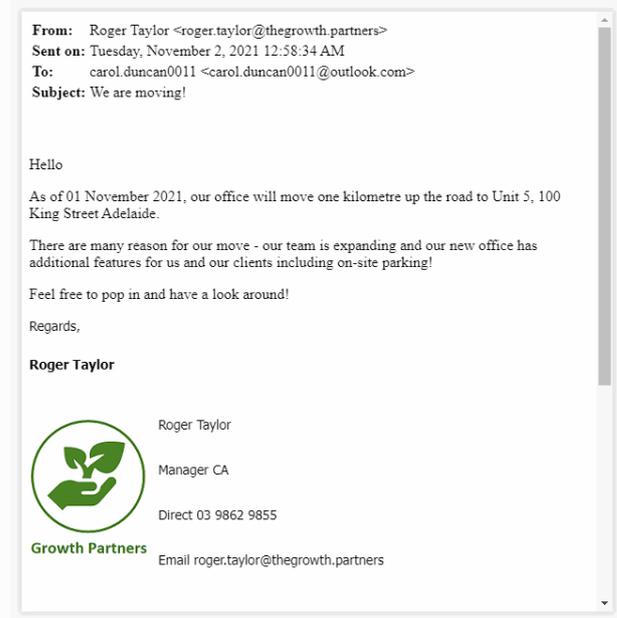# Custom Process Automation
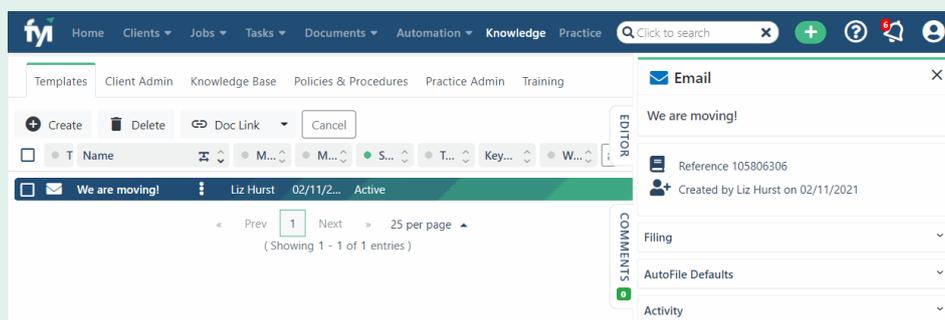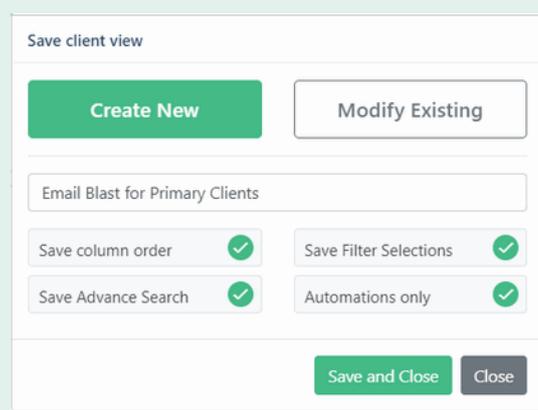## Sending a Bulk Email to all Clients

Create a custom process automation to send emails in bulk to all clients using a saved client view.

Note: To create Custom Processes you must be on the FYI Pro plan.

Required before you begin:

Saved Client View
Email Template

Create a view for your client list

From the **Clients** list, display the view to use as the basis for your client list.

Add **additional columns** and and **filter** any columns to refine your search and display your segmented list of clients.

In this example, the **Primary Client** column is included in the view and filtered to **Yes**.

Click the **View Tools** button which is at the end of the column headings and select **Save** view.

The Save client view popup displays. This shows the name of the currently displayed view.

Enter the **name** of the new view by typing over the view name displayed.

Click **Save** and **Close**.

Tip: Select the **Automations only** option to make the view available in process automations only.
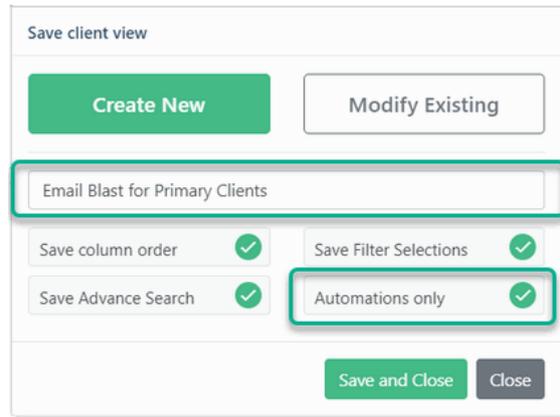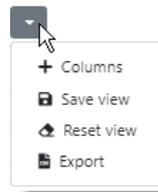
Create custom process

Go to Automation – Processes and click **Add Custom Process**.

