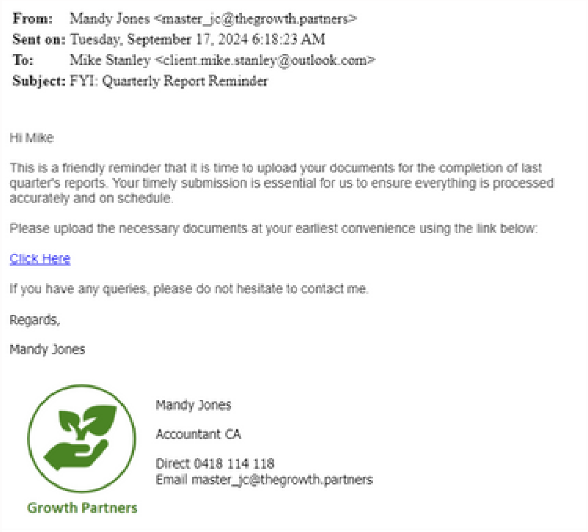
Quarterly Report Reminders

Process Automation

About this automation:

Use this process to send a series of emails to clients requesting information for quarterly reporting requirements.

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



From: Mandy Jones <master_jc@thegrowth.partners>
Sent on: Tuesday, September 17, 2024 6:18:23 AM
To: Mike Stanley <client.mike.stanley@outlook.com>
Subject: FYI: Quarterly Report Reminder

Hi Mike

This is a friendly reminder that it is time to upload your documents for the completion of last quarter's reports. Your timely submission is essential for us to ensure everything is processed accurately and on schedule.

Please upload the necessary documents at your earliest convenience using the link below:

Click Here

If you have any queries, please do not hesitate to contact me.

Regards,

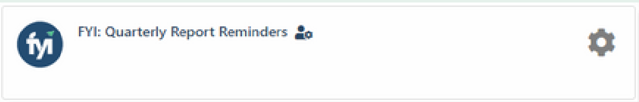
Mandy Jones

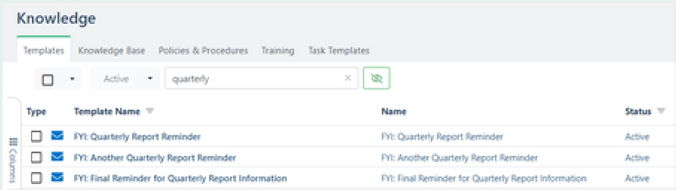
Growth Partners

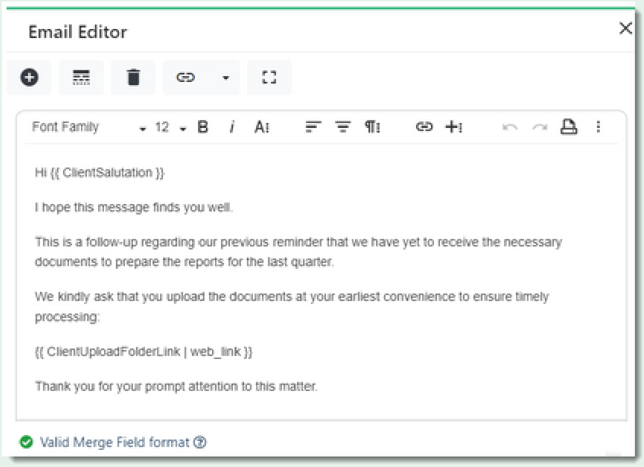
Mandy Jones
Accountant CA
Direct 0418 114 118
Email master_jc@thegrowth.partners

