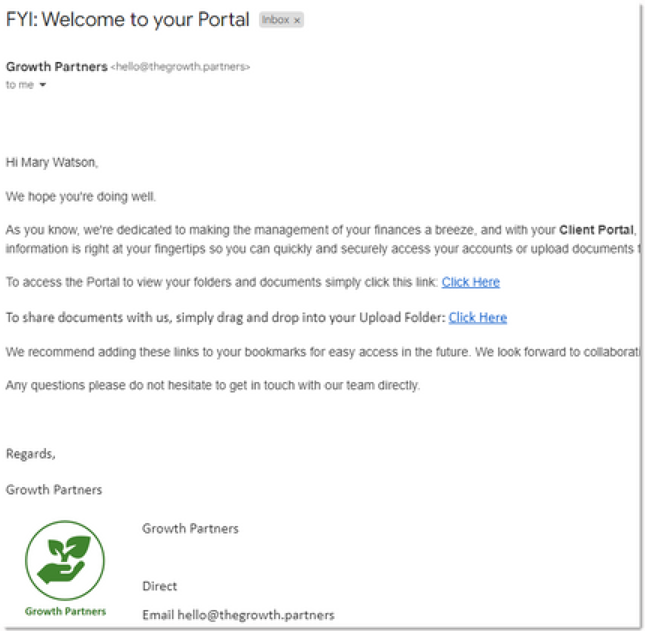
Bulk Email Invite Clients to Collaborate

Process Automation

About this automation:

Use this process to send an invitation email to clients to use Collaborate for document sharing.

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


FYI: Welcome to your Portal Inbox ×

Growth Partners <hello@thegrowth.partners>
to me

Hi Mary Watson,

We hope you're doing well.

As you know, we're dedicated to making the management of your finances a breeze, and with your **Client Portal**, information is right at your fingertips so you can quickly and securely access your accounts or upload documents t

To access the Portal to view your folders and documents simply click this link: Click Here

To share documents with us, simply drag and drop into your Upload Folder: Click Here

We recommend adding these links to your bookmarks for easy access in the future. We look forward to collaborati

Any questions please do not hesitate to get in touch with our team directly.

Regards,

Growth Partners

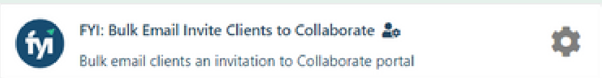
Growth Partners

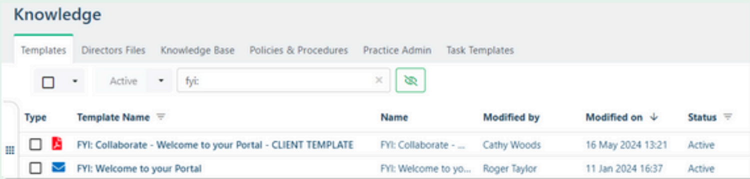
Direct

Email hello@thegrowth.partners

What's included:

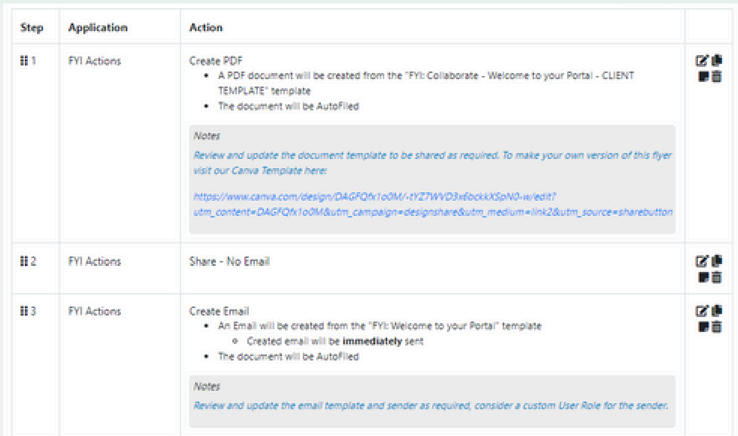
- Welcome to your Portal Email Template
- Welcome to your Portal PDF White Paper Template
- Automation Process Steps




Knowledge

Templates | Directors Files | Knowledge Base | Policies & Procedures | Practice Admin | Task Templates

