

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.



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

Details History Activity

Status: **ACTIVE** [Test] [Back]

Name: FYI: Final Invoice Auto Complete Job

Description: Once a final invoice is approved the associated job is automatically completed

Trigger: Schedule
Every hour from 16 May 2024

Filter: Invoice - View Filters
View: Approved Final Invoices

Owner: Cathy Woods

Start From: 16/05/2024

Inherit Job:

Last Run: Not yet run
Next Run: Thursday, 16 May 2024 16:00

What's included:

- Automation Process Steps

FYI: Final Invoice Auto Complete Job [Settings]

Once a final invoice is approved the associated job is automatically completed

Group: Watson Group | Client: Mary Watson | Job: Rental property advice 2024

Summary Custom Fields Processes Comments Process History Activity Time Tasks Documents Invoices

Job Details

Name: Rental property advice 2024
State: Completed
Number: J011025
Type: Standard
Template: Sale of business
Category: Compliance
Cabinet: -
Start Date: 16/04/2024
Due Date: 30/04/2024
Manager: Nicole Miller
Partner: Tony Douglas
Assigned: Cathy Woods

Phone call File note Meeting

Subject: Enter the subject

Phone: (02) 4046 5873 | Date: 16/05/2024 | Time: 15:51:56

Documents

Type	Name	Modified By	Modified On
Invoice	Invoice on 16/05/2024 - \$500.00	Cathy Woods	16 May 2024 15:48

Details History Activity

Status: **ACTIVE** [Test] [Back]

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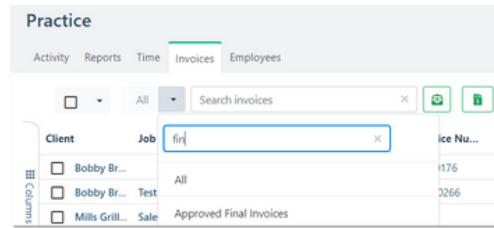
[Reset] [Add Step]

Step	Application	Action
#1	FYI Actions	Update Job <ul style="list-style-type: none"> State will be updated to Completed Notes Update to desired job state as required.

How to import:

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

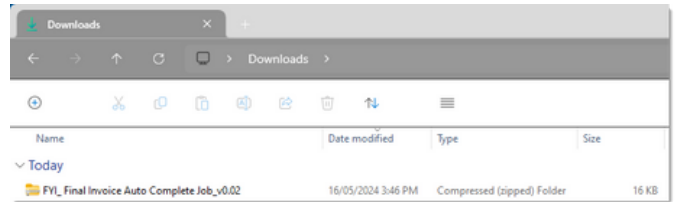
- "Approved Final Invoices" View
- Type = Final
- Status = Draft in Xero



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.

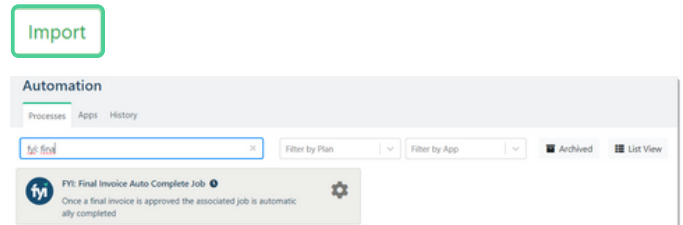


Step 2 - Import the files into FYI

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.



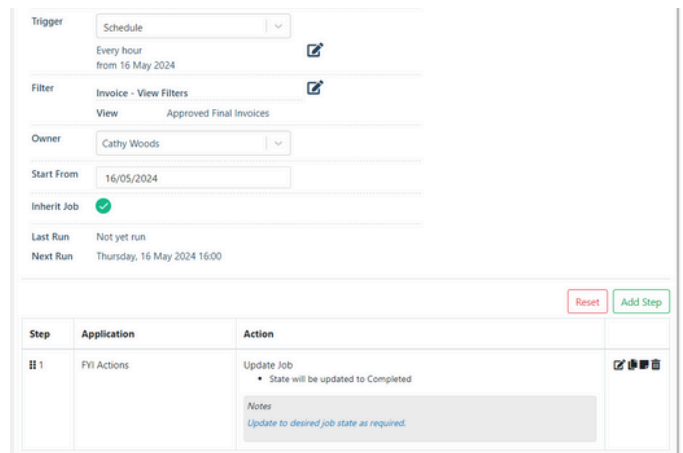
Step 3 - Review the process

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.

