Creating a Custom Process
Quick Reference Guide

Make every second count for more with Process Automation

Let FYI auto-create meetings, tasks, emails and documents for repetitive compliance work, with job states and key dates automatically updated as you go.

- ✓ **Create the required Templates and Custom Views**
- ✓ **Add a Custom Process, setup Process Controls and Steps**
- ✓ **Testing, Reviewing and Activating your process**
- ✓ **Import sample processes, ready to go out of the box**

⚙ Add Custom Process

STEP 1
Create Spreadsheet

STEP 2
Create Task

STEP 3
Create Email

Test   Run

You can create custom processes specifically for the needs of your practice. Every practice has repetitive processes that can be automated with FYI's Automation engine.

Begin by mapping out how you would normally complete a process in practice. Determine which FYI action would allow you to automate each step in the process.

Use our **Automation Workbook** to assist with mapping your process and adding your custom process into your FYI platform.
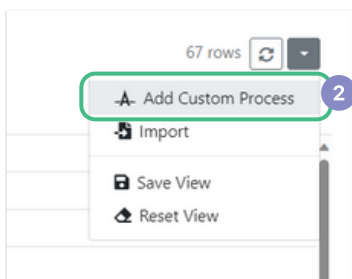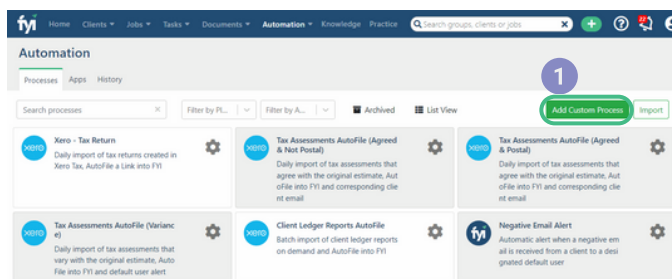
Still not sure where to start? Take our **Automation Quiz.**
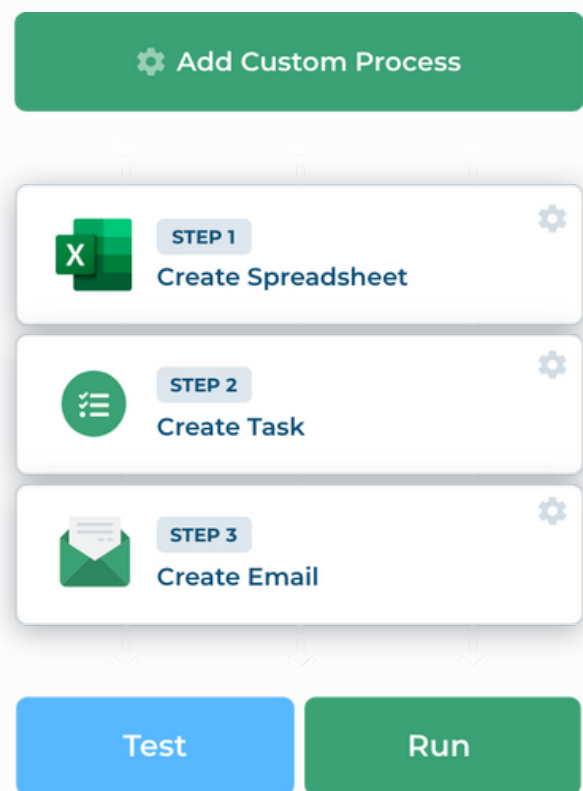
Add a Custom Process

Go to the **Automation - Processes** tab, either the **Grid View** or the **List View**.

1 From the **Grid View**, click the **Add Custom Process.**

2 Or from the **List View**, select the View Tools button which is at the end of column heading and select **Add Custom Process.**

Set up the Process Controls

1 Enter a **Name** and **Description** that clearly descirbes the purpose and expected outcome of the process.

2 Update the **Trigger**, which determines whether the process will be run manually, or on a scheduled basis.

3 Select the **Filter** and relevant **View** when running the process.

4 Select the **Owner**, the user who will receive any notifications if the process failed.

5 Enter a **Start From** date. This is only relevant if importing documents.

Add the Process Steps

Create each **Step** in the process and update the step details with relevant recipients, templates, filing details, assignees to automate the process as much as possible.

For more refer to Process Step details.

Test and Activate your Custom Process

When setting up a custom process, it is very important to test it to ensure it is working as expected.

- The **Test** option allows you to choose one specific item to run the process on. We recommend using a **Sample Client** when testing client related processes.

- A **Test** runs in the same way as when the process is active. It creates any emails, documents, tasks, jobs, comments, or performs any other actions that are setup in the process.

- You can use the **Test** option for a **Scheduled** or a **Manual** process.

Testing the Process

1. Locate and **Edit** the relevant custom process
2. Click the Test button
3. The **Select Test** window displays a list of Clients, Documents or Jobs based on the Filter that is set up in the process.
4. Select a Sample or Test client and click **Run Test**.

Note: You can switch Ignore Process Filter to "Yes" to display all records, not only those picked up by the Filter.

Reviewing the Process

When a process is open for editing, the **History** and **Activity** tabs display alongside the **Details** tab.

- The **History** tab is used to monitor processes that have been run, to check the progress and any errors.

- The **Activity** tab displays an audit trail of the process, when it was created and the changes that have been made to the process along with the user who made the changes.

Note: You can also review the Process History from the Client or Job.

For more refer to Process History and Activity

Activating the Process

Once a process has been tested and it is ready to be used, set the **Status** to **"Active"** to display the **Run** button.

Depending upon the purpose, a process can be run:

- **Within the custom process** if the process applies to all records in the filter, for example when sending a newsletter to all clients.

- The **Client - Processes** or **Job - Processes** tab if it is intended for a specific client or jobs, for example when onboarding a new client.

For more refer to Running Custom Processes

Automation Library

No need to start from scratch

Check out our range of process automations, ready for you to import and activate.
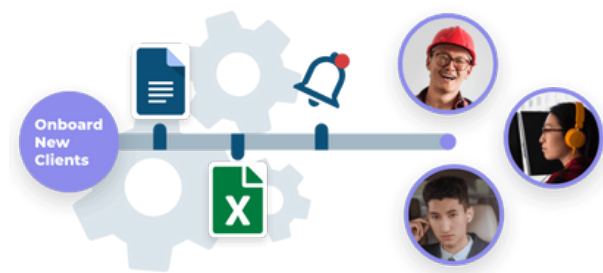
- Choose from a growing library of automations created by the FYI team.

- Auto-create emails, documents and tasks, update jobs, and more - for a range of processes used in accounting firms.

- Example templates are ready to import with just a few clicks.

Simply import, customise to suit your practice, test and activate.

Explore our Automation Library

For step-by-step instruction on importing processes to your platform **refer to Importing Custom Processes.**

Onboard A New Client

Establish A New Entity

End Of Year Compliance Job Process

GST Return Process

The more processes you automate in your practice, the faster the efficiencies add up.

When we calculated how much we could save, the numbers were phenomenal.

JASON GLUER,
PARTNER
WALLACE DIACK CHARTERED
ACCOUNTANTS LIMITED

Deliver the best client service ever. Automate new client onboarding, quarterly report reminders, income tax return checklists, reminders to contact important clients and more.

Onboard New Clients

The way we work has been transformed. FYI has challenged us to improve our processes and to work smarter.

TASHA ROSSITER,
PRACTICE MANAGER
SIDCOR

Make every second count for more with FYI Process Automation.

For more information on Process Automation with FYI, visit the FYI Help Centre