Establishing a New Entity Process Automation

About this automation:

Use this process to autocreate 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!

Details History	Activity	
Status	ACTIVE	Test Run
Name	FYI: Establish a New Entity	
Description	Auto-create the tasks and client email required when establishing a new entity for an existing client.	
Trigger	Manual	
From Workspace	0	
From List		
From Process Step		
Filter	Client - View Filters	
	View Active	
Owner	Liz Hurst V	
Start From	13/09/2024	
Last Run	18/09/2024 for Stanley Homes 🔮	

What's included:

New Entity Email Template
 Automation Process Steps

Auto-	stablish a New Entity 🍰 create the tasks and client email require for an existing client.	d when establishing a new
Knowled Templates	dge Knowledge Base Policies & Proce	dures Training Task Templates
	- Active - establish	×
Туре	Template Name =	Name
	FYI: New Entity Establishment - Signe	d Copies FYI: New Entity Establishment -

Step	Application	Action	
1 FYI Actions		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.	
II 2	FYI Actions	Create Task A task will be created with the subject "Invoice new entity & collate for signing" 	Cêri
		Notes Consider updating Task Assignee to an appropriate User Role.	
11 3	FYI Actions	Create Task A task will be created with the subject "Apply for tax and business registrations"	C¢Pi
		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 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.

XPM - Pril +	Dashboard	Clients	-	Tex	Business		laports		۲	•
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Import	
Automation Processes Apps History	
FVI × Filter by Plan ØD Phil Dealt Field Reminder ø Receive a notification reminder when you have files in your in Tray for filing. Ø	Filter by App Tar Archived Et List View Filter by App Phi: Establish a New Entity 5 Auto-case the tasks and case the main required when establishing a new entity for an existing client. \$
PM: Quarterly Reports Reminder O Send a series of emails to clients requesting information for quarterly reports.	

Know	ledg	e				
Template	es Kr	nowledge Ba	se F	Policies & Procedures	Training	Task Templates
	•	Active	٠	establish		×
Туре	Ter	nplate Nam	e =		Name	e
	FYI	: New Entity	Establ	lishment - Signed Copie	s FYI: N	ew Entity Establishment -



