



## Please ensure you complete the following prior to your InRealLife workshop



### Configure Practice Activity Automations

Ensure you have all Practice Activity automations configured and activated in your platform.

[Download & Activate](#)



### Integrate & Activate Xero Tax

Ensure your Xero Tax app (where appropriate) is integrated and your Xero Tax automation enabled.

[Integration Details](#) | [Automation Details](#)



### Integrate & Activate Corporate Affairs

Integrate your corporate affairs app (where appropriate) and enable the corresponding corporate affairs automation.

[Integration & Automation Details](#)



### Import Automations from the Library

Ensure the following automations are imported to your platform. We will run through these in the session on the day together.

[Birthday Wishes Automation](#) | [Company Annual Review Automation](#)



### Create Custom Fields

The following custom fields must be created in your platform to configure the automations successfully:

- Field Name: Birthday Reminder (or your desired name)  
Applies to: Client  
Type: Date
- Field Name: Company Annual Review (or your desired name)  
Applies to: Client & Job  
Type: Date
- Field Name: Job Budget Tracking (or your desired name)  
Applies to: Job  
Type: Decimal



### Export a Client List

Export a small list of clients in CSV format from your client list. When exporting ensure you have the **FYI Client ID field** included, we also recommend the head client for the group only for our example.

This file will be used in the session to import and populate services custom fields. Please find recommendations for this on the next page.

# Reference material and resources that will be used during your InRealLife workshop



## Recommended Service Matrix Custom Fields

During your session we will be importing information to create a service matrix in your Client List. The custom fields we will be using for this import are as follows:

- Field Name: Tax  
Applies to: Client & Job  
Type: Dropdown  
Dropdown options: Yes, No, Declined
- Field Name: CFO  
Applies to: Client & Job  
Type: Dropdown  
Dropdown options: Yes, No, Declined
- Field Name: Financial Planning  
Applies to: Client & Job  
Type: Dropdown  
Dropdown options: Yes, No, Declined
- Field Name: Bookkeeping  
Applies to: Client & Job  
Type: Dropdown  
Dropdown options: Yes, No, Declined
- Field Name: Advisory  
Applies to: Client & Job  
Type: Dropdown  
Dropdown options: Yes, No, Declined

Please note you may make your own variations to these fields. For the workshop walk through feel free to select just one to begin with so you can experience the CSV import process.



## Merge Fields (used in session)

Keep the following handy for on the day use.

Please copy paste the below merge field when prompted in your workshop session, ensure you select the field appropriate to your plan:

**Elite:** `{{ TriggerJobActualAmount | divided_by: TriggerJobBudgetAmount | times: 100 | round: 2 }}`

**Pro:** `{{ TriggerJobActualHours | divided_by: TriggerJobEstimatedHours | times: 100 | round: 2 }}`

Company Review Date: `{{ TriggerClient_custom_Company_Review_Date | date: "%d/%m/" }}{{ TriggerClient_custom_Company_Review_Date | date: "%Y" | plus: 1 }}`