Payment Approval Workflow

Completing the online form and processing approvals in Gravity Flow

Three-stage approval | Electronic signatures | Accounts processing

Form access

Purpose

This guide explains exactly what the requester and each approver must do. It reflects the configured Gravity Flow workflow for the Payment Approval Request form.

Prepared for GCI Australia

1. Completing and submitting the form

The requester completes the payment details, identifies both authorised approvers and submits the supporting documents. Submission automatically starts the workflow and generates a unique payment approval number in the format PA-xxxxx.

Before you begin

Have the invoice or receipt ready, together with the email addresses of two authorised approvers. The approvers must be able to independently review the request.

Information to complete

Section	Required information
Request details	Request date, church area and contact number.
Payee details	Payee name, address, due date and payment amount.
Tax details	Whether the entity has an ABN, the ABN where applicable, and whether it is registered for GST.
Budget status	Confirm whether the item is budgeted. If not, explain the funding source and reason.
Documents	Upload the tax invoice or receipt. Additional supporting documents may also be uploaded.
Approvers	Enter the First Approver Email and Second Approver Email carefully. These addresses control workflow routing.

Submit the request

- Review all information and attachments.
- Select Submit Payment Request.
- A confirmation appears advising that the payment approval request has been submitted.
- The workflow starts and sends the first approver an email containing the workflow entry link.

Important

Check both approver email addresses before submission. The workflow assigns each approval step using the email address entered in the form.

2. Processing an approval

Each approver receives an email with the subject “Payment request PA-xxxxx awaiting action”. The email contains a workflow entry link that opens the assigned approval step.

Standard actions for an approver

1	**Open the workflow entry link**	Use the link in the notification email to open the payment request.
2	**Review the complete request**	Check the payee, amount, purpose, budget information and supporting documents.
3	**Enter your electronic signature**	Complete the signature field made editable for your approval stage.
4	**Add a workflow note**	A workflow note is required. Record the basis for approval or clearly explain any concern.
5	**Approve or reject**	Select Approve to move the request forward, or Reject to end the workflow.

Approval decision

Approve

The workflow displays “Step completed successfully” and routes the request to the next step.

Reject

The workflow displays “Payment request rejected” and the workflow ends. The request does not continue to later approval or Accounts processing.

Already processed link

Once a step has been processed, the approval link is no longer available for a second decision.

3. Exact approval stages

Stage 1 - First Authorised Approval

Assigned to	The email address entered in First Approver Email.
Required action	Review the payment request, enter the First Approver Signature, add a required workflow note, then approve or reject.
Editable fields	First Approver Signature only.
On approval	Routes to Second Authorised Approval.

Stage 2 - Second Authorised Approval

Assigned to	The email address entered in Second Approver Email.
Required action	Independently review the request, enter the Second Approver Signature, add a required workflow note, then approve or reject.
Editable fields	Second Approver Signature only.
On approval	Routes to Final Approval.

Stage 3 - Final Approval

Assigned to	David Jordison, using the administrative Final Approver Email field.
Required action	Complete or verify accounting allocations, review prior approvals, enter the Final Approver Signature, add a required workflow note, then approve or reject.
Editable fields	Accounting Allocation Lines; Finance Review Comments; Final Approver Signature.
On approval	Triggers the approval and Accounts notifications.

Reminder timing

The final approval step is configured to resend its assignee email after 3 days if it remains outstanding.

4. After final approval

When final approval is completed, the workflow automatically issues notifications and then marks the payment workflow complete.

Approval notification

- Sent to the first approver, second approver and Accounts.
- Subject: Payment Request PA-xxxxx Approved.
- Includes the PA number, payee, amount and budget comments.
- Advises that the request has been sent to Accounts for payment processing.

Accounts processing notification

- Sent to Accounts, with the first and second approvers also included.
- Subject: Payment Request PA-xxxxx Approved for Payment.
- Includes the church area and the generated PA PDF attachment.
- The workflow then reaches Payment Workflow Complete.

Quick-reference workflow

1	**Requester**	Completes the form, uploads documents and nominates two approvers.
2	**First approver**	Signs, adds a required note and approves or rejects.
3	**Second approver**	Independently reviews, signs, adds a required note and approves or rejects.
4	**Final approver**	Checks coding and approvals, signs, adds a required note and approves or rejects.
5	**Accounts**	Receives the approved PA PDF for payment processing.

Approver checklist

- ☐ The payee, amount and purpose are clear.
- ☐ The invoice or receipt is attached and readable.
- ☐ The budget status and any funding explanation are adequate.
- ☐ The request is appropriate for the stated church area.
- ☐ The correct signature field has been completed.
- ☐ A meaningful workflow note has been added.
- ☐ Approve only when satisfied; otherwise reject and explain the reason in the note.

Form access

Use the online form at GCI Connect: https://connect.gci.org.au/gci-payment-approval/