

Payment Updates - February 2023

® ®-® Who does this change impact?

- 1. Recipients who enter expenses & submit payment requests to their funder via AmpliFund
- 2. Grant Makers who enter expenses or review payment requests
- 3. Grant Seekers who enter expenses & leverage the payment request functionality

What is Changing?

Expense records can be added directly to a payment request to reduce steps and improve user experience. Funders can add expenses to requests submitted by their recipients during the review process if Expense edit permissions are enabled. The "Additional Expenses" option on the payment request has been removed.

🖽 When is the Change?

February 24th, 2023

How does this impact the steps we / recipients take?

Customers who use Reporting Periods:

No changes are needed to current business processes. If a recipient mistakenly enters an expense directly on the payment request, they will have to navigate back to the reporting period to include the expense in the reporting period, then link the reporting period to the request.

Customers who do not use Reporting Periods:

1 - Navigate to your Grant (Grant Management>Grants>Click on Name)

\$	Grant Management		
	▶ Grants	Name	~
	Favorites Views	Test City - Award	



2 - Navigate to Payment Requests (Post-Award>Cash Flow>Payment Requests)



3 – Enter the dates From and To, for the payment request (inclusive of any expense dates)



4 - Click on Create New Expense





5 – Enter Expense Details (Note: the expense is now automatically in a status of Reviewed)

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Grant	City Improvement Award	
Category	Construction	Expense date defaults to entry
Line Item	Park Construction	date, remember to change to
	Clear all filters	the actual date of the
ltem Type	Non-Personnel Line Item	expense.
Direct Cost *	\$150.00	
	Exclude From Match	
Responsible Individual	Name Last	
Created By	enaufel@streamlinksoftware.com	
Expense Date *	11/7/2022	
Expense Status	Reviewed	
Payment Status	New	

Adding Expenses to a Submitted Request as a Funder

When reviewing a payment request, click on Create New Expense

Note expense date must be within the payment request date range

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