PROCESS AUTOMATION

Offboard a Client

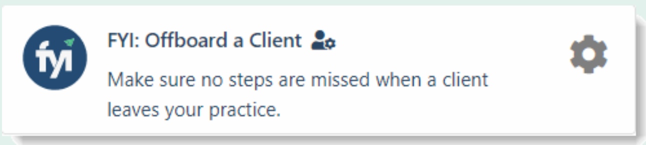
About this automation:

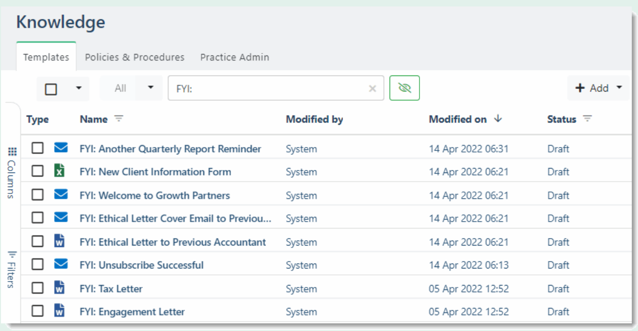
Use this process to streamline client offboarding. Auto-create emails, documents and internal tasks when a client leaves your practice.

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

What's included:

- Ethical Clearance Templates (Email and Word Document)
- Automation Process Steps

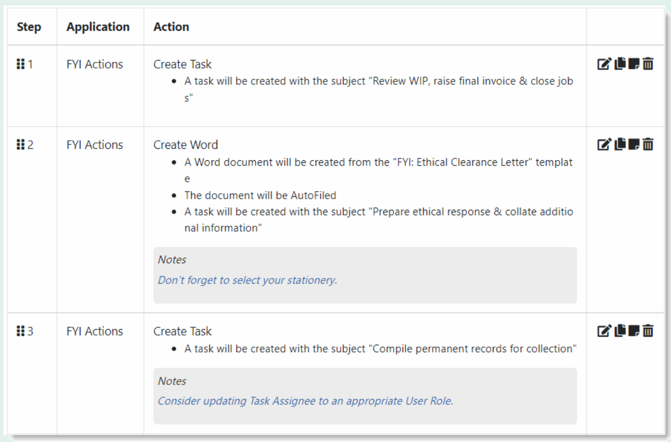




Knowledge

Templates | Policies & Procedures | Practice Admin

Type	Name	Modified by	Modified on	Status
	FYI: Another Quarterly Report Reminder	System	14 Apr 2022 06:31	Draft
	FYI: New Client Information Form	System	14 Apr 2022 06:21	Draft
	FYI: Welcome to Growth Partners	System	14 Apr 2022 06:21	Draft
	FYI: Ethical Letter Cover Email to Previou...	System	14 Apr 2022 06:21	Draft
	FYI: Ethical Letter to Previous Accountant	System	14 Apr 2022 06:21	Draft
	FYI: Unsubscribe Successful	System	14 Apr 2022 06:13	Draft
	FYI: Tax Letter	System	05 Apr 2022 12:52	Draft
	FYI: Engagement Letter	System	05 Apr 2022 12:52	Draft



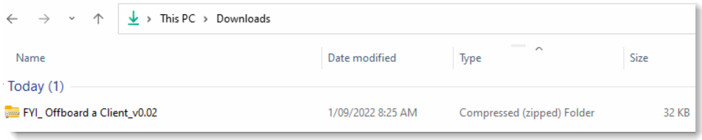
Step	Application	Action
1	FYI Actions	Create Task • A task will be created with the subject "Review WIP, raise final invoice & close job s"
2	FYI Actions	Create Word • A Word document will be created from the "FYI: Ethical Clearance Letter" templat e • The document will be AutoFiled • A task will be created with the subject "Prepare ethical response & collate additio nal information" *Notes* *Don't forget to select your stationery.*
3	FYI Actions	Create Task • A task will be created with the subject "Compile permanent records for collection" *Notes* *Consider updating Task Assignee to an appropriate User Role.*

How to import:

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.



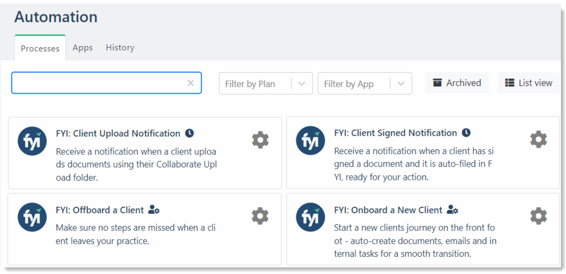
Step 2 - Import the files into FYI

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

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

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

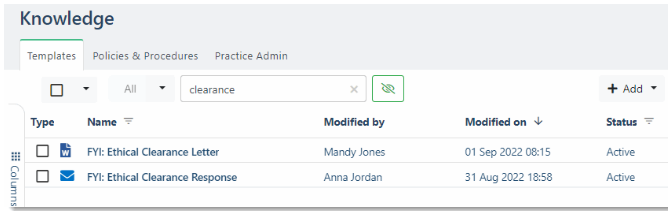
The Process and Templates will be imported into FYI.



Step 3 - Review the process

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 Processes are imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- The schedule is set to Manual
- Review the owner 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 will be run manually for a specific client, it is recommended to run the Automation from the **Client** – **Processes** tab.

Simply locate your process and click **Run**.