

Job Budget Tracking Alerts

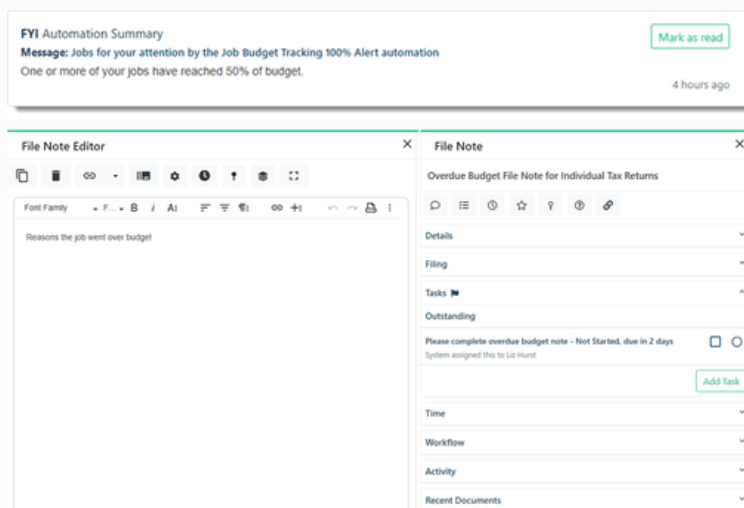
Process Automation



About this automation:

Use this process to track job budget vs. actual, triggering alerts when approaching 50% or exceeding 100% of the budget.

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



What's included:

- ✓ Job Budget Tracking Process Steps
- ✓ Job Budget Tracking 50% Alert Process Steps
- ✓ Job Budget Tracking 100% Alert Process Steps

**FYI: Job Budget Tracking** 

This automation will calculate the job budget vs actual in the 'Job Budget Tracking' custom field to trigger 50% and 100% budget alerts.

**FYI: Job Budget Tracking 50% Alert** 

Sends a notification when actual exceeds 50% of budget.

**FYI: Job Budget Tracking 100% Alert** 

Sends a notification, creates a task and file note when actual exceeds 100% of budget.

Step	Application	Action	
1	FYI Actions	Update Job Job Budget Tracking will be updated to "[TriggerJobActualAmount] divided_by: TriggerJobBudgetAmount [times: 100 round: 2]" Notes This step updated the 'Job Budget Tracking' Custom Field. Please select your Custom Field and populate with the following merge field: <code>[TriggerJobActualAmount] divided_by: TriggerJobBudgetAmount [times: 100 round: 2]</code>	  
2	FYI Actions	Execute Process The "Job Budget Tracking 50% Alert" process will be run Notes Ensure this Execute Process step has Apply Additional Process Filter toggled on.	  
3	FYI Actions	Execute Process The "Job Budget Tracking 100% Alert" process will be run Notes Ensure this Execute Process step has Apply Additional Process Filter toggled on.	  

How to import:

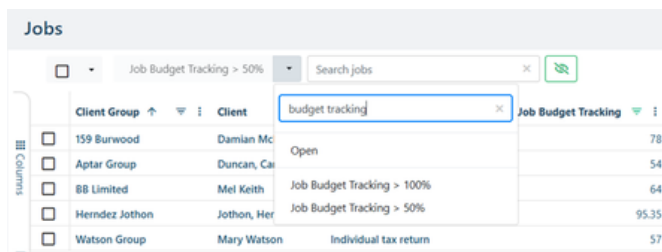
Before you begin, ensure your Job Custom Field, "Job Budget Tracking", decimal type, has been created, and your Jobs Views have been saved in the Job List with the following filters:

"Job Budget Tracking > 50%"

- Job Budget Tracking = Between, 50 and 100

"Job Budget Tracking > 100%"

- Job Budget Tracking = Greater than, 100



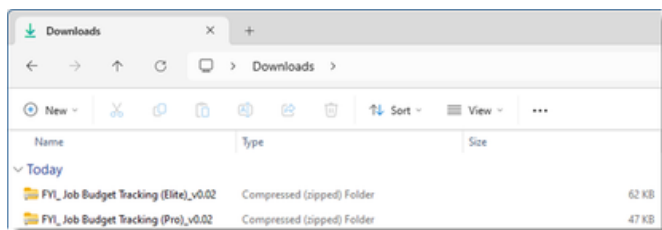
Client Group	Client	Job Budget Tracking	
159 Burwood	Damian Mc	Open	78
Aptar Group	Duncan, Ca		54
BB Limited	Mel Keith	Job Budget Tracking > 100%	64
Herndez Jothon	Jothon, Her	Job Budget Tracking > 50%	95.35
Watson Group	Mary Watson	Individual tax return	57

Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Note: Ensure you only download the zip file corresponding to your FYI plan. Merge Fields used differ for Pro to Elite.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.



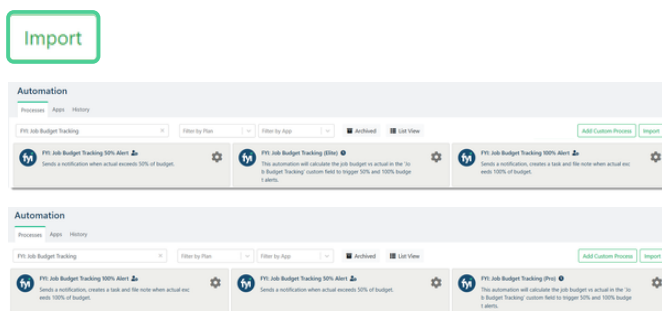
Step 2 - Import the files into FYI

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

Locate and select your saved "FYI: Job Budget Tracking" file and click Open to import the automation.

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

All Processes will be imported into FYI.



Step 3 - Review the process

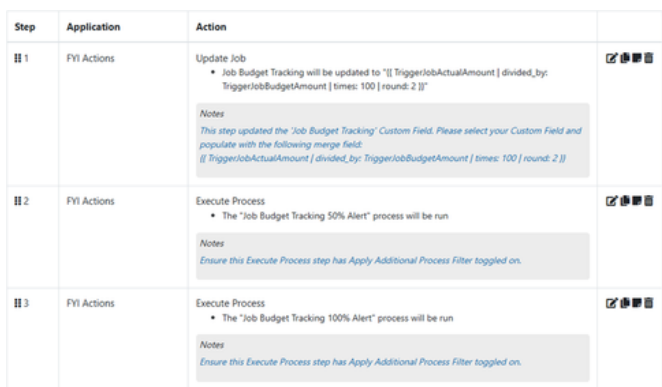
Processes are imported with the Status set to Draft.

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

These processes use the "Job Budget Tracking" decimal type custom field and the "Job Budget Tracking > 50%", "Job Budget Tracking > 100%" custom views in the Job List you created. The Job Budget Tracking process uses the default Open Jobs view.

Ensure you review and edit the process and steps:

- Review the schedule and owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



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2	FYI Actions	Execute Process The "Job Budget Tracking 50% Alert" process will be run Notes Ensure this Execute Process step has Apply Additional Process Filter toggled on.
3	FYI Actions	Execute Process The "Job Budget Tracking 100% Alert" process will be run Notes Ensure this Execute Process step has Apply Additional Process Filter toggled on.

Step 4 - Test and run the automation

You can test a Scheduled 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 of processes to Active.

