

Form Submitted Notification Process Automation

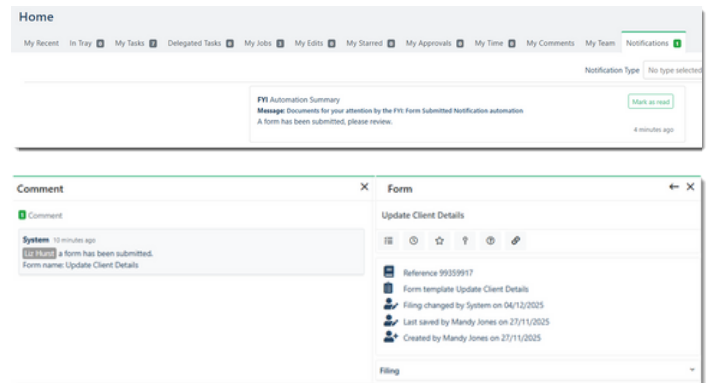


About this automation:

Use this process to automatically send notifications when clients have submitted a Form.

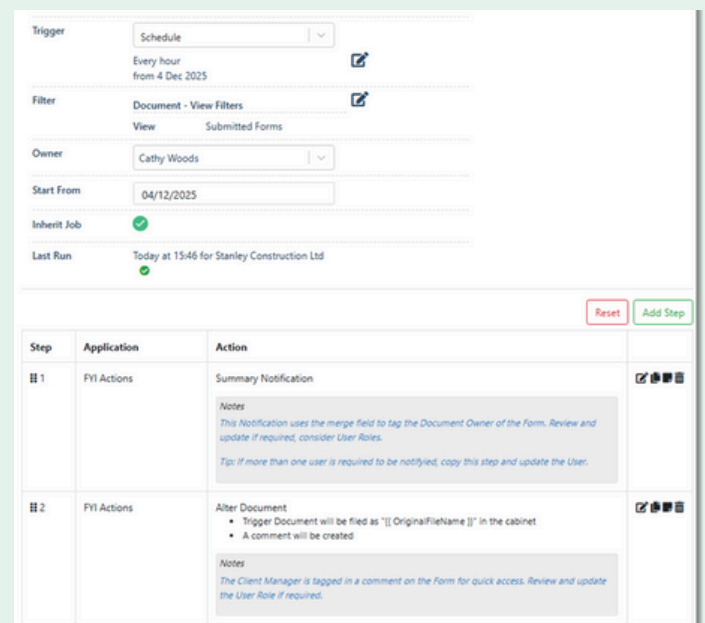
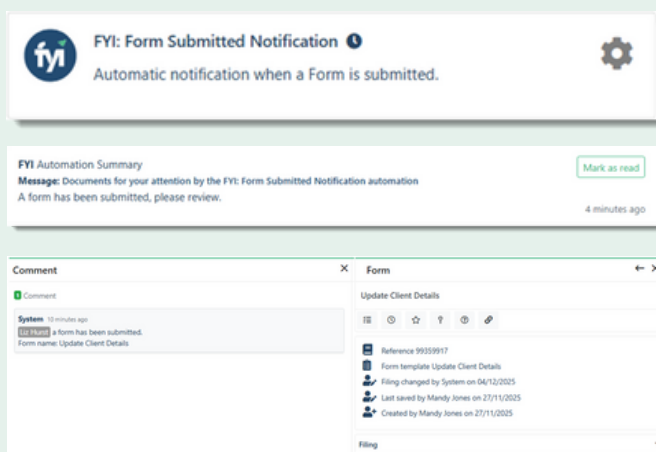


Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

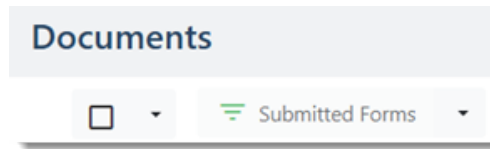
- ✓ Automation Process Steps



How to import:

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

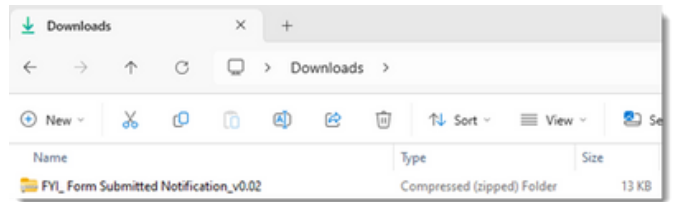
- "Submitted Forms" View
 - Workflow = Submitted
 - Type = Form



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.

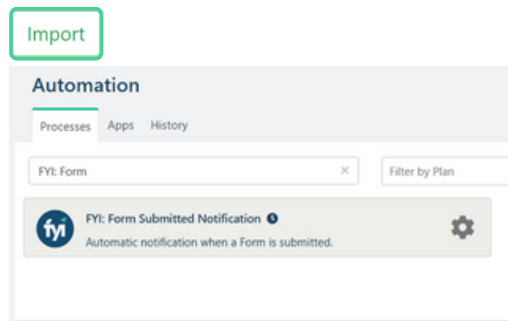


Step 2 - Import the files into FYI

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

Locate and select your saved "Form Submitted Notification" 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 as draft.



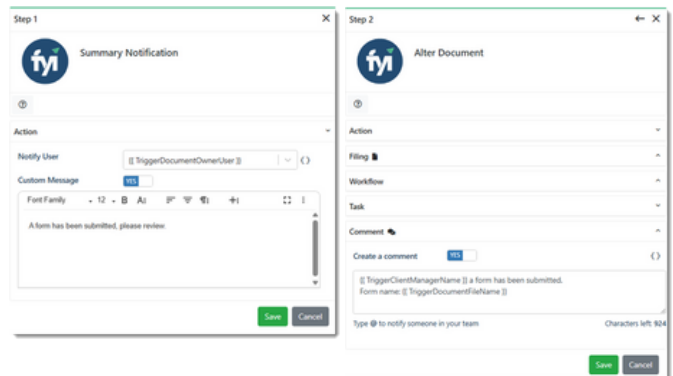
Step 3 - Review the process

Processes are imported with the Status set to Draft.

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

This process uses the Submitted Forms view, which is the custom view you created in the Document List.

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



Step 4 - Test and activate

Click the Test button to display a list of submitted Forms.

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

Go to Home - Notifications and review the summary notification received. The notification will be sent to the nominated User in the process step.

When ready, set the Status to Active.

- This automation is set to run automatically every hour from the commencement date.
- Users can receive notifications in FYI and also via Email or Teams. This is based on the Notification Mode enabled in My Settings.

