

Overdue Jobs Reminder



About this automation:

Use this process to notify a nominated team members of overdue Jobs in your practice every week.



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

The screenshot shows the configuration page for the 'FYI: Overdue Jobs Reminder' automation. It includes fields for Name, Description, Trigger (Schedule), Filter (Job - View Filters), Owner (Liz Hurst), and Start From (13/09/2024). It also displays the last and next run times. At the bottom, there is a table with one step: Step 1, Application: FYI Actions, Action: Summary Notification.

Step	Application	Action
# 1	FYI Actions	Summary Notification

What's included:

- ✔ Automation Process Steps

FYI: Overdue Jobs Reminder Send your team a weekly reminder of the overdue jobs assigned to them.

FYI Automation Summary Mark as read
Message: Jobs for your attention by the FYI: Overdue Jobs Reminder automation 11 minutes ago

1 jobs for your attention by the FYI: Overdue Jobs Reminder automation

FYI Docs <no-reply@fyi.app>
To: Mandy Jones
Mon 23/09/2024 07:23

Hi Mandy Jones,
[Click here for a list of 1 jobs for your attention by the FYI: Overdue Jobs Reminder automation as at 23/09/2024 07:23 AEST.](#)

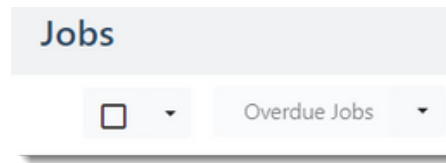
Reply Forward

How to import:

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

"Overdue Jobs" View

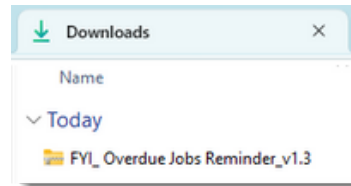
- Status = Select all that are relevant - In Progress, Pending Client Info, At Review etc
- Date = Relative, Past



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.

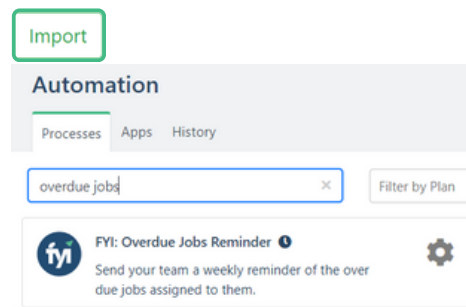


Step 2 - Import the files into FYI

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

Locate and select your saved "Overdue Jobs Reminder" 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.



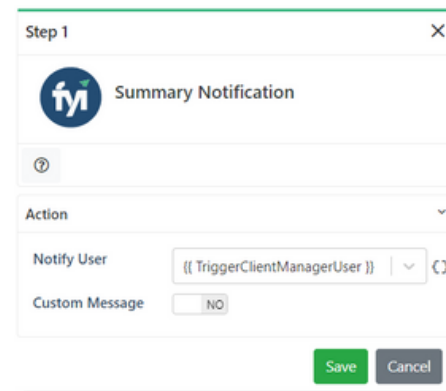
Step 3 - Review the process

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 Overdue Jobs view, which is the custom view you created in the Jobs Lists.

- 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 overdue jobs.

Search and select a specific time entry 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 nominated User in the process step.

When ready, set the Status to Active.

- This automation is set to run automatically every week 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.

