

# Marketing Unsubscribe

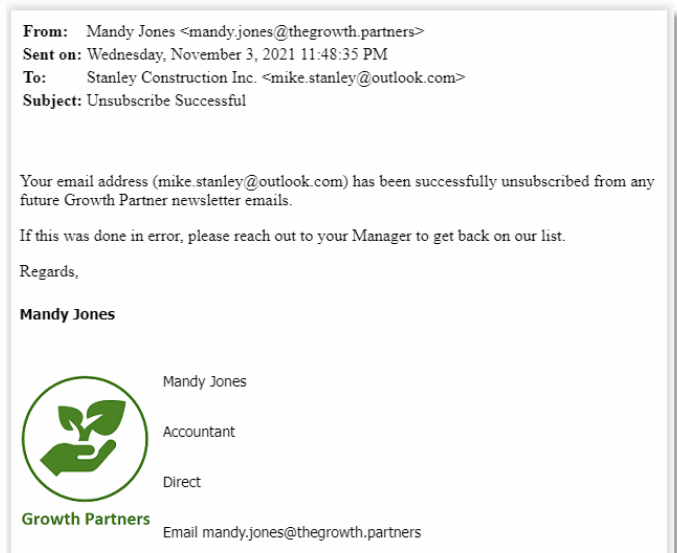


## About this automation:

Use this process to automate the management of unsubscribe requests.

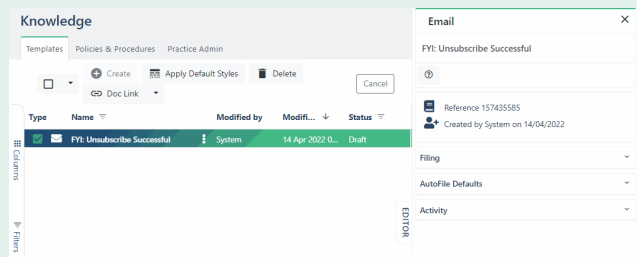
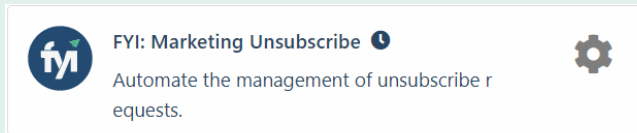


Simply import the sample automation, customise to suit your practice, test and activate!



## What's included:

- ✓ Unsubscribe Successful Email Template
- ✓ Automation Process Steps



Step	Application	Action	
#1	FYI Actions	Update Client <ul style="list-style-type: none"> <li>Opt In will be updated</li> </ul> Notes Confirm the Opt In custom field is set to 'No' option.	📄 🗑️
#2	FYI Actions	Create Email <ul style="list-style-type: none"> <li>An Email will be created from the "FYI: Unsubscribe Successful" template                             <ul style="list-style-type: none"> <li>Created email will be <b>immediately</b> sent</li> </ul> </li> <li>The document will be AutoFiled</li> <li>A comment will be created</li> </ul>	📄 🗑️

## How to import:

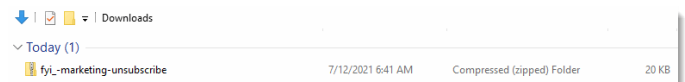
Before you begin - ensure your Marketing Unsubscribe View has been saved in Documents list:

- Opt In Client Custom Field (Drop-down field with "No" option)
- Workflow - Not Started, In Progress & Pending Approval).

### 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.

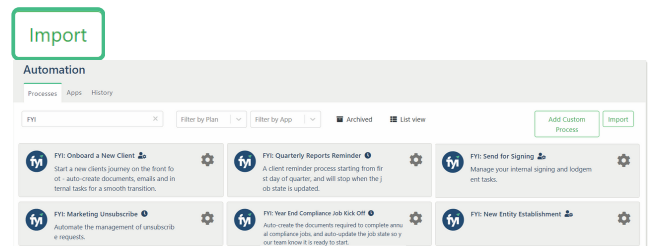


### Step 2 - Import the files into FYI

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

Locate and select your saved "Marketing Unsubscribe" 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

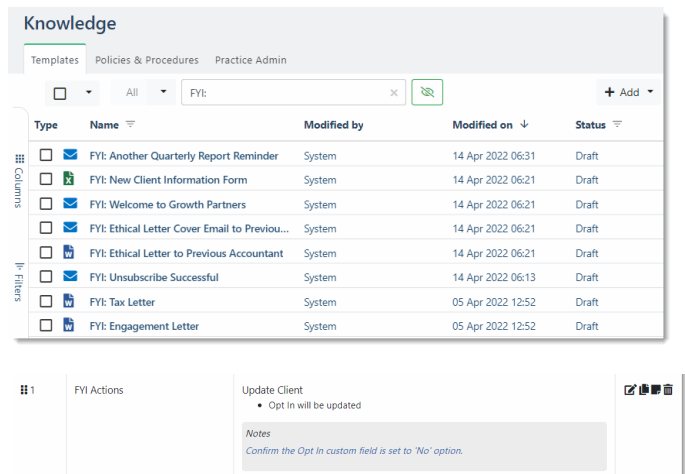
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- 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.

- Review the Filter and select the required View
- 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

You can test a Scheduled Custom Process directly from the Process itself and this can be done while the Process is still "Draft".

Click the Test button to display a list of the Documents and Clients based on the Filter that has been selected.

From the Select Test pop-up, search and select a document to run the test for and select Run Test.

When ready, set the Status to Active.

Document	Client
<input type="radio"/> Unsubscribe	Butler Family Trust
<input type="radio"/> Unsubscribe	Jacobs, Ben
<input type="radio"/> Unsubscribe	Hurst - Testing, Liz
<input type="radio"/> Unsubscribe	Duncan, Carol Elizabeth