QUICK REFERENCE GUIDE

Getting Started with Automations

Automate low value, repetitive tasks and be more productive

Use time-saving automations across document creation, import, filing, email communication and more!

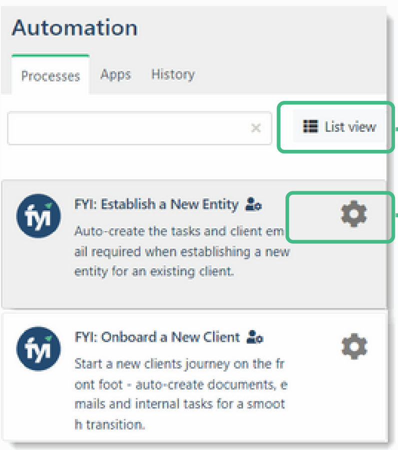
- The Automation Dashboard
- Automation Fundamentals
- Automation Steps
- Creating Automations in your FYI Platform
- Tips & Tricks

> The deeper you go into exploring what FYI can do, **you realize that it's the automations that make your life so much easier**. What FYI has really helped us with is taking away those menial, small, and tedious tasks that just don't need to be done by an individual. They can be part of an automated process that, once created, will trigger a chain of small processes, and assign the right task to the right staff member.
>
> ANDREW HOLDSWORTH
> PRACTICE MANAGER
> @ BBB PARTNERS

The Automation Dashboard

Pro Plan feature

Where you manage all automation functions for your practice.



Click to change to the List view to display your Automations

Click the cog to edit an automation

Tile colours
Grey = inactive
White = active

Processes Tab

Holds all sample and custom processes that are available for your practice. Automations can be activated, run and maintained from this tab.

Apps Tab

Holds all apps for integration including practice management, Microsoft 365, digital signing and more.

History Tab

Provides a log of all automation activities, to monitor processes that have been run and to check for errors.

Automation Fundamentals

Details Tab

Trigger

Controls whether the Automation is triggered manually or runs on a Scheduled time basis, such as every hour or once per day.

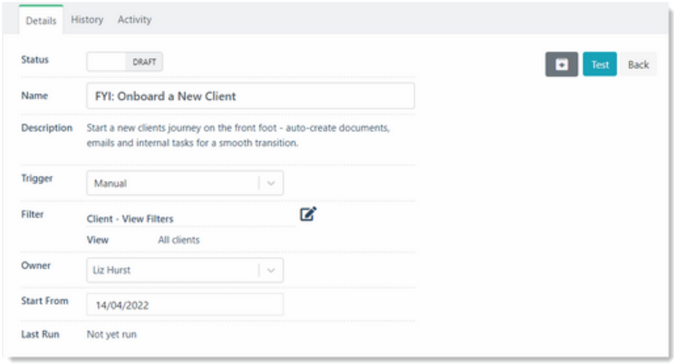
Filter

Determines who the automation is run for, or what list is used as the basis of the automation.

Use Client filters or pre-defined views for Clients, Documents, Tasks, Jobs or Practice Activity to determine what the automation is run for.

Owner

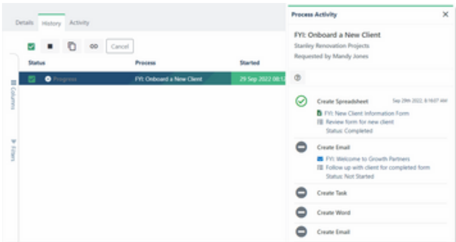
User who is notified if the automation fails.



History Tab

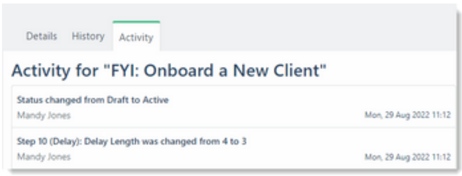
Displays the status of each time the automation has been run, who executed the automation and when it was run.

Click the automation to open the Process Activity drawer, displaying the detailed steps of the process. This displays where the automation is up to and the details of any errors.



Activity Tab

Displays a detailed list of all changes made to the automation, who made the changes and when they were made.



Automation Steps

Add Step

Steps are displayed in the order in which the automation will run. Steps can be added for a variety of Actions, such as creating a document, sending an email or updating a job state.

The settings available for the step depend on the Action and Filter selected, for example, Create Email.

