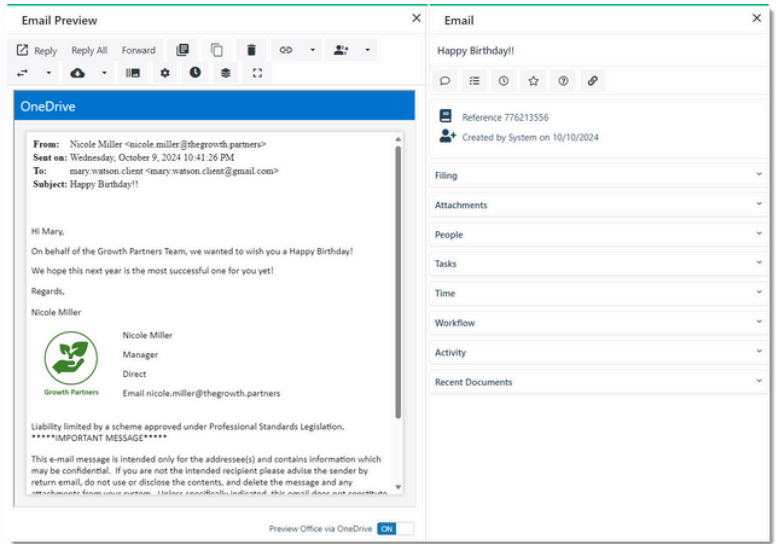PROCESS AUTOMATION

Client Birthday Email Processes

About this automation:

Use this process to auto-create and send Birthday wishes to your clients each year.

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

What's included:

- ✅ Automation Process Steps
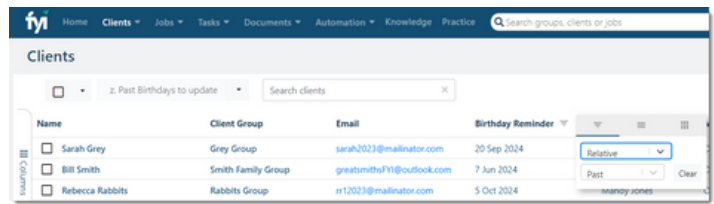- ✅ Birthday Email Template

How to import:

Before you begin, ensure your **Client Custom Field**, "Birthday Reminder", has been created, and your **Client Views,** "Birthday" and "Past Birthdays", have been saved in the **Client List** with the following filters:

"Birthday" View
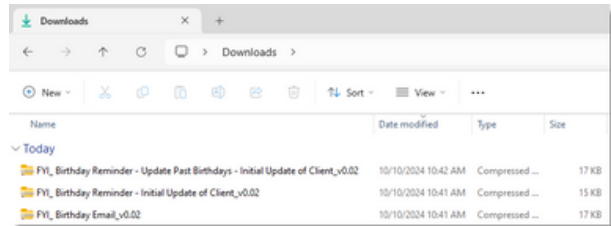- Birthday Reminder = Relative, Today

"Past Birthdays" View
- Birthday Reminder = Relative, Past

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 files locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.
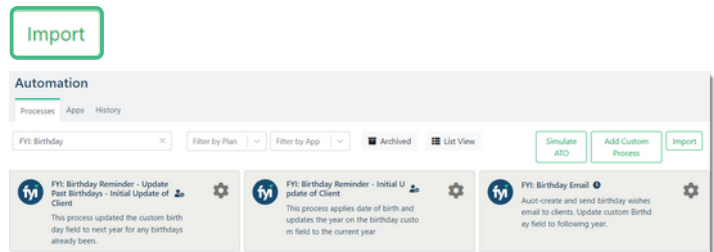
Step 2 - Import the files into FYI

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

Locate and select your saved "Birthday Process" files and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.

Step 3 - Review the process

Processes are imported with the **Status** set to **Draft**.

You can locate the processes by searching for "FYI" in the "Search processes" field.

These processes use the "**Birthday Reminder**" date custom field and the "**Birthdays**", "**Past Birthdays**" custom views in the Client List you created.

Ensure your review and edit the process and steps:
- Review the schedule
- Review the process owner
- Update the Filter and select your corresponding custom views
- 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

You can test a Manual Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the Test button to display a list of the Jobs based on the Filter that has been selected.

From the Select Test, search and select a specific client to run the test for and select Run Test.

When ready, set the **Status** to Active. Note: Execute Process Steps will require the corresponding process to be Active in order to activate the process.