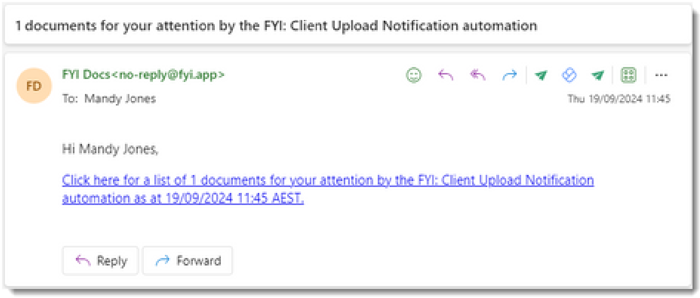
Client Upload Notification

Process Automation

About this automation:

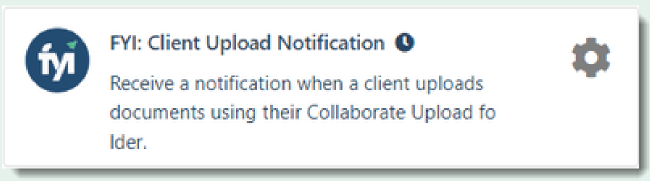
Use this process to automatically send notifications when clients have uploaded documents via their Collaborate site.

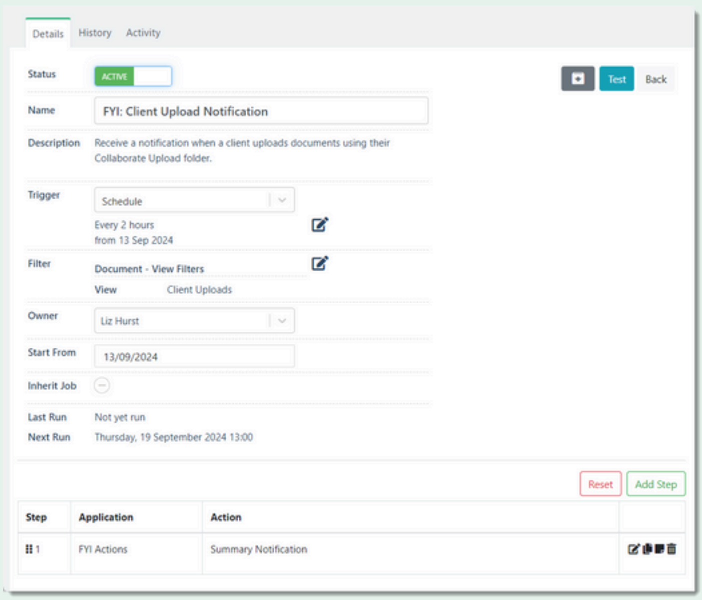


Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- Automation Process Steps



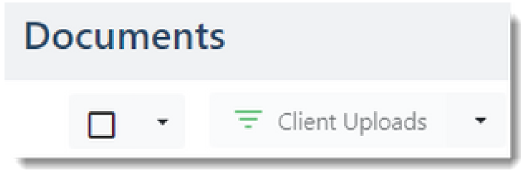


How to import:

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

"Workflow - Client Uploads " View

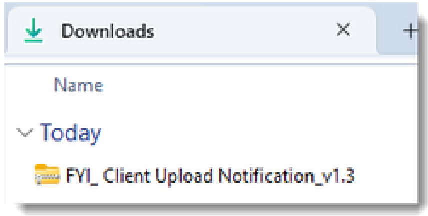
- **Workflow** = Not Started
- **Source** = Client Upload



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.

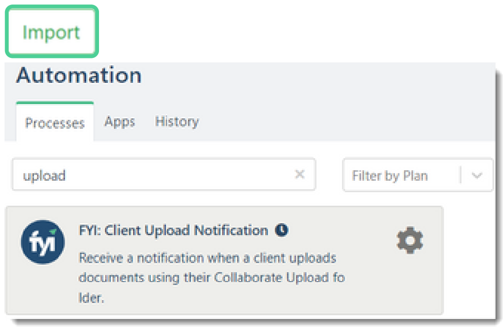


Step 2 - Import the files into FYI

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

Locate and select your saved "Client Upload 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.



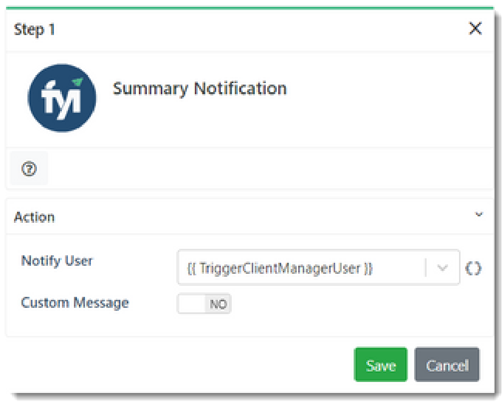
Step 3 - Review the process

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 Uploads** view, 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 uploaded 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 **Manager** of the client

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.