

# Draft Invoice Notification Process Automation



Elite Plan

## About this automation:

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



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

The screenshot shows the 'Details' tab of an automation process. The status is 'ACTIVE'. The name is 'FYI: Draft Invoice Notification'. The description states: 'This process sends a reminder notification to nominated team member(s) for draft invoices once a month'. The trigger is 'Schedule' with a frequency of 'On the 1st weekday of each month from 1 Apr 2024'. The filter is 'Invoice - View Filters' with a view of 'Draft Invoices'. The owner is 'Cathy Woods'. The start date is '04/04/2024'. The 'Inherit Job' checkbox is checked. The last run was 'Not yet run' and the next run is 'Wednesday, 1 May 2024 03:00'. There are 'Test' and 'Back' buttons in the top right.

## What's included:

- ✓ Automation Process Steps

The screenshot shows a card for the 'FYI: Draft Invoice Notification' automation in the home dashboard. It includes the FYI logo, the name of the automation, and a brief description: 'This process sends a reminder notification to nominated team member(s) for draft invoices once a month'. There is a gear icon for settings. Below the card, there is a 'Home' section with various navigation links and a 'Notifications' section with a 'Mark as read' button.

The screenshot shows the 'Steps' section of the automation process. It includes a table with the following columns: Step, Application, and Action. The first step is 'FYI Actions' with the action 'Summary Notification'. There are 'Reset' and 'Add Step' buttons in the top right. The table content is as follows:

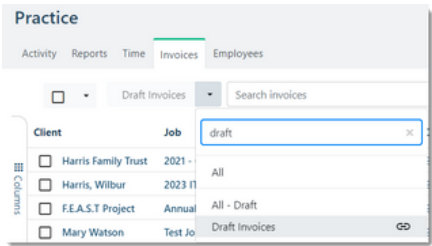
Step	Application	Action
1	FYI Actions	Summary Notification

Below the table, there is a 'Notes' section with the text: '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 Invoices list with the following filters:

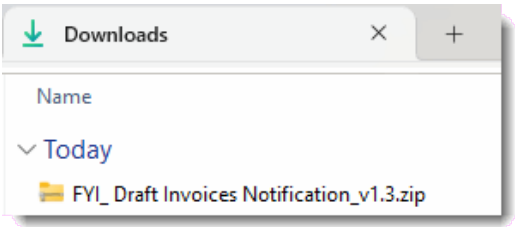
- "Draft Invoices" View
- Status = Draft



## 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.

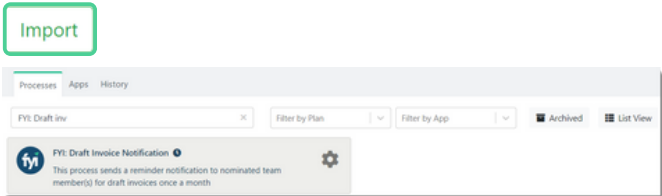


## Step 2 - Import the files into FYI

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

Locate and select your saved "Draft Invoice Notification" 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.



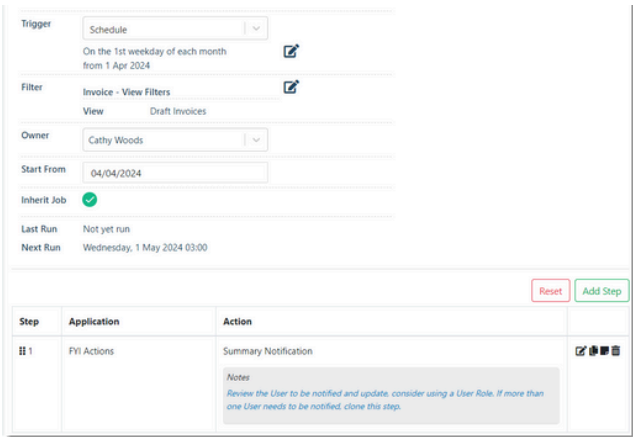
## Step 3 - Review the process

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 Invoices View, which is the custom view you created in the Invoices 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 overdue invoices.

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.

