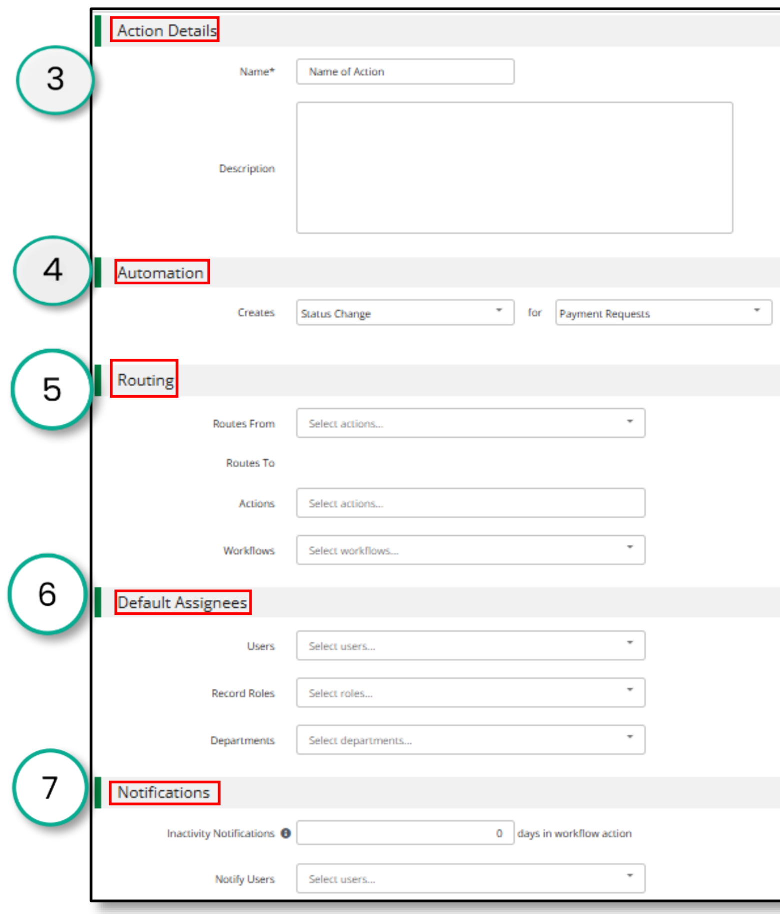
Enroll Payment Requests with our New Workflow

With this enhancement, you can now enroll Payment Requests through AmpliFund's new Workflow engine. At this time, only Payment Requests can be enrolled in late Q2.

Key Changes

- The new workflow engine has been created as a new sub-menu: Workflow. Previous sub-menu has been renamed Workflow Classic.
- Payment Requests can be enrolled and routed through a Workflow for review.
- Workflow Queues have been removed.
- Ability to assign default assignees by user, role (such as Manager or Additional user) and department.
- Payment Requests can be Approved or Rejected through Workflow Automation.

How to Build a Workflow



1. Create a Workflow under Administration > Workflow and fill out the Workflow Details.
2. Select the Actions tab and create Action Details by clicking on the + sign
3. An Initial Action is added by default. Edit and rename if needed.
4. Add an Automation, if applicable. Status Change > Payment Requests > + sign to add.
5. Build the Routing steps. Type a new Action and hit enter to create.

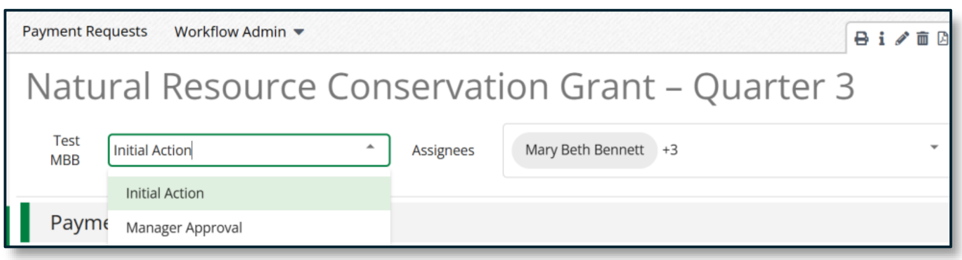
   Reminder: A Payment Request can be routed to a different Workflow.
6. Assign Actions to default assignees by User, Record Role, or Departments.
7. Set up Inactivity Notifications by adding users and days of inactivity.
8. Create as many actions as needed

Hint: If a payment request is enrolled in workflow, the Approve/Reject options at the bottom of the page disappear, the only way to approve is via workflow.

How to Enroll & Manage Payment Requests in Workflow

1. Select Grant/Award containing your Payment Request
2. Find your Payment Request(s) under Post-Award > Cash Flow > Payment Requests
3. You may select one or multiple requests into workflow using the checkboxes, click Enroll in Workflow icon, then Enroll
4. Assignees can access a payment request via Grant/Award > Post-Award > Cash-flow > Payment Requests. Option to use Activity > Workflow Actions coming in June.
5. Take action by selecting a Payment Request
6. Move to next step or make a decision by Approving/Rejecting a Request

6



User Security Considerations

- Leverage the new Enrolled Records grid to review all enrolled payment requests under Administration > Workflow > Enrolled Records tab
- Anyone assigned to a workflow can see Workflow History tab
- Account Admins may move a record Back to Start, Back to Previous Action, or Remove from Workflow from Workflow History tab
- View Workflow History of Actions that includes Date and Time Stamps, users, workflow, Actions, and Assignees