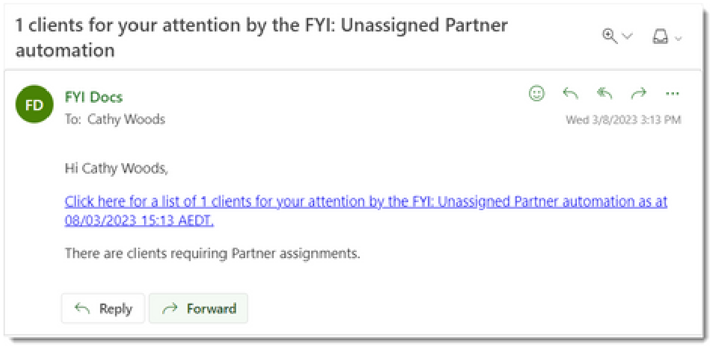
Unassigned Client Partner or Client Manager Alert

Process Automation

About this automation:

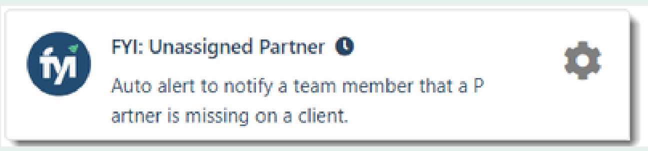
Use these processes to automatically send an alert to a user notifying them of any unassigned Partner and Manager fields in the Client list.

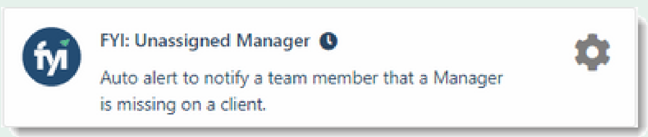


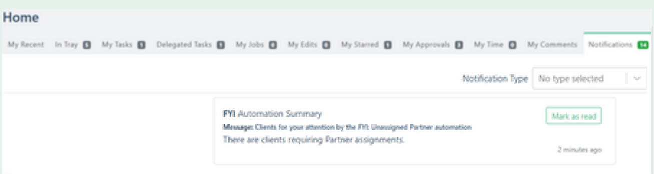
Simply import the sample automation, customise to suit your practice, test and activate!

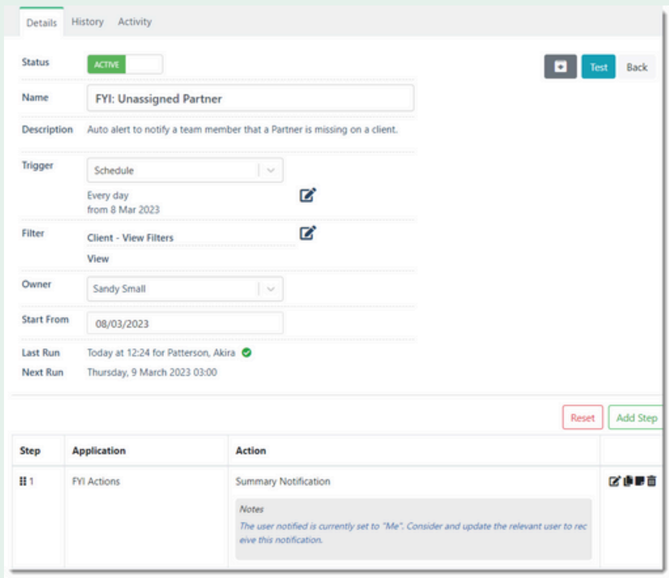
What's included:

- Automation Process Steps







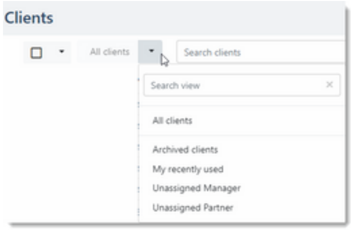


How to import:

Before you begin, ensure your Views have been saved in the **Clients list** with the following filters:

"Unassigned Partner" View
- **Partner** = (Blank)

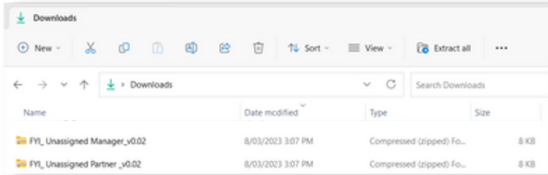
"Unassigned Manager" View
- **Manager** = (Blank)



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

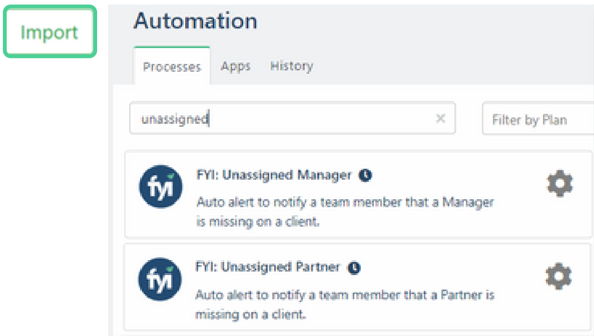


Step 2 - Import the files into FYI

Navigate to the **Automations** screen and click the **Import** button on the right-hand side of the screen.

Locate and select your saved "Unassigned Partner" and "Unassigned Manager" files and click **Open** to import the automations.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



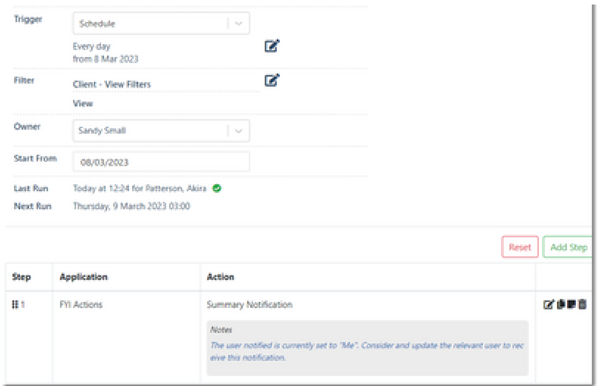
Step 3 - Review the process

Processes are imported with the **Status** set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

These processes use the Unassigned Partner and Unassigned Manager Views in the Client - View Filter, which are the custom views you created in the Clients list.

- Review the schedule
- Review the process owner
- Review and update each **process step.**



Step 4 - Test and activate

Click the **Test** button to display a list of clients without a partner or manager assigned.

Search and select a specific client to run the test for and select **Run Test**.

Go to **Home - Notifications** and review the summary notification received. The notification will be sent to the specific user selected in the automation.

When ready, set the **Status** to Active.

- This automation is set to run automatically every day from the commencement date.
- Users can receive notifications in FYI and also via Email or Teams. This is based on the **Notification Mode** enabled in My Settings.