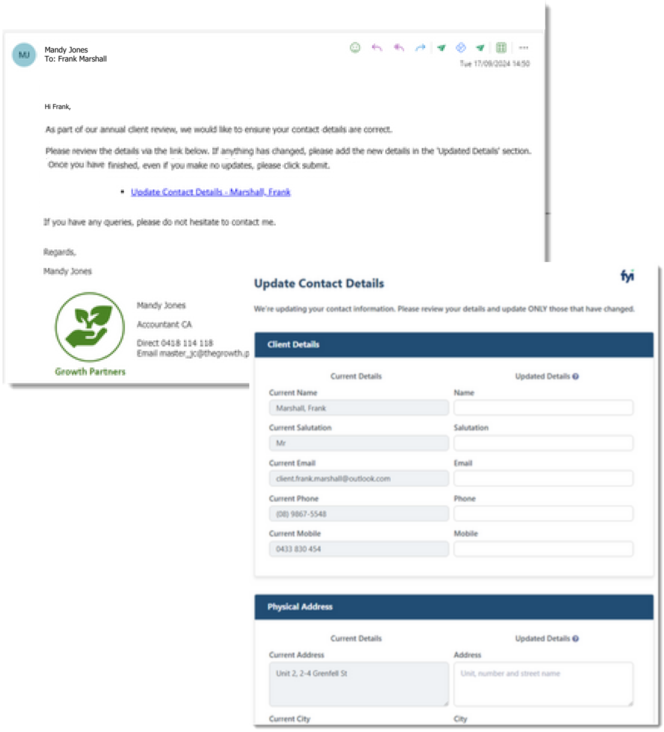
# Update Client Details

## Process Automation

Elite Plan



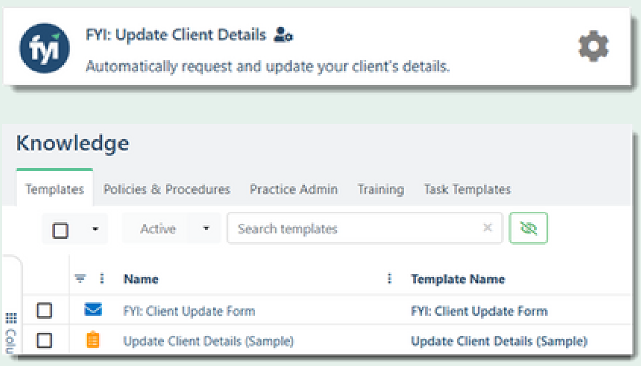

## About this automation:

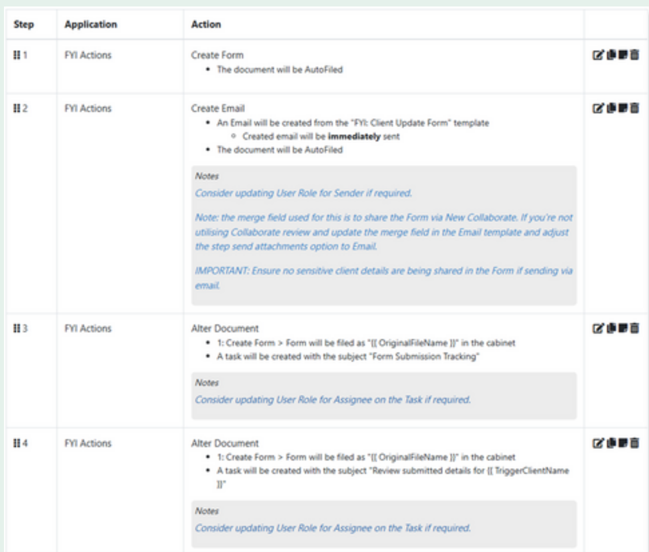
Use this process to automatically request and update client details using a form.

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

## What's included:

- Client Update Form Email Template
- Client Update Form Template
- Automation Process Steps



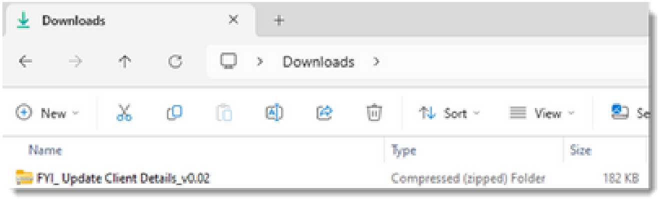



# How to import:

## 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.



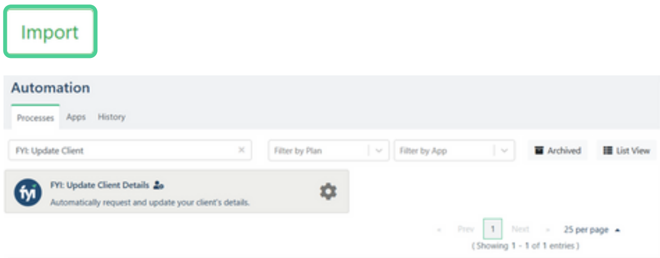

## Step 2 - Import the files into FYI

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

Locate and select your saved "Update Client Details" 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

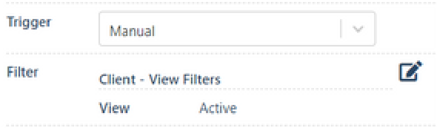
**Set the Filter**
As this process will be run manually for an individual client, set the **Filter** to **Client - View Filters**, and the **View** to **Active clients**.

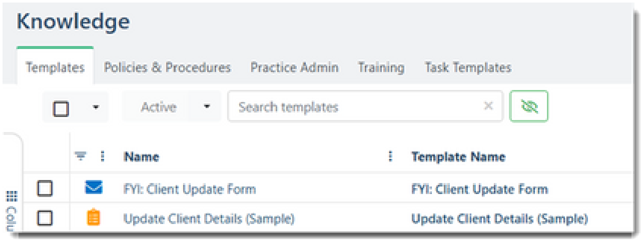
**Review the Templates**
Locate the templates in **Knowledge - Templates.** The email template will import with the prefix "FYI" and the form template will have "(Sample)" affixed to the name making them easy to locate.

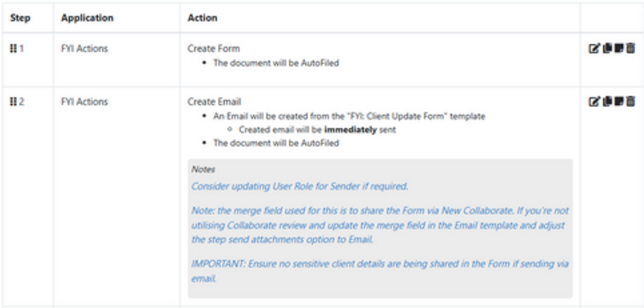
- Review and personalise the imported templates
- Update the template **Status** to Active.

**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**. Note: this will send an email to the selected client, consider testing on a sample client to check the end result.

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 process will be run for a specific client, it is recommended to run the Automation from the **Client – Processes** tab.

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