AUTOMATE YOUR PRACTICE WITH FYI

Make every second count for more

Automate repetitive tasks and recover more time for what counts - work that adds value for your practice and your clients.

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

Proven ROI > Time savings of up to 20%

Not sure where to start your Automations journey? Take our Quiz, and we'll point you in the right direction.

AUTOMATION LIBRARY

No need to start from scratch

Check out our range of process automations - ready for you to import and activate.

Onboard a New Client
Auto-create emails, documents and tasks for an excellent client experience.

Overdue Task Reminder
Send your team a daily summary of outstanding tasks.

Reminder to Contact a Client
Send a reminder to a Partner if a client has not been contacted in 90 days.

Quarterly Report Reminders
Send a series of emails requesting information for quarterly reports.

Send a Bulk Email to All Clients
Send an email newsletter to your entire client base.

Client Signed Notification
Get notified when a signed client document has been auto-filed in FYI.

Establish a New Entity
Auto-create tasks and emails establishing a new entity for a client.

Year-End Compliance Job Kick-Off
Auto-create documents and let your team know it's ready to start.

Explore Our Automation Library

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

Jason Gluer Project Manager + Shareholder **Wallace Diack Chartered Accountants Limited**

Automation Workbook

Start

Fill in the details of what event takes place. Examples:

- an email is sent
- start of a quarter/ month
- documents are received

When this event occurs...

____

____

____

What do you need to do

Fill in the details of actions that need to take place for this event i.e. a job or document is created, an email is sent or a client is updated. Also consider who (staff member(s)) is responsible for the action if applicable.

ACTION 1

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 2

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 3

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 4

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 5

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 6

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 7

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 8

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 9

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

ACTION 10

____

____

Due:____________ Staff:____________

Action must be complete before next action begins: Y ☐/☐ N

When

Fill in the details of how often the event and actions need to occur. Examples:

- once/as and when required
- monthly/quarterly

How often do you need this event and listed actions to occur...

____

Let's build your Automation!

Add Custom Process

Your Event = Process Filter

The event you've outlined in your workbook becomes the Custom Process **Filter**.

The **Process Filter** determines what information is or is not included in the process.

There are **6 Filter Types** you can select and the type will depend on the nature of your event.

Your **Filter** needs to be set up before you commence your automation.

Consider if you need to create **Custom View(s)** or **Client Custom fields** and any other requirements to ensure you have the correct information included in your process **| click here for more details on the Filter**.

How Often = Process Trigger

The when/how often you need the event and actions to occur in your workbook becomes the **Custom Process Trigger**.

The **Trigger** controls when the process will be run.

The **Trigger** can either be set to **Manual** or **Schedule**.

Use **Manual** in the circumstance that you only need the process to run once or as and when required.

Where you need the process to recur i.e. every week, month, quarter or year, you can use the **Schedule** option and set the frequency per your requirements in your workbook **| click here for more details on the Trigger**.

What do you need to do

ACTION 1
Create Task

=

STEP 1
Create Task

Each action in your workbook become the **Steps** of your **Custom Process**.

Select "**Add Step**" and the corresponding **FYI Action** (or other application as necessary).

Once you've selected your **Action** fill in the relevant details as required.

For example, if creating a document select the type of document, the template, filing details and add any tasks or workflow requirements. Or if creating a task, select the template or complete the task details manually, you can also use tasks as blocking items **| click here for more details for Process Steps**.

Other Process Controls & Recommendations

Ensure you also complete the following **Process Controls**:

- give your process a **Name** for easy identification in your Automation Workspace.
- You can also provide a summary of what the process does in the **Description** section.
- We recommend the **Owner** to be the person that will troubleshoot any issues with the process as they will be notified should anything go wrong.

Finally always ensure you **Test** your **Custom Process** to ensure it runs the way you intend before you update the status to **Active** and the process **Runs**.
Tip: Use our Sample Clients.

