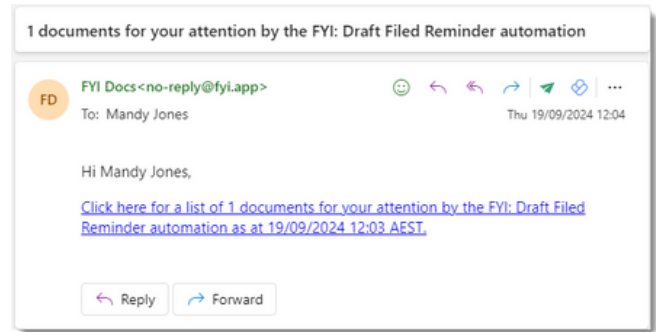# Draft Filed Reminder
Process Automation

About this automation:
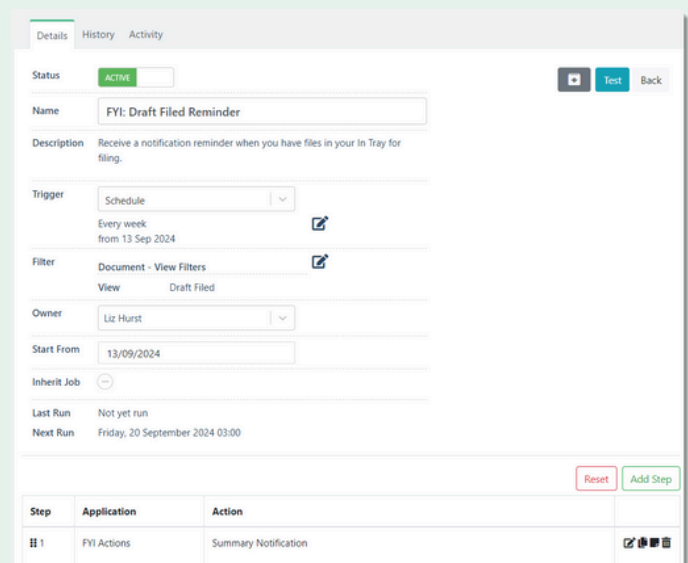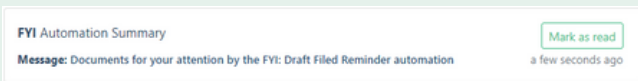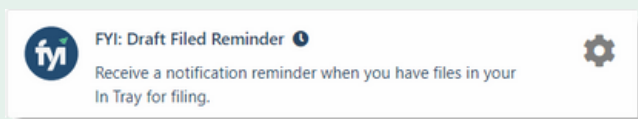
Use this process to automatically send notification reminders to users with draft filed emails and documents in their In Tray.

1 documents for your attention by the FYI: Draft Filed Reminder automation

FD **FYI Docs<no-reply@fyi.app>**
To: Mandy Jones
Thu 19/09/2024 12:04

Hi Mandy Jones,

Click here for a list of 1 documents for your attention by the FYI: Draft Filed Reminder automation as at 19/09/2024 12:03 AEST.

↩ Reply   ↪ Forward

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

What's included:

✅ Automation Process Steps

FYI: Draft Filed Reminder 🕐
Receive a notification reminder when you have files in your In Tray for filing.

⚙️

FYI Automation Summary   Mark as read
Message: Documents for your attention by the FYI: Draft Filed Reminder automation   a few seconds ago

Details | History | Activity

Status	ACTIVE			Test Back
Name	FYI: Draft Filed Reminder			
Description	Receive a notification reminder when you have files in your In Tray for filing.			
Trigger	Schedule			
	Every week from 13 Sep 2024		✏️	
Filter	Document - View Filters		✏️	
	View Draft Filed			
Owner	Liz Hurst			
Start From	13/09/2024			
Inherit Job	—			
Last Run	Not yet run			
Next Run	Friday, 20 September 2024 03:00			

Reset | Add Step

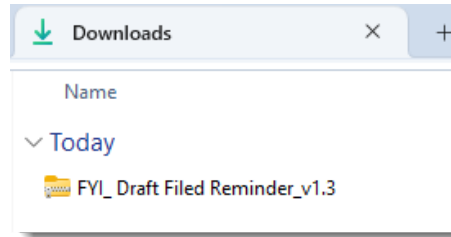| Step	Application	Action	
#1	FYI Actions	Summary Notification	

How to import:

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.
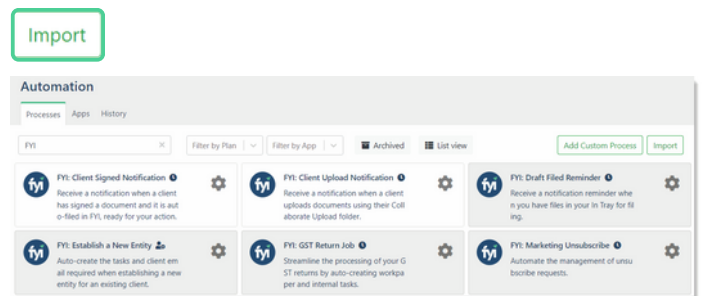
Step 2 - Import the files into FYI

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

Locate and select your saved "Draft Filed Reminder" 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

Edit and 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 **Draft Filed** View, which is a standard view in the Documents Lists in FYI.

- Review the schedule
- Review the process owner
- Review and update each **process step.**
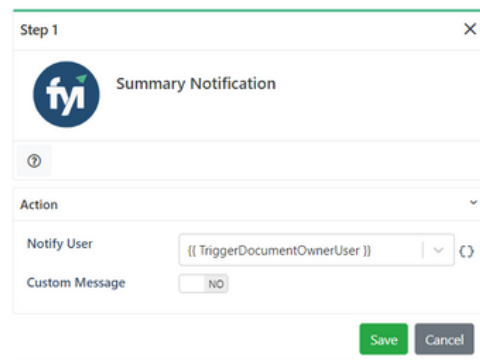
Step 4 - Test and activate

Click the **Test** button to display a list of draft filed emails and 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 In Tray for the selected document.

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.