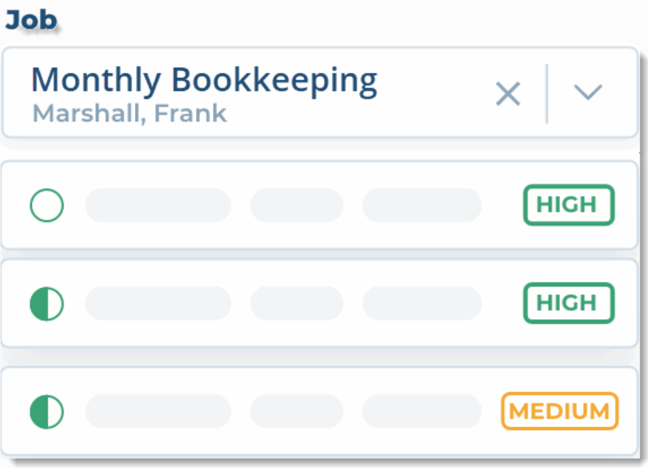
PROCESS AUTOMATION

Monthly Bookkeeping

About this automation:

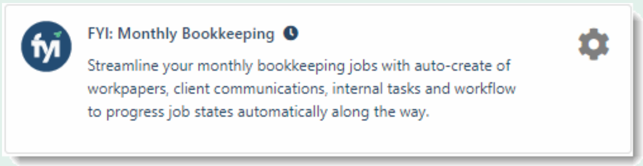
Streamline your monthly bookkeeping jobs and auto-create workpapers, client communications, internal tasks and workflow to progress job states automatically along the way.

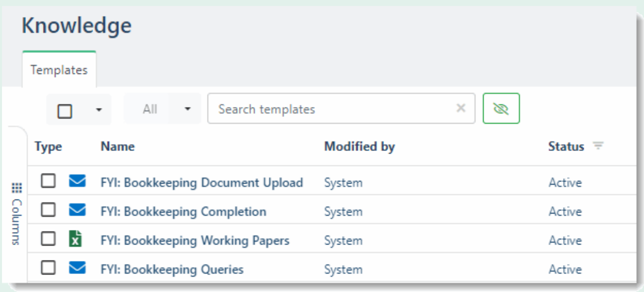


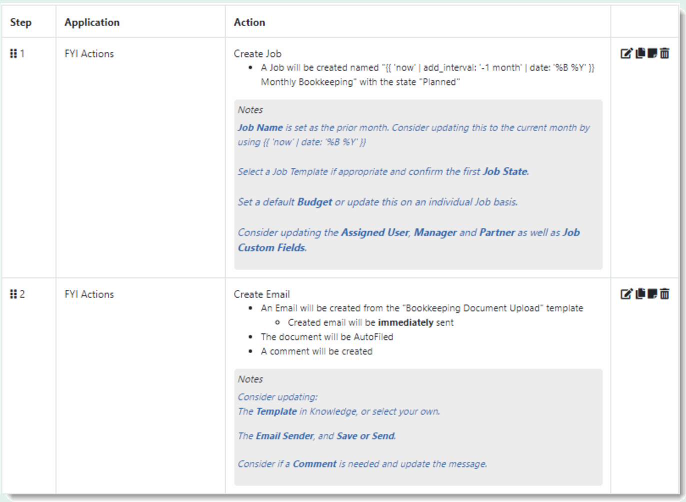
Simply import the sample automation, customise to suit your practice, test and activate!

What's included:

- Client Communication Email Templates
- Bookkeeping Workpapers
- Monthly Bookkeeping Process Steps





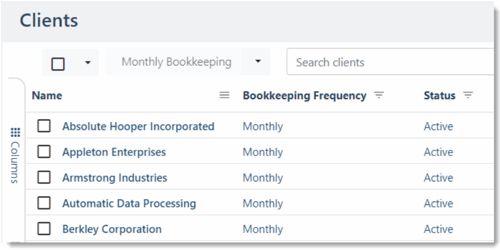


How to import:

Before you begin, ensure your View has been saved.

- 'Bookkeeping Frequency' Custom Field = Monthly
- Status = Active

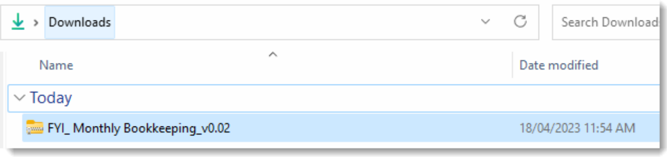
The automation will run for all active Clients with a Monthly Bookkeeping service.



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.

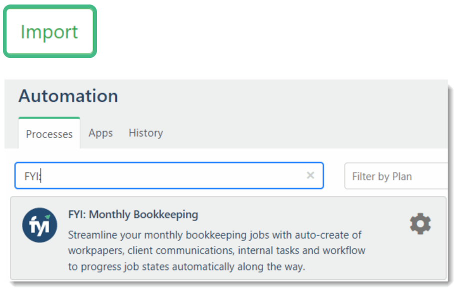


Step 2 - Import the files into FYI

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

Locate and select your saved "Monthly Bookkeeping" file and click **Open** to import both automation.

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



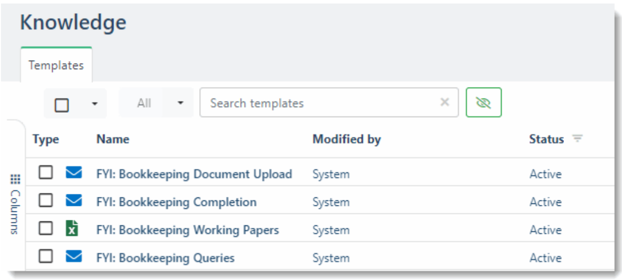
Step 3 - Review the processes

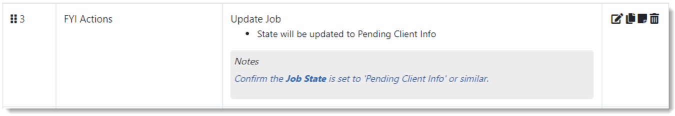
Review the Templates
Locate the templates in **Knowledge - Templates.** The templates will import with the prefix FYI making them easy to locate.

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

Edit and Review Each Process Step

- Update the Filter and select your Monthly Bookkeeping Jobs Clients 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 in "Draft".

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

From the Select Test, search and select a specific client or job to run the test for and select Run Test.

When ready, set the Process to Active.