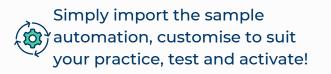
# **Recurring Invoices**

# **Process Automation**

Elite Plan

# About this automation:

Use this process to streamline your monthly invoicing by auto-creating invoices for your client work.



Details H	istory Activity			
Status	ACTIVE		C	Test
lame	FYI: Recurring Invoices			
Description	Streamline your monthly invoicing by auto-cre work.	ating invoices for client		
Trigger	Schedule			
	On the last day of each month from 30 Sep 2024	ľ		
Filter	Job - View Filters	C		
	View FYI: Monthly Invoice Required			
Owner	Cathy Woods 🛛 🗸			
Start From	20/09/2024			
Last Run	Today at 12:59 for Bobby Brown Limited 🥝			
Next Run	Thursday, 31 October 2024 03:00			

# What's included:

Automation Process Steps

Streamline your monthly invoicing by auto-creati	ng invoices for		Name	FYI: Recurring	Invoices			
client work.			Description	Streamline your more work.	nthly invoicing by auto-cre	ating invoices for client		
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	Details		Owner	Cathy Woods	~			
	Status Xero Ledger Account	Draft The Growth Partners	Start From	20/09/2024				
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	Invoice Description Monthly invoice for work per agreement						Reset	t Ad
		Edit Approve	Step	Application	Action			
			81	FYI Actions	in the Correspo Notes Review and update th	ndence cabinet he Invoice Name, Due Date and Do	me ]] Invoice ([ "now"   date: "No %Y" ]]" escription. ided by 12, Review and update as	6,0

## How to import:

Before you begin, ensure your View has been saved in the Jobs list with the following filters (or those relevant for your invoicing requirements): "Monthly Invoice Required" View

- Job State = In Progress
- Job Type = Billing
- Monthly Invoice = True

#### 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 "Recurring Invoices" 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 **Monthly Invoices** View, which is the custom view you created in the Job 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

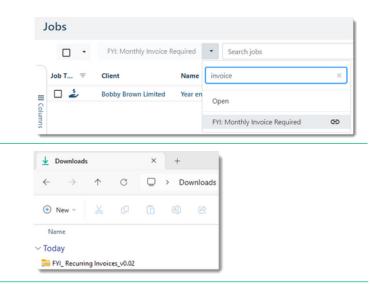
Click the **Test** button to display a list of all jobs that fit the invoicing criteria.

Search and select a specific job to run the test for and select **Run Test**.

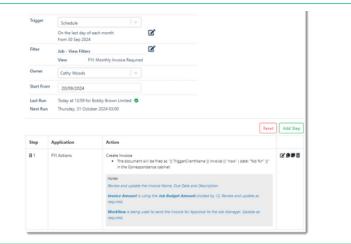
Go to the Job Workspace - Invoices tab or the Practice - Invoices List to review the draft invoice.

When ready, set the Status to Active.

• This automation is set to run automatically on the last day of the month from the commencement date.



Import						
Automation						
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