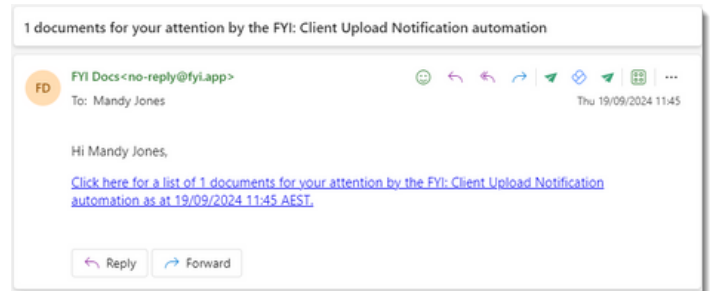


# Client Upload Notification Process Automation



## About this automation:



Use this process to automatically send notifications when clients have uploaded documents via their Collaborate site.



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

## What's included:

- ✓ Automation Process Steps

**FYI: Client Upload Notification** 

Receive a notification when a client uploads documents using their Collaborate Upload folder.

**FYI Automation Summary** Mark as read

**Message:** Documents for your attention by the FYI: Client Upload Notification automation a few seconds ago

Details History Activity

Status: **ACTIVE** Test Back

Name: FYI: Client Upload Notification

Description: Receive a notification when a client uploads documents using their Collaborate Upload folder.

Trigger: Schedule  
Every 2 hours from 13 Sep 2024

Filter: Document - View Filters  
View: Client Uploads

Owner: Liz Hurst

Start From: 13/09/2024

Inherit Job:

Last Run: Not yet run  
Next Run: Thursday, 19 September 2024 13:00

Reset Add Step

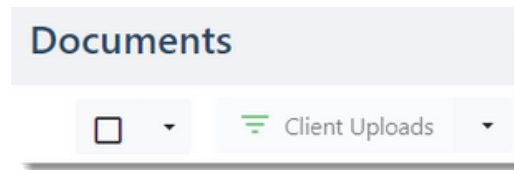
Step	Application	Action
#1	FYI Actions	Summary Notification <span>edit delete</span>

## How to import:

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

"Workflow - Client Uploads " View

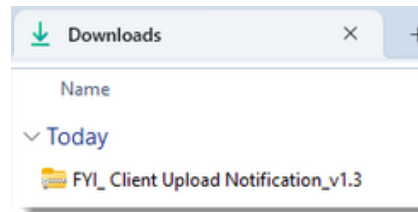
- Workflow = Not Started
- Source = Client Upload



### 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.

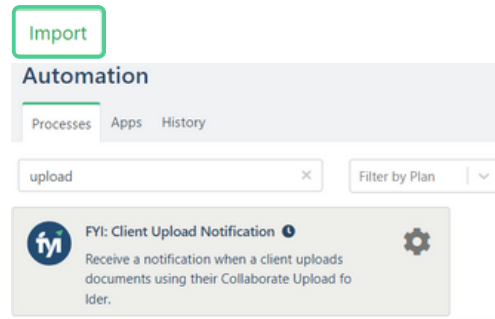


### Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Client Upload Notification" 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 as draft.



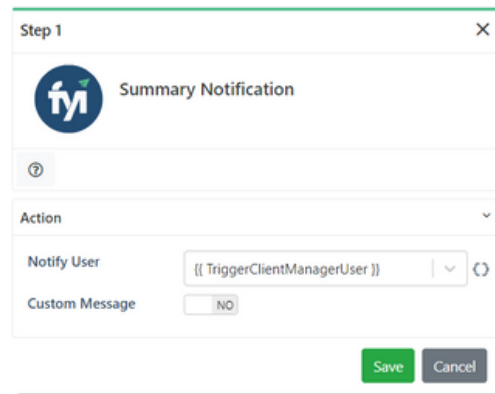
### Step 3 - Review the process

Processes are imported with the Status set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the Client Uploads view, which is a system view in Documents Lists.

- Review the schedule
- Review the process owner
- Review and update the process step.



### Step 4 - Test and activate

Click the Test button to display a list of client uploaded documents.

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

Go to Home - Notifications and review the summary notification received. The notification will be sent to the Manager of the client

When ready, set the Status to Active.

- This automation is set to run automatically every hour from the commencement date.
- Users can receive notifications in FYI and also via Email or Teams. This is based on the Notification Mode enabled in My Settings.

