Client Signed Notification Process Automation

About this automation:

Use this process to automatically send notifications when signed documents are received.

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1	To: Mandy Jones Thu 19/09/2024 10:0
ŀ	Hi Mandy Jones,
	Click here for a list of 1 documents for your attention by the FYI: Client Signed Notification automation as at 19/09/2024 10:04 AEST.

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

What's included:

Automation Process Steps

fyi	FYI: Client Signed Notification Receive a notification when a client has signed a document and it is auto-filed in FYI, ready for your action.	*
	ion Summary	Mark as read
Aessage: Doc	uments for your attention by the FYI: Client Signed Notification automation	an hour ago

Status	ACTIVE			Test Back
Name	FYI: Client Sig	gned Notification		
Descripti	Ion Receive a notificat filed in FYI, ready	tion when a client has signed for your action.	a document and it is auto-	
Trigger	Schedule	~]		
	Every hour from 13 Sep 2024		C	
Filter	Document - View	Filters	C	
	View V	Vorkflow - Client Signed		
Owner	Liz Hurst	×		
Start Fro	m 13/09/2024			
Inherit Jo	ob 😑			
Last Run Next Rur		Stanley Homes O ember 2024 11:00		
				Reset Add Step
Step	Application	Action		
1	FYI Actions	Summary Notificatio	n	化自己

How to import:

Before you begin, ensure your View have been saved in the **Documents list w**ith the following filters:

"Workflow - Client Signed " View • Workflow = Client Signed

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 "Client Signed 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 as draft.

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 **Client Signed**, which is a system view in Documents Lists.

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

Step 4 - Test and activate

Click the **Test** button to display a list of client signed documents.

Search and select a specific document 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 Owner of the document

When ready, set the Status to Active.

- This automation is set to run automatically every hour 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.

Doc	um	ents			
(•	Ŧ	Workflow - Client Signed	•

Ŧ	Downloads	×	+	
1	Name			
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mport			
Automation			
client signed	×	Filter by Plan	1.
FYI: Client Signed Notificat Receive a notification when a a document and it is auto-fil your action.	a client has signe		

Step 1		×
fyi Summ	nary Notification	
0		
Action		~
Notify User	{{ TriggerDocumentOwnerUser,	o
Custom Message	NO	
	Save Cance	

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iter		
Documen		
	int	Client
O 🔂 Signed	ed engagement letter	Stanley Construction Ltd
O 🚺 Engage	gement Letter 2024 - Signed	Stanley Construction Ltd
O 🚺 Signed	d Declarations	Stanley Homes
O 🚺 (SIGNE	ED] Signed Contract (FV1-258280483)	Stanley Homes
O 🚺 Signed	d Contract	Stanley Homes