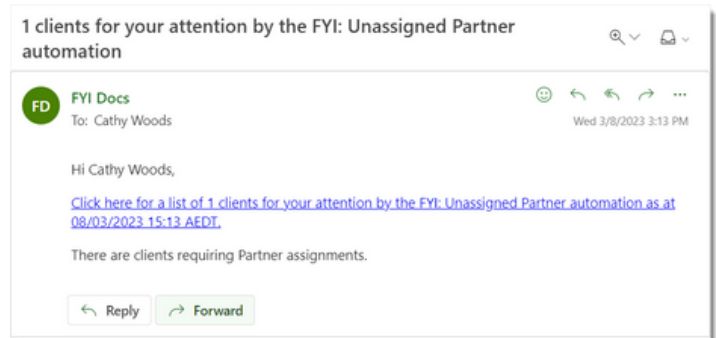




# Unassigned Client Partner or Client Manager Alert

## 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 Client list.



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

## What's included:

- Automation Process Steps

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

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

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: Clients for your attention by the FYI Unassigned Partner automation  
There are clients requiring Partner assignments.  
2 minutes ago

Details | History | Activity

Status: ACTIVE

Name: FYI: Unassigned Partner

Description: Auto alert to notify a team member that a Partner is missing on a client.

Trigger: Schedule  
Every day from 8 Mar 2023

Filter: Client - View Filters  
View

Owner: Sandy Small

Start From: 08/03/2023

Last Run: Today at 12:24 for Patterson, Akira

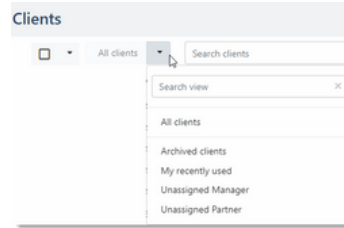
Next Run: Thursday, 9 March 2023 03:00

Step	Application	Action
1	FYI Actions	Summary Notification <i>Notes</i> 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 Clients list with the following filters:

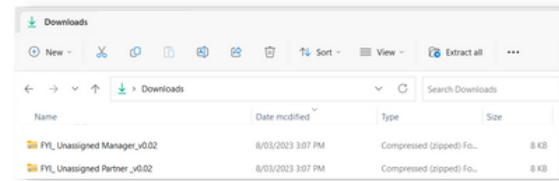
- "Unassigned Partner" View
  - Partner = (Blank)
- "Unassigned Manager" View
  - Manager = (Blank)



### 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.

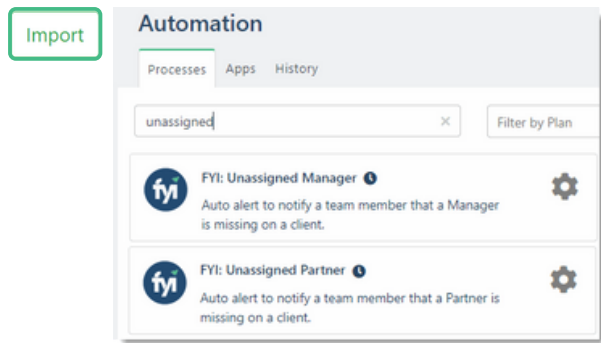


### Step 2 - Import the files into FYI

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

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

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



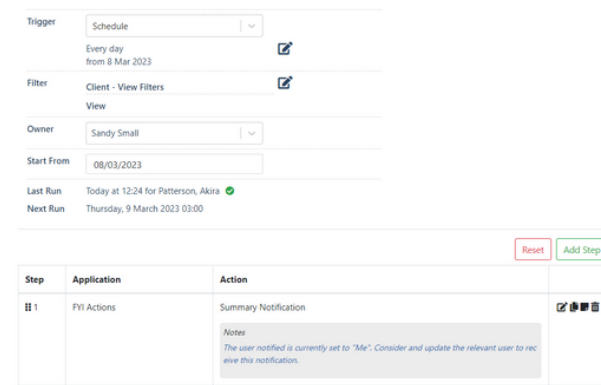
### Step 3 - Review the process

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 Partner and Unassigned Manager Views in the Client - View Filter, which are the custom views you created in the Clients 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 clients 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.

