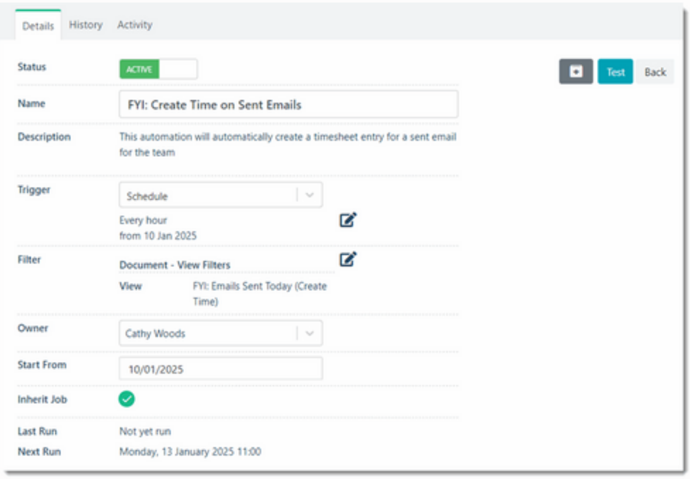
Create Time on Sent Emails
Process Automation

Elite Plan

About this automation:

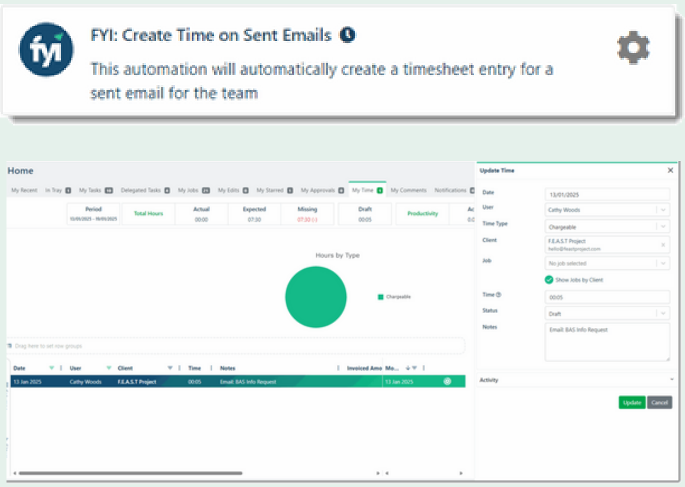
Use this process to take the hassle out of recording time for emails by auto-creating time entries for team members on emails they've sent.

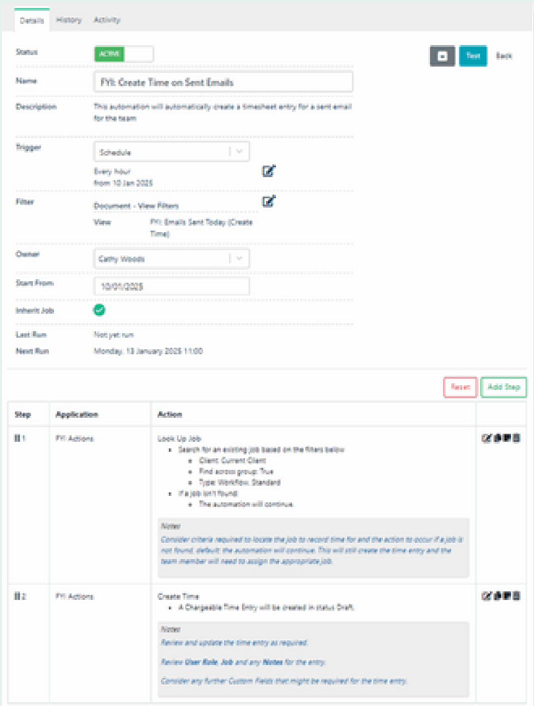
Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

Automation Process Steps

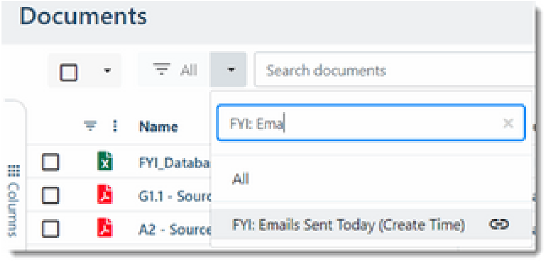




How to import:

Before you begin, ensure your View has been saved in the Document list with the following filters:
"Emails Sent Today (Create Time)" View

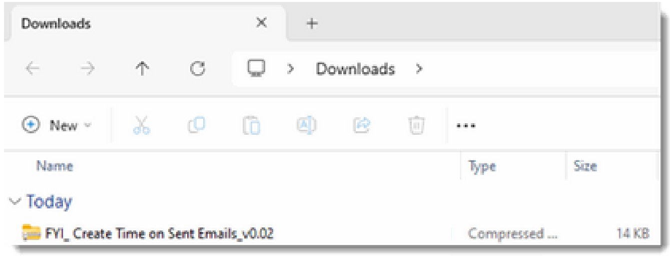
- Type = Email
- Created by = remove 'system' user
- Created on = Relative - Today
- Delivery = Sent
- Source = Outlook & FYI



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.

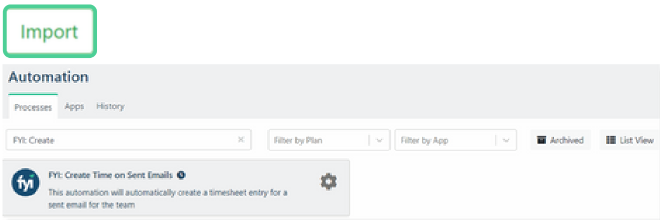


Step 2 - Import the files into FYI

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.



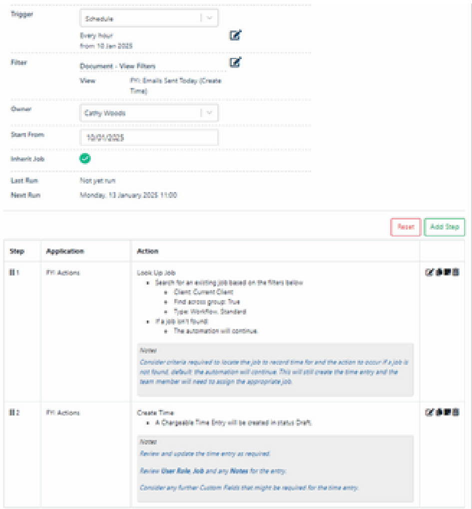
Step 3 - Review the process

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.