**Supplemental Video: Project Import File**

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| Script  |
| Welcome to the AmpliFund Core Concept video focused on the project import template file.  |
| Before you leverage the project import template file, be sure you’ve consulted with your AmpliFund implementation team on the best ways to use the project module with your grants portfolio.  Also we recommend ensuring you’ve watched the project overview video available on AmpliFund’s support site.  |
| The project import file is available on AmpliFund’s support site, it is an excel based file where you can import numerous project records into AmpliFund at once.  Be sure not to adjust the order of columns and to confirm the accuracy of your data before importing the file.  |
| Let’s jump over to the project import template file together.  |
| When you open the template file it will look like this excel document.  Columns that are required are marked with an asterisk.  The red comments provide additional information about what you should include in the file.  |
| Note that the project manager, which is a required field must match exactly a contact you have listed in your Staff records.   |
| After you’ve completed entering information on the file and checking for accuracy, you are ready to import to AmpliFund.  Navigate to project management then Projects.  |
| Select the import icon from the upper right hand corner.  |
| Select the relevant file from your desktop.  |
| Review the import screen to ensure your source columns are mapping to the appropriate destination in AmpliFund.  If you are using the import template file to revise existing project records you must use either the project ID or a unique identifier if you have a unique identifier entered for your project records.  After you click import, your project records will import to AmpliFund.  Be sure to review the imported data for accuracy and to navigate into each project to link applicable grants to that project.  |
| To link your grants to the project, click on the pencil icon next to the applicable project name.  |
| Go to the grants option under project information and select your applicable grant or grants from the drop down list.  |
| Once you’ve made your updates click save in the bottom right hand corner.  |
| Through this Core Concept video, you’ve learned about the project import template file.  Should you have additional questions, please reference our support site.  Thank you!  |