Start by giving the automation a **Name** – something that makes it easy to identify in a list.

In this instance, the **Trigger** is set to "Manual".

The **Filter** determines which Clients the process will run for. In this example, select Client - View Filters and select the **Email Blast** client view you crated in the previous step.
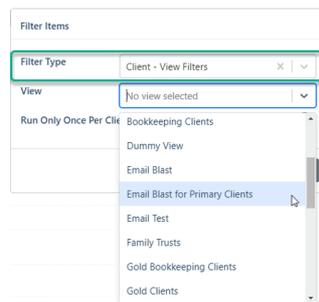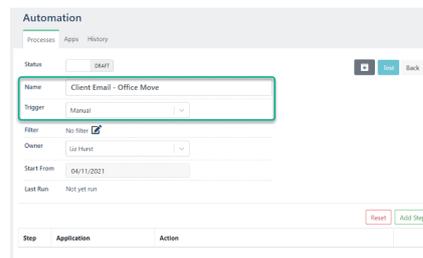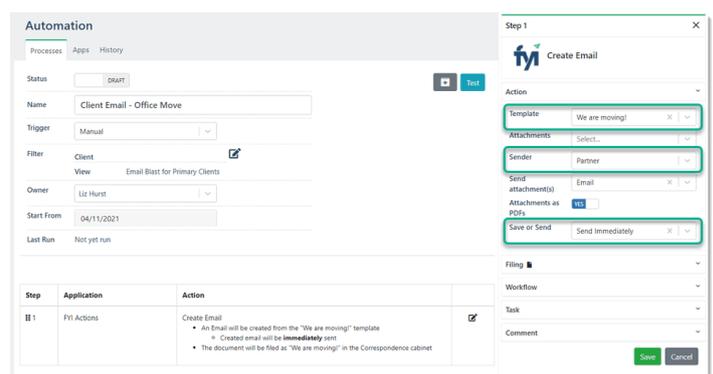
Add step to create the email

Add step as **Create Email** and select your **We are Moving** Template.

Update the **sender** as required and select whether to send the email immediately, or to create Draft emails.

Review the **filing details** and **rename** the subject of your email.

Save your process step.

Test a manual custom process

When setting up a Custom Process, it is very important to test it to ensure it is working as expected.

Click the **Test** button to display the Select Test pop-up. Your list of the Clients will display based on the filters you have selected.

From the Select Test, search and select a specific client to run the test for.
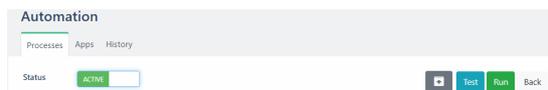
Select **Run Test.**

You can navigate to documents list in your client's workspace to review the test email.
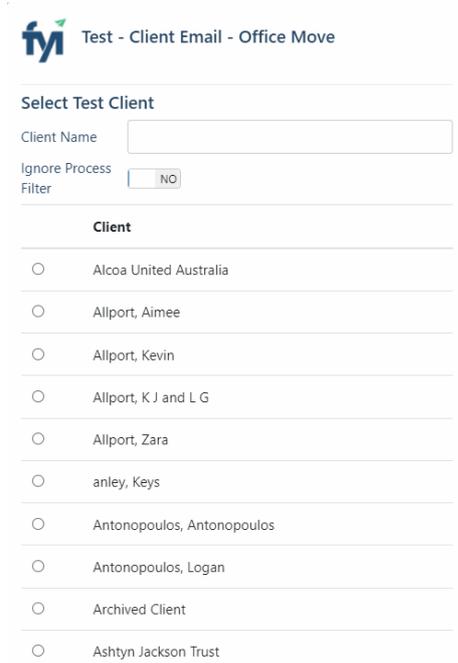
Setting the Status to Active

When you are satisfied with the test result, set the **Status** of the process to **Active**.

Running the Process

It's now time to run your custom process.

As you are sending this to a segmented client list, it can be run directly from **Automations - Processes** by your FYI Administrator or a user with Automations permissions.

Click the **Run** button.

A list of Clients displays as per the Filter applied. This shows a count of the number of clients it will run for.

Before proceeding, always check this is what you are expecting

To run the process, click **Run.**