**How To Move Through a Workflow**

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| Script |
| Welcome to the AmpliFund Training video focused on moving through a workflow |
| You can 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 |
| When a grant is enrolled into a workflow, you will receive an email notification from Amplifund letting you know what actions are required from you. The email will include the queue that grant is in and link you to the workflow actions assigned to you. |
| To access the workflow, you will need to navigate to the grant record, and go to the grant workflow tab. Or you can go to Activity>Workflow Actions for a comprehensive list of all your assigned actions.From there you will be able to see the list of available actions you can take for this workflow |
| When you select an action, you will then get a pop-up that gives more details about the workflow action. It will contain the name, instructions, a place for you to write a comment and the ability for you to mark the workflow as complete |
| Now let’s dive into AmpliFund and walk through this process.First let’s navigate to the grant by going to grant management > grants > and then the grant I want to work with |
| From the grant record, I can click the grant workflow tab, then hover over the available actions. I will select grant opportunity review |
| Looking at this pop-up, the instructions are asking if I completed the grant opportunity form and uploaded the documentation. For the purposes of this video, let's assume I already did that. That means I can change the is Complete from No to Yes. I can also go ahead and leave a comment if I’d like. Then I will go ahead and click confirm |
| Now, we go back to our list of available actions, the grant opportunity has disappeared since we completed it. Now all that is left to is to Send the Grant to the CEO for review. |
| I’ll click that action type and the pop-up that appears is telling us that completing this action will move this grant to a new workflow queue called CEO Review.When we click confirm, the grant moves to that workflow, and we have now completed all the actions assigned to us |
| Through this training video you’ve learned about workflows and how to move through them. Should you have any additional questions, please reference our support site. Thank you! |