

Job Rework & Review Processes

Process Automation



About this automation:







Use this process to auto-create the Tasks required for Job Rework and Review stages, allowing you to cycle through the stages as many times as required until complete.


















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

What's included:

✓ Automation Process Steps

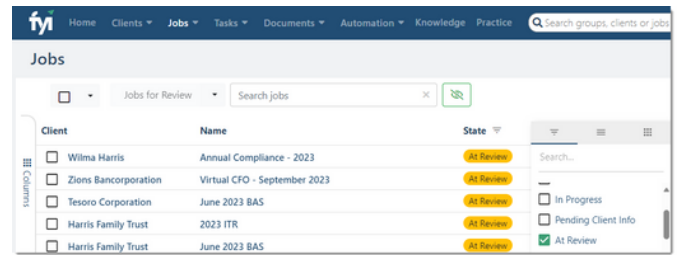
	FYI: Job - Rework Required 	
Automatically update job state and create the tasks required to complete rework on client work.		
	FYI: Job - Review Process 	
Automatically create the tasks required to complete review and/or rework on client work.		
	FYI: Job - Review Process - Final Review 	
Automatically create the tasks required to complete final review on client work.		

Step	Application	Action	
# 1	FYI Actions	Stop <ul style="list-style-type: none">Stop the automation if the filter no longer matches.	  
# 2	FYI Actions	Create Task <ul style="list-style-type: none">A task will be created with the subject "Job ready for review" <div>Notes<ul style="list-style-type: none">Review Task Assignee, consider updating to an appropriate User Role.</div>	  
# 3	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI: Job - Rework Required" process will be run	  
# 4	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI: Job - Review Process - Final Review" process will be run	  
# 5	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI: Send for Signing" process will be run	  

How to import:

Before you begin - ensure your Jobs Views have been saved.

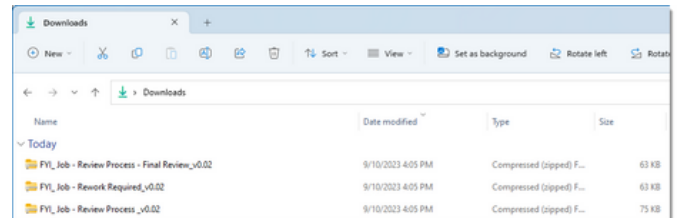
- Job State - Rework
- Job State - Review
- Job State - Final Review
- Job State - Ready to Send



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.



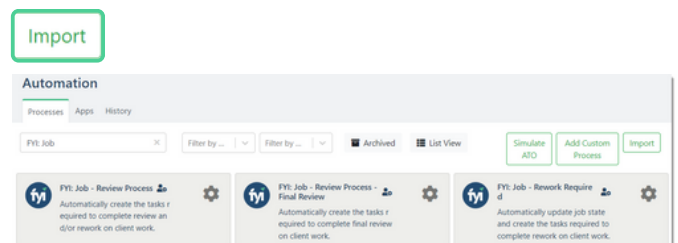
Step 2 - Import the files into FYI

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

Locate and select your saved "Job Process" files and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



Step 3 - Review the process

Edit and Review Each Process & Process Step

These processes use the custom views you created.

- Update the Filter and select your corresponding custom view
- Review the owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.

Consider the trigger Process for the Job - Review Process automation and add the Execute Process step into that process, ensure you enable the 'additional filter' for the step - refer to the help article for more.

Step	Application	Action	
1	FYI Actions	Stop <ul style="list-style-type: none">Stop the automation if the filter no longer matches.	
2	FYI Actions	Create Task <ul style="list-style-type: none">A task will be created with the subject "Job ready for review" <div>Notes<ul style="list-style-type: none">Review Task Assignee, consider updating to an appropriate User Role.</div>	
3	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI Job - Rework Required" process will be run	
4	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI Job - Review Process - Final Review" process will be run	
5	FYI Actions	Execute Process <ul style="list-style-type: none">The "FYI Send for Signing" process will be run	

Step 4 - Test and run the automation

You can test a Manual Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the Test button to display a list of the Jobs based on the Filter that has been selected.

From the Select Test, search and select a specific client to run the test for and select Run Test.

When ready, set the Status to Active. Note: Execute Process Steps will require the corresponding process to be Active in order to activate the process.

