Update Time Custom Fields

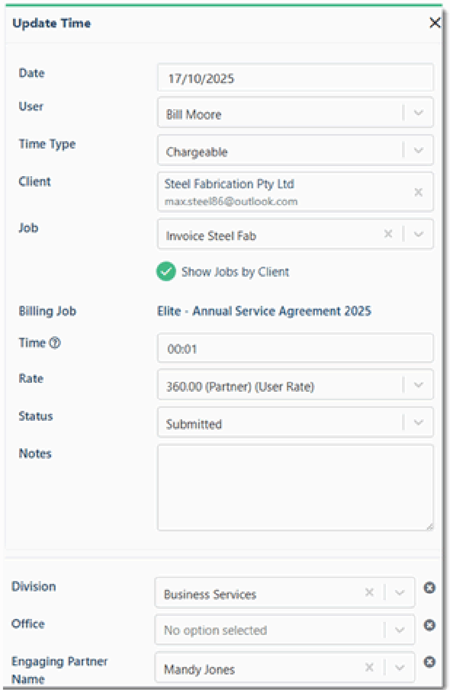
Process Automation

Elite Plan

About this automation:

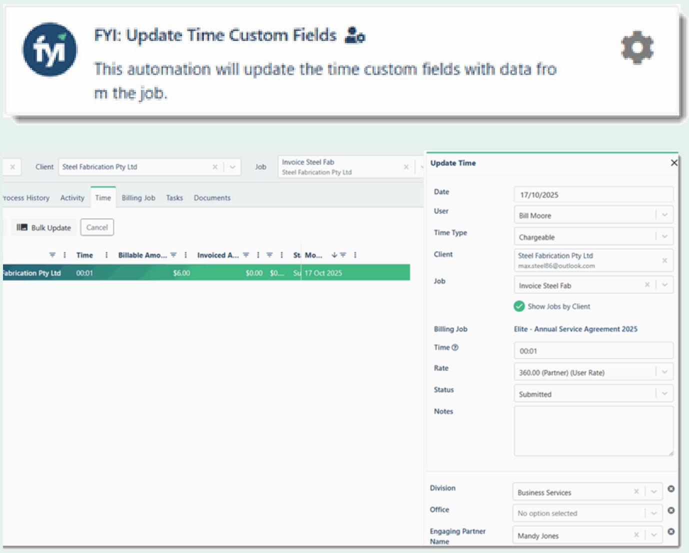
Use this process to apply custom field data from the job to your time entries for greater reporting flexibility.

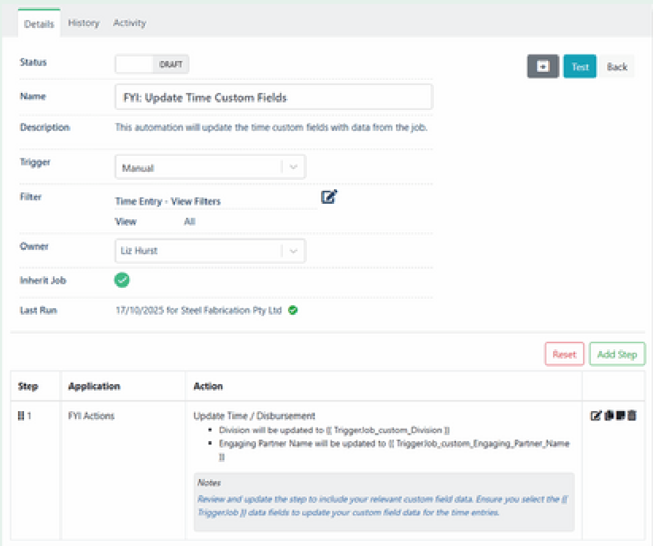
Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

- Automation Process Steps



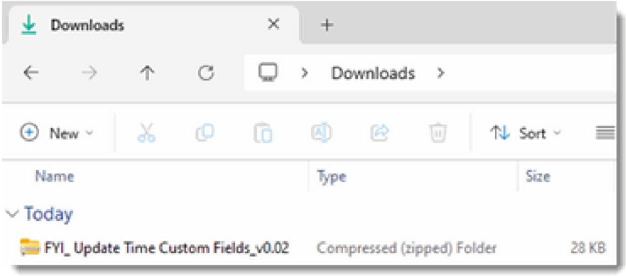


How to import:

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.

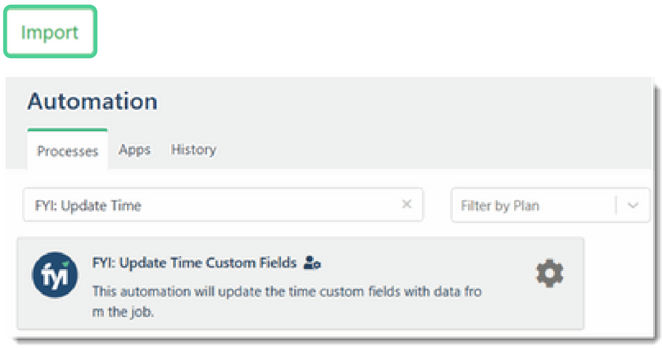


Step 2 - Import the files into FYI

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

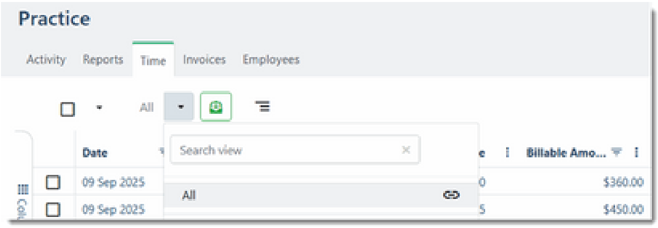
Locate and select your saved "FYI Update Time Custom Fields" file and click **Open** to import the automation.

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

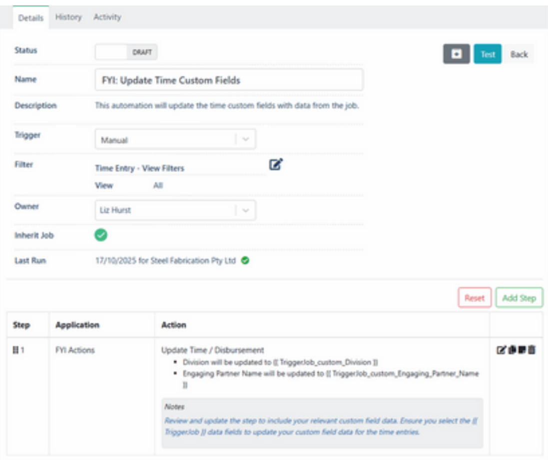
Set the Filter
This process is run **manually** typically for data maintenance for historical entries before moving to FYI as PM, as such the **Filter** is set to **Time Entry - View Filters**, and the **View** selected is '**All**'.
Note: you can create a custom view to update specific time entries 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.