Year End Compliance Job - Start to Finish Process Automation



About this automation:

Use this process to autocreate the meetings, workpapers, emails and tasks required to complete annual compliance jobs, with job states and key dates automatically updated along the way.

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

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2							Client:	FYI_ClientName		
3							Balance Date:	FYI_ClientBaland		
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5	Growth Partners						Date: 1			
	Descriptio	on of Poin	ts:							
9	W/P Re	f.		Point			Action & W/P Ref.	By & Date		
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	>	Point Sheet	Queries	Group Loan Matrix	Group Tax Estimate	Tax Timing	Div 7A Loan (7 Years)	HP Income Tax Re		

What's included:

- Year End Queries Email
- Year End Checklist
- EOY Workpaper Template
- Year End Compliance Automation Process Steps
- Send for Signing Process Steps

		FYI: Year End Compliance Job -			Step	Application	Action				
	fyi	Automatically create the meeting			H 1	FYI Actions	Update Job Notes	C. 9 8 9			
	asks required to complete annual compliance jobs, with job states and key dates automatically updated along the way.								Confirm the Job Start Date Custom Field is set to the 'Current Date' option.		
ŀ	nowle	dge				1	1 2	FYI Actions	Create Meeting A meeting will be created The document will be AutoFiled	C	
	Templates Knowledge Base Policies & Procedures Task Templates								 A task will be created with the subject "Complete once meeting has occurred" 		
		All Search templates	× 82						Notes Task is Assigned to the Job Manager. Consider updating the Task Assignee to the appropriate		
	Туре	Name	Modified by	Modified on \downarrow	Status 🔻				User Role.		
		FYI: EOY Workpapers	System	11 Apr 2023 15:10	Draft		H 3	FYI Actions	Create Task	C	
Colu		FYI: Year End Checklist	System	11 Apr 2023 15:10	Draft			11740010	 A task will be created with the subject "Assign job details" 		
mns		FYI: Year End Querles	System	11 Apr 2023 15:10	Draft	ļ			Notes Task is Assigned to the Job Manager. Consider updating the Task Assignee to the appropriate User Role.		

How to import:

Before you begin - ensure your **Jobs View** has been saved.

- Job State Planned
- Search jobs annual compliance jobs

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 "Year End Compliance Jobs " file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

<u>Both</u> Processes and the 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

This process uses the custom view you created.

- Update the Filter and select your Compliance Jobs view
- 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**.

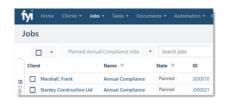
Step 4 - Test and run the automation

You can test a Scheduled Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the Test button to display a list of the Jobs based on the Filter that has been selected.

From the Select Test, search and select a specific client to run the test for and select Run Test.

When ready, set the **Status** of <u>both</u> Processes to Active.



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	FYI_ Year End Compliance Job -	Start to	o Finish_v1.3.zip

Auto	mation							
Process	Apps History							
m	×	Filter by Plan	v I	Filter by App	III List view		Add Custom Process	Impo
60	Ph: Onboard a New Client Lo Start a new clients journey on the front to ot - auto-create documents, emails and in ternal tasks for a smooth transition.	\$	69	FYI: Quarterly Reports Reminder A client reminder process starting from fir st day of quarter, and will stop when the j ob state is updated.	\$	69	PYI: Send for Signing 20 Manage your internal signing and lodgem ent tasks.	\$
69	FYI: Marketing Unsubscribe O Automate the management of unsubscrib e requests.	¢	69	FYI: Year End Compliance Job Kick Off O Auto-create the documents required to complete al compliance jobs, and auto-update the job state our team know it is ready to start.		69	FYI: New Entity Establishment 🍰	4

Templates	Knowledge Base Policies &	Procedures Task Templates		
	All Search ten	aplates × &]	
Туре	Name	Modified by	Modified on \downarrow	Status 🦷
	FYI: Year End Queries	System	11 Apr 2023 15:10	Active
	FYI: EOY Workpapers	System	11 Apr 2023 15:10	Active
	FYI: Year End Checklist	System	11 Apr 2023 15:10	Active

H 1	FYI Actions	Update Job • Job Start Date will be updated				
		Notes Confirm the Job Start Date Custom Field is set to the "Current Date" option.				

