

# Company Annual Review Jobs

## Process Automation



### About this automation:

Automatically generate the Annual Company Review job and tasks for your clients each year, while also ensuring that client custom field data is consistently updated.



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

Group: Parker Group Client: Parker Industries

Summary Custom Fields Processes Comments Process History Activity

**Job Details**

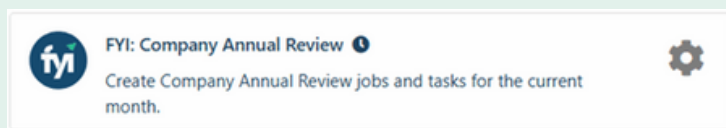
Name	Parker Industries - Company Annual Review 2025
State	In Progress
Number	
Type	Standard
Template	Company Annual Review
Category	Compliance
Cabinet	-
Start Date	04/03/2025
Due Date	24/03/2025
Manager	Olivia Williams
Partner	Mandy Jones

**Tasks**

Status	Subject	Assignee	Due date
<input type="radio"/>	Parker Industries - Complete Company Review	Olivia Williams	11/03/2025

### What's included:

- ✓ Automation Process Steps



Details History Activity

Status: **ACTIVE**

Name: FYI: Company Annual Review

Description: Create Company Annual Review jobs and tasks for the current month.

Trigger: Schedule  
On the 1st day of each month from 1 Feb 2025

Filter: Client - View Filters  
View: FYI: Company Annual Review

Owner: Ben Brown

Start From: 25/01/2025

Last Run: 05/02/2025 for Mama M's Marinades

Next Run: Tuesday, 1 April 2025 03:00

Reset Add Step

Step	Application	Action
1	FYI Actions	Create Job • A job will be created named "[TriggerClientName] - Company Annual Review [now]" date: "[now]" with the state "In Progress"
2	FYI Actions	Create Task • A task will be created with the subject "[TriggerClientName] - Complete Company Review"
3	FYI Actions	Update Job • State will be updated to Completed & Invoiced
4	FYI Actions	Update Client • Company Review Date will be updated to [TriggerClientCustomCompanyReviewDate] date: "[now]" [TriggerClientCustomCompanyReviewDate] + 1

# How to import:

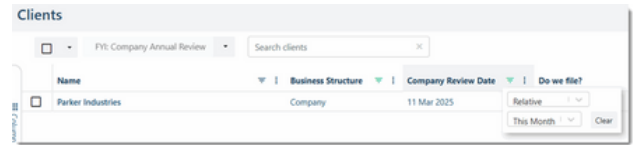
Before you begin, ensure your View has been saved in **Clients** with the following filters:

"Company Annual Review" View

**Business Structure** = Company

Custom Field: **Company Review Date**, filter  
Relative, This Month

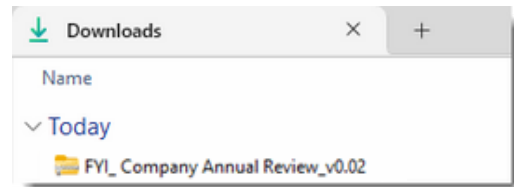
Custom Field: **Do we file**, filter = Yes



## 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.

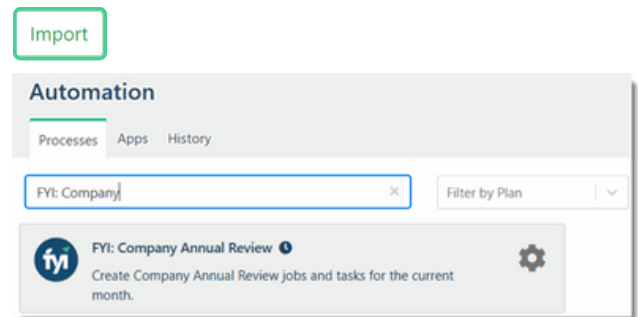


## Step 2 - Import the files into FYI

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

Locate and select your saved "Company Annual Review" file and click **Open** to import the automation.

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



## Step 3 - Review the process

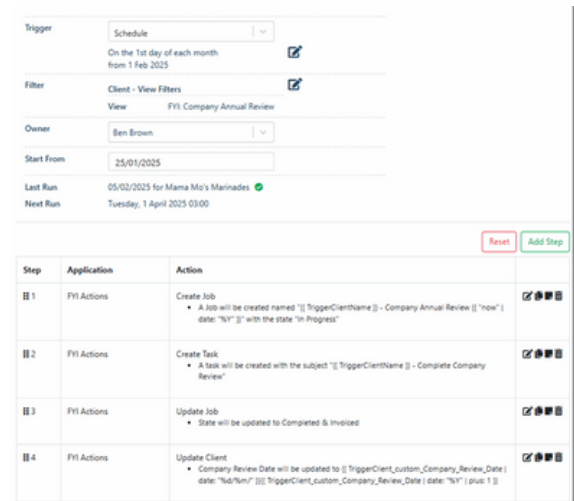
Processes are imported with the **Status** set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the **Company Annual Review** View which is the custom view you created in the Client workspace.

- Review the schedule
- Review the process owner
- Review the process steps

Note: If using Elite, consider adding the additional steps to your process outlined in the article.



## Step 4 - Test and activate

Click the **Test** button to display a list of documents.

Search and select a specific document to run the test for and select **Run Test**.

Go to the Client Workspace - Jobs tab, to locate the Annual Review job, and the Task.

When ready, set the **Status** to Active:

- This automation is set to run automatically on the first day of every month from the commencement date.
- This automation updates the client custom field, Company Review Date, using Merge Fields.

