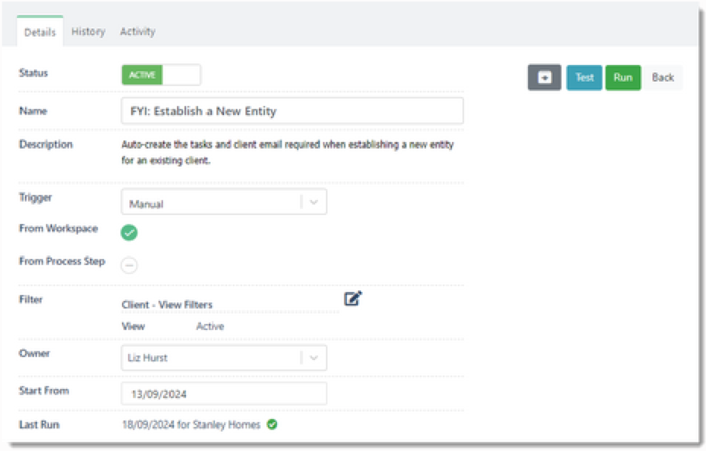
PROCESS AUTOMATION

Establish a New Entity

About this automation:

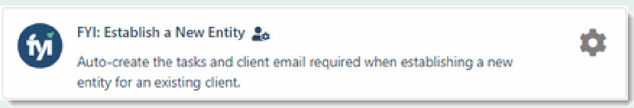
Use this process to auto-create the tasks and emails required when establishing a new entity for a client.

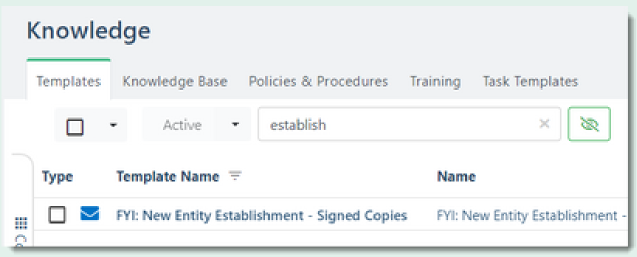


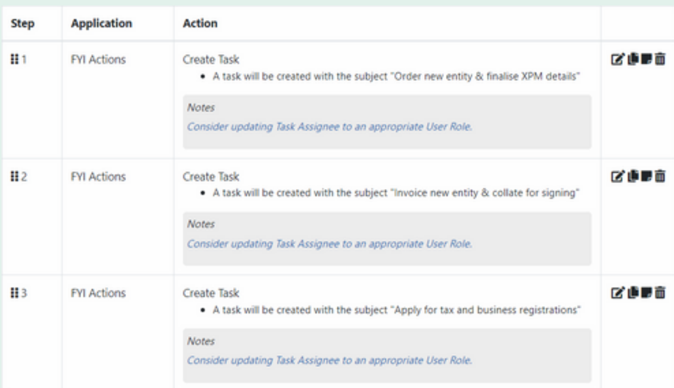
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- New Entity Email Template
- Automation Process Steps

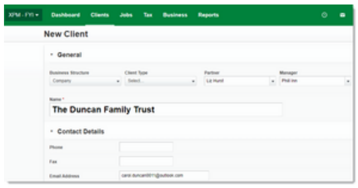






How to import:

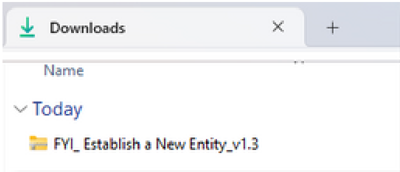
Before you begin - ensure your new client is set up in your practice management software.



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.

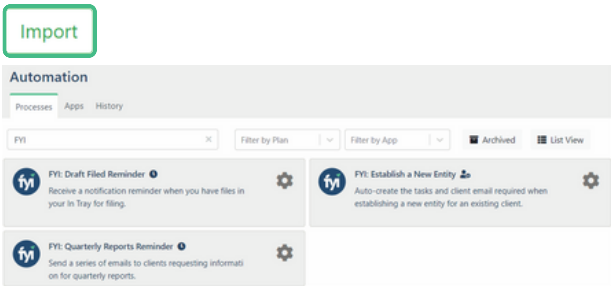


Step 2 - Import the files into FYI

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

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

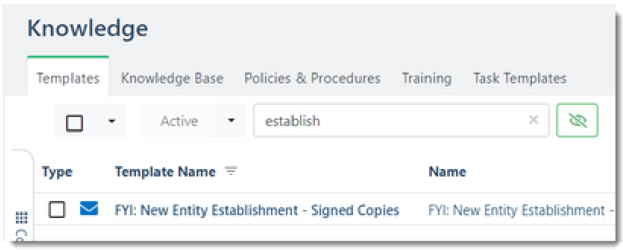
You can also drag and drop the zip file to the Automation list view. The Process and Templates will be imported into FYI.



Step 3 - Review the process

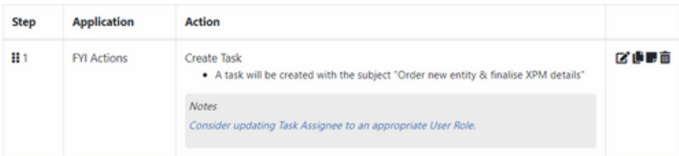
Review the Templates
Locate the templates in **Knowledge - Templates.** The templates will import with the prefix FYI making them easy to locate.

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



Edit and Review Each Process Step
The 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 client workspace to review the test task created.

When ready, set the **Status** to Active. As this will be run for a specific client, it is recommended to run the Automation from the **Client – Processes** tab.

Simply locate your Client and **Run** the process.