# Auto Share Signed Documents via Collaborate Process Automation



## About this automation:

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



Details H	istory Activity		
Status	ACTIVE		Te
Name	FYI: Auto Share Signed Documents	via Collaborate	
Description	Automatically share documents to client port	al post signature recieved	
frigger	Schedule V		
	Every day from 3 Oct 2023	C	
Filter	Document - View Filters	C	
	View Workflow - Client Signed		
Owner	Cathy Woods   ~		
Start From	03/10/2023		
inherit Job	0		
Last Run	Not yet run		
Next Run	Friday, 17 May 2024 03:00		

# What's included:

Automation Process Steps

<b>fy</b>	FYI: Auto Share Automatically s cieved	e Signed Docum hare documents t	ents via Collaborate 0	iture re
Summary	Custom Fields Co	ntacts Collaborate	Security Invoices	
	• = All •	Search documents	× Sharing S	ettings 6 rows 2 -
Туре	Name	Client Group	Cabinet	Modified on $\ \downarrow$
D 🕻	ITR 2023	Watson Group	Workpapers	22 Apr 2024 15:04 📚

Casture				
status	ACTIVE			fest Back
Name	FYI: Auto Share S	igned Documents	via Collaborate	
Descrip	tion Automatically share do	ocuments to client porta	I post signature recieved	
rigger	Schedule	~		
	Every day from 3 Oct 2023		2°	
Filter	Document - View Filte	rs	c	
	View Workf	low - Client Signed		
Owner	Cathy Woods	~		
Start Fre	om 03/10/2023			
nherit J	Job 🥑			
Last Ru	n Not yet run			
Vext Ru	an Friday, 17 May 2024 03	3:00		
			Reset	Add Ste
step	Application	Action		
1	FYI Actions	Share - No	Email	<b>200</b>
		Notes This step st	ares the document without emailing the client. If you'd like to email the	

## 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
 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.







Import					
Automation Processes Apps	History				
auto share	2	K Filter by Plan	I v Riter by App	- Archived	I 🔡 List View
FYI: Auto S Automatica cieved	hare Signed Documents via Collaboral ly share documents to client portal post	t signature re			



select Test D	locument			
ocument Nam	e itr 2023			
nore Process Iter	YES			
D	ocument			Client
* 6	ITR 2023			Mary Watson
0 6	KP ITR 2023 [FY1-606452539].	pdf (SIGNED)		Kevin Porter
o 🛚	KP ITR 2023			Kevin Porter
		« Prev 1 2 3	4 5 Next > 5 per page	
		(Showing	1 - 5 of 66 entries )	Run Test Oc
Summar	ry Custom Fields	(Showing Contacts Collaborate	1 - 5 of 66 entries ) Security Invoices	Run Text Co
Summar	ry Custom Fields ] → 〒 All	Contacts Collaborate  Search documents	1 - 5 of 66 entries ) Security Invoices	Run Test Co
Summar	ry Custom Fields ] → 〒 All Name	Contacts Collaborate Contacts Collaborate Client Group	I - 5 of 66 entries ) Security Invoices X Shu Cabinet	Run Test Co ring Settings 6 rows € • Modified on ↓