



THE WORLD'S
MOST AUTOMATED
**DOCUMENT MANAGEMENT
PLATFORM**



FYI is an online document management and automation engine, purpose-built for accountants.

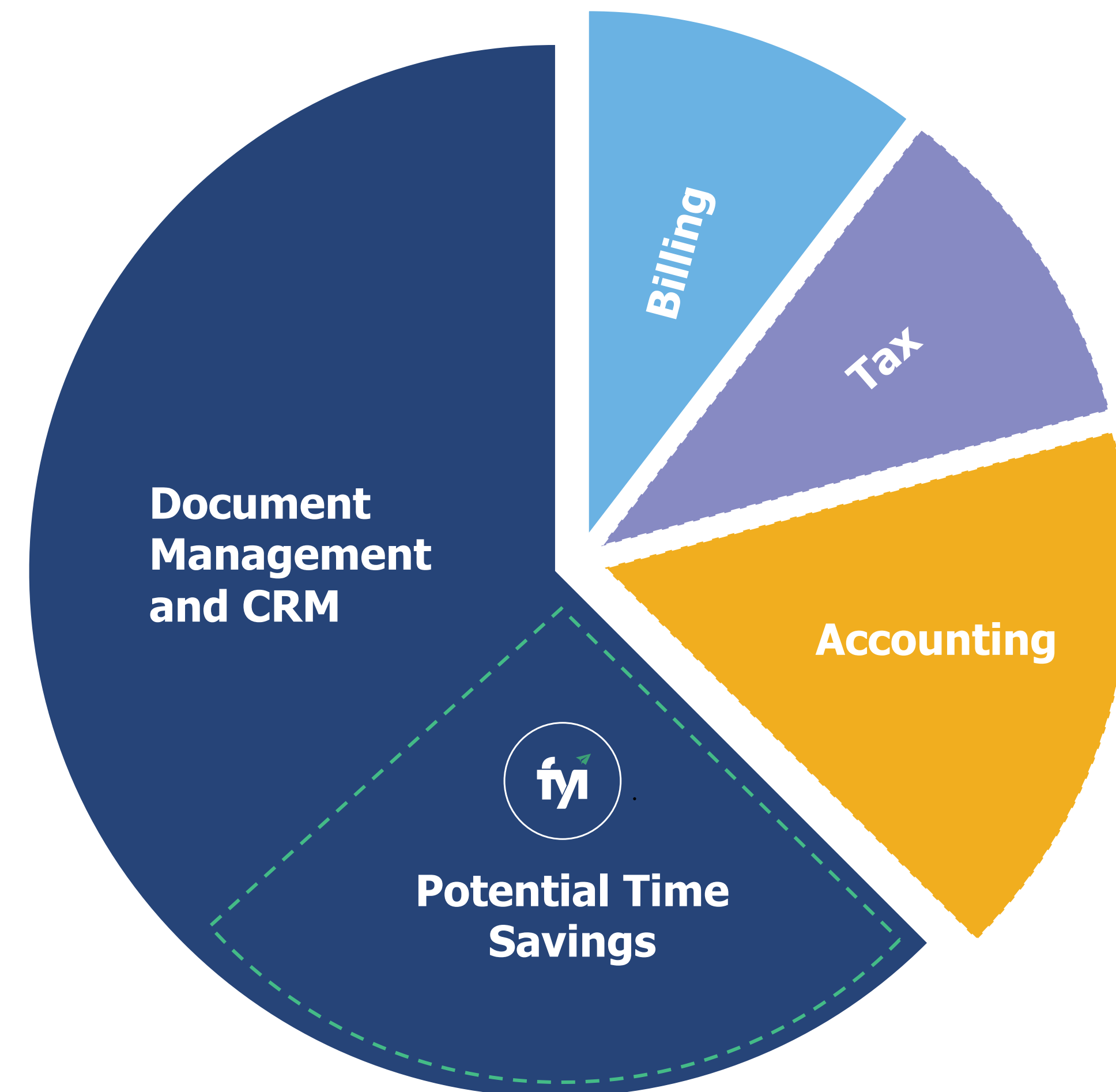
The screenshot displays the FYI web application interface. At the top is a dark blue navigation bar with the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this is a secondary navigation bar with tabs: In Tray (36), My Recent, My Tasks (11), My Jobs (0), Delegated Tasks (14), and My Edits (8). A 'Select' button and a 'Search documents' input field are located below the tabs. Below the search bar are filter buttons for 'Type', 'Name', 'Client', and 'Year'. The main content area is a table listing documents with columns for document type, name, client, and year.

