

Update Time Custom Fields Process Automation



Elite Plan

About this automation:

Use this process to apply custom field data from the job to your time entries for greater reporting flexibility.



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

The 'Update Time' form contains the following fields and values:

- Date: 17/10/2025
- User: Bill Moore
- Time Type: Chargeable
- Client: Steel Fabrication Pty Ltd (max.steel96@outlook.com)
- Job: Invoice Steel Fab
- Show Jobs by Client:
- Billing Job: Elite - Annual Service Agreement 2025
- Time: 00:01
- Rate: 360.00 (Partner) (User Rate)
- Status: Submitted
- Notes: (Empty)
- Division: Business Services
- Office: No option selected
- Engaging Partner Name: Mandy Jones

What's included:

- ✔ Automation Process Steps

The configuration interface shows the automation name 'FYI: Update Time Custom Fields' and a description: 'This automation will update the time custom fields with data from the job.' Below this, there is a preview of the 'Update Time' form with the same data as shown in the previous screenshot.

The step configuration interface shows the automation name 'FYI: Update Time Custom Fields' and a description: 'This automation will update the time custom fields with data from the job.' The trigger is set to 'Manual' and the filter is 'Time Entry - View Filters'. The owner is 'Liz Hurst'. The last run is '17/10/2025 for Steel Fabrication Pty Ltd'. The step configuration table is as follows:

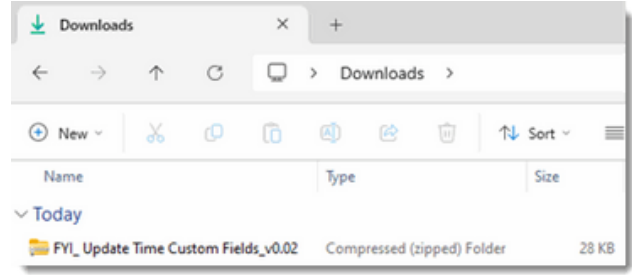
Step	Application	Action
1	FYI Actions	<p>Update Time / Disbursement</p> <ul style="list-style-type: none">Division will be updated to [TriggerJob_custom_Division]Engaging Partner Name will be updated to [TriggerJob_custom_Engaging_Partner_Name] <p>Note</p> <p>Review and update the step to include your relevant custom field data. Ensure you select the [TriggerJob] data fields to update your custom field data for the time entries.</p>

How to import:

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.

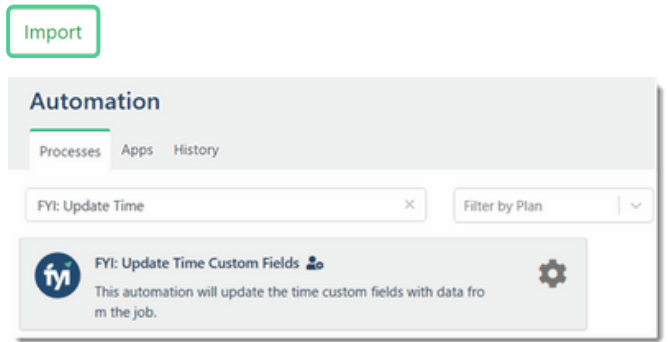


Step 2 - Import the files into FYI

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

Locate and select your saved "FYI Update Time Custom Fields" 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

Set the Filter

This process is run manually typically for data maintenance for historical entries before moving to FYI as PM, as such the Filter is set to Time Entry - View Filters, and the View selected is 'All'.

Note: you can create a custom view to update specific time entries if preferred.

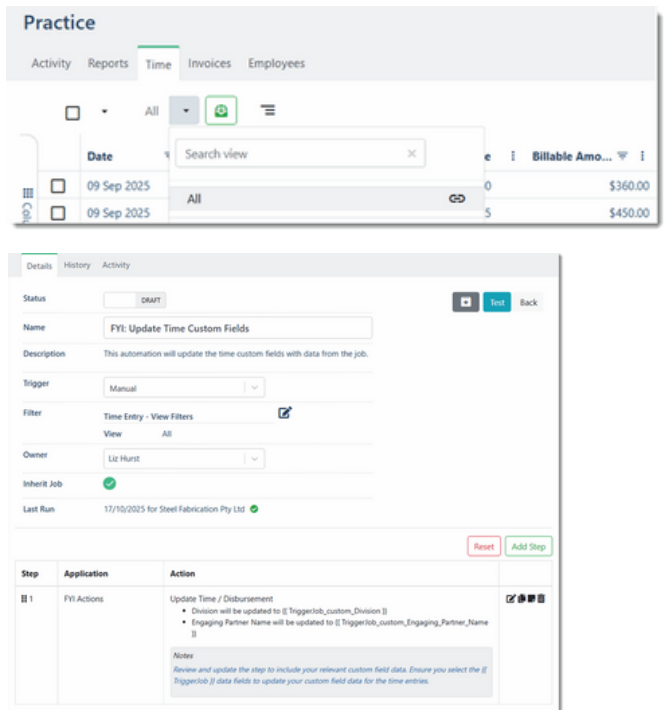
Edit and Review the Process Step

The Process is imported with the Status set to Draft.

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

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

Note: You need to select a custom field to update in the Update Time/Disbursement step then select the TriggerJob merge field data using the merge field selector.



Step 4 - Test and run the automation

Click the Test button to display a list of all time entries.

Search and select a specific time entry to run the test for and select Run Test.

You can navigate to the Practice - Time List to review the test time entry update. Confirm the custom fields are populated correctly from the trigger job.

When ready, set the Status to Active. This automation is set to run manually, simply locate this process in your Automation workspace, open and select Run to perform updates to all time entries in the view.