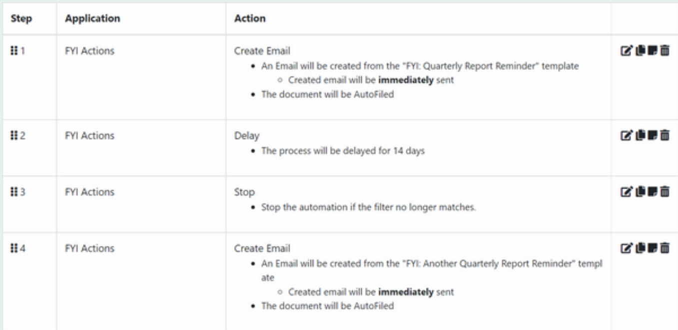
What's included:

- Quarterly Report Reminder Email Templates
- Automation Process Steps





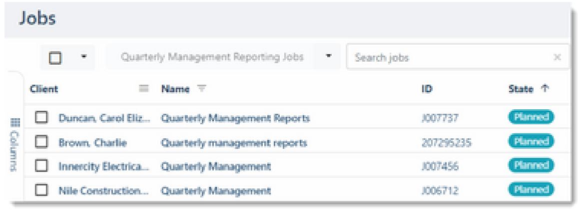




Step	Application	Action
1	FYI Actions	Create Email • An Email will be created from the "FYI: Quarterly Report Reminder" template ◦ Created email will be **immediately** sent • The document will be AutoFiled
2	FYI Actions	Delay • The process will be delayed for 14 days
3	FYI Actions	Stop • Stop the automation if the filter no longer matches.
4	FYI Actions	Create Email • An Email will be created from the "FYI: Another Quarterly Report Reminder" template ◦ Created email will be **immediately** sent • The document will be AutoFiled

How to import:

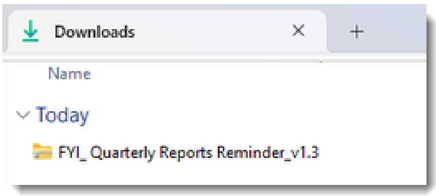
Before you begin - ensure your **Jobs View** has been saved.
- Job State = Planned
- Search jobs = 'quarterly management'



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.



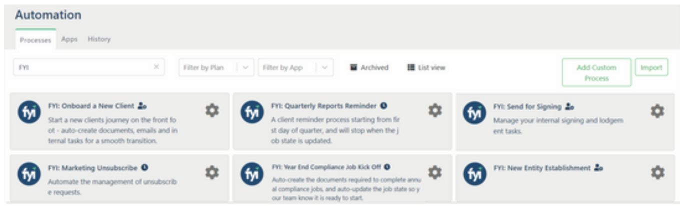
Step 2 - Import the files into FYI

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

Locate and select your saved "Quarterly Report Reminders " file and click **Open** to import the automation.

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

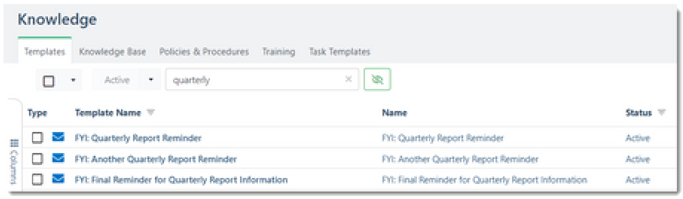
The Process and Templates will be imported into FYI.



Step 3 - Review the process

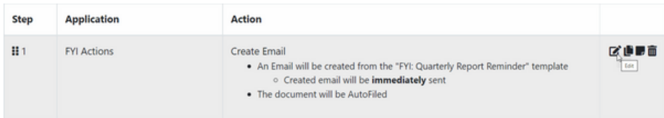
Review the Templates
Locate the templates in **Knowledge** - **Templates.**
The templates will import with the prefix FYI making them easy to locate.

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



Edit and Review Each Process Step
The Custom Process is imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- 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

Click the **Test** button to display a list of the Jobs and associated Clients.

From Select Test Job, search and select a specific client to run the test for and select **Run Test**. A Test Client is handy for testing scheduled automations.

Review the test by clicking the **View History link**, or from the Client workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.