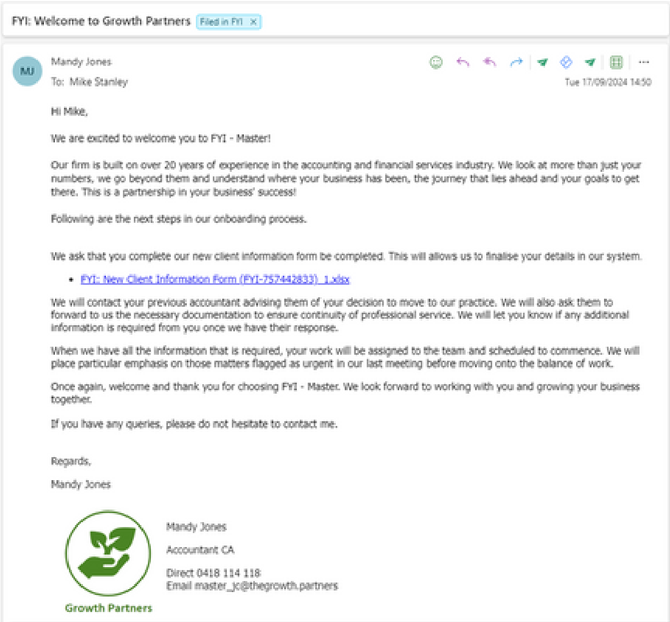
Onboarding a New Client

Process Automation

About this automation:

Use this process to streamline client onboarding. Auto-create emails, documents and internal tasks for a smooth transition and great client experience.


FYI: Welcome to Growth Partners Filed in FYI

Mandy Jones
To: Mike Stanley
Tue 17/09/2024 14:50

Hi Mike,

We are excited to welcome you to FYI - Master!

Our firm is built on over 20 years of experience in the accounting and financial services industry. We look at more than just your numbers, we go beyond them and understand where your business has been, the journey that lies ahead and your goals to get there. This is a partnership in your business' success!

Following are the next steps in our onboarding process.

We ask that you complete our new client information form be completed. This will allows us to finalise your details in our system.

- FYI: New Client Information Form (FYI-757442833)_1.xlsx

We will contact your previous accountant advising them of your decision to move to our practice. We will also ask them to forward to us the necessary documentation to ensure continuity of professional service. We will let you know if any additional information is required from you once we have their response.

When we have all the information that is required, your work will be assigned to the team and scheduled to commence. We will place particular emphasis on those matters flagged as urgent in our last meeting before moving onto the balance of work.

Once again, welcome and thank you for choosing FYI - Master. We look forward to working with you and growing your business together.

If you have any queries, please do not hesitate to contact me.

Regards,

Mandy Jones

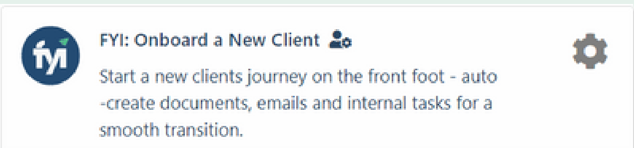
Growth Partners

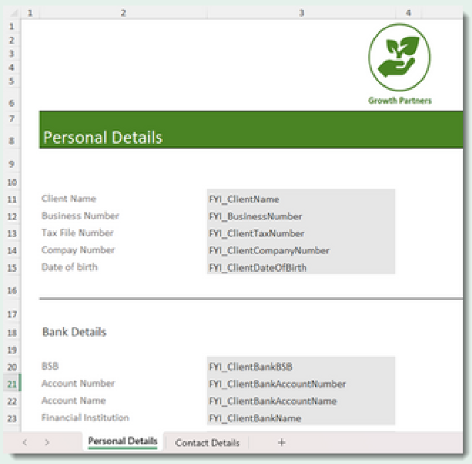
Mandy Jones
Accountant CA
Direct 0418 114 118
Email master_jc@thegrowth.partners

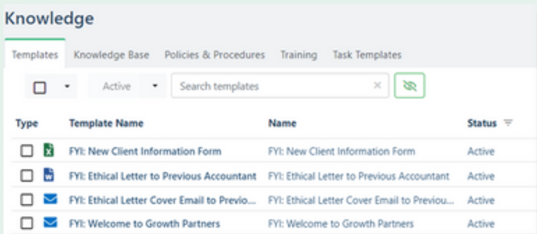
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

