

Draft Disbursements Reminder Process Automation



Elite Plan

About this automation:

Use this process to notify a nominated team member(s) of Draft Disbursements in your practice once a week.



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

Details History Activity

Status: ACTIVE

Name: FYI: Draft Disbursement Reminder

Description: This process sends a reminder to a nominated team member(s) with outstanding disbursements every week

Trigger: Schedule
Every week from 5 Apr 2024

Filter: Time Entry - View Filters
View: Draft Disbursements

Owner: Cathy Woods

Start From: 04/04/2024

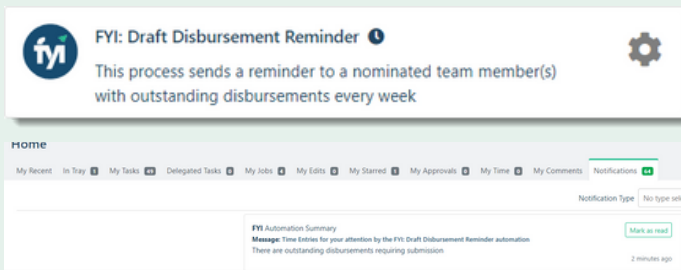
Inherit Job:

Last Run: Today at 13:33 for Wilma Harris

Next Run: Friday, 5 April 2024 03:00

What's included:

- ✓ Automation Process Steps



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Reset Add Step

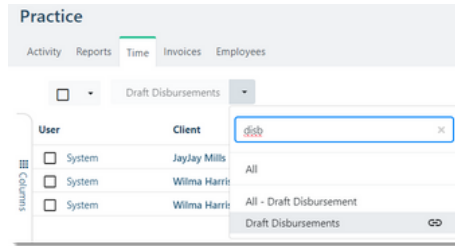
Step	Application	Action
#1	FYI Actions	Summary Notification <i>Notes</i> Review the User to be notified and update, consider using a User Role. If more than one User needs to be notified, clone this step.

How to import:

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

"Draft Disbursements" View

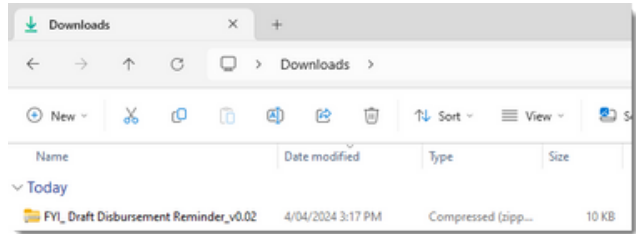
- Type = Disbursement
- Status = Draft
- Date = Relative, Past



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.

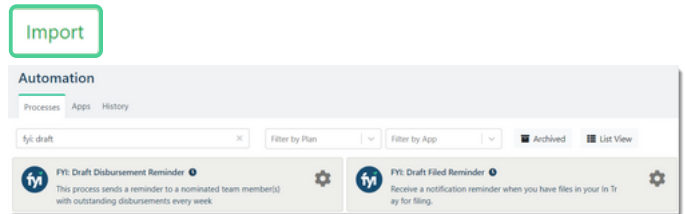


Step 2 - Import the files into FYI

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

Locate and select your saved "Draft Disbursement Reminder" 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.



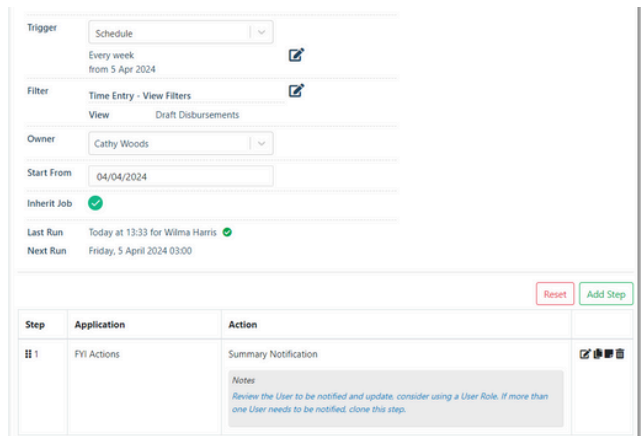
Step 3 - Review the process

The Process is imported with the Status set to Draft.

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

This process uses the Draft Disbursements View, which is the custom view you created in the Time Lists.

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



Step 4 - Test and run the automation

Click the Test button to display a list of all draft disbursement entries.

Search and select a specific time entry 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 week 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.

