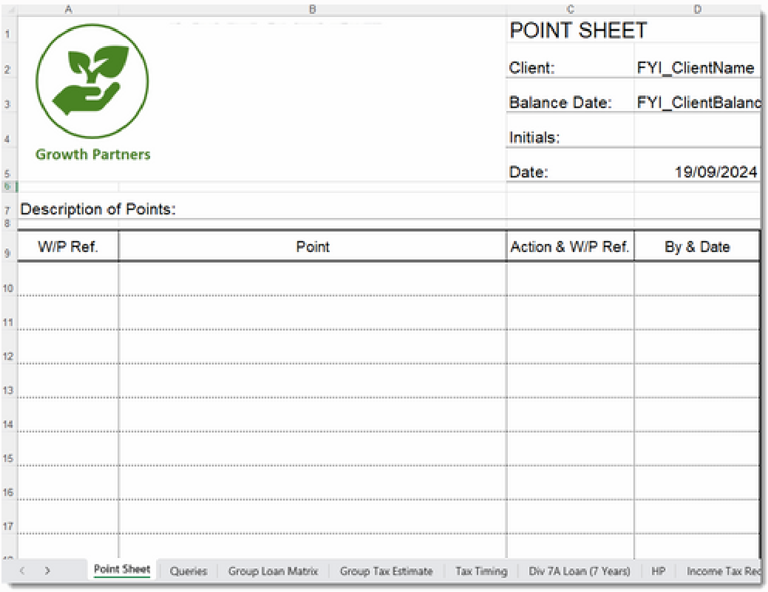
PROCESS AUTOMATION

Year End Compliance - Job Kick Off

About this automation:

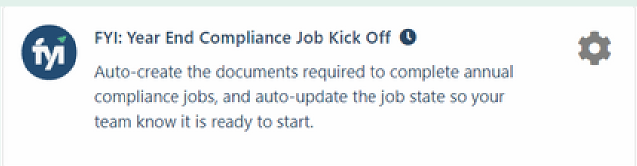
Use this process to auto-create the documents required to complete annual compliance jobs, and auto-update the job states so your team knows it's ready to start.

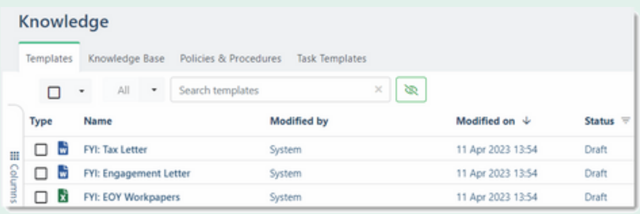


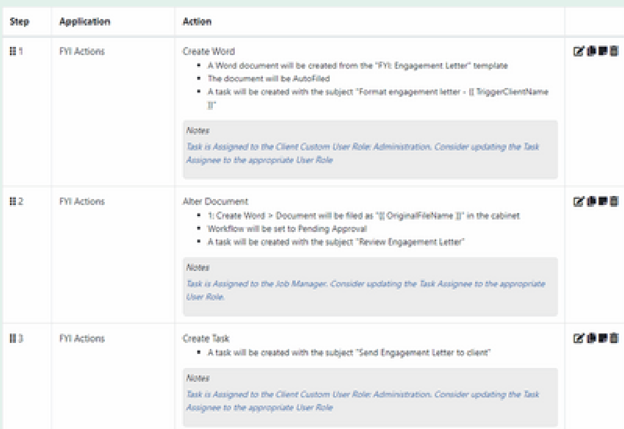
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

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



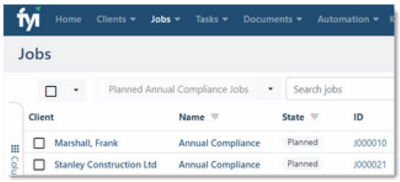




How to import:

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

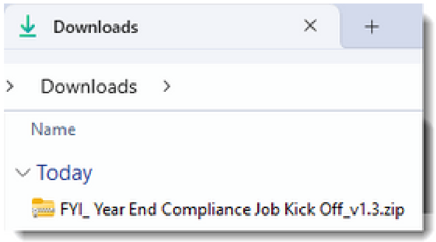
- Job State - Planned
- Search jobs - annual compliance jobs



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.



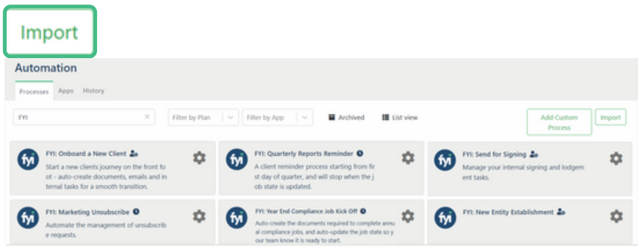
Step 2 - Import the files into FYI

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.

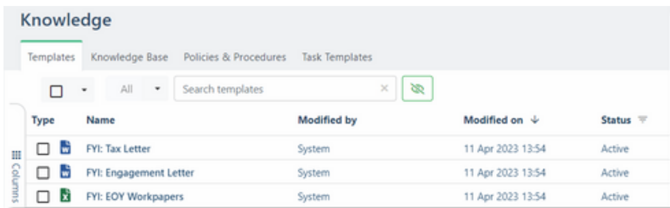


Step 3 - Review the process

Review the Templates

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

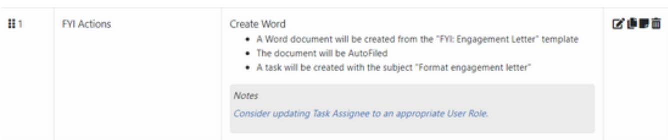
- Review and personalise the imported templates
- Update the template **Status** to Active.



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.