Type	Template Name	Name	Modified by	Modified on	Status
PDF	FYI: Collaborate - Welcome to your Portal - CLIENT TEMPLATE	FYI: Collaborate - ...	Cathy Woods	16 May 2024 13:21	Active
Email	FYI: Welcome to your Portal	FYI: Welcome to yo...	Roger Taylor	11 Jan 2024 16:37	Active



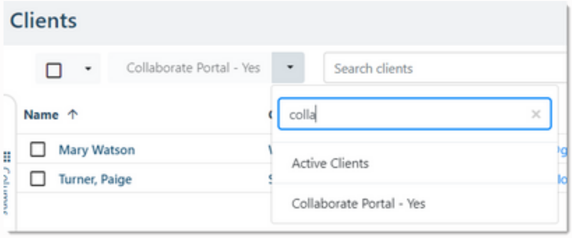
Step	Application	Action
1	FYI Actions	Create PDF • A PDF document will be created from the "FYI: Collaborate - Welcome to your Portal - CLIENT TEMPLATE" template • The document will be AutoFiled *Notes* *Review and update the document template to be shared as required. To make your own version of this flyer visit our Canva Template here:* *https://www.canva.com/design/DAGFQfx1o0M/-tYZ7WVD3x6bckkXSpN0-w/edit?utm_content=DAGFQfx1o0M&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton*
2	FYI Actions	Share - No Email
3	FYI Actions	Create Email • An Email will be created from the "FYI: Welcome to your Portal" template ◦ Created email will be **immediately** sent • The document will be AutoFiled *Notes* *Review and update the email template and sender as required, consider a custom User Role for the sender.*

How to import:

Before you begin - ensure your View has been saved in the Client list, the following filters have been applied in this example:
'Collaborate Portal - Yes' View

- Client Custom Field 'Collaborate Portal' = Yes

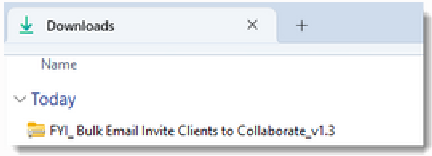
Note: You will need to create this custom field and populate accordingly.



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.



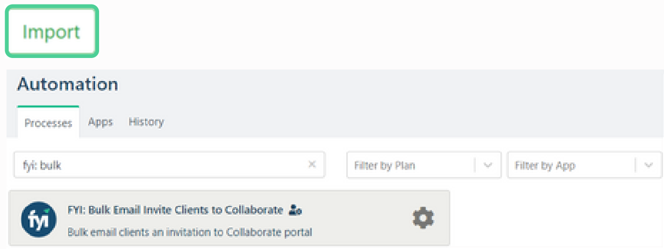
Step 2 - Import the files into FYI

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

Locate and select your saved "Bulk Email Invite Clients to Collaborate" 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.



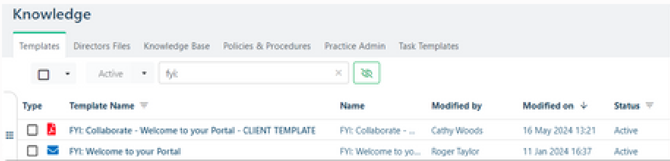
Step 3 - Review the process

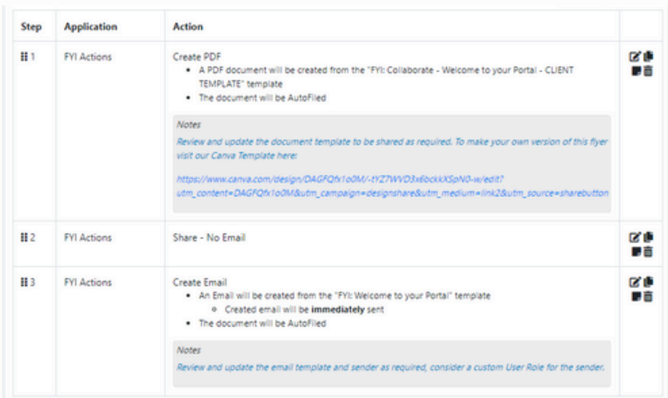
Review the Templates
Locate the templates in **Knowledge - Templates.**
The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates (note: for the flyer Canva template link refer to the help article)
- 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 the filter, this example is set to run once per client
- 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 documents list in your client's workspace to review test documents.

When ready, set the **Status** to Active. We recommend running this from the process itself for any newly added clients to the list - you can also opt to schedule this to run automatically if preferred.

Simply locate your process and click **Run.**