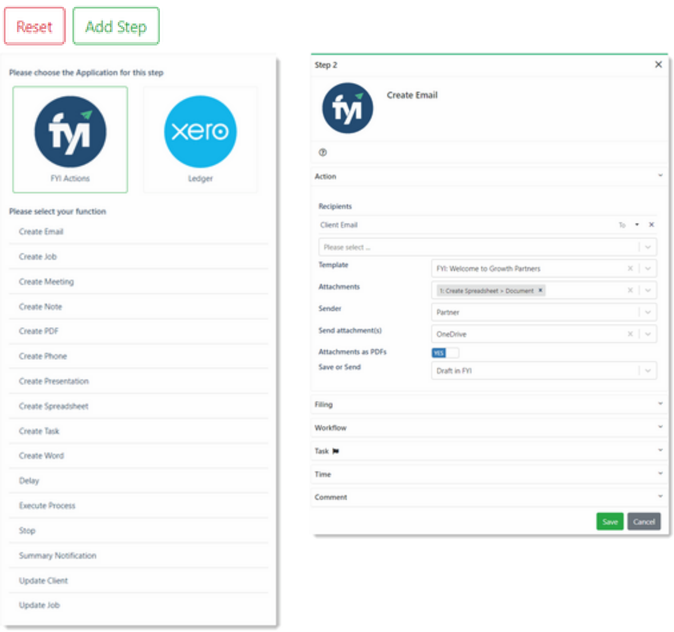
Action
Select recipients, email template, attachments and sender details.

Filing
The name of the document and where it should be filed to.

Workflow
The Owner, Approver and Workflow status of the email, where needed.

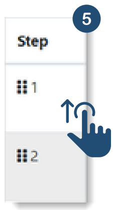
Task
When a task is created off the back of the email, and assigned to a user to follow up.

Comment
Add a comment to the email to notify a team member.



Quick Actions within a Step

1. Edit
   To edit a Step, click anywhere on the Step, or click the Edit tool to open the step drawer.
2. Clone
   To copy a Step, click the Clone tool next to the relevant Step. Clone will copy that Step directly below the selected step.
3. Add Note
   This can be used to add comments and provide further context, or to provide a description of what the Step does. It can also be used for internal automation audits.
4. Delete
   Remove the Step.
5. Move a Step
   To move a Step and change the sequence, simply drag and drop it up or down to the appropriate position.



Creating Automations in your FYI Platform

Import an Automation

Explore our range of Automations commonly used in accounting practices. Simply import, customise to suit your practice, test and activate.

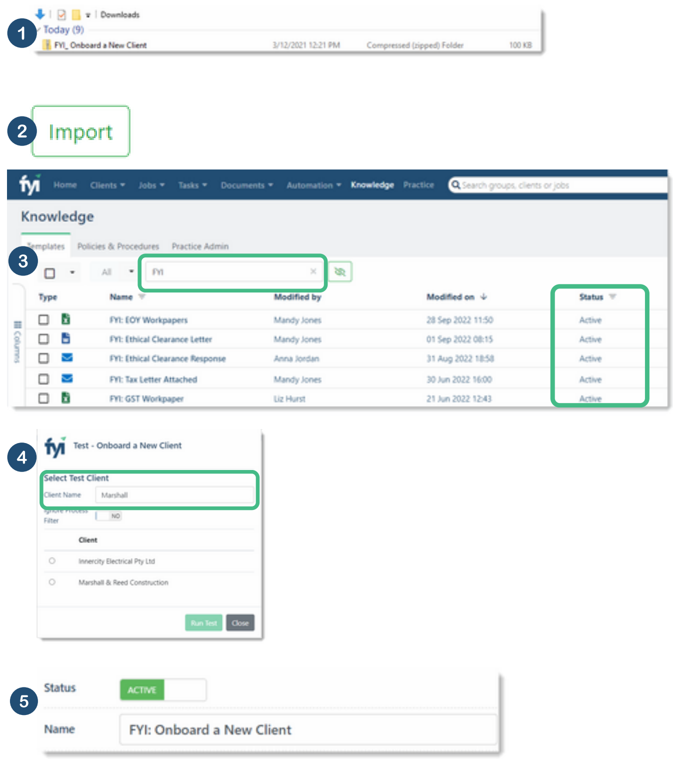
[Refer to our Automations Library]

