#### **AUTOMATE YOUR PRACTICE WITH FYI**

# Make every second count for more

Automate repetitive tasks and recover more time for what counts - work that adds value for your practice and your clients.

The more processes you automate in your practice, the faster the efficiencies add up

Proven ROI > Time savings of up to 20%

Not sure where to start your Automations journey? <u>Take our</u> <u>Quiz</u>, and we'll point you in the right direction.

#### **AUTOMATION LIBRARY** No need to start from scratch Check out our range of process automations - ready for you to import and activate. Onboard a New Client Overdue Task Reminder Reminder to Contact a Client Send your team a daily summary of Auto-create emails, documents and Send a reminder to a Partner if a client tasks for an excellent client experience. outstanding tasks. has not been contacted in 90 days. Send a Bulk Email to All Clients **Client Signed Notification Quarterly Report Reminders** \* Send an email newsletter to your entire Send a series of emails requesting Get notified when a signed client information for quarterly reports. document has been auto-filed in FYI. Establish a New Entity Year-End Compliance Job Kick-Auto-create tasks and emails **Explore Our** establishing a new entity for a client. Auto-create documents and let your **Automation Library** team know it's ready to start.



When we calculated how much we could save, the numbers were phenomenal.



## Start

Fill in the details of what event takes place. Examples:

- · an email is sent
- start of a quarter/ month
- documents are received

When thi	s event occurs			\$

# What do you need to do

Fill in the details of actions that need to take place for this ever Also consider who (staff member(s)) is responsible for the action		a job or document is created, an email is sent or a client is update applicable.	ed.	
ACTION 1	\$	ACTION 2		\$
				_
Due: Staff:	_	Due: Staff:		
Action must be complete before next action begins: Y /	N	Action must be complete before next action begins: Y	/	N
ACTION 3	<b>\$</b>	ACTION 4		\$
Due:Staff:		Due: Staff:		
Action must be complete before next action begins: Y /	N	Action must be complete before next action begins: Y	/	N
ACTION 5	\$	ACTION 6		\$
Due: Staff:	_	Due: Staff:		
Action must be complete before next action begins: Y /	N	Action must be complete before next action begins: Y	/	N
ACTION 7	<b>\$</b>	ACTION 8		\$
Due: Staff:	_	Due: Staff:		
Action must be complete before next action begins: Y /	N	Action must be complete before next action begins: Y	/	N
ACTION 9	\$	ACTION 10		*
Due:Staff:	_	Due: Staff:		
Action must be complete before next action begins: Y /	N	Action must be complete before next action begins: Y	/	N

#### When

Fill in the details of how often the event and actions need to occur. Examples:

- once/as and when required
- · monthly/quarterly

How often do you need this event and listed actions to occur...

# Let's build your Automation!



**Your Event** 

**Process Filter** 

The event you've outlined in your workbook becomes the Custom Process **Filter**.

The **Process Filter** determines what information is or is not included in the process.

There are **6 Filter Types** you can select and the type will depend on the nature of your event.

Your **Filter** needs to be set up before you commence your automation.

Consider if you need to create

Custom View(s) or Client Custom

fields and any other requirements
to ensure you have the correct
information included in your
process | click here for more
details on the Filter.

**How Often** 

**Process Trigger** 

The when/how often you need the event and actions to occur in your workbook becomes the **Custom Process Trigger**.

The **Trigger** controls when the process will be run.

The **Trigger** can either be set to **Manual** or **Schedule**.

Use **Manual** in the circumstance that you only need the process to run once or as and when required.

Where you need the process to recur i.e. every week, month, quarter or year, you can use the **Schedule** option and set the frequency per your requirements in your workbook | click here for more details on the Trigger.

## What do you need to do





Each action in your workbook become the **Steps** of your **Custom Process**.

Select "Add Step" and the corresponding FYI Action (or other application as necessary).

Once you've selected your **Action** fill in the relevant details as required.

For example, if creating a document select the type of document, the template, filing

details and add any tasks or workflow requirements. Or if creating a task, select the template or complete the task details manually, you can also use tasks as blocking items | click here for more details for Process Steps.

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# **Other Process Controls & Recommendations**

Ensure you also complete the following **Process Controls**:

- give your process a **Name** for easy identification in your Automation Workspace.
- You can also provide a summary of what the process does in the Description section.
- We recommend the **Owner** to be the person that will troubleshoot any issues with the process as they will be notified should anything go wrong.

Finally always ensure you

Test your Custom Process
to ensure it runs the way
you intend before you
update the status to Active
and the process Runs.

Tip: Use our Sample Clients.

Test

#### **Troubleshooting**

Don't forget to use the **History** tab for all the details of who, what and when a process has run | click here for more details on troubleshooting.

