

Invoice 11636

Invoice

New Segment Request Updates - K2



Date	December 30, 2020
Invoice Number	11636
Invoice Due	January 30, 2021

Invoice Total	\$2,666.67
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Balance	\$0.00
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From	Mr. SharePoint, LLC 6457 South Kimbark Ave Unit 1S Chicago, IL 60637 US
To	Walton Street Capital, L.L.C. 900 North Michigan Avenue, Suite 1900 Chicago, IL 60611 US

Task	Rate	Qty	Amount
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Kelly and team requested some updates to the existing New Segment Request process, which are outlined below. These updates required careful changes to the solution assets since the New Segment Request process is currently in a production state and actively utilized:

- Added a new admin form and SmartObjects so that the dropdown lists can be modified without the need for IT
- Moved some of the SmartObjects from pointing to SharePoint to K2 SmartBox (SQL) instead
- Removed Doug Welker from the existing workflow process and restructured the workflow and task forms as needed
- Set up email reminders for the PM group to send every 48 hours until the task is completed
- Added an attachment views view on the display and edit forms so that files can be added to the New Segment Request during or after the approval process
- Added the Originator field to the SharePoint list view
- Created a "K2 ViewFlow" field in the SharePoint list that shows the status and links back to the K2 ViewFlow
- Made the "Aliases / Also Known As Names" a required field and added an "*" at the end of the field name
- Changed "Fund Placement*" field name to "Investment Vehicle Placement*"
- Added the following columns at the very end of the form which can only be edited by AP / Administrator:
 - Confirmed Investment Vehicle Placement
 - Date Confirmed by IC Member
 - Split Vehicle Allocation
 - Dead Deal
 - Dead Deal Date
 - Additional Comments

\$100	40	\$4,000
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Subtotal	\$4,000.00
Discount	\$1,333.33
Total 	\$2,666.67
Payments	\$2,666.67
Balance	\$0.00

Notes

Thank you! We really appreciate your business.

Terms

We do expect payment within 30 days, so please process this invoice within that time. There will be a 1.5% interest charge per month on late invoices.

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