Missing Time Reminder (Beta)
Process Automation

Elite Plan

About this automation:

Use this process to remind staff with missing time entries and notify their managers once reminders are sent.

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 My Team list with the following filters (or those relevant for your requirements):

"My Team - Missing Hours" View
- Missing Hours = Less than 0
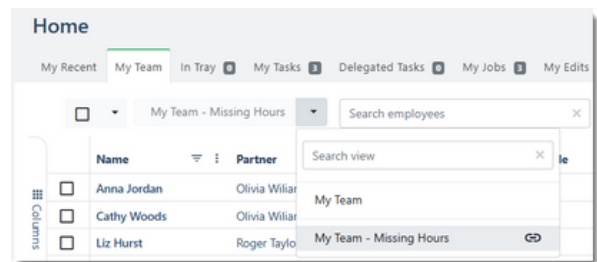
Step 1 - Save the import file locally

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.
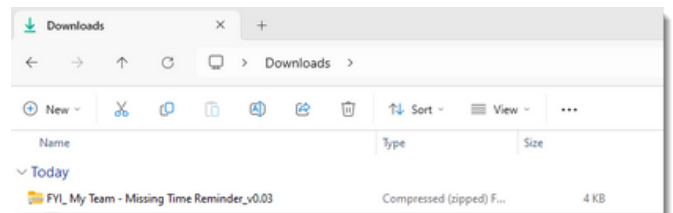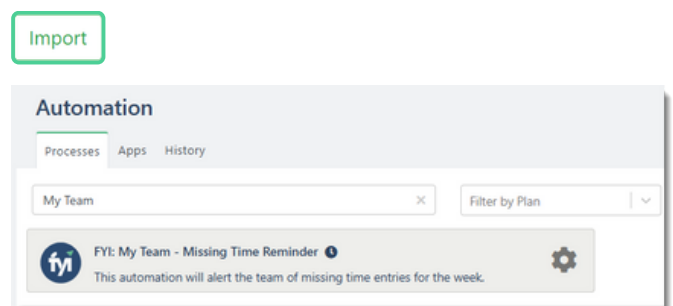
Locate and select your saved "FYI_My Team - Missing Time Reminder" file and click **Open** to import the automation.

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 **"My Team - Missing Hours"** View, which is the custom view you created in the My Team List.

- 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.
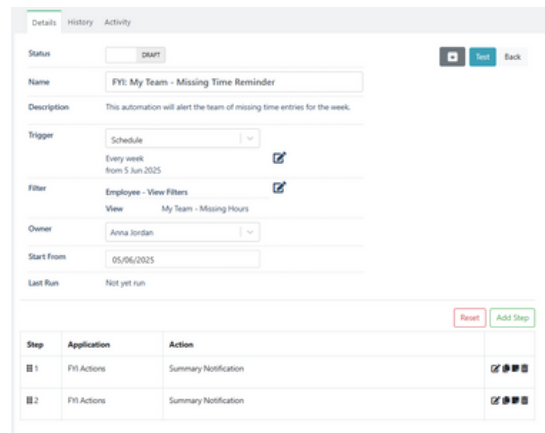
Step 4 - Test and run the automation

Click the **Test** button to display a list of all employees that fit the missing hours criteria.

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

Confirm the notifications were received for the employee and their respective manager.

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

- This automation is set to run automatically each week.