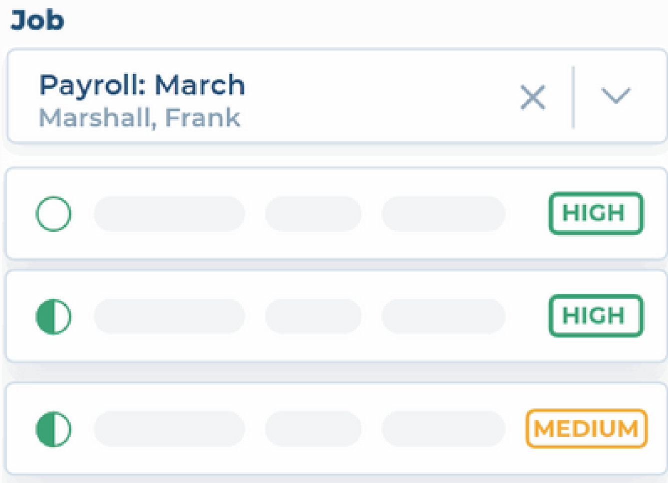
PROCESS AUTOMATION

Payroll Process

About this automation:

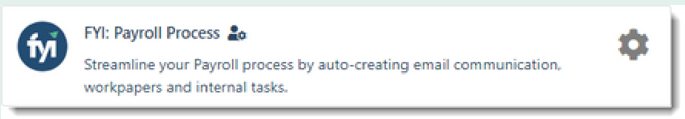
Streamline your Payroll process by auto-creating email communication and internal tasks.

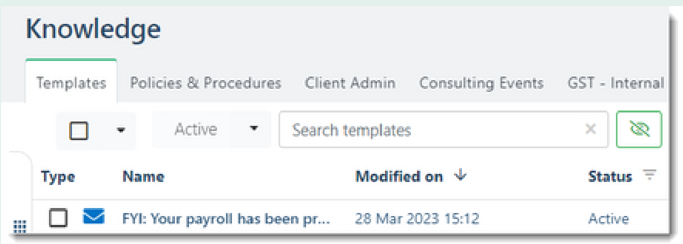


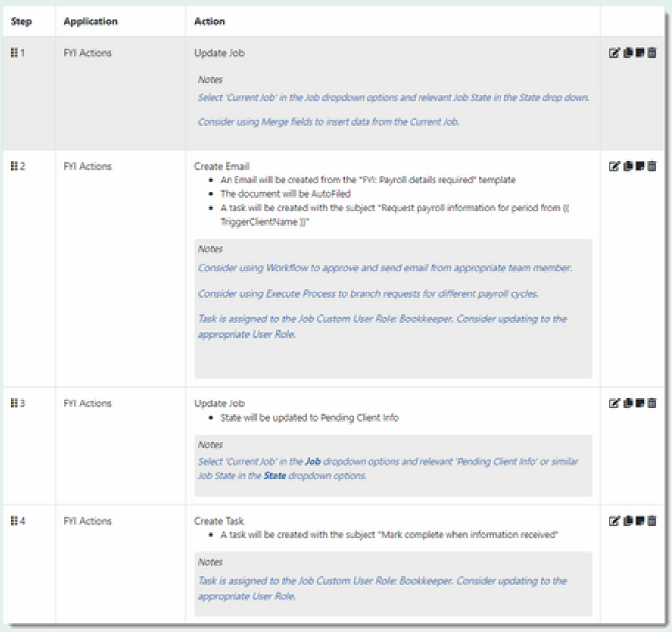
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- Payroll Email Template
- Automation Process Steps







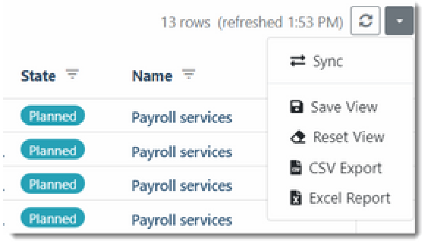
Step	Application	Action
1	FYI Actions	Update Job *Notes* *Select 'Current Job' in the Job dropdown options and relevant Job State in the State drop down.* *Consider using Merge fields to insert data from the Current Job.*
2	FYI Actions	Create Email • An Email will be created from the "FYI: Payroll details required" template • The document will be AutoFiled • A task will be created with the subject "Request payroll information for period from {{ TriggerClientName }}" *Notes* *Consider using Workflow to approve and send email from appropriate team member.* *Consider using Execute Process to branch requests for different payroll cycles.* *Task is assigned to the Job Custom User Role: Bookkeeper. Consider updating to the appropriate User Role.*
3	FYI Actions	Update Job • State will be updated to Pending Client Info *Notes* *Select 'Current Job' in the **Job** dropdown options and relevant 'Pending Client Info' or similar Job State in the **State** dropdown options.*
4	FYI Actions	Create Task • A task will be created with the subject "Mark complete when information received" *Notes* *Task is assigned to the Job Custom User Role: Bookkeeper. Consider updating to the appropriate User Role.*

How to import:

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

- State = All, except for Completed and Cancelled
- Filter on Name or Name (multi) = Payroll or Payroll job names.

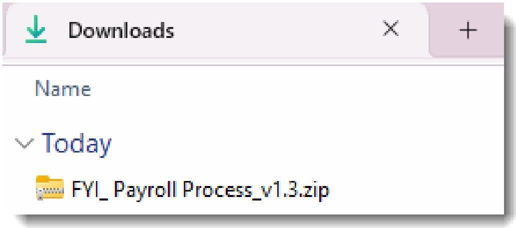
The automation will run for all open Payroll jobs.



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.



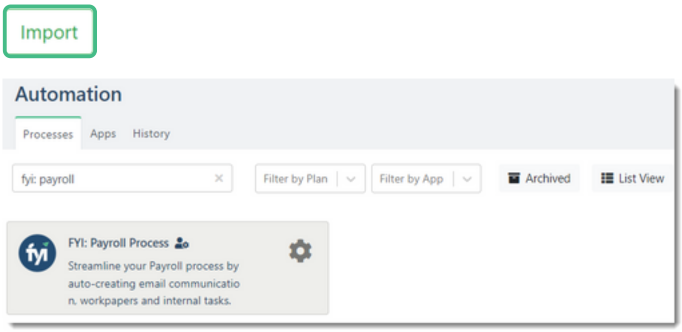
Step 2 - Import the files into FYI

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

Locate and select your saved "Payroll Process" 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.

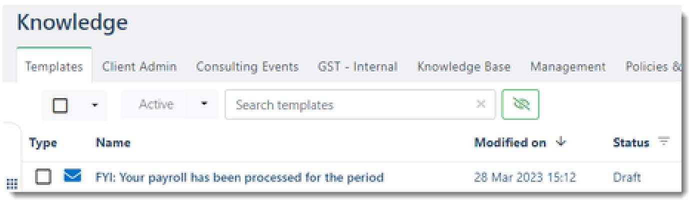


Step 3 - Review the process

Review the templates

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

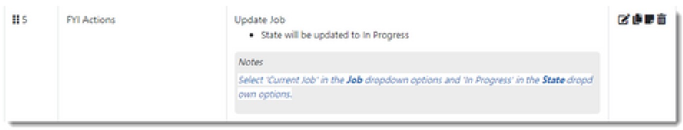
- Review and personalise the imported templates
- Update the template **Status** to Active.



Edit and review the process and each process step

The Process is imported with the **Trigger** set to Schedule, to run every month.

- Update the Filter and select your Payroll 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

Click the **Test** button to display a list of the Jobs and associated Clients.

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

Review the test from the Client workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.