**How To Create A Workflow**

|  |
| --- |
| **Script** |
| Welcome to the AmpliFund Training video focused on creating workflows |
| Workflows allow you create customizable workflows that match your business processes. Workflows can be used to create a structured review and approval process as well as enforce accountability by capturing a full audit trail |
| A workflow is referred to as instance which is a collection of workflow queues and actions. Queues are stopping points within the workflow instance and actions are activities that can occur within a queue. There are 4 different action types which are send to queue, add attachment, complete task and remove from workflow. Within the workflow instance, there are workflow notifications which send an email to all users who are responsible for an action in the current queue. |
| To access the workflow functionality, you can navigate to Administration > System Administration > WorkflowsHere you will be able to create and manage your workflows |
| To edit workflows, simply click the workflow name to bring you to the workflow details page where you can click the edit icon to edit your workflow detailsYou are also able to copy the workflow, delete the workflow and configure the workflow queues all from this workflow page |
| To create a new workflow, click the plus sign icon in the upper right hand corner of the screen. |
| After clicking that icon, you will be prompted to complete the workflow details. |
| You can also set up workflow notifications from this page. These notifications allow you to automate alerts when no action has been taken on the workflow for a specified amount of days |
| After setting up the workflow details, you will then be able to add workflow queues to build out the workflow. |
| You are able to view the workflow by clicking on the workflow queue. You can click the pencil icon to edit the queue or you can click the trash can icon to delete workflow queue. |
| To add a new workflow action item to the queue, click the plus icon next to the workflow queue name. |
| You can then select what the action type for the workflow is and also select users to assign to this workflow queue. Once done, click save |
| After you have set up your workflow queues, you can always edit them if needed. To do so, simply click the pencil icon to edit. You can also rearrange the order of the queues by using the arrows.  |
| Through this training video you’ve learned about workflows and how to create them. Should you have any additional questions, please reference our support site. Thank you! |