ATOmate Collaborate Upload Process Automation

About this automation:

Use this process to automatically share documents from ATOmate to clients via their Collaborate site.

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

 Details
 History

 Status
 Activity

 Status
 Activity

 Name
 FY1: ATOmate Collaborate Upload

 Description
 Automatically share ARD documents received from ADOmate integration, via Collaborate.

 Ensure a Document View has been set up and selected as a Filter below.

 Trigger
 Schedule

 Every hour
 C

 Every hour
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 Every hour
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 Wew
 ATOmate Collaborate Upload

 Ommer
 Obvia Williams

 Start From
 11/11/2024

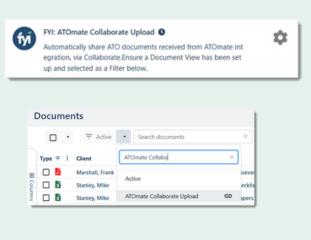
 Inherit Job
 C

 Last Ran
 Not yet run

 Next Ran
 Monday, 11 November 2024 1150

What's included:

Automation Process Steps



Status		ACTIVE		Test Back
Name		FYI: ATO	mate Collaborate Upload	
Descrip	tion	via Collabor	ly share AZO documents received from AZOmate integration, ate. cument View has been set up and selected as a Filter below.	
Trigger		Schedule	~]	
		Every hour from 11 No	2024	
Filter		Document - View	View Filters Collaborate Upload	
Owner		Olivia Willi	ams I Y	
Start Fr	om	11/11/20	24	
Inherit J	lob	0		
Last Run Next Run		Not yet run Monday, 11	November 2024 11:00	
				Reset Add Step
Step	Applica	tion	Action	
1	FYI Actions		Share - No Email	
			Notes This step shares the document without emailing the client. If you'd like to email the client	

How to import:

Before you begin, ensure you have contacted ATOmate to automatically set up the cabinet for you. Then, save the view in the **Documents list w**ith the following filters:

"ATOmate Collaborate Upload " View:

- Source = ATOmate
- Cabinet = ATOmate Collaborate

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 "ATOmate Collaborate Automation" 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 ATOmate Collaborate Upload view, saved in Documents Lists.

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

Step 4 - Test and activate

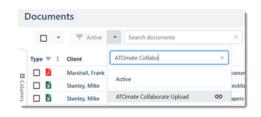
Click the **Test** button to display a list of ATOmate uploaded documents. **Tip:** Where required, toggle **Ignore Process Filter** on to use other documents to test this automation. We recommend using a Test Client to test this process.

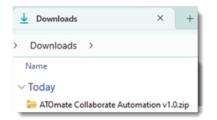
Search and select a specific document to run the test for and select **Run Test**.

Go to the Collaborate Site of the Test Client and review the **Share** folder, to locate the ATOmate document uploaded.

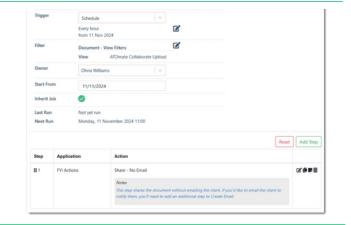
When ready, set the Status to Active.

- This automation is set to run automatically every hour from the commencement date.
- Add a Summary Notification step to the process if you wish to also notify a User of the upload.





Processes Apps History			
YI: ATOmate	× Filter by Plan	↓ Filter by App	V Archived 🔛 List Vie
Automatically share ATO documents r	PY: ATOmate Collaborate Upload Automatically share ATO documents received from ATOmate int spation, via Collaborate.Ensure a Document View has been set up and selected as a Filter below.		



Select Test D	locument					
Document Nam	Notice of Assessment					
ignore Process Filter						
	Document	Client				
0	Notice of Assessment	Marshall, Frank				
0	Notice of Assessment	Marshall, Frank				
0	Notice of Assessment Cover Email	Marshall, Frank				
0	Notice of Assessment Cover Email	Marshall, Frank				
0	Facsimile Notice of Assessment	Stanley Homes				
	Prev 1 Next > Sperpage = (Showing 1 - 5 of 5 entries)					