AmpliFund

Import Guide

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Import Overview

AmpliFund allows users to import a variety of record types instead of adding them manually. Import templates are available on the AmpliFund Support Site, **amplifund.zendesk.com**. Any record type that can be imported and exported will have a record ID column available on its list page. Users can update records in bulk by importing new data with record IDs.

Icons

- Print
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Contacts

Administrators can import Organization, Individual, Staff, and Staff Compensation records from the *Contacts* module.

How To Import Organizations

Organizations are external groups that can be categorized as Federal Government, State Government, Local Government, Foundations, Corporations, Vendors, or Other.

The **Organizations Import Template** allows Administrators to import Organization contact records. Required fields are designated with an asterisk (*). Once completed, users can import from *Contacts>Organizations*.

1. Open **Contacts>Organizations**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Organizations Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import Individuals

Individuals are individual contacts that are external to your organization. Internal contacts should be listed as staff. Individuals can be converted to staff if necessary.

The **Individuals Import Template** allows Administrators to import Individual contact records. Required fields are designated with an asterisk (*). Once completed, users can import from *Contacts>Individuals*.

1. Open **Contacts>Individuals**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Individuals Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import Staff

Staff are individuals internal to your organization. Staff records include compensation and benefit history and funding details. Staff can be added as AmpliFund users.

The **Staff Import Template** allows Administrators to import Staff contact records. Required fields are designated with an asterisk (*). Once completed, users can import from *Contacts>Staff*.

1. Open **Contacts>Staff**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Staff Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import Staff Compensation

Warning
If the Unique Staff Identifier does not exactly match the information in *Contacts>Staff*, the data will not import correctly.

The **Compensation Import Template** allows Administrators to import Staff compensation records. Required fields are designated with an asterisk (*). Once completed, users can import from *Contacts>Staff*.

1. Open **Contacts>Staff**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select Compensation Import from the Choose Import dropdown.
4. Click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the **Compensation Import Template** (recommended), the source and destination fields should match.
6. Click **Import**.

Icons

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Grant Management

Administrators and Managers can import Grants, Performance Plans and Goals, Budgets and Line Items, Cash Receipts, Payment Authorizations, and Tasks from the *Grant Management* module.

How To Import Grants

The **Grants Import Template** allows Administrators and Managers to import Grant records. Required fields are designated with an asterisk (*). Once completed, users can import from *Grant Management>Grants>All Grants*.

1. Open **Grants Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Grant Import** from the *Choose Import* dropdown.
4. Click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the **Grants Import Template** (recommended), the source and destination fields should match.
6. Click **Import**.

How To Import Performance Plans and Goals to Multiple Grants

Note
The *Grant ID* field is required for importing to multiple grants.

The **Performance Plan Import Template** allows Managers and Administrators to import pre-award or post-award performance plans and goals to grants instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, users can import from a grants list or a grant record.

1. Open **Grants Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Performance Plan Import** from the *Choose Import* dropdown.
4. Select **Award Type**.
5. Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
6. Click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the **Performance Plan Import Template** (recommended), the source and destination fields should match.
8. Click **Import**.

How To Import Performance Goals to a Single Grant

1. Open **Grants Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan** or **Post-Award tab>Performance Plan**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. Click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the **Performance Plan Import Template** (recommended), the source and destination fields should match.
7. Click **Import**.

How To Import Budgets and Line Items for Multiple Grants

Note
The *Grant ID* field is required for importing to multiple grants.

The **Budget Import Template** allows Managers and Administrators to import grant budgets and line items instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, users can import from a grants list or a grant record.

1. Open **Grants Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Budget Import** from the *Choose Import* dropdown.
4. Select **Award Type**.
5. Select to *Identify Grant by* **ID** or **Unique Identifier.**
6. Click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the **Budget Import Template** (recommended), the source and destination fields should match.
8. Click **Import**.

How To Import Budget Line Items for a Single Grant

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget** or **Post-Award tab>Financial>Budget**.
4. Click the **(Import icon)** in the *Icon Bar*.

5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the **Budget Import Template** (recommended), the source and destination fields should match.
7. Click **Import**.

