**Supplemental Training Video Master Data Import Template**

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| Script  |
| Welcome to the AmpliFund Training video focused on the Master Data Import Template.  |
| As you may have learned from our Core Concept videos on Master data, it is the starting point for building a robust grants management system within AmpliFund.  While you’ve already learned how to manually enter records for all your master data, today we are going to review the import options for master data.  Using our master data import template can be a quick way to load records for each component.  |
| Next, we’ll go through some key instructions and walk through the template file.  The master data import template file is an excel based file, it has tabs for each master data component and within each tab are columns for all potential fields on that record in AmpliFund.  The template itself cannot be modified in anyway.  Please use caution not to adjust the tabs or columns or drop down options.  This template file will be directly uploaded to your AmpliFund account so ensuring accuracy of the data you are putting in the spreadsheet is critical.  If your organization set any standards for naming conventions or other data components be sure to follow those standards with the excel template.  Finally, as a reminder, do not add any master data records to the template that you already entered manually.  |
| Let’s look at the template file tab by tab now.  |
| The first tab on the import file is the organizations tabs.  As a reminder, organizations are external entities such as funders, partners or contractors.  Hovering over any cell that has the red comment will provide you with additional instruction that may be helpful.  All fields with an asterisk are required and must be completed to import the record.  The required fields for import here are name and organization type.  The organization type field is a drop down, so your options are: Federal/State/Local Government, Foundation, Corporation, Vendor or Other.  As a reminder organization type allows you to filter within AmpliFund.  As you enter data be sure to use caution in data entry to ensure accuracy.  |
| The next tab is individuals.  As a reminder, individuals are people who work at external organizations.  The required fields on this tab are first name, last name and email address.  You can also enter data in any of the other columns provided if you’d like.  |
| The next tab is staff.  Staff are people who work at your organization.  The required fields on this tab are first name, last name, time tracking, email address and status.  Time tracking is not included in your Core Basic subscription so for import purposes you can enter as Monthly.  For status you should enter Enabled.  The other option is Disabled, this status can be used as staff leave your organization, their record will still be in the system but they will not be an active staff record that can be assigned tasks, etc.  |
| The next tab in the file is users.  Users are staff members of your organization who have AmpliFund credentials and can log into the system.  Required fields on this tab are: First Name, Last Name, Track Time, Email address, and Role.  Similar to staff you can default Track time as monthly.   This can be changed at any time.  For role there is a drop down available, select the appropriate role for the user.  As a reminder with users you can also set their access to the research portal and identify the frequency of when they receive AmpliFund communications.   |
| The next tab in the file is departments.  Departments are either actual departments within your organization or programs.  The only required field is the name.  |
| The next tab in the file is subjects.  As a reminder subjects are tags that can be added to your grant – such as areas like Education or STEM.  The only field to enter is the name.  Be sure to follow any organizational standards on naming conventions.  |
| Our next tab is benefit types.  Again in this tab the only required field is name.  Here you’d enter names like Medical Benefits, Fringe Benefits, etc.  |
| Our final tab on the import template is the budget categories tab.  Budget categories are used to group line items within your grant budgets.  Examples of budget categories could be Travel, Office Supplies or Materials.  The only required field is the name.  |
| We’ve reviewed each tab of the master data import template file and the required fields, you are now ready to start filling out your file!  |
| Your next steps in the process are to: Carefully enter your master data records onto the excel template file, then review the file for accuracy and completion.  Next send your master data template file to: support@amplifund.zendesk.com  AmpliFund will upload your master data file within 48 business hours and will provide you with confirmation once completed.  After your master data is loaded to AmpliFund, we recommend logging in and reviewing each master data component.  |
| Import functionality is always available for the master data components within AmpliFund.  Your implementation services package includes the team completing your initial master data load.  Should you need to import data in the future, you can visit our support site for file templates and additional detailed instructions.  |
| Through this video, you’ve learned how to complete the master data import template file.  For additional instructional documentation, please visit our support site.  Thank you!  |