

# Create Time on Sent Emails


## Process Automation



Elite Plan

### About this automation:

Use this process to take the hassle out of recording time for emails by auto-creating time entries for team members on emails they've sent.

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

**Details** | History | Activity

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

Name: FYI: Create Time on Sent Emails

Description: This automation will automatically create a timesheet entry for a sent email for the team

Trigger: Schedule  
Every hour from 10 Jan 2025

Filter: Document - View Filters  
View: FYI: Emails Sent Today (Create Time)

Owner: Cathy Woods

Start From: 10/01/2025

Inherit Job:

Last Run: Not yet run  
Next Run: Monday, 13 January 2025 11:00

### What's included:

- Automation Process Steps

**FYI: Create Time on Sent Emails**

This automation will automatically create a timesheet entry for a sent email for the team

**Home**

My Recent | In Tray | My Tasks | Delegated Tasks | My Jobs | My Edits | My Starred | My Approvals | My Time | My Comments | Notifications

Period: selection-reviews | Total Hours: 00:00 | Actual: 07:30 | Expected: 07:30 | Missing: 07:30 | Draft: 00:00 | Productivity: 0.0

Hours by Type: **Chargable**

Date	User	Client	Time	Notes	Invoiced	Area	Me...
13 Jan 2025	Cathy Woods	FEAST Project	00:00	Email Sent Info Request	13 Jan 2025		

Update Time

Date: 13/01/2025  
User: Cathy Woods  
Client: Chargable  
Job: FEAST Project  
Job ID: No job selected  
Show Info by Client:   
Time ID: 0005  
Status: Draft  
Notes: Email SAC Info Request

Activity

[Update] [Cancel]

**Details** | History | Activity

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

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Trigger: Schedule  
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Filter: Document - View Filters  
View: FYI: Emails Sent Today (Create Time)

Owner: Cathy Woods

Start From: 10/01/2025

Inherit Job:

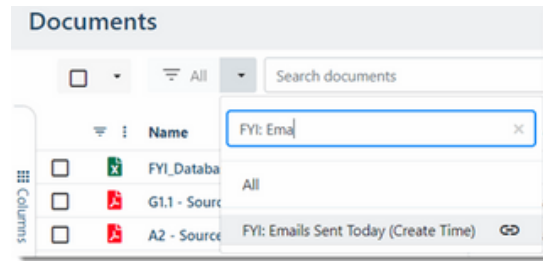
Last Run: Not yet run  
Next Run: Monday, 13 January 2025 11:00

Step	Application	Action	
01	FYI Actions	<b>Look Up Job</b> <ul style="list-style-type: none"><li>Search for an existing job based on the filters below<ul style="list-style-type: none"><li>Client: Current Client</li><li>Find across group: True</li><li>Type: Workflow: Standard</li></ul></li><li>If a job isn't found:<ul style="list-style-type: none"><li>The automation will continue.</li></ul></li></ul> <p><b>Note:</b> Consider criteria required to locate the job to record time for and the action to occur if a job is not found; default the automation will continue. This will still create the time entry and the team member will need to assign the appropriate job.</p>	[Test] [Stop]
02	FYI Actions	<b>Create Time</b> <ul style="list-style-type: none"><li>A Chargable Time Entry will be created in status Draft.</li></ul> <p><b>Note:</b> Review and update the time entry as required. Review User Role, Job and any Notes for the entry. Consider any further Custom Fields that might be required for the time entry.</p>	[Test] [Stop]

## How to import:

Before you begin, ensure your View has been saved in the Document list with the following filters:

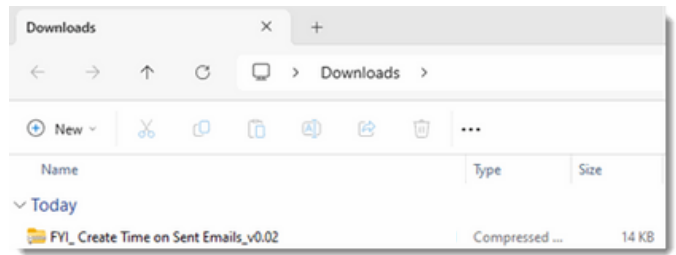
- "Emails Sent Today (Create Time)" View
- Type = Email
- Created by = remove 'system' user
- Created on = Relative - Today
- Delivery = Sent
- Source = Outlook & FYI



### 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.

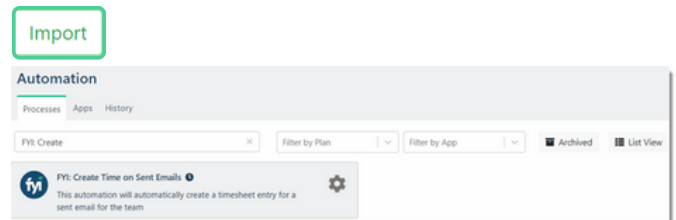


### Step 2 - Import the files into FYI

Navigate to Automation - Processes and click the Import button on the right-hand side of the screen.

Locate and select your saved "Create Time Sent Emails" 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.



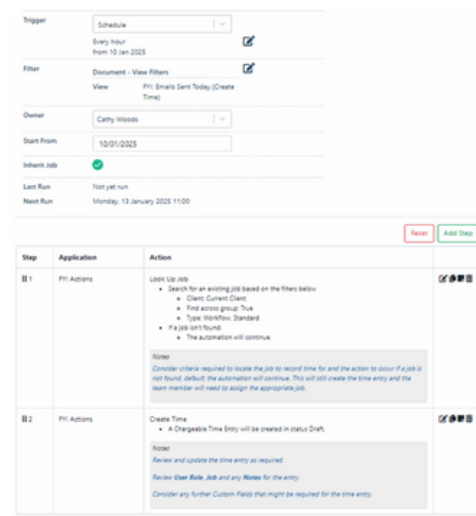
### Step 3 - Review the process

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 Emails Sent Today (Create Time) View, which is the custom view you created in the Documents List.

- 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 Practice Workspace - Time tab or the Home - My Time Tab to review the draft entry.

When ready, set the Status to Active.

- This automation is set to run automatically every hour from the commencement date.

