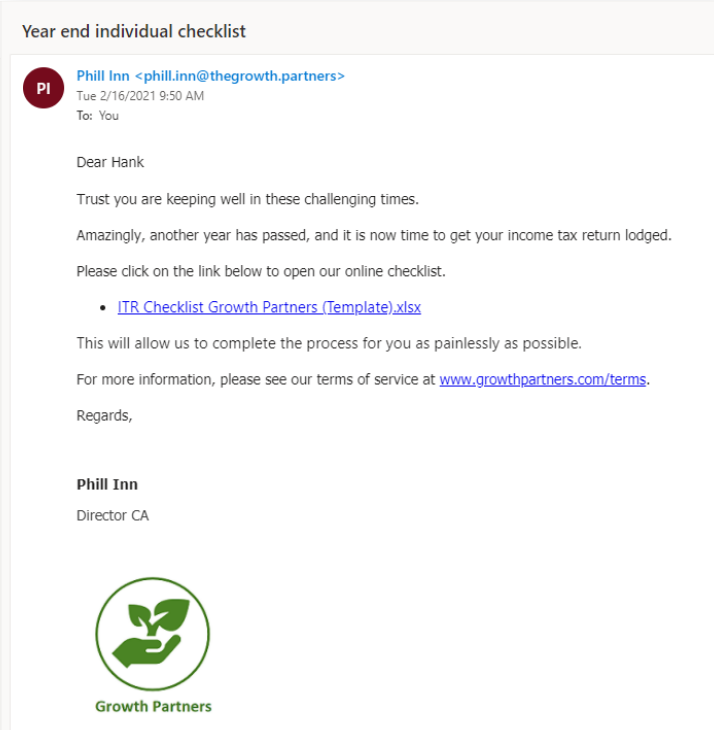
Custom Process Automation
ITR Checklist

Auto-create a high-quality Income Tax Return checklist and send it to your client, in a co-editable format.

Note: To create **Custom Processes** you must be on the **FYI Pro** plan and have the **Collaborate** functionality configured so you can co-edit the ITR Checklist with your client.


Year end individual checklist

PI Phill Inn <phill.inn@thegrowth.partners>
Tue 2/16/2021 9:50 AM
To: You

Dear Hank

Trust you are keeping well in these challenging times.

Amazingly, another year has passed, and it is now time to get your income tax return lodged.

Please click on the link below to open our online checklist.

- ITR Checklist Growth Partners (Template).xlsx

This will allow us to complete the process for you as painlessly as possible.

For more information, please see our terms of service at www.growthpartners.com/terms.

Regards,

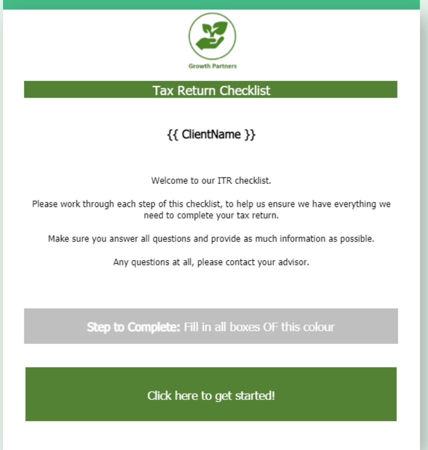
Phill Inn
Director CA

Growth Partners

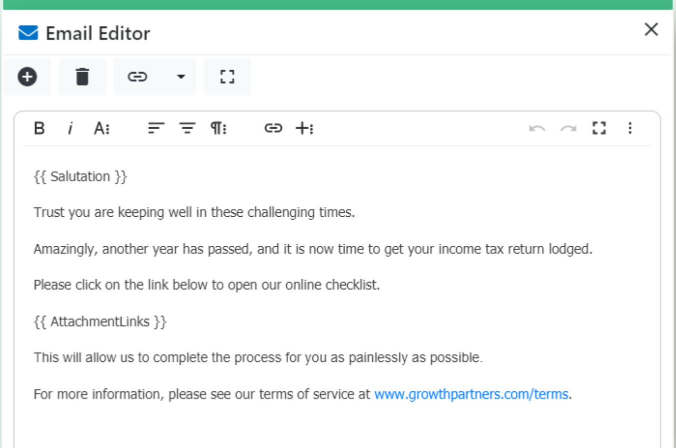
Required Templates:

