Missing Client Group Alert

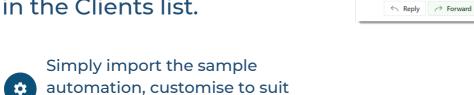


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Thu 3/9/2023 9:11 AM

About this automation:

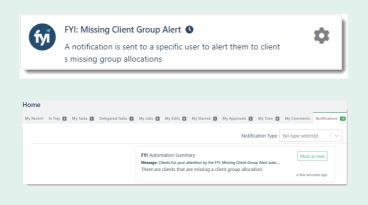
Use this process to automatically send an alert to a user for any clients that are missing a client group allocation in the Clients list.

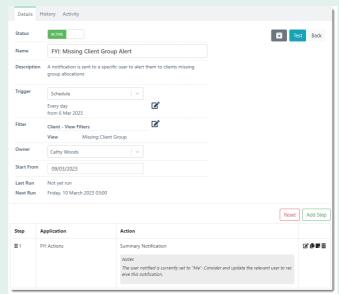


your practice, test and activate!

What's included:

Automation Process Steps





1 clients for your attention by the FYI: Missing Client Group

Click here for a list of 1 clients for your attention by the FYI: Missing Client Group Alert

Alert automation

FYI Docs
To: Cathy Woods

Hi Cathy Woods,

automation as at 09/03/2023 09:11 AEDT.

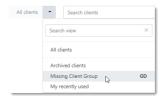
There are clients that are missing a client group allocation.

How to import:

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

"Missing Client Group " View

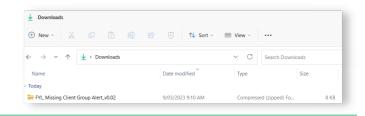
• Client Group = Blank



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.



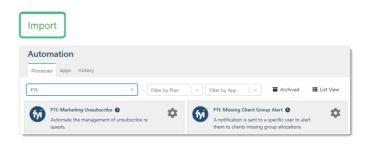
Step 2 - Import the files into FYI

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

Locate and select your saved "Missing Client Group" file and click Open to import the automation.

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.

This process uses the Missing Client Group View, which is the custom view you created in the Clients list.

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

Trigger Schedule Every day from 6 Mar 2023 Filter Client - View Filters View Missing Client Group Owner Cathy Woods Start From 09/03/2023 Last Run Not yet run Next Run Friday, 10 March 2023 03:00 Reset Add Step Step Application Action B 1 FYI Actions Summary Notification Notes The usen notified is currently set to "Me" Consider and update the relevant user to receive this notification.

Step 4 - Test and activate

Click the **Test** button to display a list of clients missing a client group allocation.

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.

