the appropriate destination then click Import.  |
| You will receive a success message if your import worked and then can review the results of your import on the screen.  We recommend reviewing data to ensure it imported as you expected.  |
| Next, let’s import staff together.  Navigate to staff by going to Contacts>Staff  |
| Click on the import icon in the upper right hand corner of the screen.  |
| Similar to organizations, select the file you’d like to import.  |
| If you used the staff template file from the support site all columns should map appropriately, however we recommend you review mapping for accuracy.  Once you’ve checked mapping click on import.  Staff records will match based on email address, so if you have records in AmpliFund you need to update ensure the email address matches in your file.  You an also change the match key to unique identifier and can update based on matches from that field.  |
| You will receive a success message and then you can review import results on your screen.  |
| Through this AmpliFund training video you learned how to import in AmpliFund.  Should you have additional questions, please reference our support site.  Thank you!  |