How To Import Payment Authorizations for Multiple Sub-Awards

For funder clients

Payment authorizations document payments authorized and paid to recipients. The **Payment Authorizations Import Template** allows Managers and Administrators to import payment authorizations instead of adding them manually. Payment authorizations can be imported for individual awards, or across multiple sub-awards from the same parent grant. Required fields are designated with an asterisk (*). Once completed, users can import from a grant, award, or sub-award record.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Cash Flow>Payment Authorizations**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the **Payment Authorizations Import Template** (recommended), the source and destination fields should match.
7. Select a **Match Key**. This will determine how AmpliFund identifies and updates the records.
8. Click **Import**.

How To Import Payment Authorizations for a Single Award or Sub-Award

For funder clients

Payment authorizations document payments authorized and paid to recipients. The **Payment Authorizations Import Template** allows Managers and Administrators to import payment authorizations instead of adding them manually. Payment authorizations can be imported for individual awards, or across multiple sub-awards from the same parent grant.

Required fields are designated with an asterisk (*). Once completed, users can import from a grant, award, or sub-award record.

> **Note**
> The *Sub-Award ID* field is required when importing from a parent grant to sub-awards.

1. Open **Grant Management>Grants>Grants Awarded** or **>Sub-Awards**.
2. Click a **award** or **sub-award name**.
3. Open the **Post-Award tab>Cash Flow>Payment Authorizations**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the **Payment Authorizations Import Template** (recommended), the source and destination fields should match.
7. Select a **Match Key**. This will determine how AmpliFund identifies and updates the records.
8. Click **Import**.

How To Import Tasks for Multiple Grants

The **Grant Tasks Import Template** allows users to import grant tasks instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, users can import from a grants list or a grant record.

1. Open **Grant Management>Grants>All Grants**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select **Grant Tasks Import** from the *Choose Import* dropdown.
4. Click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the **Grant Tasks Import Template** (recommended), the source and destination fields should match.
6. Click **Import**.

How To Import Tasks for a Single Grant

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Tasks**.
4. Click the **(Import icon)** in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the **Grant Tasks Import Template** (recommended), the source and

destination fields should match.

7. Click **Import**.

Note

The *Grant ID* field is required for importing to multiple grants.

Icons

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- Copy
- Delete

Project Management

For clients with the Project module

Administrators and Managers can import Projects from the *Project Management* module.

How To Import Projects

The **Projects Import Template** allows Administrators and Managers to import Project records. Required fields are designated with an asterisk (*). Once completed, Organizational Administrators can import to *Project Management>Projects*.

1. Open **Project Management>Projects**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Projects Import Template** (recommended), the source and destination fields should match.
5. Select a **Match Key**. This will determine how AmpliFund identifies and updates the records.
6. Click **Import**.

Icons

- Print
- Help
- Save View
- Add
- Import
- View Award
- Edit

Fund Management

For clients with the Competitive Award Management or Fund module

Administrators and Managers can import Awards from the *Fund Management* or *Award Management* module.

How To Import Awards

The **Awards Import Template** allows Administrators and Managers to import Award records. Required fields are designated with an asterisk (*). Once completed, Organizational Administrators can import to *Fund Management>Awards* or *Award Management>Awards*.

1. Open **Fund Management>Awards** or **Award Management>Awards**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Awards Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

Icons

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- Delete
- Invite to AmpliFund

Administration

Administrators can import Recipients, Users, Departments, Subjects, Budget Categories, Benefit Types, GL Accounts, Expenses, and HR Actuals from the *Administration* module.

How To Import Recipients

The **Recipients Import Template** allows Administrators to import recipient information. Required fields are designated with an asterisk (*). Once completed, users can import from *Administration>License Information>Lead Recipients tab* or *Administration>License Information>Sub-Recipients tab*.

1. Open **Administration>License Information**.
2. Open the **Lead Recipients tab** or **Sub-Recipients tab**.
3. Click the **(Import icon)** in the *Icon Bar*.
4. In the pop-up window, click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the **Recipients Import Template** (recommended), the source and destination fields should match.
6. Click **Create**.

