Getting Started with Automations

Quick Reference Guide

Automate low value, repetitive tasks and be more productive

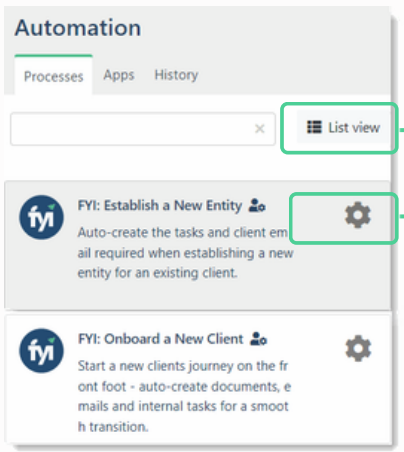
Use time-saving automations across document creation, import, filing, email communication and more!

- **The Automation Dashboard**
- **Automation Fundamentals**
- **Automation Steps Using the Import Wizard**
- **Creating Automations in your FYI Platform**
- **Tips & Tricks**

> We use FYI automations in the background. As soon as a document is approved, the processes that our admin team follow are now fully automated.
>
> JARROD BRAMBLE
> PARTNER
> @ CUTCHER & NEALE

The Automation Dashboard

Where you manage all automation functions for your practice.



Click to change to the List view to display your Automations

Click the cog to edit an automation

Tile colours
Grey = inactive
White = active

Processes Tab

Holds all sample and custom processes that are available for your practice. Automations can be activated, run and maintained from this tab.

Apps Tab

Holds all apps for integration including practice management, Microsoft 365, digital signing and more.

History Tab

Provides a log of all automation activities, to monitor processes that have been run and to check for errors.

Automation Fundamentals

Details Tab

Trigger

Controls how the automation is executed. It can be triggered manually, run on a scheduled time basis (e.g. every hour or once per day), or set to an event trigger to run automatically in real-time when a specific action occurs within the platform.

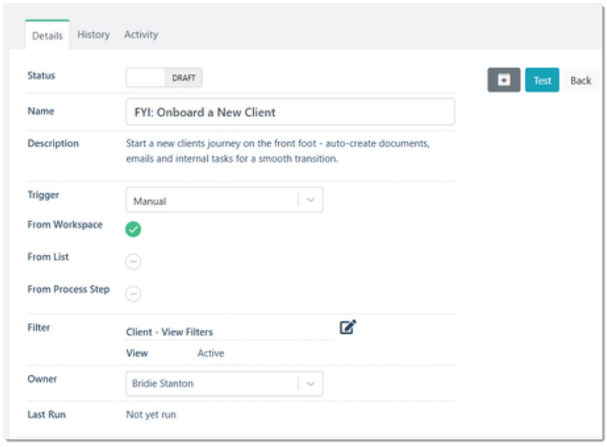
Filter

Determines who the automation is run for, or what list is used as the basis of the automation.

Use Client filters or pre-defined views for Clients, Documents, Tasks, Jobs or Practice Activity to determine what or who the automation is run for.

Owner

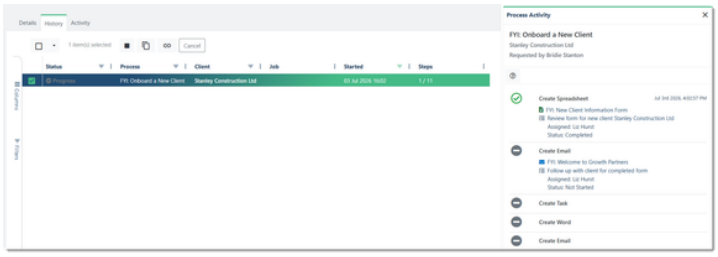
User who is notified if the automation fails.



History Tab

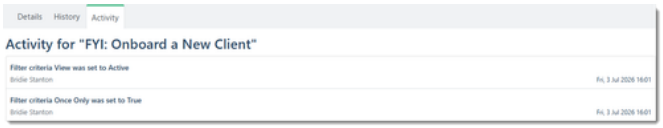
Displays the status of each time the automation has been run, who executed the automation and when it was run.

Click the automation to open the Process Activity drawer, displaying the detailed steps of the process. This displays where the automation is up to and the details of any errors.



Activity Tab

Displays a detailed list of all changes made to the automation, who made the changes and when they were made.



Automation Steps

Add Step

Steps are displayed in the order in which the automation will run. Steps can be added for a variety of Actions, such as creating a document, sending an email or updating a job state.

The settings available for the step depend on the Action and Filter selected, for example, Create Email.

Action

Select recipients, email template, attachments and sender details.

Filing

The name of the document and where it should be filed to.

Workflow

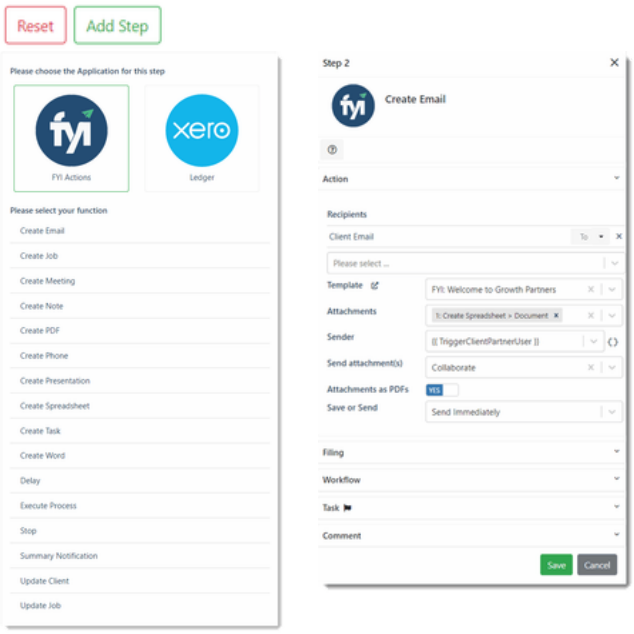
The Owner, Approver and Workflow status of the email, where needed.

