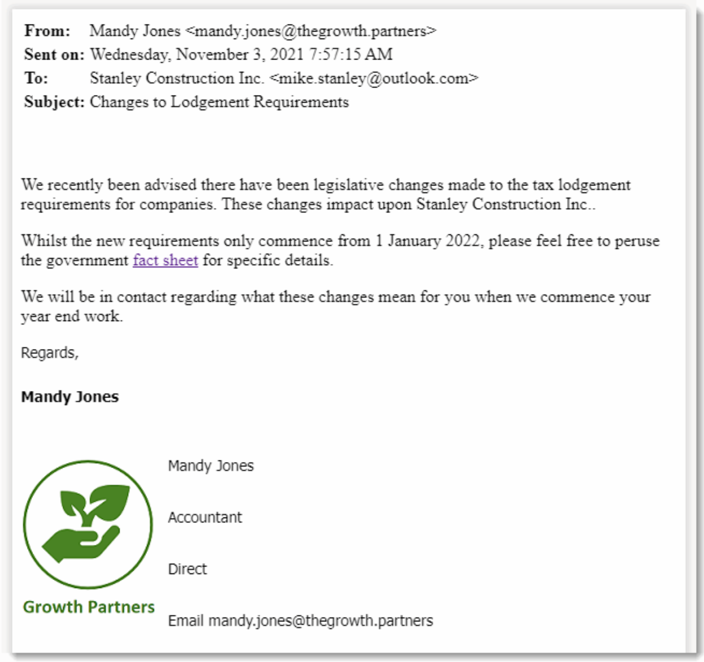
Custom Process Automation

Sending an Email to
a Segmented Client List

Create a custom process automation to send emails in bulk to a filtered client list.

Note: To create Custom Processes you must be on the FYI Pro plan.



From: Mandy Jones <mandy.jones@thegrowth.partners>
Sent on: Wednesday, November 3, 2021 7:57:15 AM
To: Stanley Construction Inc. <mike.stanley@outlook.com>
Subject: Changes to Lodgement Requirements

We recently been advised there have been legislative changes made to the tax lodgement requirements for companies. These changes impact upon Stanley Construction Inc..

Whilst the new requirements only commence from 1 January 2022, please feel free to peruse the government fact sheet for specific details.

We will be in contact regarding what these changes mean for you when we commence your year end work.

Regards,

Mandy Jones

Growth Partners

Mandy Jones

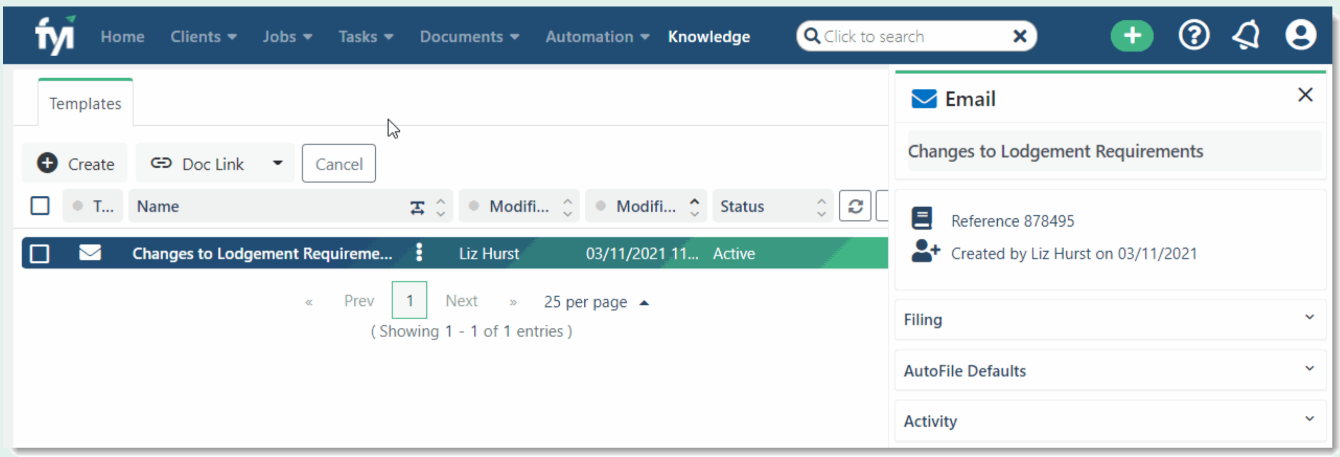
Accountant

Direct

Email mandy.jones@thegrowth.partners

Required before you begin:

Email Template



Create custom process

Go to Automation – Processes and click **Add Custom Process**.

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”.

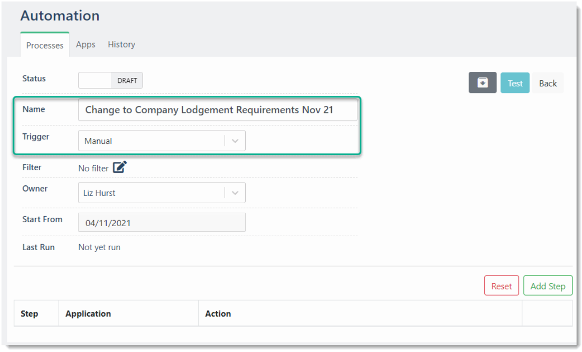
The **Filter** determines which Clients the process will run for.

