

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.



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

Details History Activity

Status: **ACTIVE** [Test] [Back]

Name: FYI: Recurring Invoices

Description: Streamline your monthly invoicing by auto-creating invoices for client work.

Trigger: Schedule
On the last day of each month from 30 Sep 2024

Filter: Job - View Filters
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

FYI: Recurring Invoices
Streamline your monthly invoicing by auto-creating invoices for client work.

Invoice: Bobby Brown Limited Invoice Sept 2024

Invoice Number	Invoice Date	Invoice Type	Invoice Amount	Invoice Description
2024/09/01	20/09/2024	Monthly	\$752.00	Monthly invoice for work per agreement

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[Reset] [Add Step]

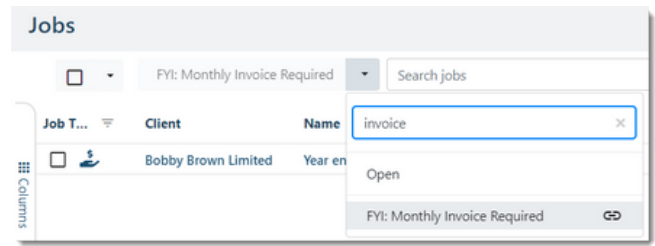
Step	Application	Action
#1	FYI Actions	<p>Create Invoice</p> <ul style="list-style-type: none">The document will be filed as "[TriggerClientName] Invoice [{"now"} date: "{nb NY}]" in the Correspondence cabinet. <p>Notes</p> <p>Review and update the Invoice Name, Due Date and Description.</p> <p>Invoice Amount is using the Job Budget Amount divided by 12. Review and update as required.</p> <p>Workflow is being used to send the Invoice for Approval to the Job Manager. Update as required.</p>

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

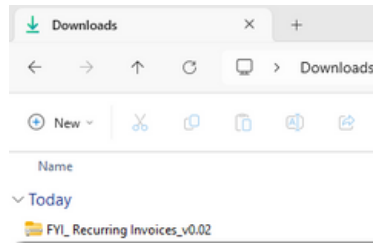
- Job State = In Progress
- Job Type = Billing
- Monthly Invoice = True



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.

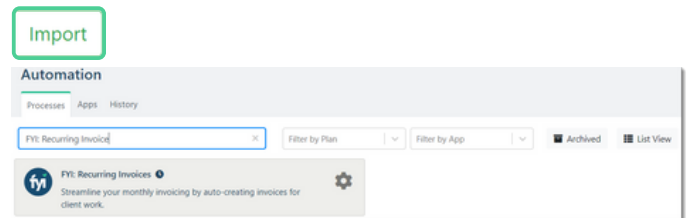


Step 2 - Import the files into FYI

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.



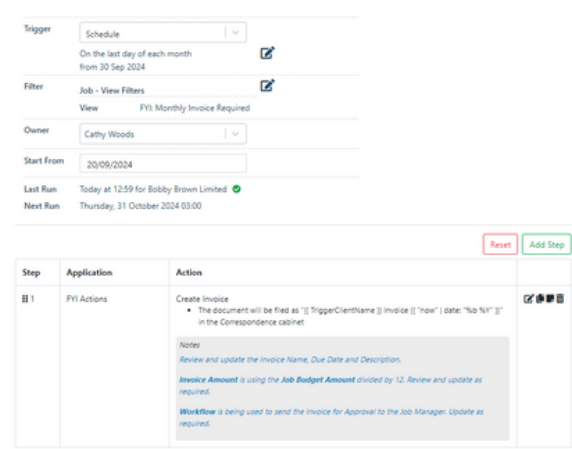
Step 3 - Review the process

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.

