

Update Client Details Process Automation



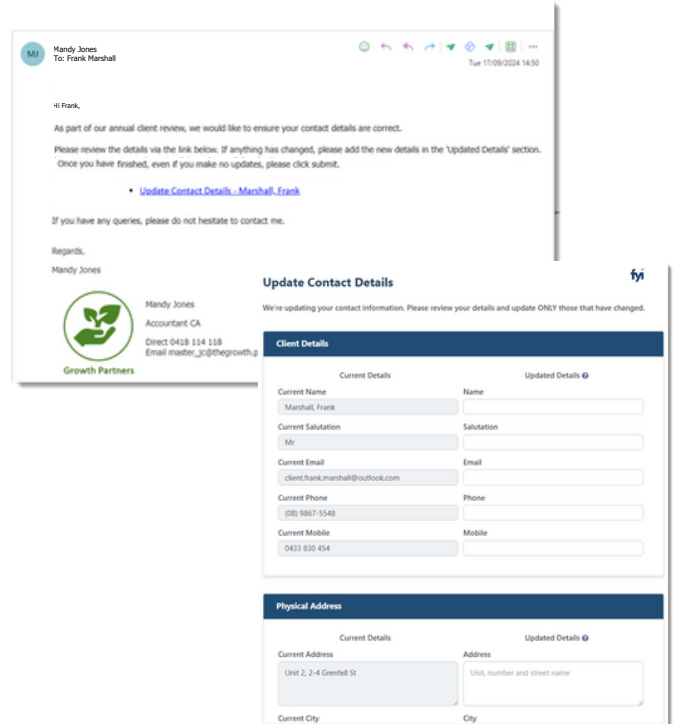
Elite Plan

About this automation:

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

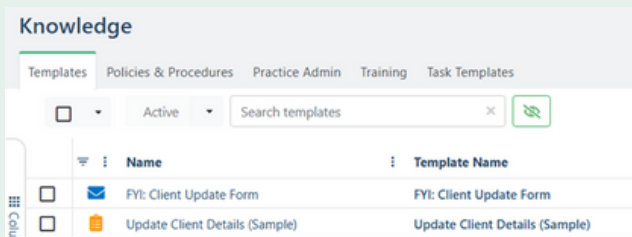
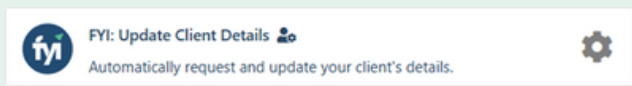


Simply import the sample automation, customise to suit your practice, test and activate!



What's included:

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



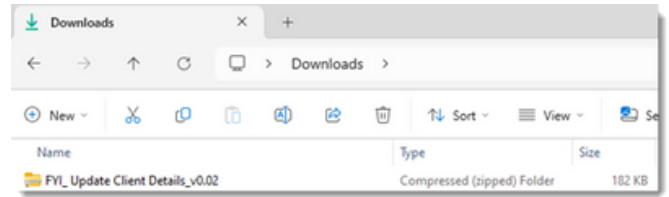
Step	Application	Action	
11	FYI Actions	Create Form <ul style="list-style-type: none"> The document will be AutoFiled 	
12	FYI Actions	Create Email <ul style="list-style-type: none"> An Email will be created from the "FYI: Client Update Form" template <ul style="list-style-type: none"> Created email will be immediately sent The document will be AutoFiled <p><i>Notes</i></p> <p>Consider updating User Role for Sender if required.</p> <p>Note: the merge field used for this is to share the Form via New Collaborate. If you're not utilising Collaborate review and update the merge field in the Email template and adjust the step send attachments option to Email.</p> <p>IMPORTANT: Ensure no sensitive client details are being shared in the Form if sending via email.</p>	
13	FYI Actions	Alter Document <ul style="list-style-type: none"> 1: Create Form > Form will be filed as "[OriginalFileName]" in the cabinet A task will be created with the subject "Form Submission Tracking" <p><i>Notes</i></p> <p>Consider updating User Role for Assignee on the Task if required.</p>	
14	FYI Actions	Alter Document <ul style="list-style-type: none"> 1: Create Form > Form will be filed as "[OriginalFileName]" in the cabinet A task will be created with the subject "Review submitted details for [TriggerClientName]" <p><i>Notes</i></p> <p>Consider updating User Role for Assignee on the Task if required.</p>	

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.



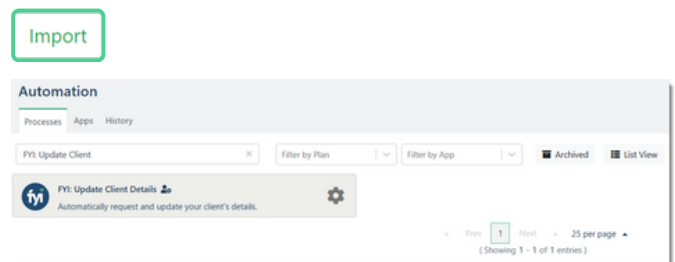
Step 2 - Import the files into FYI

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

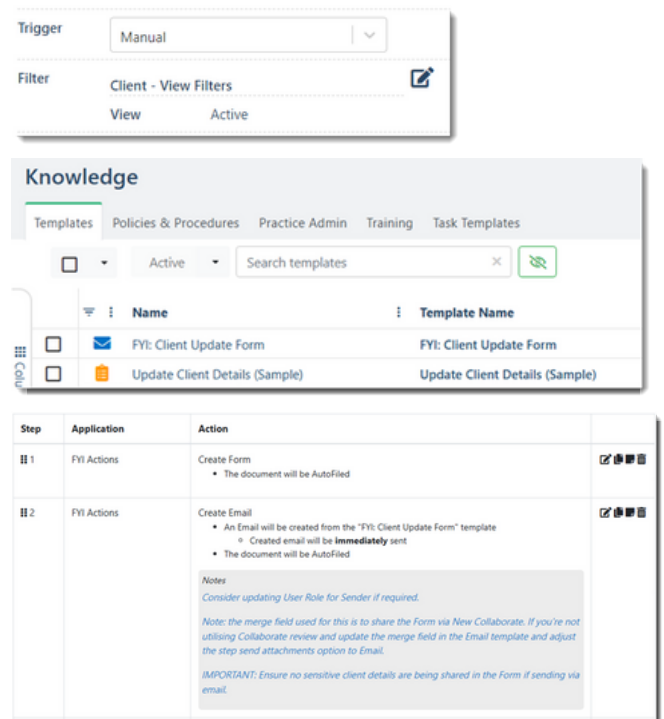
Locate the templates in Knowledge - Templates. The email template will import with the prefix "FYI" and the form template will have "(Sample)" affixed to the name making them easy to locate.

- 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.

