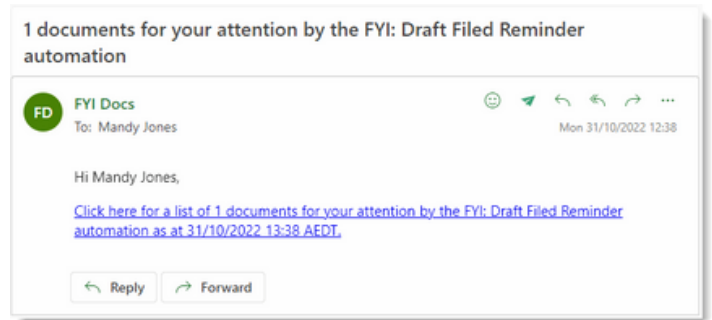


Draft Filed Reminder



About this automation:

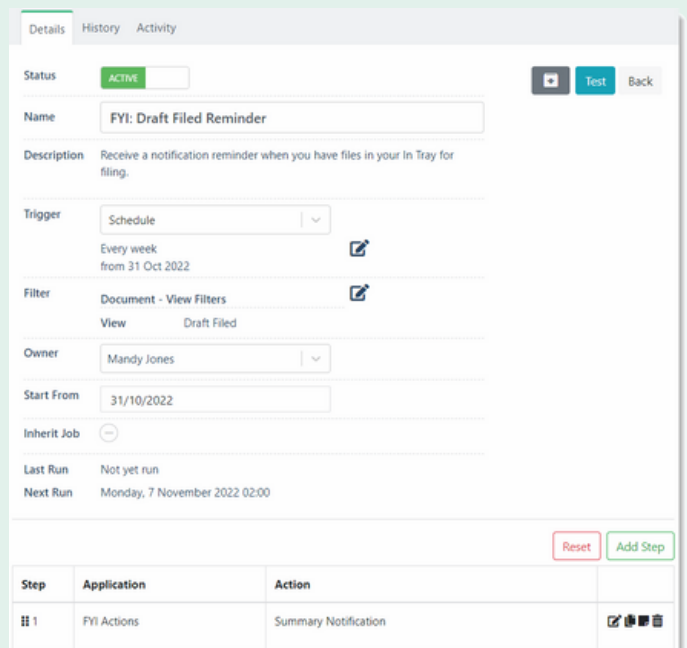
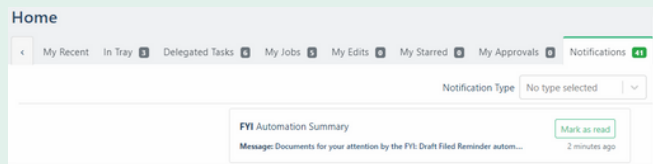
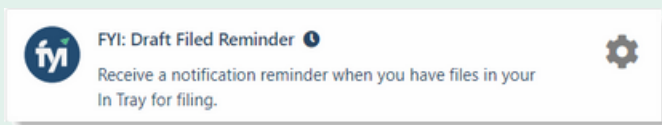
Use this process to automatically send notification reminders to users with draft filed emails and documents in their In Tray.



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

What's included:

- Automation Process Steps

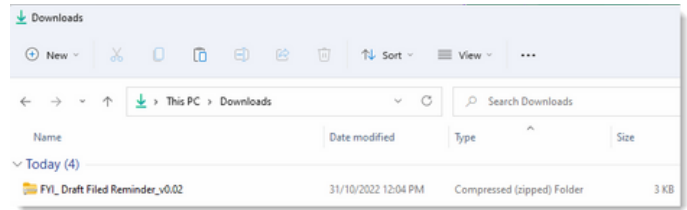


How to import:

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.



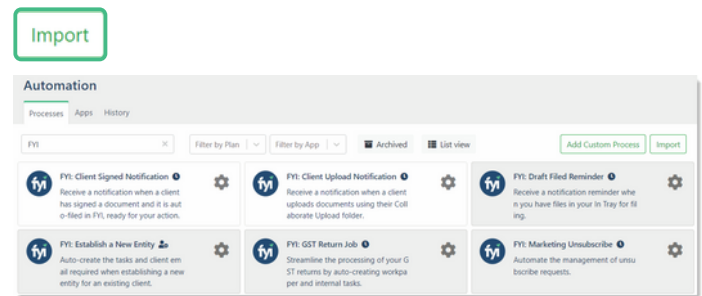
Step 2 - Import the files into FYI

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

Locate and select your saved "Draft Filed 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.



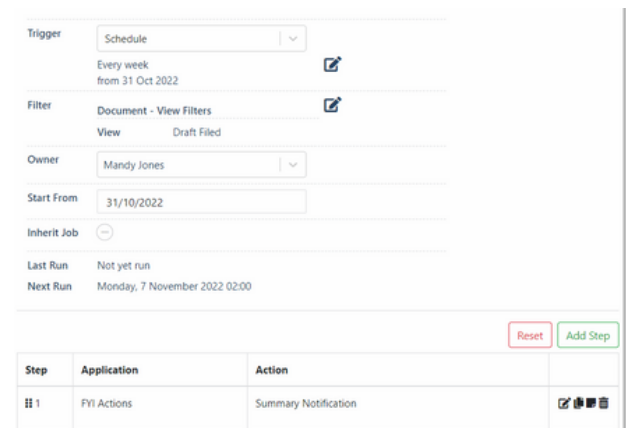
Step 3 - Review the process

Edit and 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 Draft Filed View, which is a standard view in the Documents Lists in FYI.

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



Step 4 - Test and activate

Click the Test button to display a list of draft filed emails and documents.

Search and select a specific document 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 owner of the In Tray for the selected document.

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.

