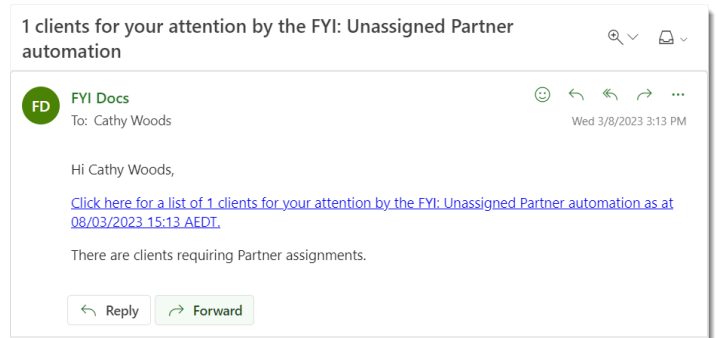




Unassigned Partner or Manager Alert

About this automation:

Use these processes to automatically send an alert to a user notifying them of any unassigned Partner and Manager fields in the Client list.



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

What's included:

- Automation Process Steps

FYI: Unassigned Partner

Auto alert to notify a team member that a Partner is missing on a client.

FYI: Unassigned Manager

Auto alert to notify a team member that a Manager is missing on a client.

Home

My Recent In Tray My Tasks Delegated Tasks My Jobs My Edits My Starred My Approvals My Time My Comments Notifications

Notification Type: No type selected

FYI Automation Summary

Message: Clients for your attention by the FYI: Unassigned Partner automation

There are clients requiring Partner assignments.

2 minutes ago

Details History Activity

Status: ACTIVE Test Back

Name:

Description: Auto alert to notify a team member that a Partner is missing on a client.

Trigger:

Every day from 8 Mar 2023

Filter:

View

Owner:

Start From:

Last Run: Today at 12:24 for Patterson, Akira ✔

Next Run: Thursday, 9 March 2023 03:00

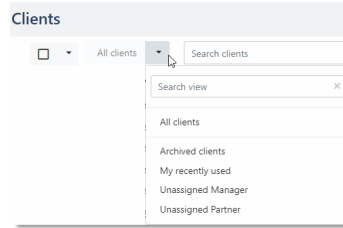
Reset Add Step

Step	Application	Action
1	FYI Actions	Summary Notification Notes The user notified is currently set to "Me". Consider and update the relevant user to receive this notification.

How to import:

Before you begin, ensure your Views have been saved in the Clients list with the following filters:

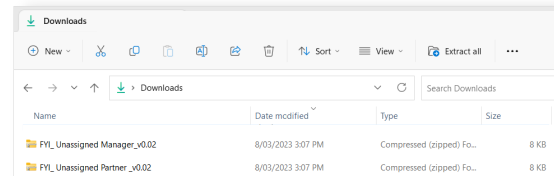
- "Unassigned Partner" View
 - Partner = (Blank)
- "Unassigned Manager" View
 - Manager = (Blank)



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.

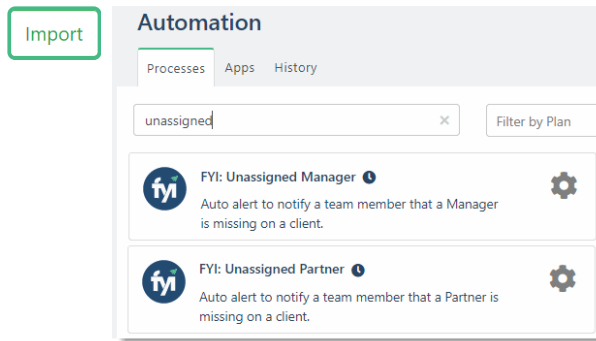


Step 2 - Import the files into FYI

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

Locate and select your saved "Unassigned Partner" and "Unassigned Manager" files and click Open to import the automations.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



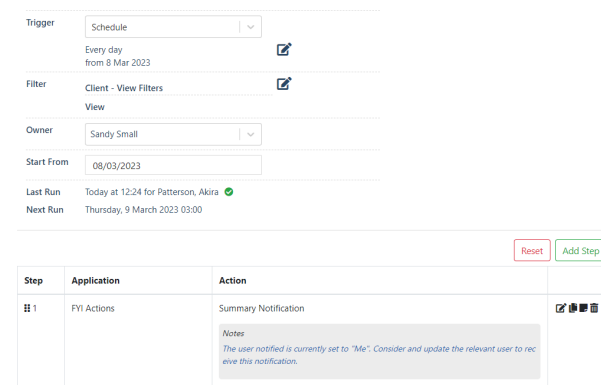
Step 3 - Review the process

Processes are imported with the Status set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

These processes use the Unassigned Partner and Unassigned Manager Views in the Client - View Filter, which are the custom views you created in the Clients list.

- 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 clients without a partner or manager assigned.

Search and select a specific client 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 specific user selected in the automation.

When ready, set the Status to Active.

- This automation is set to run automatically every day 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.