Task

When a task is created off the back of the email, and assigned to a user to follow up.

Comment

Add a comment to the email to notify a team member.



Quick Actions within a Step



1. **Edit**
   To edit a Step, click anywhere on the Step, or click the Edit tool to open the step drawer.

2. **Clone**
   To copy a Step, click the Clone tool next to the relevant Step. Clone will copy that Step directly below the selected step.

3. **Add Note**
   This can be used to add comments and provide further context, or to provide a description of what the Step does. It can also be used for internal automation audits.

4. **Delete**
   Remove the Step.



5. **Move a Step**
   To move a Step and change the sequence, simply drag and drop it up or down to the appropriate position.

Creating Automations in your FYI Platform

Import an Automation

Explore our range of Automations commonly used in accounting practices. Import using the Automation Wizard, customise to suit your practice, test and activate.

Refer to our Automations Library

Quick steps using the Import Wizard:

1. **Save**
   Download the automation zip file and save it locally.

2. **Import**
   Select 'Import' or drag and drop the zip file to your automations list.

3. **Map**
   The fields available to map include Custom Fields, Views, Templates, Task Templates, Job States, Job Templates (Elite), Disbursement Rates (Elite). These are based on the process being imported.



4. **Review and Test**
   Confirm in Practice Activity that all items have imported successfully.

   Review and customise the templates imported with your automation. They will have the prefix 'FYI'.

   Review each step of the automation and customise as needed.

   Click the Test button to display a list of all relevant clients, tasks, jobs, documents (based upon your automation filter).

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

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

Explore our Automation Collections

To help you get started quickly, we offer a curated range of Automation Collections relating to specific practice areas, such as Client or Document Management.

View and Download our Automation Collections

Create an Automation

Create an automation without using FYI's Import feature.

Refer to Setting Up Automations

Quick steps to create an automation from scratch:

1. **Add Custom Process**
   From the Automations Dashboard, select 'Add Custom Process'.

2. **Define the Details**
   Give your Automation a **Name** and **Description**.
   Select the **Trigger**.
   Select the appropriate **Filter** and create the view if required.
   Set the **Owner** and when the Automation will commence.

3. **Add Process Steps**
   Add all required process steps in order of execution.

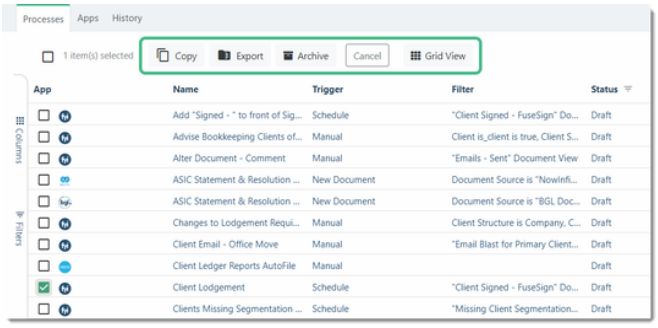
4. **Test**
   Click the Test button to display a list of all relevant clients, tasks, jobs, documents (based upon your automation filter).

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

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

Using the List View

The List View displays all Automations in alphabetical order and you can search for processes or filter key columns such as Apps.



Select an Automation to display other key functions in the List View, including:

Copy
Create a duplicate of the selected Automation.

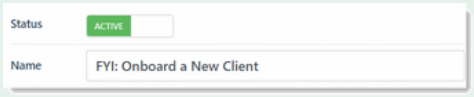
Export
Export selected processes individually or in bulk to download them as a single .zip file, allowing you to share process components with other practices..
Exception: Automation processes using **Client - Select Filters** cannot be exported.

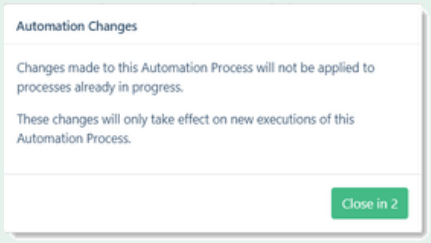
Archive
Archive the selected automation from the list view. This can be done individually or in bulk.

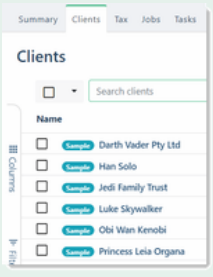
Views
The All view displays "Active" and "Draft" processes by default. Additional views can be saved or modified by a user with relevant permissions.

Tips & Tricks

- Automations will auto default back to draft when a change is made. Ensure you change the Automation back to Active.
- When editing an existing Automation, note that any changes made will only take effect from newly executed processes. An exception is for templates, if a change is made to a template - this will take effect immediately.
- Sample Content can be enabled in your FYI Platform. When testing automations, we recommend selecting a sample client or document to allow you to safely test and review your custom processes.







Work won't feel like work with this level of automation.
For more information on Automations, visit the FYI Help Centre at support.fyi.app