

Onboarding a New Client (Forms) Process Automation



Elite Plan

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.



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

New Client Details

Client Details

Name *	Business Number	Company Number
Marshall, Frank	12 345 678 910	
For Individuals:		
First Name	Last Name	Other Name
	Robert	
Date of Birth	dd-MM-yyyy	
	dd-MM-yyyy	

Contact Information

Salutation	Email
Mr	client.frank.marshall@outlook.com
Phone	Mobile
(08) 9807-5548	0433 830 454

Physical Address

Address	City

What's included:

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

FYI: Onboard a New Client (Forms Version)

Start a new clients journey on the front foot - auto-create onboarding form, ethical letter, emails and internal tasks for a smooth transition.

New Client Details

Welcome! To set you up as a client, we need some important details about you and/or your entity. The information you provide will be kept strictly confidential and used only for compliance and engagement purposes.

Please complete all sections that apply to you. If something doesn't apply, simply leave it blank. Once submitted, our team will review the details, set up your client record in our system, and be in touch with next steps.

Client Details

Name *	Business Number	Company Number
Marshall, Frank	12 345 678 910	
For Individuals:		
First Name	Last Name	Other Name
	Robert	
Date of Birth	dd-MM-yyyy	
	dd-MM-yyyy	

Contact Information

Knowledge

Templates Policies & Procedures Practice Admin Training Task Templates

Active Search templates

Name	Template Name	Status
FYI: Welcome to Growth Partners	FYI: Welcome to Growth Partners (Forms version)	Active
Client Onboarding (Sample)	Client Onboarding (Sample)	Active
FYI: Ethical Letter Cover Email to Pr...	FYI: Ethical Letter Cover Email to Previous Accountant	Draft
FYI: Ethical Letter to Previous Acco...	FYI: Ethical Letter to Previous Accountant	Draft

Step	Application	Action
#1	FYI Actions	<p>Create Form</p> <ul style="list-style-type: none"> The document will be AutoFiled
#2	FYI Actions	<p>Create Email</p> <ul style="list-style-type: none"> An Email will be created from the "FYI: Welcome to Growth Partners (Forms version)" template The document will be AutoFiled A task will be created with the subject "Form Submission Tracking" <p>Notes</p> <p>Consider updating User Roles for Sender if required.</p> <p>Note: the merge field used for this to share the Form via New Collaborate. If you're not utilising Collaborate review and update the merge field in the Email template and adjust the step send attachments option to Email.</p>
#3	FYI Actions	<p>Alter Document</p> <ul style="list-style-type: none"> Create Form > Form will be filed as "[OriginalFileName]" in the cabinet A task will be created with the subject "Form Submission Tracking" <p>Notes</p> <p>Consider updating the User Role for Assignee on the Task if required.</p>

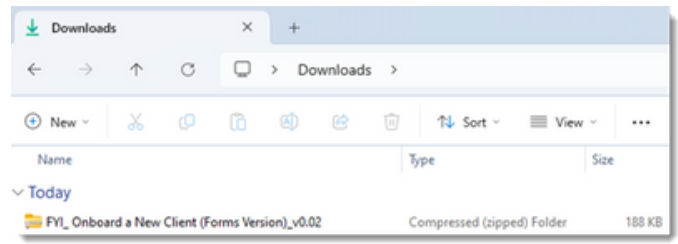
How to import:

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.



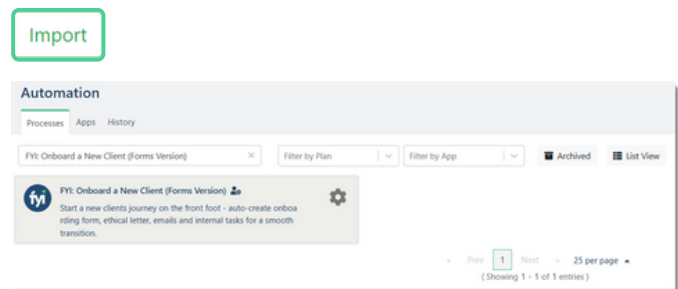
Step 2 - Import the files into FYI

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 (Forms Version)" file and click Open to import the automation.

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

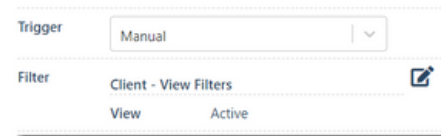
The Process and Templates will be imported into FYI.



Step 3 - Review the process

Set the Filter

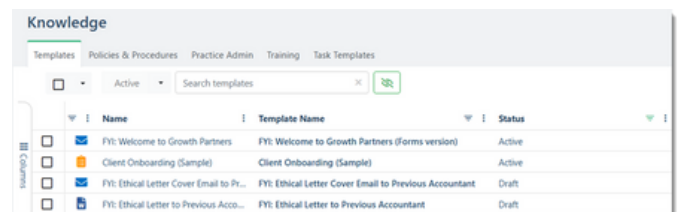
As this process will be run manually for an individual client, set the Filter to Client - View Filters, and the View to Active clients.



Review the Templates

Locate the templates in Knowledge - Templates. The email template will import with the prefix "FYI" and the form template will have "(Sample)" affixed to the name making them easy to locate.

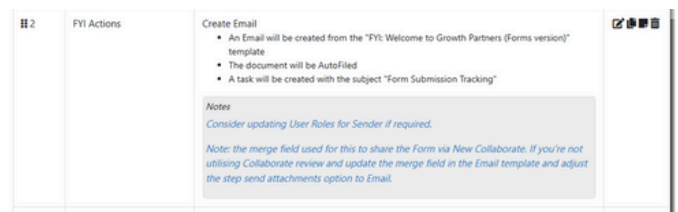
- Review and personalise the imported templates
- Update the template Status to Active.



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. Note: this will send an email to the selected client, consider testing on a sample client to check the end result.

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.

