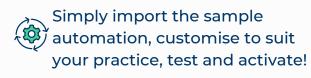
Final Invoice Auto Complete Job Process Automation

About this automation:

Use this process to automatically complete the client job when the final invoice has been raised.



| Details H | istory Activity | | |
|-------------|---|------------------------|------|
| Status | ACTIVE | | Test |
| Name | FYI: Final Invoice Auto Complete Jo | 0 | |
| Description | Once a final invoice is approved the associate completed | d job is automatically | |
| Trigger | Schedule V | | |
| | Every hour from 16 May 2024 | ľ | |
| Filter | Invoice - View Filters | ľ | |
| | View Approved Final Invoices | | |
| Owner | Cathy Woods 🔰 🗸 | | |
| Start From | 16/05/2024 | | |
| inherit Job | 0 | | |
| Last Run | Not yet run | | |
| Next Run | Thursday, 16 May 2024 16:00 | | |

What's included:

Automation Process Steps

| fу | FYI: Final Invoice Once a final invoic ally completed | | | | b is auto | omatio | c | \$ |
|-------------|---|-------------|------------------------------|-----------------|-------------|------------------------------|-------------|------------|
| Group Watso | on Group × | Client | Mary Watson | x v | | ital property a ry Watson | advice 2024 | × |
| Summary C | ustom Fields Processes Comments Proc | ess History | Activity Time Tasks Doo | uments Invoices | | | | |
| lob Details | e c'c' | C. Pho | me call 📑 File note 🕻 | Meeting | | | | |
| iame | Rental property advice 2024 | Subject | | | | | | |
| tate | Completed | Subject | Enter the subject | | | | | |
| lumber | 3011025 | Font F | amiy + 12 + B / A | । লাজ পা | co 🖬 +i | | r. | ~ 0.1 |
| ype | Standard | | | | | | | î |
| emplate | Sale of business | | | | | | | |
| ategory | Compliance | | | | | | | I |
| abinet | | | | | | | | ÷ |
| tart Date | 16/04/2024 | Phone | (02) 4046 5873 | Date 16/05/202 | | Time | 15:51:56 | × |
| lue Date | 30/04/2024 | | | | | | C | cate Clear |
| fanager | Nicole Miller | | | | | | | |
| arther | Tony Douglas | Docum | ents | | | | | |
| ssigned | Cathy Woods | Type | Name | | Modified By | | Modified Or | n |
| | | | Invoice on 16/05/2024 - \$50 | 00.00 | Cathy Woods | | 16 May 2024 | 15:48 |

| Status | ACTIVE | | | Test Back |
|-----------|---|------------------------|------------------------------|---------------|
| Name | FYI: Final Invoice | Auto Complete Jo | b | |
| Descripti | on Once a final invoice is completed | approved the associate | d job is automatically | |
| Trigger | Schedule | ~ | | |
| | Every hour from 16 May 2024 | | ľ | |
| Filter | Invoice - View Filters | | ľ | |
| | View Appro | wed Final Invoices | | |
| Owner | Cathy Woods | × | | |
| Start Fro | m 16/05/2024 | | | |
| Inherit J | ob 🥝 | | | |
| Last Run | Not yet run | | | |
| Next Rur | h Thursday, 16 May 202- | 4 16:00 | | |
| | | | | Reset Add Ste |
| Step | Application | Action | | |
| 11 | FYI Actions | Update Job • State | will be updated to Completed | ₿₽ |
| | | Notes | | |

How to import:

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

"Approved Final Invoices" View

- Type = Final
- Status = Draft in Xero

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 "Final Invoice Auto Complete Job" 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 **Approved Final Invoices** View, and is set to run once per invoice.

- 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

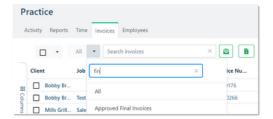
Click the **Test** button to display a list of all client signed documents.

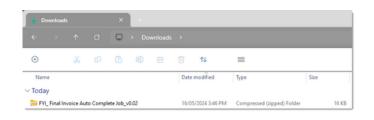
Search and select a specific document to run the test for and select **Run Test**.

Go to the **Client Workspace - Jobs** tab and review the complete job.

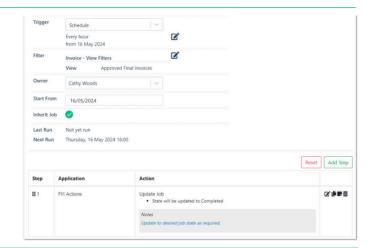
When ready, set the **Status** to Active.

• This automation is set to run automatically every hour from the commencement date.





| Import | | | | | |
|----------------|--|------------------|-----------------|---|------------------------|
| Automation | | | | | |
| | | | | | |
| Processes Apps | History | | | | |
| tić fina | | × Filter by Plan | ✓ Filter by App | V | Inchived III List View |
| TM | nvoice Auto Complete Job O al invoice is approved the associated job reed | is automatic | | | |
| | | | | | |



| Test - FYI: F | inal Invoice Auto Complete Job | | | | | |
|------------------------|----------------------------------|-------------------|-------------------------------|----------------|--|-----------------|
| elect Test Invoice | | | | | | |
| tvoice Name | | | | | | |
| phore Process liter | ND | | | | | |
| Client | Job | | | Invoice Number | | |
| Mary Watson | Rental property | advice 2024 | | INV-0267 | | |
| | | (Showing 1 - 5 or | (7 entries) | | | |
| | | | | Run Test | Close | |
| Group Watson G | Sroup | × Client | Mary Watson | dot 🔍 X | Rental property advice 2024 Mary Watson | × v ø |
| Summary Custo | om Fields Processes Comments Pro | cess History | Activity Time Tasks Documents | Invoices | | |
| Job Details 🚦 | 66 | 📞 Ph | one call 📑 File note 🛅 Meeti | ing | | |
| Name | Rental property advice 2024 | Subject | (accession and | | | |
| State | Completed | | Enter the subject | | | |
| Number | 1011025 | Fort F | amity + 12 + B / Al P | r⊽¶i ∞⊡+ | H | $\sim \sim 0.1$ |
| Type | Standard | | | | | î |
| Template | Sale of business | | | | | |
| Category | Compliance | | | | | I |
| Cabinet | | | | | | * |
| Start Date | 16/04/2024 | Phone | (02) 4046 5873 Dat | 16/05/2024 | Time 15:51:56 | н |
| Due Date | 30/04/2024 | | | | | Create Clear |
| Manager | Nicole Miller | | | | | |
| Partner | Tony Douglas | Docum | ents | | | |
| Assigned | Cathy Woods | Type | Name | Modified | I By Mod | fied On |
| | | | | | | |