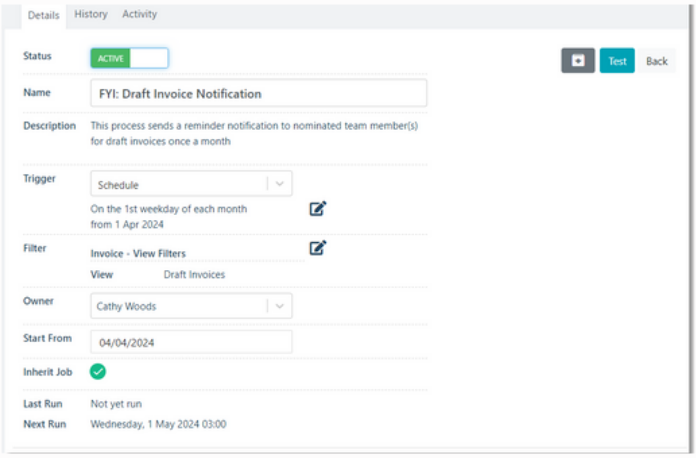
PROCESS AUTOMATION

Draft Invoices Notification

About this automation:

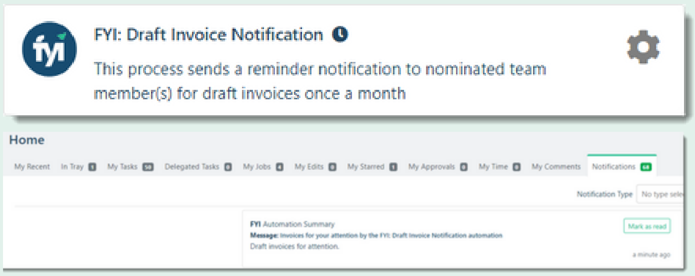
Use this process to notify a nominated team member(s) of Draft Invoices in your practice once a month.

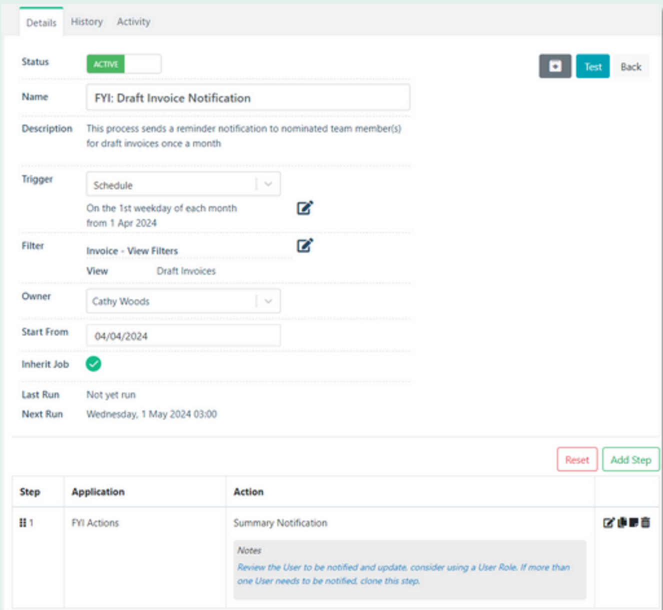
Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

- Automation Process Steps



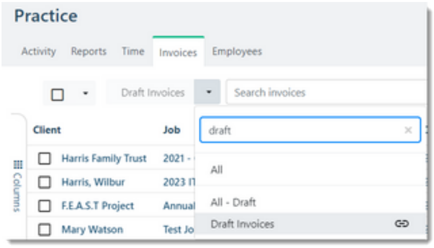


How to import:

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

"Draft Invoices" View

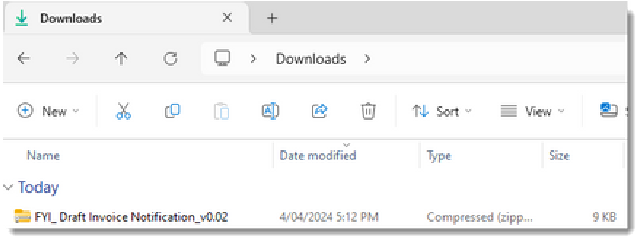
- Status = Draft



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.

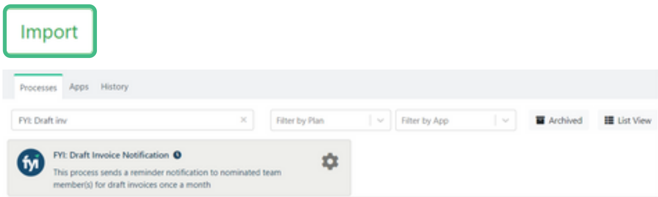


Step 2 - Import the files into FYI

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

Locate and select your saved "Draft Invoice Notification" 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.



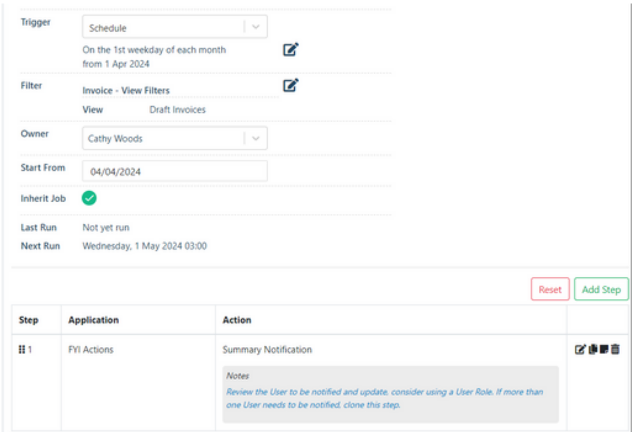
Step 3 - Review the process

The Process is imported with the **Status** set to Draft.

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

This process uses the **Draft Invoices** View, which is the custom view you created in the Invoices Lists.

- Review the **schedule**
- Review the process **owner**
- Review and update each **process step.** Specific comments have been added to the steps where action is required. These will display in blue.



Step 4 - Test and run the automation

Click the **Test** button to display a list of all overdue invoices.

Search and select a specific time entry 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 nominated User in the process step.

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

- This automation is set to run automatically every week 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.