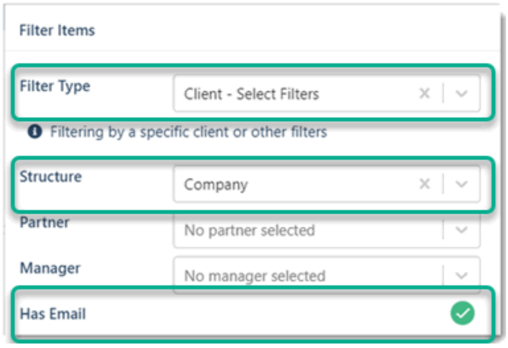
In this example, the **Filter** is set to "Client - Select Filters". This allows you to select from a range of client filters, including the Client Custom Fields.

In the **Structure** field, select "Company". This will filter all clients with a company structure.

As this communication is being sent by email only, click the "**Has Email**" field to select this.

Save your filter.





Add step to create the email

Add step as **Create Email** and select your **Change to Lodgement Requirements template**.

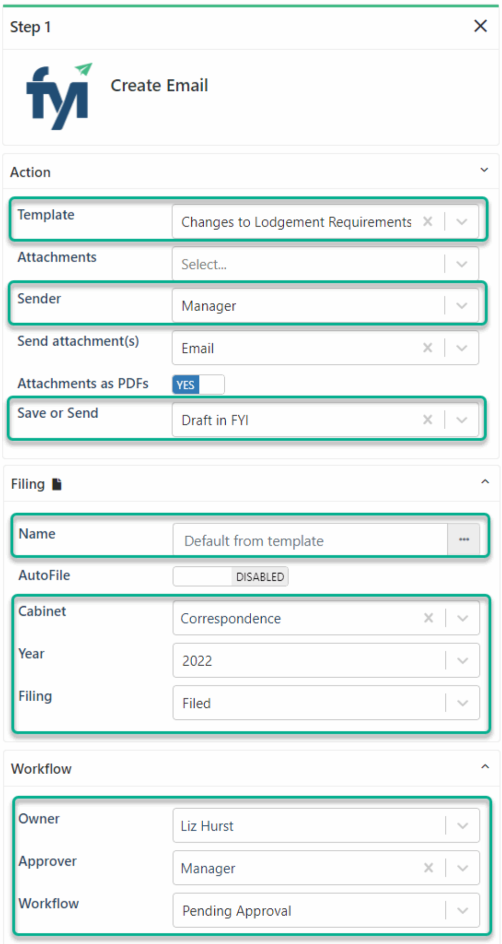
Update the **sender** as required and select **Draft in FYI.**

Rename the subject of your email if required and review the **filing details.**

In this example, the email communication will be reviewed by the Client Manager prior to sending.

In the Workflow section, update the **Approver** to "Manager", and set the **Workflow** to "Pending Approval".

Save your process step.



Test a manual custom process

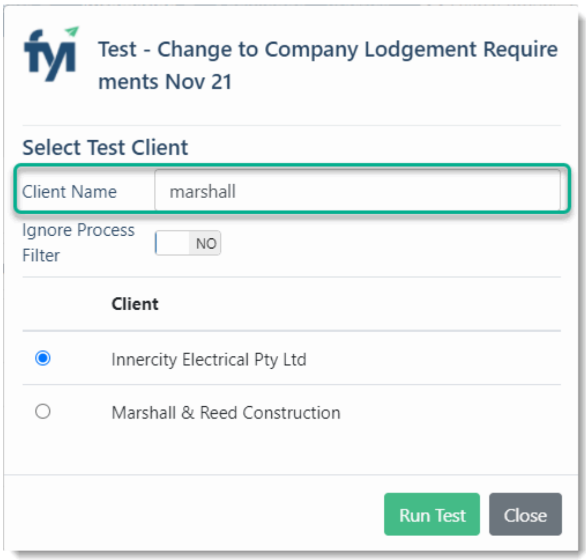
When setting up a Custom Process, it is very important to test it to ensure it is working as expected.

Click the **Test** button to display the Select Test pop-up. Your list of the Clients will display based on the filters you have selected.

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

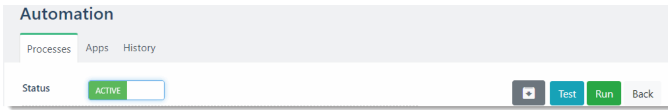
Select **Run Test.**

You can navigate to documents list in your client's workspace to review the test email.



Setting the Status to Active

When you are satisfied with the test result, set the **Status** of the process to **Active**.



Running the Process

It's now time to run your custom process.

As you are sending this to a segmented client list, it can be run directly from **Automations - Processes** by your FYI Administrator or a user with Automations permissions.

Click the **Run** button.

A list of Clients displays as per the Filter applied. This shows a count of the number of clients it will run for.

Before proceeding, always check this is what you are expecting

To run the process, click **Run.**