

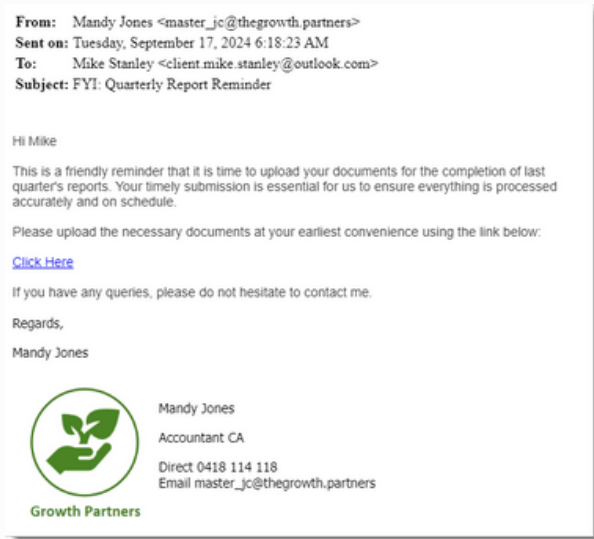
Quarterly Report Reminders



About this automation:

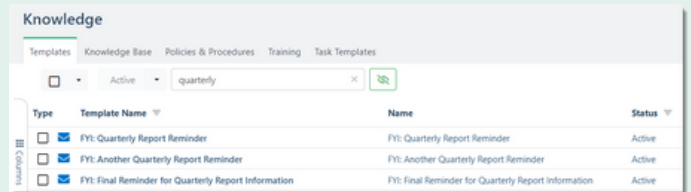
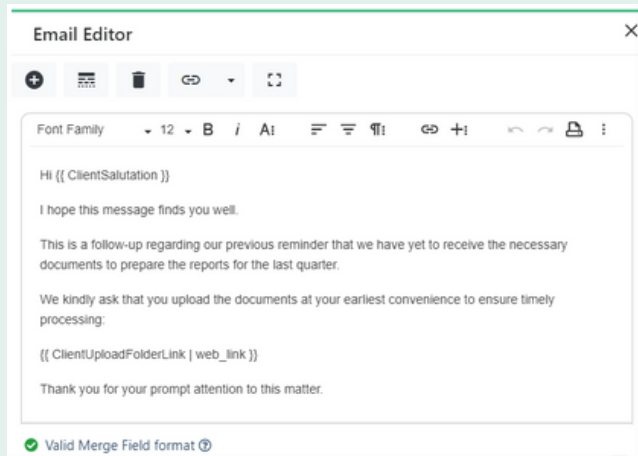
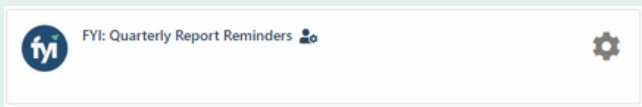
Use this process to send a series of emails to clients requesting information for quarterly reporting requirements.

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



What's included:

- ✓ Quarterly Report Reminder Email Templates
- ✓ Automation Process Steps



Step	Application	Action	
#1	FYI Actions	Create Email <ul style="list-style-type: none"> An Email will be created from the "FYI: Quarterly Report Reminder" template <ul style="list-style-type: none"> Created email will be immediately sent The document will be AutoFiled 	[Icons]
#2	FYI Actions	Delay <ul style="list-style-type: none"> The process will be delayed for 14 days 	[Icons]
#3	FYI Actions	Stop <ul style="list-style-type: none"> Stop the automation if the filter no longer matches. 	[Icons]
#4	FYI Actions	Create Email <ul style="list-style-type: none"> An Email will be created from the "FYI: Another Quarterly Report Reminder" template <ul style="list-style-type: none"> Created email will be immediately sent The document will be AutoFiled 	[Icons]

How to import:

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

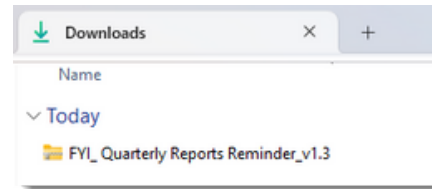
- Job State = Planned
- Search jobs = 'quarterly management'

Client	Name	ID	State
<input type="checkbox"/> Duncan, Carol Eliz...	Quarterly Management Reports	J007737	Planned
<input type="checkbox"/> Brown, Charlie	Quarterly management reports	207295235	Planned
<input type="checkbox"/> Innercity Electrica...	Quarterly Management	J007456	Planned
<input type="checkbox"/> Nile Construction...	Quarterly Management	J006712	Planned

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.



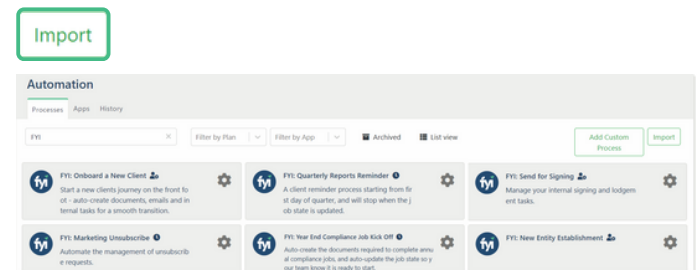
Step 2 - Import the files into FYI

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

Locate and select your saved "Quarterly Report Reminders" 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 Each Process Step

The Custom 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.

Type	Template Name	Name	Status
<input checked="" type="checkbox"/>	FYI: Quarterly Report Reminder	FYI: Quarterly Report Reminder	Active
<input checked="" type="checkbox"/>	FYI: Another Quarterly Report Reminder	FYI: Another Quarterly Report Reminder	Active
<input checked="" type="checkbox"/>	FYI: Final Reminder for Quarterly Report Information	FYI: Final Reminder for Quarterly Report Information	Active

Step	Application	Action
#1	FYI Actions	Create Email <ul style="list-style-type: none"> • An Email will be created from the "FYI: Quarterly Report Reminder" template <ul style="list-style-type: none"> ◦ Created email will be immediately sent • The document will be AutoFiled

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 client to run the test for and select Run Test. A Test Client is handy for testing scheduled automations.

Review the test by clicking the View History link, or from the Client workspace.

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

