Offboarding a Client

Process Automation

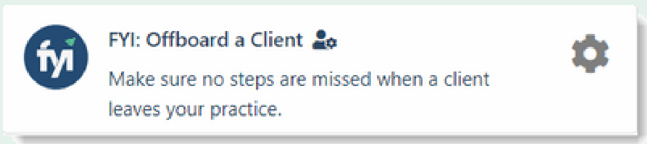
About this automation:

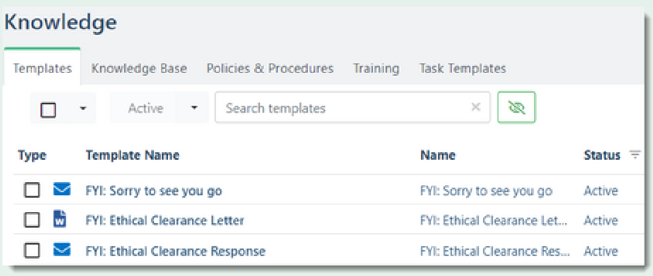
Use this process to streamline client offboarding. Auto-create emails, documents and internal tasks when a client leaves your practice.

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



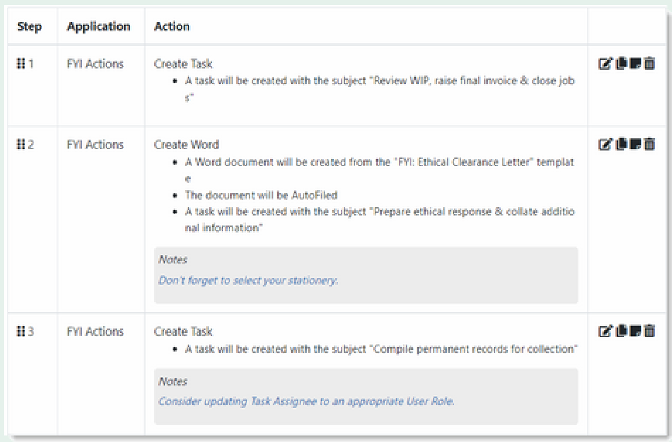


Knowledge

Templates | Knowledge Base | Policies & Procedures | Training | Task Templates

Active | Search templates

Type	Template Name	Name	Status
	FYI: Sorry to see you go	FYI: Sorry to see you go	Active
	FYI: Ethical Clearance Letter	FYI: Ethical Clearance Let...	Active
	FYI: Ethical Clearance Response	FYI: Ethical Clearance Res...	Active



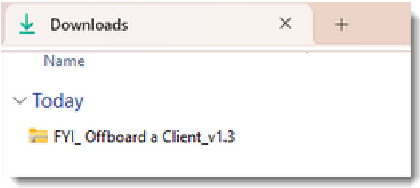
Step	Application	Action
1	FYI Actions	Create Task • A task will be created with the subject "Review WIP, raise final invoice & close jobs"
2	FYI Actions	Create Word • A Word document will be created from the "FYI: Ethical Clearance Letter" template • The document will be AutoFiled • A task will be created with the subject "Prepare ethical response & collate additional information" *Notes* *Don't forget to select your stationery.*
3	FYI Actions	Create Task • 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.



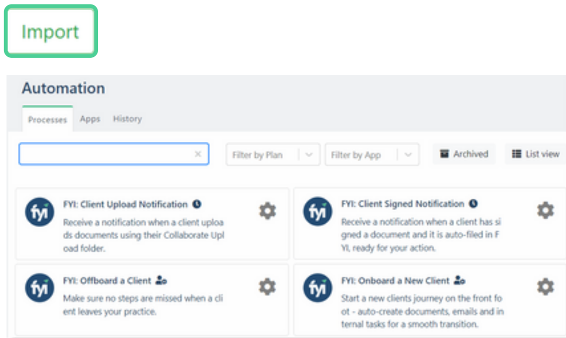
Step 2 - Import the files into FYI

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.

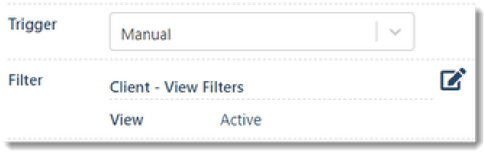
You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



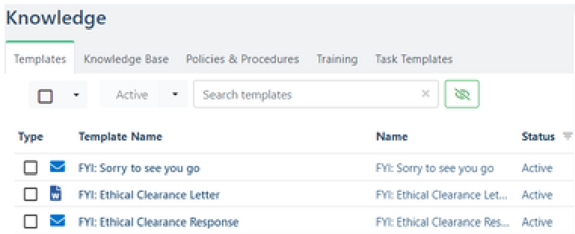
Step 3 - Review the process

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**.