



About this automation:

Use this process to streamline client offboarding. Auto-create emails, documents and internal tasks when a client leaves your practice.



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

What's included:

- ✓ Ethical Clearance Templates
- ✓ Sorry to see you go Template
- ✓ Automation Process Steps

FYI: Offboard a Client

Make sure no steps are missed when a client leaves your practice.

Knowledge			
Type	Template Name	Name	Status
<input type="checkbox"/>	FYI: Sorry to see you go	FYI: Sorry to see you go	Active
<input type="checkbox"/>	FYI: Ethical Clearance Letter	FYI: Ethical Clearance Let...	Active
<input type="checkbox"/>	FYI: Ethical Clearance Response	FYI: Ethical Clearance Res...	Active

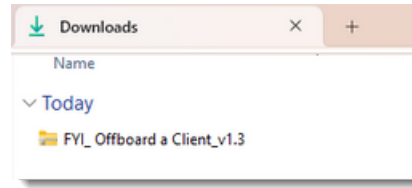
Step	Application	Action	
1	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Review WIP, raise final invoice & close jobs" 	
2	FYI Actions	Create Word <ul style="list-style-type: none"> A Word document will be created from the "FYI: Ethical Clearance Letter" template The document will be AutoFiled A task will be created with the subject "Prepare ethical response & collate additional information" Notes Don't forget to select your stationery.	
3	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Compile permanent records for collection" Notes Consider updating Task Assignee to an appropriate User Role.	

How to import:

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.



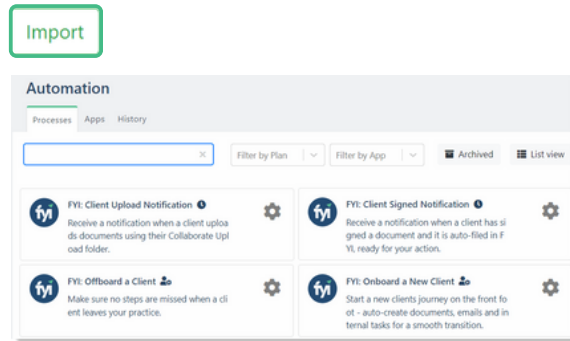
Step 2 - Import the files into FYI

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

Locate and select your saved "Offboard a Client" 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

Set the Filter

As this process will be run manually for an individual client, set the Filter to Client - View Filters, and the View to Active clients.

Review the Templates

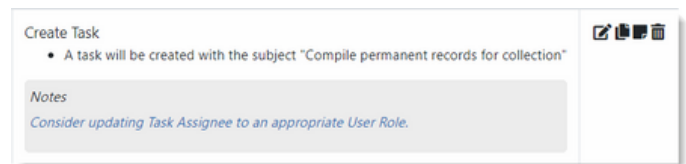
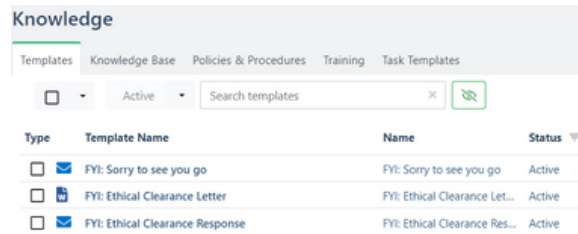
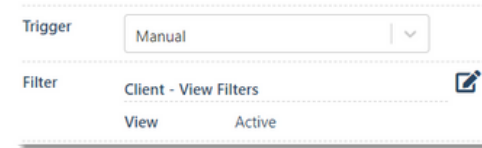
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

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

Edit and Review Each Process Step

The Processes are imported with the Status set to Draft. You can locate the process by searching in the "Search processes" field.

- The schedule is set to Manual
- Review the owner 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

Click the Test button to display a list of all clients.

Search and select a sample client to run the test for and select Run Test.

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

When ready, set the Status to Active. As this will be run manually for a specific client, it is recommended to run the Automation from the Client - Processes tab.

When required, locate your process and click Run.

