

Holiday Office Closure Email

Process Automation



About this automation:

Use this process to notify all your clients about your holiday office closure and wish them a happy holiday period.

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

From: Cathy Woods <cathy.woods@thegrowth.partners>
Sent on: Tuesday, December 2, 2025 11:52:13 PM
To: mary.watson.client <mary.watson.client@gmail.com>
Subject: Wishing you a very Happy Holidays M

Hi M,

Please note that our office will be closed on **22nd December to 2nd January**, reopening on **5th January**.

Our team will be taking a short break for the holiday period. During this time we will have limited access to email. If an urgent matter arises, please contact **admin@growth.partners** and we will respond as promptly as possible. All other enquiries will be addressed when we return.

We would like to take this opportunity to thank you for choosing our firm and for the trust you have placed in us throughout the year. We wish you a restful and enjoyable holiday season and look forward to supporting you again in the year ahead.

Regards,

Cathy Woods



Cathy Woods
 Junior Accountant CPA
 Direct
 Email cathy.woods@thegrowth.partners

What's included:

- ✔ Office Closure Email Template
- ✔ Automation Process Step



FYI: Holiday Period Out Of Office Email 

This process will create and send an email to all clients to communicate holiday office closure

Knowledge

Template Name	Name	Modified	Modified
FYI: Happy Holidays Office Closure Email	Wishing you a very happy holidays & salutations	Cathy Woods	02 Dec 2025 14:11

Email

Template Name: FYI: Happy Holidays Office Closure Email

Name: Wishing you a very happy holidays & salutations

Reference: 1420548519

Created by: Cathy Woods on 02/12/2025

Filing:
 AutoFile Defaults:
 Activity:

Step	Application	Action
11	FYI Actions	<p>Create Email</p> <ul style="list-style-type: none"> • An Email will be created from the "FYI: Happy Holidays Office Closure Email" template <ul style="list-style-type: none"> ◦ Created email will be immediately sent • The document will be AutoFiled <p><i>Notes</i></p> <p><i>Review the template and sender details, consider using a user role if appropriate. Note, the sender's signature will apply to the email.</i></p>

How to import:

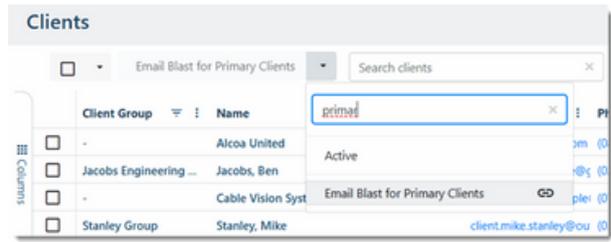
Before you begin - ensure your Client View has been saved in Client list. We recommend using a Primary Client list to ensure each client receives one email. For more on how to configure this view refer to [this article](#).

Step 1 - Save the import file locally

The first step is to download the zip file provided.

[Click here to download.](#)

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

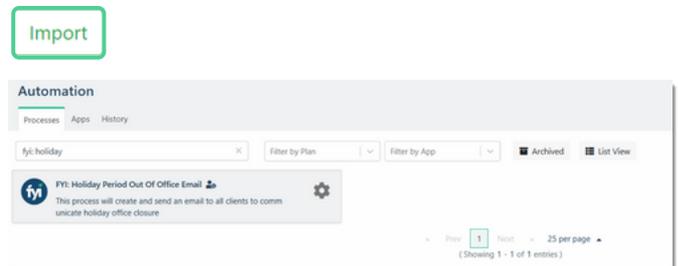
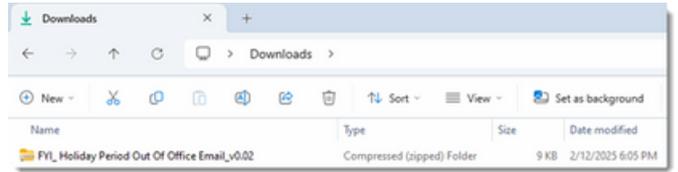


Step 2 - Import the files into FYI

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

Locate and select your saved "Holiday Period Out Of Office Email" 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.



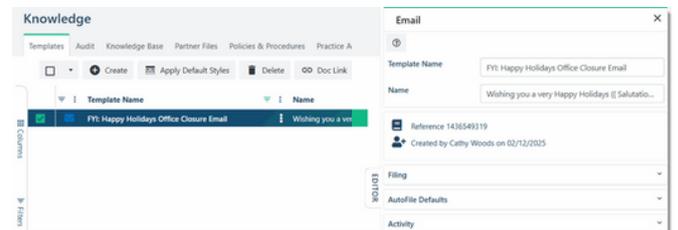
Step 3 - Review the process

Review the Template
Locate the template in Knowledge - Templates.
The template 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	Application	Action
1	FYI Actions	<p>Create Email</p> <ul style="list-style-type: none">• An Email will be created from the "FYI: Happy Holidays Office Closure Email" template• Created email will be immediately sent• The document will be AutoFiled <p>Notes</p> <p>Review the template and sender details, consider using a user role if appropriate. Note, the sender's signature will apply to the email.</p>

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. Note: this will send an email to the selected client, consider testing on a sample client to check the end result.

When ready, set the Status to Active.

