Recurring Invoices

Elite Plan

About this automation:

Use this process to streamline your monthly invoicing by auto-creating invoices for your client work.

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

What's included:

✔ Automation Process Steps

How to import:

Before you begin, ensure your View has been saved in the Jobs list with the following filters (or those relevant for your invoicing requirements):
"Monthly Invoice Required" View
- Job State = In Progress
- Job Type = Billing
- Monthly Invoice = True
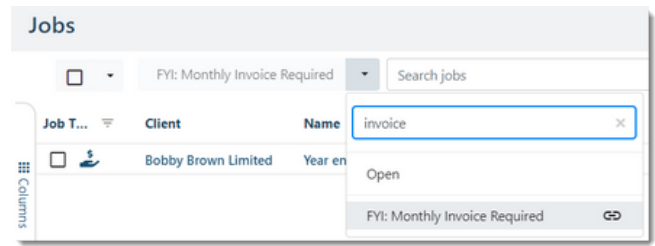
Step 1 - Save the import file locally

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.
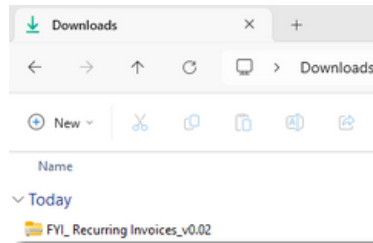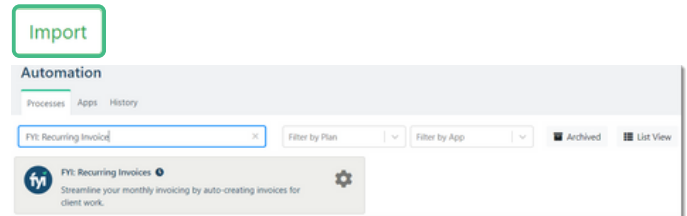
Step 2 - Import the files into FYI

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

Locate and select your saved "Recurring Invoices" 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 **Monthly Invoices** View, which is the custom view you created in the Job 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.
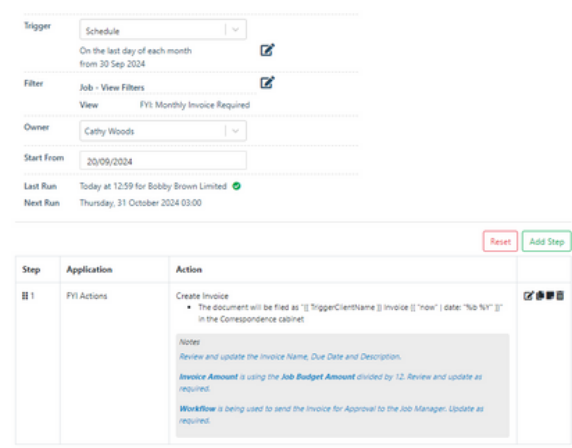
Step 4 - Test and run the automation

Click the **Test** button to display a list of all jobs that fit the invoicing criteria.

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

Go to the **Job Workspace - Invoices** tab or the **Practice - Invoices List** to review the draft invoice.

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

- This automation is set to run automatically on the last day of the month from the commencement date.