

Establishing a New Entity

Process Automation



About this automation:

Use this process to auto-create the tasks and emails required when establishing a new entity for a client.



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

What's included:

- ✓ New Entity Email Template
- ✓ Automation Process Steps

FYI: Establish a New Entity

Auto-create the tasks and client email required when establishing a new entity for an existing client.

Knowledge

Templates Knowledge Base Policies & Procedures Training Task Templates

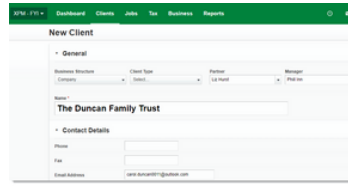
Active establish

Type	Template Name	Name
	FYI: New Entity Establishment - Signed Copies	FYI: New Entity Establishment -

Step	Application	Action
# 1	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Order new entity & finalise XPM details" Notes Consider updating Task Assignee to an appropriate User Role.
# 2	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Invoice new entity & collate for signing" Notes Consider updating Task Assignee to an appropriate User Role.
# 3	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Apply for tax and business registrations" Notes Consider updating Task Assignee to an appropriate User Role.

How to import:

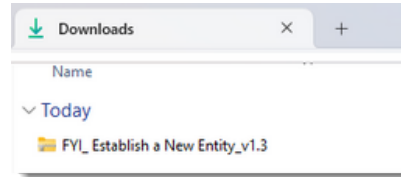
Before you begin - ensure your new client is set up in your practice management software.



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.

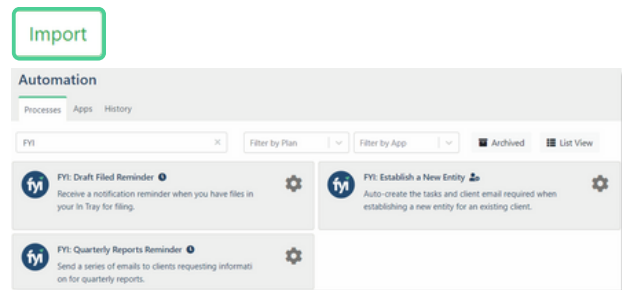


Step 2 - Import the files into FYI

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

Locate and select your saved "Establish a New Entity" 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

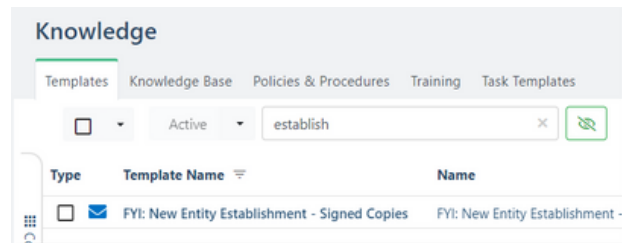
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

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

Edit and Review Each Process Step

The 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	Application	Action	
1	FYI Actions	Create Task • A task will be created with the subject "Order new entity & finalise XPM details" Notes Consider updating Task Assignee to an appropriate User Role.	

Step 4 - Test and run the automation

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

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

You can navigate to the client workspace to review the test task created.

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

Simply locate your Client and Run the process.

