



Year End Compliance - Job Kick Off

About this automation:

Use this process to auto-create the documents required to complete annual compliance jobs, and auto-update the job states so your team knows it's ready to start.



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

What's included:

- ✓ Engagement Letter Template
- ✓ Tax Letter Template
- ✓ EOY Workpaper Template
- ✓ Automation Process Steps

FYI: Year End Compliance Job Kick Off ⓘ

Auto-create the documents required to complete annual compliance jobs, and auto-update the job state so your team know it is ready to start.

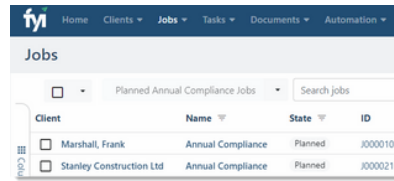
Knowledge				
Type	Name	Modified by	Modified on	Status
<input type="checkbox"/>	FYI: Tax Letter	System	11 Apr 2023 13:54	Draft
<input type="checkbox"/>	FYI: Engagement Letter	System	11 Apr 2023 13:54	Draft
<input type="checkbox"/>	FYI: EOY Workpapers	System	11 Apr 2023 13:54	Draft

Step	Application	Action
1	FYI Actions	<p>Create Word</p> <ul style="list-style-type: none"> A Word document will be created from the "FYI: Engagement Letter" template The document will be AutoFilled A task will be created with the subject "Format engagement letter - [TriggerClientName]" <p><i>Notes</i> Task is Assigned to the Client Custom User Role Administration. Consider updating the Task Assignee to the appropriate User Role</p>
2	FYI Actions	<p>Alter Document</p> <ul style="list-style-type: none"> 1. Create Word > Document will be filed as "[OriginalFileName]" in the cabinet Workflow will be set to Pending Approval A task will be created with the subject "Review Engagement Letter" <p><i>Notes</i> Task is Assigned to the Job Manager. Consider updating the Task Assignee to the appropriate User Role</p>
3	FYI Actions	<p>Create Task</p> <ul style="list-style-type: none"> A task will be created with the subject "Send Engagement Letter to client" <p><i>Notes</i> Task is Assigned to the Client Custom User Role Administration. Consider updating the Task Assignee to the appropriate User Role</p>

How to import:

Before you begin - ensure your Jobs View has been saved.

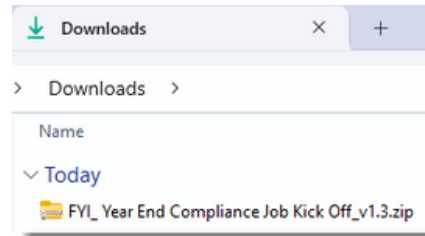
- Job State - Planned
- Search jobs - annual compliance jobs



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.



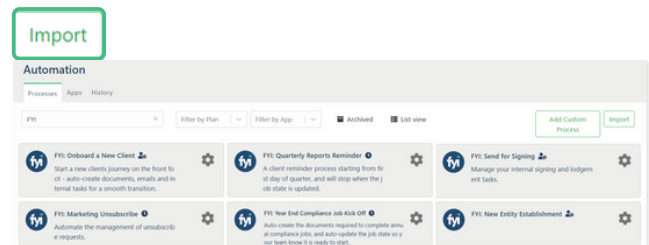
Step 2 - Import the files into FYI

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

Locate and select your saved "Year End Compliance Jobs " file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



Step 3 - Review the process

Review the Templates

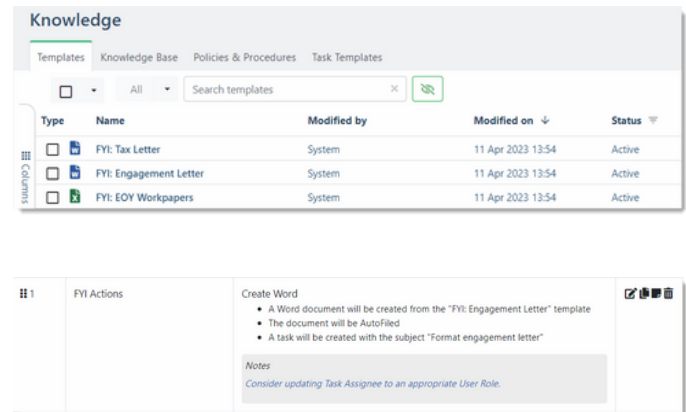
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template Status to Active.

Edit and Review Each Process Step

This process uses the custom view you created.

- Update the Filter and select your Compliance Jobs view
- Review the schedule and 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

You can test a Scheduled Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the Test button to display a list of the Jobs based on the Filter that has been selected.

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

When ready, set the Status to Active.

