

New Feature! Payment Authorizations Import

Release Summary




- Import **multiple** Payment Authorizations across **several awards**.
- **Preview** and **fix** system identified **error reconciliations** on the Preview Grid, allowing for **quick changes** before import completion.
- Save **Field Mapping values** for future imports.
- Only Payment Authorizations with **one fund** can be uploaded at this time.

Find Flexibility with Two Options for Import



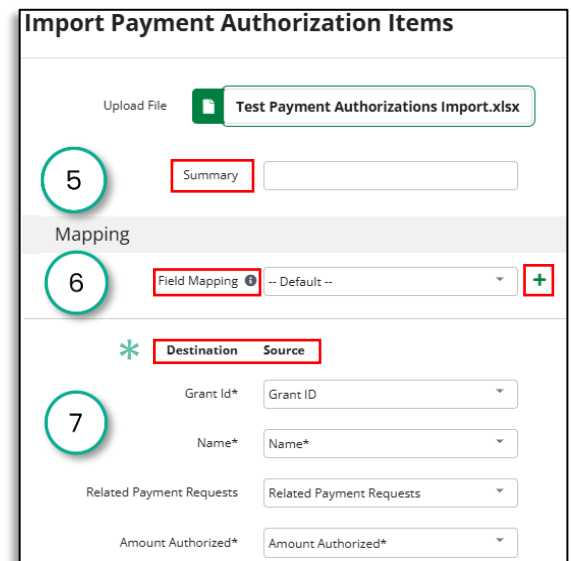
Import several Payment Authorizations for one or many Awards




1. From the Awards grid select the  icon.
2. From the dropdown on the Award Import screen, select **Payment Authorizations Import**, then Next.
3. On the Payment Authorization **Import Grid**, select the  icon to create a new **Import**.
4. Choose a file to upload.
5. Stay organized by typing a note in the Summary field.
6. Select a **Default Field Mapping** or **Create a new mapping** by clicking the  icon and a name.
7. On the **Items** screen, review all mapped fields.

***Note:** The position of **Destination** and **Source** on the bulk import mapping screen are different than other mapping import screens.

Instructions Continued on Page 2




Import Payment Authorization Items

Upload File  Test Payment Authorizations Import.xlsx

5 Summary

Mapping

6 Field Mapping 

* **Destination** **Source**

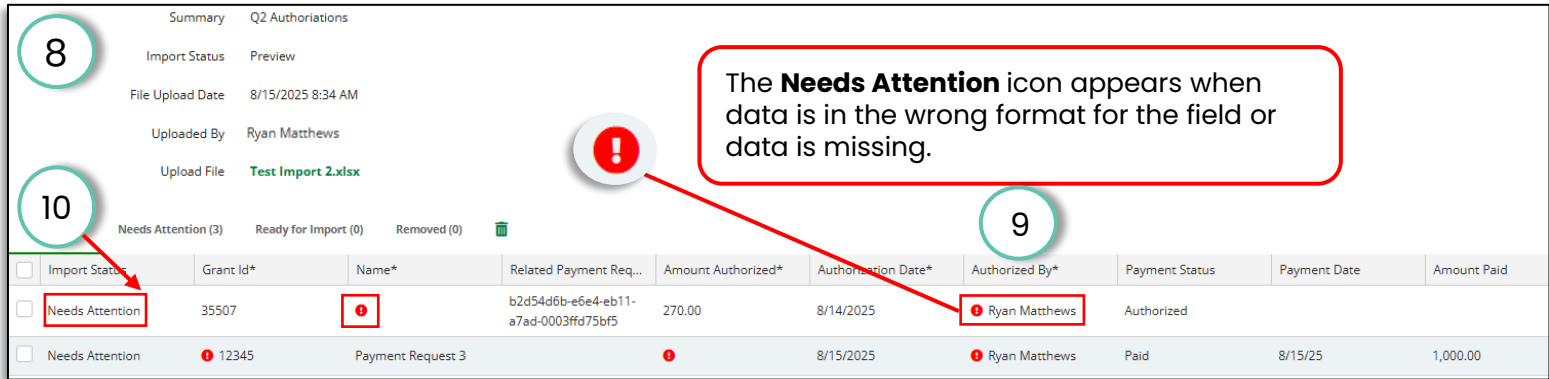
7 Grant Id*

Name*

Related Payment Requests

Amount Authorized*

8. The **Import Preview Grid** displays all mapped data, the data to be imported, and any errors.



Summary Q2 Authorizations

Import Status Preview

File Upload Date 8/15/2025 8:34 AM


Uploaded By Ryan Matthews

Upload File Test Import 2.xlsx

Needs Attention (3) Ready for Import (0) Removed (0)

Import Status	Grant Id*	Name*	Related Payment Req...	Amount Authorized*	Authorization Date*	Authorized By*	Payment Status	Payment Date	Amount Paid
<input type="checkbox"/> Needs Attention	35507	<input type="checkbox"/> Needs Attention	b2d54d6b-e6e4-eb11-a7ad-0003ffd75bf5	270.00	8/14/2025	<input type="checkbox"/> Needs Attention Ryan Matthews	Authorized		
<input type="checkbox"/> Needs Attention	<input type="checkbox"/> 12345	Payment Request 3		<input type="checkbox"/>	8/15/2025	<input type="checkbox"/> Ryan Matthews	Paid	8/15/25	1,000.00

9. To fix errors flagged by the **Needs Attention** icon , click on the field and type the correct information. Then, click **Save and Validate**.

10. Should a payment Authorization need to be removed from the import, **check the box** next to **Needs Attention** and click the  icon.

11. Once the Import Status field changes to **Ready for Import**, click **Import**.



File Upload Date	Import Status	Date Imported	Summary	Imported By	# Uploaded	# Imported	# Not Imported
08/14/2025 02:59 PM	Preview			Ryan Matthews	1	0	1
08/14/2025 03:03 PM	Preview			Ryan Matthews	1	0	1
08/14/2025 03:07 PM	Import Failed			Ryan Matthews	1	0	1
08/14/2025 03:18 PM	Imported	08/14/2025 03:19 PM		Ryan Matthews	1	1	0
08/14/2025 03:40 PM	Preview		Use this to write a summary	Ryan Matthews	2	0	2
08/14/2025 03:42 PM	Partially Imported		Write a summary here.	Ryan Matthews	2	1	1

- After upload, the **Import Grid** will display the status of each import, as well as a history of **previous existing file uploads** and associated information.
- If necessary, click on the **File Upload Date** link to return to the **Import Preview Grid**.

B Update existing Payment Authorizations in bulk via Import

Follow steps in **Option B** and include the **Payment Authorization ID** in the import template. The ID number can be found in the Payment Authorization's **URL** in the Award.

Example: <https://il.amplifund.com/Grants/PaymentAuthorizations/Details/0e081222-9536-ec11-9820-0003ff0b85b9?grantId=185>

Hint: To find the Payment Authorizations import template, visit ZenDesk [Import Templates](#)