



New Feature! Payment Authorizations Import

Release Summary




- Import **multiple** Payment Authorizations across **one** or **several awards** or **sub-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 Three Options for Import

A Import Payment Authorization for one Award

1. Go to Fund Management > Awards > Click icon next to appropriate Award
2. Select Post Award > Tools > Payment Authorizations
3. Click icon to open import interface
4. Choose a File > Map appropriate fields > Click Import

B 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  -- Default --

* **Destination** **Source**

7 Grant Id* Grant ID

Name* Name*

Related Payment Requests Related Payment Requests


Amount Authorized* Amount Authorized*

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

The **Needs Attention** icon appears when data is in the wrong format for the field or data is missing.

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"/> Ryan Matthews	Authorized		
<input type="checkbox"/> Needs Attention	12345	Payment Request 3			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**.

C 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: gotomygrants.com/Grants/PaymentAuthorizations/Details/a9376d88-0051-e911-b49e-000d3a115f13?grantId=10609

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