Complete the Learn course to become an expert on automations! Access the course.

Activate & Run

# **Automation Workbook**

#### **Start**

Fill in the details of what event takes place. Examples:

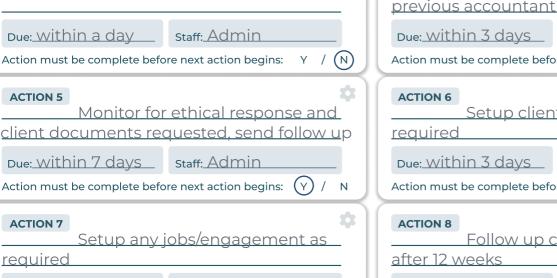
- an email is sent
- start of a quarter/ month
- documents are received

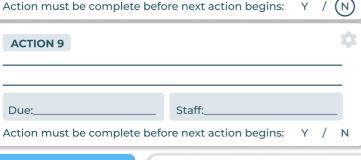
When this event occurs	101
New client coming onboard	

# What do you need to do

Fill in the details of actions that need to take place for this event i.e. a job or document is created, an email is sent or a client is updated.

# Also consider who (staff member(s)) is responsible for the action if applicable. ACTION 1 New client form created to request client details Due: Within a day Staff: Admin Action must be complete before next action begins: Ν **ACTION 3** Enter client details in XPM Due: Within a day Staff: Admin Action must be complete before next action begins: **ACTION 5** Monitor for ethical response and





Staff: Admin

# **ACTION 2** Send welcome email with information request form Due: Within 7 days staff: Partner Action must be complete before next action begins: **ACTION 4** Ethical letter/email sent to

	Due: <u>vvitiiii 3 days</u>	Staff: Partrier	
l	Action must be complete befo	re next action begins: (Y) /	١
	ACTION 6 Setup clien	t registrations as	1
	required		_
	Due: Within 3 days	Staff: Admin	
l	Action must be complete befo	re next action begins: Y /	(1
ſ	ACTION 8		-

within 7 days

Follow up c after 12 weeks	lient for feedbac	:k_	
Due: 12 Weeks post	Staff: Partner	V	
Action must be complete before next action begins: Y			
ACTION 10			4,0

);	Staff:				Due:	Staff:	
on must be complete befo	ore next action begins:	Υ /	N	$\ $	Action must be complete before	ore next action begins:	Υ

#### When

**ACTION 7** 

reauired

Due: Within 3 days

Fill in the details of how often the event and actions need to occur. Examples:

- · once/as and when required
- · monthly/quarterly

How often do you need this event and listed actions to occur...

As and when required

# Let's build your Automation!



**Event New Client** 

**Process Filter Client View** 

The event you've outlined in your workbook becomes the **Custom Process Filter.** 

The **Process Filter** determines what information is or is not included in the process.

For onboarding new clients, you could use a Custom Field if you have one in your system to run the **Process Filter** on. Alternatively, you can set the

**Process Filter** to

**Client View - All Clients.** 

There are **6 Filter Types** you can select and the type will depend on the nature of your event.

Remember your **Filter** needs to be set up before you commence your automation.

**How Often** As Required

**Process Trigger** Manual

The when/how often you need the event and actions to occur in your workbook becomes the **Custom Process Trigger.** 

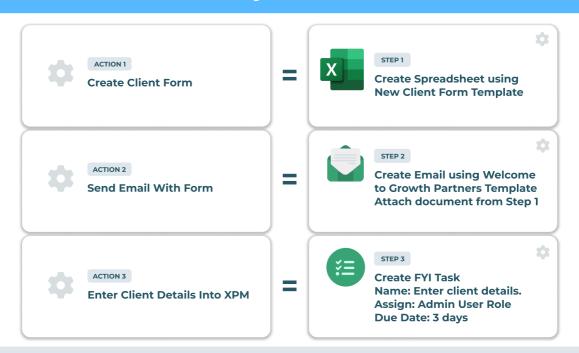
The **Trigger** controls when the process will be run.

The **Trigger** can either be set to Manual or Schedule.

Use Manual in the circumstance that you only need the process to run once or as and when required.

A new client is something that happens every now and again, so, the nature of the process is to run as and when required. As such, the **Trigger** is set to **Manual**, and the **Process** is run from the **Client** when needed.

# What do you need to do



Each action in your workbook become the Steps of your **Custom Process.** 

Select "Add Step" and the corresponding FYI Action (or other application as necessary). Once you've selected your **Action** fill in the relevant details as required, don't forget to use blocking and delay functions.

**Test** 

Ensure you **Test** your **Custom Process** to check it runs the way you intend before you update the status to Active and the process Runs.

**Activate & Run**