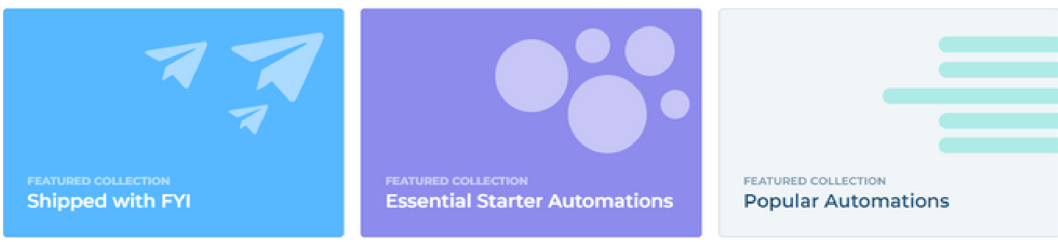
Quick steps to import an automation:

1. Save
   Download the automation zip file and save it locally.
2. Import
   Select 'Import' or drag and drop the zip file to your automations list.
3. Review
   Review and activate the templates imported with your automation. They will have the prefix 'FYI'.

   Review each step of the automation and customise as needed.
4. Test
   Click the Test button to display a list of all relevant clients, tasks, jobs, documents (based upon your automation filter).

   Search and select a specific record to run the test for and select Run Test.
5. Activate
   When ready, set the Status to Active.





Creat an Automation

Create an automation without using FYI's Import feature.

[Refer to Setting Up Automations]()

Quick steps to create an automation from scratch:

1. Add Custom Process
From the Automations Dashboard, select 'Add Custom Process'.

2. Define the Details
Give your Automation a **Name** and **Description**.
Select the Trigger.
Select the appropriate **Filter** and create the view if required.
Set the **Owner** and when the Automation will commence.

3. Add Process Steps
Add all required process steps in order of execution.

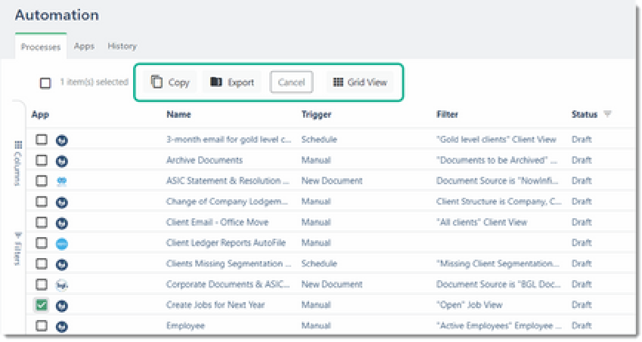
4. Test
Click the Test button to display a list of all relevant clients, tasks, jobs, documents (based upon your automation filter).

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

5. Activate
When ready, set the Status to Active.

Using the List View

The List View displays all Automations in alphabetical order and you can search for processes or filter key columns such as Apps.



Select an Automation to display other key functions in the List View, including:

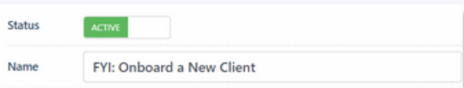
Copy
Create a duplicate of the selected Automation.

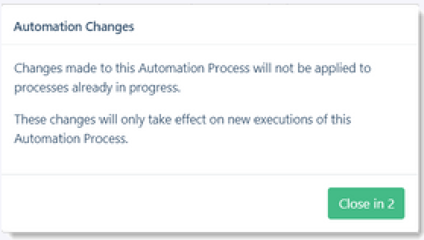
Export
Export the selected Automation to allow you to share the process steps and templates with other practices.

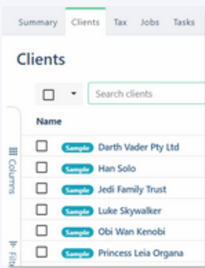
Views
The All view displays "Active" and "Draft" processes by default. Additional views can be saved or modified by a user with relevant permissions.

Tips & Tricks

- Automations will auto default back to draft when a change is made. Ensure you change the Automation back to Active.
- When editing an existing Automation, note that any changes made will only take effect from newly executed processes. An exception is for templates, if a change is made to a template - this will take effect immediately.
- Sample Content can be enabled in your FYI Platform. When testing automations, we recommend selecting a sample client or document to allow you to safely test and review your custom processes.







Work won't feel like work with this level of automation.
For more information on Automations, visit the FYI Help Centre at [support.fyidocs.com]()