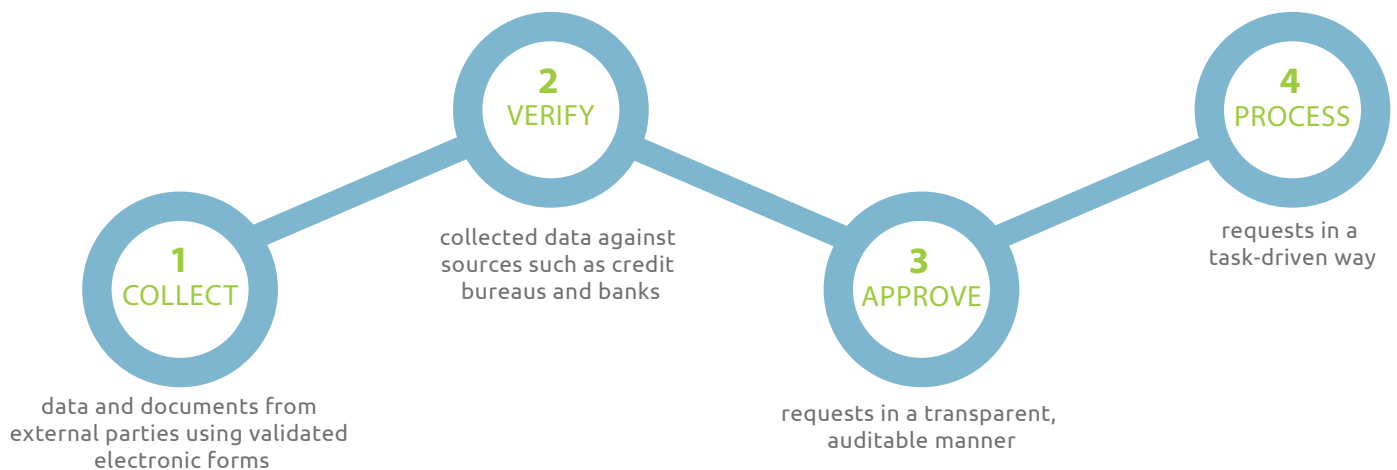


Autopilot ►

# THE EASIEST WAY TO ON-BOARD NEW CLIENTS.

Autopilot's cloud-based solution is one of the most agile workflow management systems around. It's the perfect tool to help any business streamline their processes - make them faster, more efficient and far easier to manage - **it's especially good for on-boarding new clients.**



► **On-boarding new clients with Autopilot**

In this Case Study we take a look at how Autopilot made on-boarding new clients simpler, faster and more efficient for accounting firm Gallaway & Associates.

**Gallaway & Associates is a progressive Johannesburg-based accounting firm who provide financial services to clients across the country.**



**Gallaway  
& Associates**  
Chartered Accountants

When they were referred to Autopilot they had just implemented a suite of cloud-based technologies to help modernise their practice processes. Their aim was to enable their clients to access financial information from tablets or smart devices as and when they needed it, efficiently and securely.

Despite all the new systems they were still on-boarding new clients the old fashioned way – manually. This process was taking huge amounts of time and causing a number of headaches.

What they were after was a simple, easy-to-implement solution for on-boarding new clients into their accounting practice, quickly and efficiently.

The solution would need to integrate seamlessly into their existing systems, notably XERO accounting software. It would also need to effortlessly and accurately manage the flow of documentation between new clients, themselves and the various cloud-based technologies they were using to run their business.

Of paramount importance to Gallaway was the need to simplify the on-boarding process for new clients. They wanted to implement a process that did not require the usual email chain to track and manage the information required for a setup.

**They needed Autopilot.  
And they needed it fast.**

## Autopilot Approach



The Gallaway request provided us with the perfect opportunity to showcase our ability to develop workflow solutions quickly and effectively.

Our Co-pilot team engaged with them to discuss their requirements to ensure our solution met their needs. Accuracy of workflow, integration with existing systems, data tracking and speed of delivery were important considerations for them.

Our Co-pilot team were then able to use one of our existing workflow templates and customise it to fit the Gallaway needs perfectly.

In no time Gallaway had a customised, fully-integrated, fully-tested workflow system managing the on-boarding of new clients and the flow of information between their various suppliers and systems.

Here's a quick overview of the new client on-boarding solution that we implemented for Gallaway.

1

### CLIENT ENTERS DETAILS

The Autopilot 'New lead' form is embedded within the public website.

The screenshot shows the Gallaway & Associates website with a 'REQUEST DETAILS' form. The form fields include: Requested info, Please describe, Please, Contact Last Name, Business, Email, Mobile Number, and Page. The form is titled 'REQUEST DETAILS' and has a 'Request Sub-Proprietor' field at the bottom.

### GALLAWAY NOTIFIED

2

On submission an email is sent to Gallaway, and a task is assigned to follow up with the lead.



3

### CLIENT ACCEPTS PROPOSAL

The screenshot shows the Autopilot 'I'M DONE' confirmation screen. It includes a message: 'On submission your request will be sent to Hannes Bantjes to complete the Set up client in payfast task.' There are also fields for 'Contact Last Name' (Bantjes), 'Business' (Personal/Sole Proprietor), and 'Subscription amount per month' (100.00). The screen also shows a 'More options' section with links to 'Save progress', 'Send proposal', 'Review and change', 'Export the request', and 'Cancel the request'.

4

CLIENT  
ENTERS  
DETAILS ON  
PAYFAST

PAYFAST DETAILS

The PayFast subscription has been set up correctly.

INVOICE DETAILS

Invoice Contact name \*  
Jean Bantjes

Invoice Contact Email \*  
jean@autopilot.co.za

Address Line 1 \*  
62 Bloubaard

City \*  
Wellington

VAT number

Postal Code \*  
7655

5

GALLAWAY  
ENTERS CLIENT  
DETAILS ON  
XERO

Create an invoice in Xero

Invoice to \*  
Jean Bantjes

Invoice to Email \*  
jean@autopilot.co.za

Address Line 1 \*  
62 Bloubaard

City \*  
Wellington

Postal Code \*  
7655

VAT number

Invoice Line Items

Account	Item	Description	Quantity	Unit Price	Amount
200 - Sales	Choose...	Accounting & Business	1	15	15

Create the invoice in Xero

6

CLIENT IS NOW  
ON-BOARDED  
AND RECEIVES  
WELCOME NOTE

Done! Thank you

Hannes Bantjes will automatically be notified that your information is submitted - you don't have to do anything more.

Want to transform the way your company collaborates on document-driven tasks and business routines?

Put your business on Autopilot ►

**Today, with Autopilot effortlessly managing the on-boarding of their new clients, Gallaway is able to run their practice more efficiently and more accurately – with less time wastage and far less stress.**

Autopilot has been seamlessly integrated into their existing systems, saving them time and ensuring that all requests, data and information relating to new clients is visible and clear in an easily accessible audit trail.

#### IN SHORT AUTOPILOT HAS BENEFITED GALLAWAY IN THE FOLLOWING WAYS:

- Quicker on-boarding of new clients.
- More accurate information transfer.
- Effortless integration into existing systems.
- Easily accessible data tracking.

That's Autopilot. Doing what it does best.

Making work flow faster, effortlessly and more accurately.