


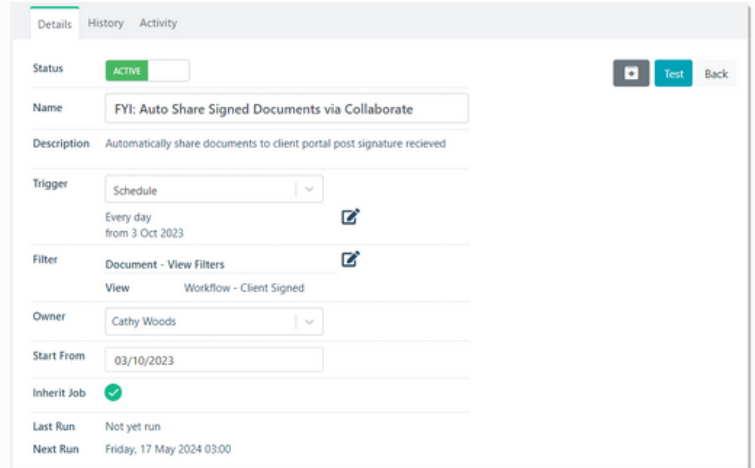
Signed Document Upload to Collaborate Process Automation



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!



Details History Activity

Status: ACTIVE

Name: FYI: Auto Share Signed Documents via Collaborate

Description: Automatically share documents to client portal post signature received

Trigger: Schedule
Every day from 3 Oct 2023

Filter: Document - View Filters
View: Workflow - Client Signed

Owner: Cathy Woods

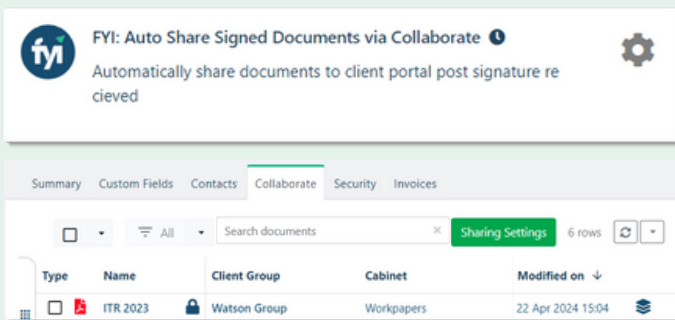
Start From: 03/10/2023

Inherit Job:

Last Run: Not yet run
Next Run: Friday, 17 May 2024 03:00

What's included:

- Automation Process Steps

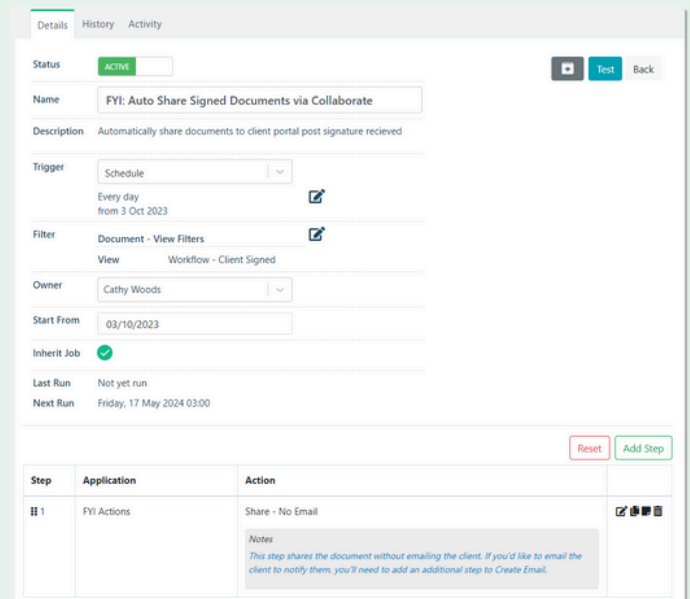


FYI: Auto Share Signed Documents via Collaborate
Automatically share documents to client portal post signature received

Summary Custom Fields Contacts Collaborate Security Invoices

Search documents x Sharing Settings 6 rows

Type	Name	Client Group	Cabinet	Modified on
	ITR 2023	Watson Group	Workpapers	22 Apr 2024 15:04



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Reset Add Step

Step	Application	Action
1	FYI Actions	Share - No Email <i>Notes</i> This step shares the document without emailing the client. If you'd like to email the client to notify them, you'll need to add an additional step to Create Email.

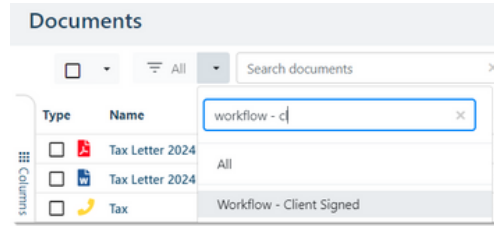
How to import:

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

"Workflow - Client Signed" View

- Workflow = Client Signed

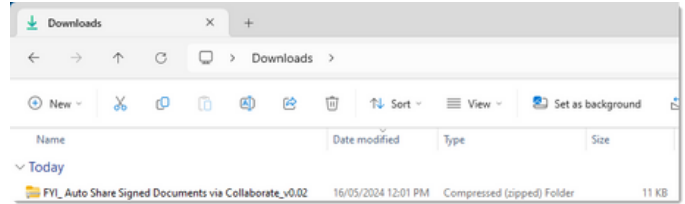
Note: this is a system default view and will be available in your platform.



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.

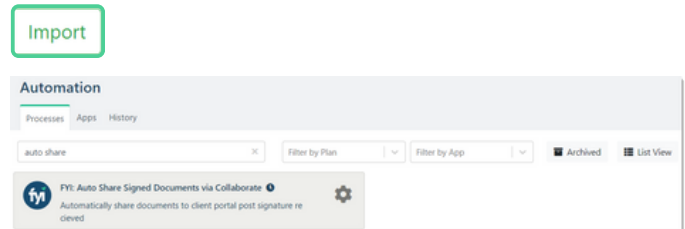


Step 2 - Import the files into FYI

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.



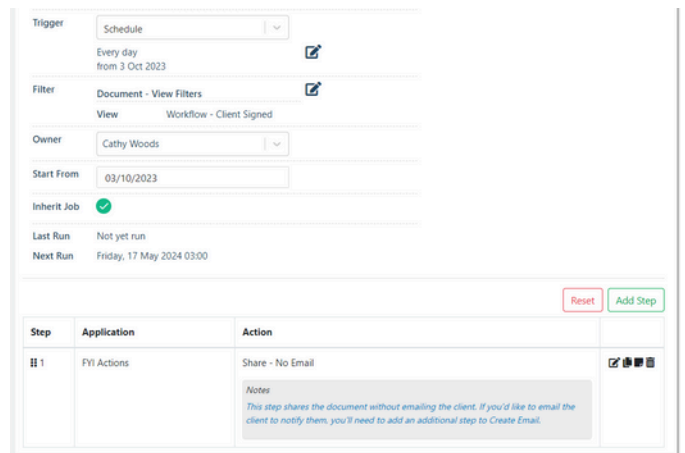
Step 3 - Review the process

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.

