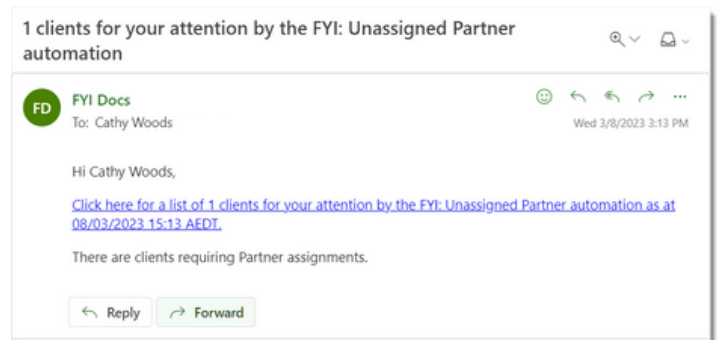


# Unassigned Job Partner or Job Manager Alert Process Automation



## About this automation:



Use these processes to automatically send an alert to a user notifying them of any unassigned Partner and Manager fields in the Jobs list.





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


## What's included:

- ✓ Automation Process Steps

 **FYI: Unassigned Job Partner**   
Auto alert to notify a team member that a Job Partner is missing on a job.

 **FYI: Unassigned Job Manager**   
Auto alert to notify a team member that a Job Manager is missing on a job.

Home

My Recent | In Tray | My Tasks | Delegated Tasks | My Jobs | My Edits | My Starred | My Approvals | My Time | My Comments | Notifications 

Notification type: No type selected

**FYI Automation Summary**



**Message:** Jobs for your attention by the FYI: Unassigned Job Partner automation

There are jobs requiring a Job Partner to be assigned.

[Mark as read](#)


a minute ago


Details | History | Activity

Status: **ACTIVE**  

Name: FYI: Unassigned Job Partner


Description: Auto alert to notify a team member that a Jobs are missing a Partner assignment.

Trigger: Schedule  
Every day from 8 Mar 2023 

Filter: Job - View Filters   
View: Unassigned Job Partner

Owner: Sandy Small

Start From: 08/03/2023

Last Run: Today at 13:03 for Brown, Charlie 

Next Run: Thursday, 9 March 2023 03:00

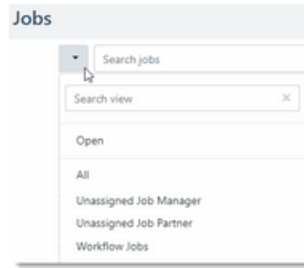
[Reset](#) [Add Step](#)

Step	Application	Action
#1	FYI Actions	Summary Notification  Notes The user notified is currently set to "Me". Consider and update the relevant user to receive this notification.

# How to import:

Before you begin, ensure your Views have been saved in the Jobs list with the following filters:

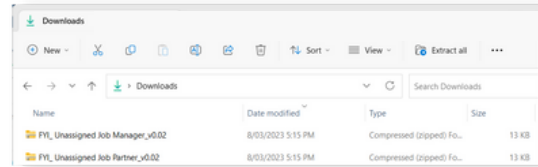
- "Unassigned Job Partner" View
  - Job Partner = (Blank)
- "Unassigned Job Manager" View
  - Job Manager = (Blank)



## 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.

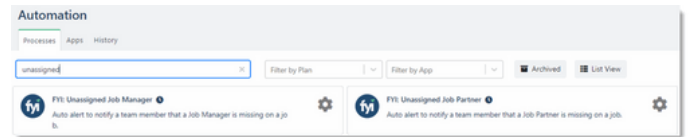


## Step 2 - Import the files into FYI

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

Locate and select your saved "Unassigned Job Partner" and "Unassigned Job Manager" files and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Processes will be imported into FYI.



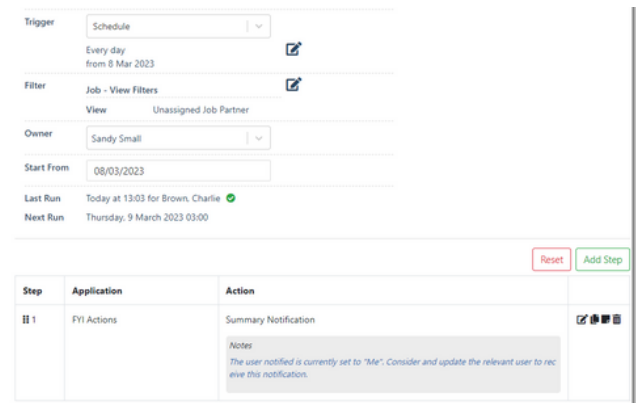
## Step 3 - Review the process

Processes are imported with the Status set to Draft.

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

These processes use the Unassigned Job Partner and Unassigned Job Manager Views in the Job - View Filter, which are the custom views you created in the Jobs list.

- Review the schedule
- Review the process owner
- Review and update each process step.



## Step 4 - Test and activate

Click the Test button to display a list of jobs without a partner or manager assigned.

Search and select a specific client 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 specific user selected in the automation.

When ready, set the Status to Active.

- This automation is set to run automatically every day 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.