Test

Activate & Run

Troubleshooting

Don't forget to use the **History** tab for all the details of who, what and when a process has run **| click here for more details on troubleshooting**.

Complete the Learn course to become an expert on automations!
Access the course.

Automation Workbook

Start

Fill in the details of what event takes place. Examples:

- an email is sent
- start of a quarter/ month
- documents are received

When this event occurs...

New client coming onboard

What do you need to do

Fill in the details of actions that need to take place for this event i.e. a job or document is created, an email is sent or a client is updated. Also consider who (staff member(s)) is responsible for the action if applicable.

ACTION 1

New client form created to request client details

Due: within a day | Staff: Admin

Action must be complete before next action begins: Y / N

ACTION 2

Send welcome email with information request form

Due: within 7 days | Staff: Partner

Action must be complete before next action begins: Y / N

ACTION 3

Enter client details in XPM

Due: within a day | Staff: Admin

Action must be complete before next action begins: Y / N

ACTION 4

Ethical letter/email sent to previous accountant

Due: within 3 days | Staff: Partner

Action must be complete before next action begins: Y / N

ACTION 5

Monitor for ethical response and client documents requested, send follow up

Due: within 7 days | Staff: Admin

Action must be complete before next action begins: Y / N

ACTION 6

Setup client registrations as required

Due: within 3 days | Staff: Admin

Action must be complete before next action begins: Y / N

ACTION 7

Setup any jobs/engagement as required

Due: within 3 days | Staff: Admin

Action must be complete before next action begins: Y / N

ACTION 8

Follow up client for feedback after 12 weeks

Due: 12 weeks post | Staff: Partner

Action must be complete before next action begins: Y / N

ACTION 9

Due: | Staff:

Action must be complete before next action begins: Y / N

ACTION 10

Due: | Staff:

Action must be complete before next action begins: Y / N

When

Fill in the details of how often the event and actions need to occur. Examples:

- once/as and when required
- monthly/quarterly

How often do you need this event and listed actions to occur...

As and when required

Let's build your Automation!

Add Custom Process

Event
New Client

=

Process Filter
Client View

The event you've outlined in your workbook becomes the **Custom Process Filter**.

The **Process Filter** determines what information is or is not included in the process.

For onboarding new clients, you could use a **Custom Field** if you have one in your system to run the **Process Filter** on. Alternatively, you can set the **Process Filter** to **Client View - All Clients**.

There are **6 Filter Types** you can select and the type will depend on the nature of your event.

Remember your **Filter** needs to be set up before you commence your automation.

How Often
As Required

=

Process Trigger
Manual

The when/how often you need the event and actions to occur in your workbook becomes the **Custom Process Trigger**.

The **Trigger** controls when the process will be run.

The **Trigger** can either be set to **Manual** or **Schedule**.

Use **Manual** in the circumstance that you only need the process to run once or as and when required.

A new client is something that happens every now and again, so, the nature of the process is to run as and when required. As such, the **Trigger** is set to **Manual**, and the **Process** is run from the **Client** when needed.

What do you need to do

Action		Step
ACTION 1 **Create Client Form**	=	STEP 1 **Create Spreadsheet using New Client Form Template**
ACTION 2 **Send Email With Form**	=	STEP 2 **Create Email using Welcome to Growth Partners Template Attach document from Step 1**
ACTION 3 **Enter Client Details Into XPM**	=	STEP 3 **Create FYI Task** **Name: Enter client details.** **Assign: Admin User Role** **Due Date: 3 days**

Each action in your workbook become the **Steps** of your **Custom Process**.

Select "**Add Step**" and the corresponding **FYI Action** (or other application as necessary).

Once you've selected your **Action** fill in the relevant details as required, don't forget to use blocking and delay functions.

Test

Ensure you **Test** your **Custom Process** to check it runs the way you intend before you update the status to **Active** and the process **Runs**.

Activate & Run