Satterley Training & Consulting
Premier Training for Accounting Professionals

Client On-boarding Automation Worksheet

Task	Step # in Process	App used (or manual process)	Integrations (does this app integrate with another step in the process)	Integration Notes	On Zapier	On other platform (Microsoft Flow, Integromat, etc.)	Notes
Proposal							
Contract							
Engagement Letter							
Retainer / Deposit							
Client portal							
Set up client in billing system							
Set up client in workflow system							
Set up initial client appointment							
Request banking access / passwords							
Set up client in document management system							
Set up files / folders							
Request permanent file documents							
Request source documents							