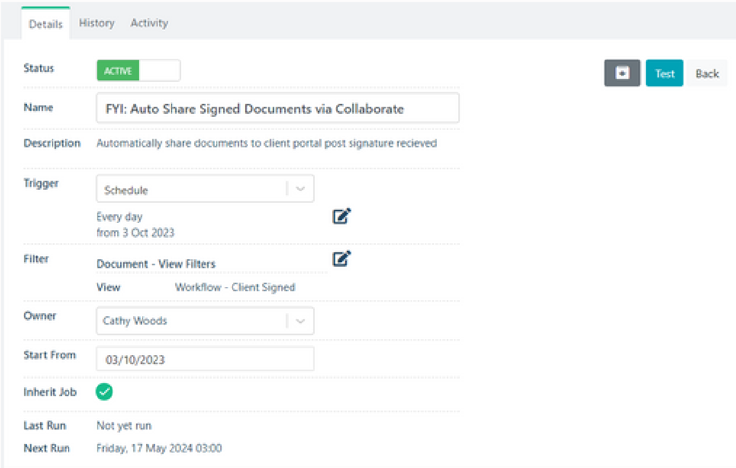
Signed Document Upload to Collaborate

Process Automation

About this automation:

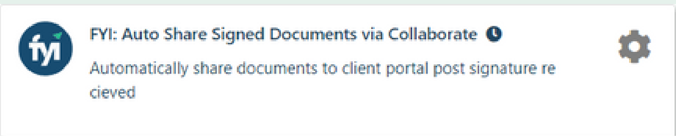
Use this process to automatically share client signed documents to their Collaborate folder.

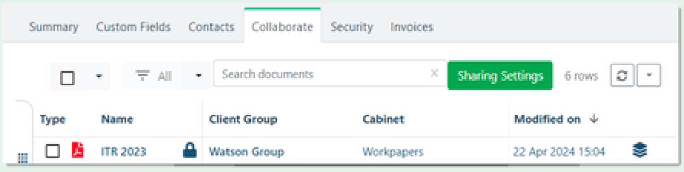


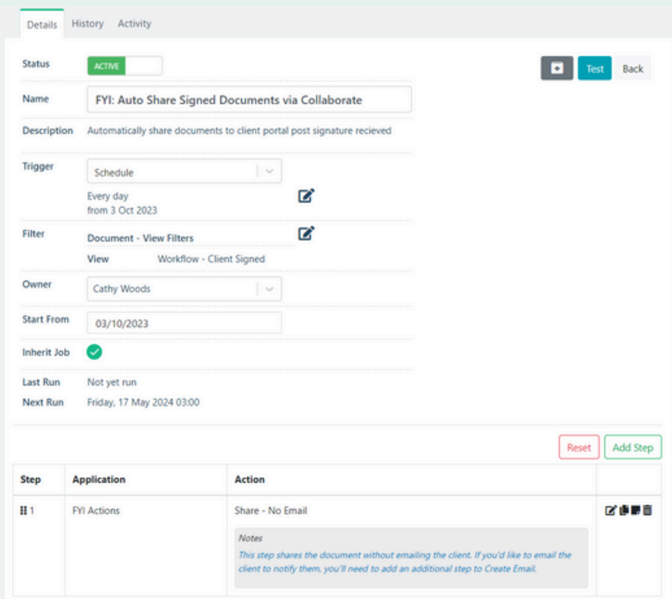
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- Automation Process Steps





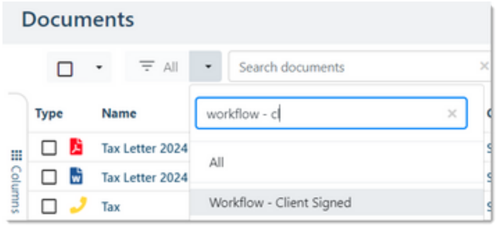


How to import:

Before you begin, ensure your View has been saved in the Document list with the following filters:
"Workflow - Client Signed" View

- Workflow = Client Signed

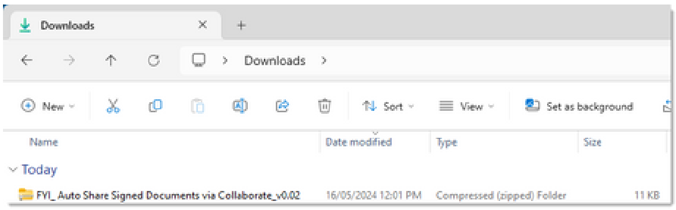
Note: this is a system default view and will be available in your platform.



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.

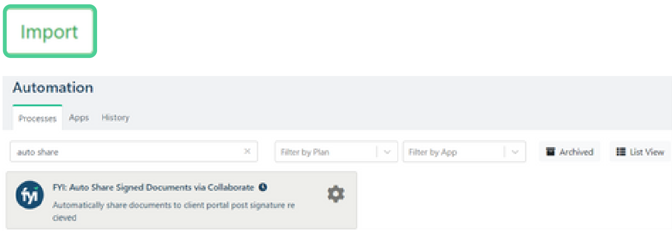


Step 2 - Import the files into FYI

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

Locate and select your saved "Auto Share Signed Documents via Collaborate" 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.



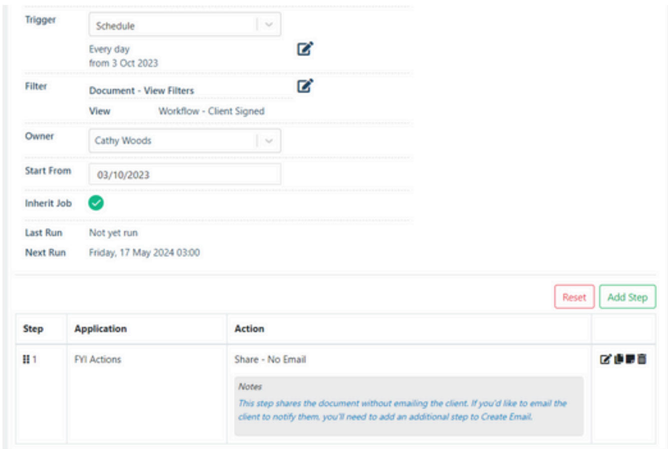
Step 3 - Review the process

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 **Workflow - Client Signed** View, which is the default view in the Documents List.

- 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 client signed documents.

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

Go to the **Client Workspace - Collaborate** tab and review the shared document. Note: the client will not be notified the document has been uploaded.

When ready, set the **Status** to Active.

- This automation is set to run automatically every day from the commencement date.
- Add a Create Email step to the process if you wish to also notify the client.