**Script: AmpliFund Training: Multi Round Scoring Workflow Set-up**

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| Script |
| Welcome to the AmpliFund Training video focused on workflow set-up for multi round scoring. Multi round scoring is an advanced feature in AmpliFund available to customers who have an Advanced or Enterprise subscription with custom workflow configuration capability. This video is recommended for users who are already well versed in AmpliFund’s workflow capabilities and have set-up opportunity application workflows. If you are not familiar with workflow you may reference other videos and user guides on our support site or materials provided to you during training. |
| To leverage AmpliFund’s multi round scoring capability, there are a number of steps to set up and configure. In this video we will review how to configure a workflow for an opportunity that will utilize multi round scoring. Please note that for the relevant opportunity, you must complete the multi round scoring settings in the application settings and have scored questions on your application form or forms. |
| When configuring a workflow for multi round scoring, the workflow must include one queue per scoring round. So for example if your review process includes 2 scoring rounds, you should have 2 queues that include the scoring action. The name of the queue will be the scoring round name. So for instance if you name the queues round 1 and round 2 – your scoring rounds will be labeled round 1 and round 2. |
| Let’s go into AmpliFund and build a basic workflow for multi round scoring. From the calendar after logging into AmpliFund, click on Administration, the arrow next to system administration and then Workflow |
| Once on the workflow page, click on the plus icon in the upper right hand corner to create a new workflow. |
| Under the Workflow details section, select the object type of Opportunity Application. Then you must name your workflow and can provide a description if you’d like. |
| Under notifications you can configure action alerts to alert users if days have pasted without any action and if you’d like you can add a unique identifier. For additional information on these two sections, please reference the workflow videos or documentation on our support site. |
| Once you’ve entered relevant information click save in the bottom right hand corner. |
| Now you can start to build out the queues within your workflow. To add a queue click on the plus icon next to Add workflow queue. You can change the name of the initial queue by clicking on the pencil icon. |
| Then to add another queue click the and use the name you’d like for your scoring round. Here I’ve named this application consensus round. |
| You can continue to add any other relevant queues for additional steps in your review process. Next, add the scoring action to the 2 scoring queues. First, click the plus icon next to Application Scoring Round 1. Here name the action and make the action type, create related item. After selecting create related item an additional box will appear for related item type. Select application form. With in the action you can also assign any reviewers who will be a part of this round of scoring. Alternatively, you can assign users to this action within specific opportunities. After you’ve entered all required information, click save. |
| Next, take the same steps with the second scoring queue and any other scoring queues that you’ve built. Click on the plus icon next to the queue name, in this case, application consensus round queue. Then in the action details, name the action, select the action type of create related item and select the related item type of application form. In this action you can also add relevant reviewer users. Note that you can have either the same or different reviewers in each scoring round. Once done entering information click save to move forward. |
| In the workflow tool, you can continue to build out any additional queues or actions that are relevant to your business process. Just be sure that for all scoring round planned you have 1 queue and within that queue you have a scoring action included. |
| Through this AmpliFund Training video, you’ve learned how to configure a workflow for multi round scoring. Should you have additional questions, please reference our support site. Thank you! |