ITR Checklist Document Template (Word or Excel)
ITR Checklist Email Template

Example Excel Template

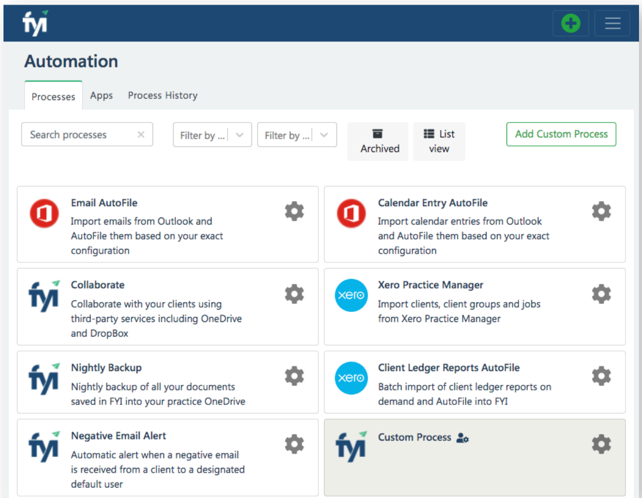


Example Email Template



How to begin

Go to **Automation – Processes** and click on the **"Add Custom Process"** button.

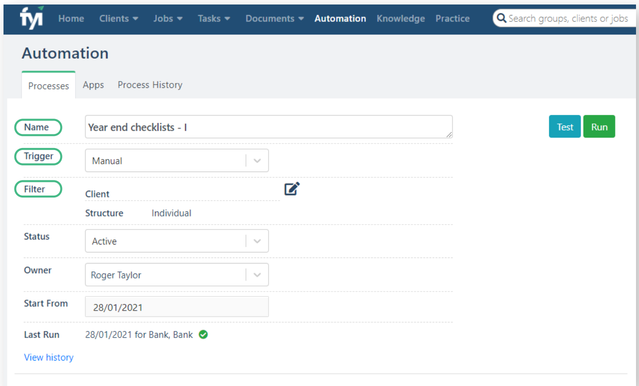


Initial Set Up

Start by giving the automation a **Name** – something that makes it easy to identify in a list.

In this instance, the **Trigger** is set to "Manual". For a more advanced option, you could schedule this process to run whenever a job reaches a certain job state.

The **Filter** determines which Clients or Jobs the process will run for. This is required if you plan to run the process for multiple clients at once.



Step 1: Create and file the Checklist

Select your preferred **Template**. In this example, we've chosen a spreadsheet.

Tell FYI how you would like the document **Named**. In this example, we've chosen the same name as the template.

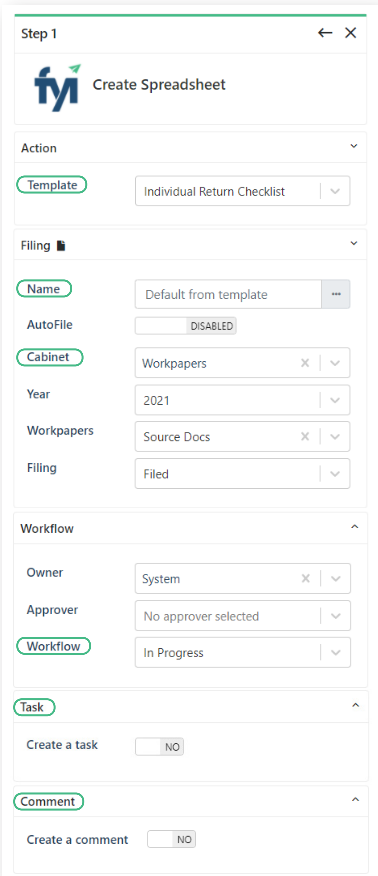
Specify where you would like the document to be filed.

Ensure the **Workflow** status is set to "In Progress" to avoid it being locked as 'read-only'.

Option to assign a task linked to the document. Eg. "Review and populate this ITR checklist based on prior year information."

Option to **Create a Comment** to notify a team member when the document has been generated.

Eg: [Roger Taylor] This ITR checklist has now been generated.



Step 2: Create and file the email, attach the document and send

Select your preferred **Template**. In this example, we've chosen a spreadsheet.

Choose the document you created in Step 1 as the Attachment. Note - **Attachments** will only appear here if they have been generated in a previous step in this process.

Select a **Sender** for the email. This is relevant if the automation is sending the email immediately.

Send Attachment(s) via OneDrive if you want to send a link to a document that can be co-edited by your client.

Set **Attachments as PDFs** to '**NO**' - We want the document to be editable, so do not convert to PDF.

Set Co-edit with client to '**YES**'. This will allow your client to work with you on the document.

Select your preferred approach to **Save or Send**. If you choose to "Send Immediately" please test the email template first to ensure it appears correctly.

Tell FYI how you would like the email **Named** and where you would like it to be **Filed**.

Ensure the **Workflow** status is set to "In Progress" to avoid it being locked as 'read-only'. If drafting the email, you may want to mark the Workflow as "Pending Approval" and set an Approver.

Option to **Assign a Task** linked to this email. Eg. Follow-up Client if no activity on ITR checklist after 7 days.

Option to **Create a Comment** to notify a team member when this email has been generated.

Eg: [Roger Taylor] The ITR Checklist email has now been sent.