How To Import Users

The **Users Import Template** allows Administrators to import AmpliFund users instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import from *Administration>System Security>Users*.

1. Open **Administration>System Security>Users**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Users Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import Departments

Departments are internal departments in your organization. Departments can be used when creating a department-related user, grant, or project. Users that are associated with a department can view all other records linked to the department.

The **Departments Import Template** allows Administrators to import Departments instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>System Security>Departments*.

1. Open **Administration>System Security>Departments**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. Click **Select Files...** to select a file from your computer.
4. Click **Next**.
5. Select the **Destination** field for each Source column. If you are using the **Departments Import Template** (recommended), the source and destination fields should match.
6. Click **Create**.

How To Import Subjects

Subjects are keywords that link grant and project records. By including subjects, your grants and projects can be more searchable and manageable. Subjects may be created in the *Administration* module, or when creating a new grant or project.

The **Subjects Import Template** allows Administrators to import Subjects instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>Lists>Subjects*.

1. Open **Administration>Lists>Subjects**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. Click **Select Files...** to select a file from your computer.
4. Click **Next**.
5. Select the **Destination** field for each Source column. If you are using the **Subjects Import Template** (recommended), the source and destination fields should match.
6. Click **Create**.

How To Import Budget Categories

Budget categories group budget line items in the budget and reports. To learn more about adding categories to a budget, see the **AmpliFund Grant Management Guide**.

The **Budget Categories Import Template** allows Administrators to import Budget Categories instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>Lists>Budget Categories*.

1. Open **Administration>Lists>Budget Categories**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Budget Categories Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import Benefit Types

The Benefit Types list contains all available benefit options that may be used when planning staff compensation and personnel line items.

The **Benefit Types Import Template** allows Administrators to import Benefit Types instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>Lists>Benefit Types*.

1. Open **Administration>Lists>Benefit Types**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **Benefit Types Import Template** (recommended), the source and destination fields should match.
5. Click **Import**.

How To Import GL Accounts

Note

If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>Lists>GL Accounts*.

The **GL Accounts Import Template** allows Administrators to import GL accounts instead of adding them manually. Required fields have asterisks (*) next to their names. Once completed, Administrators can import to *Administration>Lists>GL Accounts*.

1. Open **Administration>Lists>GL Accounts**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the **GL Accounts Import Template** (recommended), the source and destination fields should match.
5. Click **Create**.

How To Import Expenses

Warning
The GL names and GL codes in the import template must exactly match the GL names and GL codes in *Administration>Lists>GL Accounts* for the data to import correctly.

The **Expenses Import Template** allows Administrators to import expenses. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>Actuals>Expenses*.

1. Open **Administration>Actuals>Expenses**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, add an **Import Name**. The name must not match any other import names.
4. Click **Choose a file** to select a file from your computer.
5. Click **Create New** to create default mapping or select an existing default map (optional). A default map can be useful if you use the same file template for importing expenses.
6. Select the **Destination** field for each Source column. If you are using the **Expenses Import Template** (recommended), the source and destination fields should match.
7. Click **Preview**.
8. On the Preview page, update the information as necessary. You will see all actuals by default; use the tabs at the top of the page to filter.
9. Click **Import to Expenses**.

How To Import HR Actuals

For clients with the Time & Effort Certification Module

Warning
If the staff First Name, Last Name, and Unique Identifier do not exactly match the information in *Contacts>Staff*, the data will not import correctly.

The **HR Actuals Import Template** allows Administrators to import personnel HR actuals instead of adding them manually. Required fields are designated with an asterisk (*). Once completed, Administrators can import to *Administration>Actuals>HR Actuals (Personnel)*.

1. Open **Administration>Actuals>HR Actuals (Personnel)**.
2. Click the **(Import icon)** in the *Icon Bar*.
3. In the pop-up window, select the expenses' **month and year**. This will not override the dates in the HR Actuals Import Template.
4. Click **Select Files...** to select a file from your computer.
5. Click **Next**.
6. Select the **Destination** field for each Source column. If you are using the **HR Actuals Import Template** (recommended), the source and destination fields should match.
7. Click **Create**.