Automating the processing of IiV registrations

Workflow

- Open client registration form (word doc)
- Open registered orgs spreadsheet

In registered orgs excel spreadsheet:

- Insert new row into alphabetically ordered organisations
- Copy org name from registration form into 1st column of new row
- Update renewal number if applicable in reg orgs
- Update membership field
- Update days field
- Copy area of work from registration form into Sector field
- Open browser and search for organisation name + twitter
- Copy and paste twitter handle from results into reg orgs
- Copy and paste region from registration form into reg orgs region field
- Fill in UK wide if applicable
- Copy first and second name from registration form into contact field
- Copy e-mail address from registration form into email field
- Copy phone number from registration form into phone field
- Fill in assessor name
- Work out lead assessor name from assessor name and populate field
- Get date modified from registration form and input into date registered
- Insert today's date in contract sent
- Input price of sale into price field
- save spreadsheet

In sales tracker spreadsheet (excel):

- Open sales tracker
- Insert new row into alphabetically ordered organisations
- Copy org name from registration form into 1st column of new row
- Copy sale value from registered orgs into price charged field
- Same with number of days
- Copy discount from reg orgs into relevant field in sales tracker
- Input month of sale and current FY quarter
- Input organisation sector type
- Select organisation income band field from info on registration form
- If organisation volunteer numbers > 1000 on registration form, input field for vol numbers > 1000
- choose New or Renewal application from reg orgs
- select Renewal and Member or not from registered orgs

- Complete the 4 stages of work to be expected fields with the following timeframes from point of application:

  - workshop: + 2 months
  - SA/DP: + 5 months
  - assessment: + 14 months
  - report: + 15 months

- save spreadsheet

In Assessor Agreement template (word doc)

- Open assessor agreement template
- Insert assessor name, in bold
- Insert organisation name from client registration form, in bold
- Input number of volunteers and roles from registration form
- Input number of sites from client registration form
- Input postcode from client registration form
- Insert renewal number if applicable
- Complete breakdown of days table with following information:
  - Total number of assessment days allocated
  - Fill in fees for each stage of work + total
  - Input the current month for invoice & contract sent field
  - workshop: + 2 months
  - SA/DP: + 5 months
  - assessment: + 14 months
  - report: + 15 months

- save template

In client contract

- Open either new sale or renewal contract template
- Find and replace all instances of XXX with organisation name
- update vol numbers, roles and sites from client registration form into contract
- update cost and number of days from reg orgs sheet
- copy and paste timelines from assessor agreement form
- insert current date on page 6
- save file
- export to PDF

Workflow completed