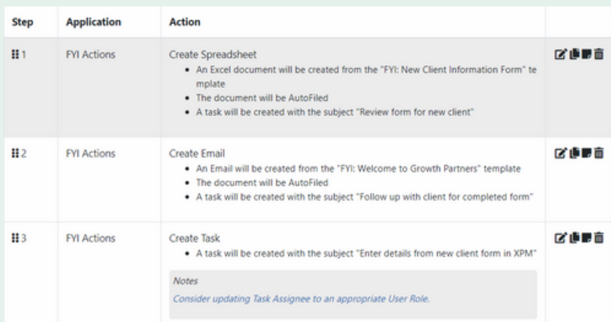
- Welcome Email Template
- New Client Information Form
- Ethical Letter to Previous Accountant (Email and Document Templates)
- Automation Process Steps







Type	Template Name	Name	Status
	FYI: New Client Information Form	FYI: New Client Information Form	Active
	FYI: Ethical Letter to Previous Accountant	FYI: Ethical Letter to Previous Accountant	Active
	FYI: Ethical Letter Cover Email to Previo...	FYI: Ethical Letter Cover Email to Previou...	Active
	FYI: Welcome to Growth Partners	FYI: Welcome to Growth Partners	Active



Step	Application	Action
1	FYI Actions	Create Spreadsheet • An Excel document will be created from the "FYI: New Client Information Form" template • The document will be AutoFiled • A task will be created with the subject "Review form for new client"
2	FYI Actions	Create Email • An Email will be created from the "FYI: Welcome to Growth Partners" template • The document will be AutoFiled • A task will be created with the subject "Follow up with client for completed form"
3	FYI Actions	Create Task • A task will be created with the subject "Enter details from new client form in XPM" Notes Consider updating Task Assignee to an appropriate User Role.

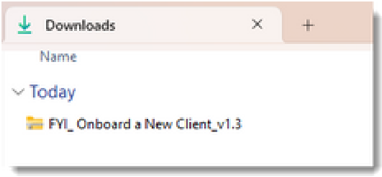
How to import:

Before you begin - ensure your new client is set up in your practice management software.

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.



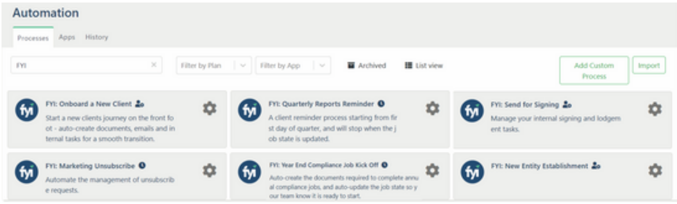
Step 2 - Import the files into FYI

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

Locate and select your saved "Onboard a New Client" file and click **Open** to import the automation.

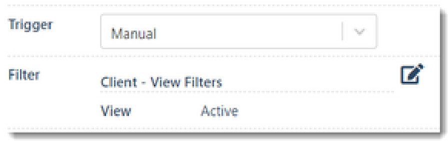
You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



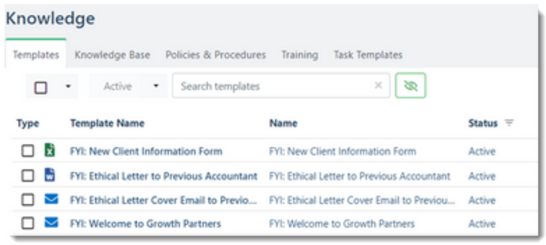
Step 3 - Review the process

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**.



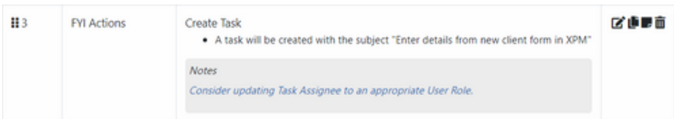
Review the Templates
Locate the templates in **Knowledge - Templates.** The templates will import with the prefix FYI making them easy to locate.

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



Edit and Review Each Process Step
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**.

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**.