Type	Name	Client	Year
Word	Session FYI007 - Bulk Importer.docx	Ellya, Naomi	2018
Email	2 people	Ellya, Naomi	2019
Email	123 - attachment	Energizer Holdings	2019
PDF	Marshall Family Trust Tax Return 2018.pdf	Marshall, Julia	2019
Excel	2018 fbt workpapers.xlsx	Marshall, Frank	2019
Excel	2018 bas & ias preparation smart workpapers.xlsx	Marshall, Frank	2019
Excel	2018 annual leave planner.xlsx	J.B. Hunt Transport	2019
Excel	2017 accounts & tax smart workpapers - Micro.xlsx	Aptar Group	2019
Excel	2017 accounts & tax smart workpapers Health.xlsx	O'Brien	2019
Excel	2016 trust smart workpapers.xlsx	Brisbane Cattle Company.	2019
PDF	Daily Mail 3	Stone, Sam	2019

At the bottom right, there is a pagination control showing 'Prev', '1', '2' (highlighted), and 'Next'.



We're on a mission
to halve the time spent on
compliance and administration
through automation.



TIME SPENT BY ACCOUNTANTS

Source: FYI Compliance Time and Motion Study 2018



KEY DRIVERS FOR OUR ROADMAP

Planning and workflow

Job scoping, capacity planning,
reviewing milestone progress

Administration

General client admin and job
maintenance, updating client
records, time recording, billing and
debt collection

Gathering, filing and sharing data

From emails, attachments, client
storage, scanners, integration apps
and more

**Highly targeted opportunities
to save time, improve service
and increase the productivity
of accounting practices,
globally.**

Completion and lodgement

Compiling final reports, sending to client
for signing, lodging returns and processing
assessments

Preparing workpapers

Searching and retrieving documents
multiple times a day from numerous
sources, comparing and cross-linking to
substantiate amounts

Review and Supervision

Liaising with your team throughout the
job with ongoing delegation and
tracking of tasks

Client collaboration

Corresponding with clients, chasing
information via emails, meetings
and phone calls



OUR FOUNDATIONS



**SECURITY AND
RELIABILITY**



**PROVEN RETURN
ON INVESTMENT**



**EASY
ONBOARDING**



PROTECT YOUR DOCUMENTS IN THE CLOUD



SECURITY AND RELIABILITY



**Highest levels of
data encryption**



**AWS Well-Architected
Framework**



**Microsoft Windows
authentication**



**24/7 data
protection**



**ISO27001:2019
Certified**



Tier 1 Hosting



**ATO Digital Service
Provider**



**Regular load and
penetration testing**



**PROVEN RETURN
ON INVESTMENT**

SHAVE MINUTES OFF EVERY JOB

- Save more than 2 hours **for every compliance job**
- Boost productivity by 20% using FYI's core feature set
- Even more to gain as we continue to roll out new features



PROVEN TIME SAVINGS

JOB STAGE	TIME SPENT	FYI TIME SAVING FEATURES	MINUTES SAVED
Planning and workflow	6%	<ul style="list-style-type: none">• Job management	
Gathering, filing and sharing information	23%	<ul style="list-style-type: none">• Email AutoFile• Custom Processes	20 mins
Preparing workpapers	27%	<ul style="list-style-type: none">• Document automation• Cross linking• Search and Retrieval	30 mins
Review and supervision	9%	<ul style="list-style-type: none">• Document workflows	10 mins
Collaboration with clients and team	18%	<ul style="list-style-type: none">• Task management• Collaborate	15 mins
Completion and lodgement	9%	<ul style="list-style-type: none">• Digital signatures• Email templates	15 mins
Administration	8%	<ul style="list-style-type: none">• Timesheets	30 mins
TOTAL	100%		120 mins



PLATFORM FEATURES



**Email
management**



**Document
automation**



**Search and
retrieval**



**Client
management**



**Task
management**



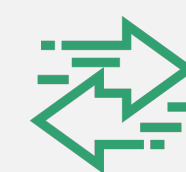
**Jobs and Time
management**



**Document
workflows**



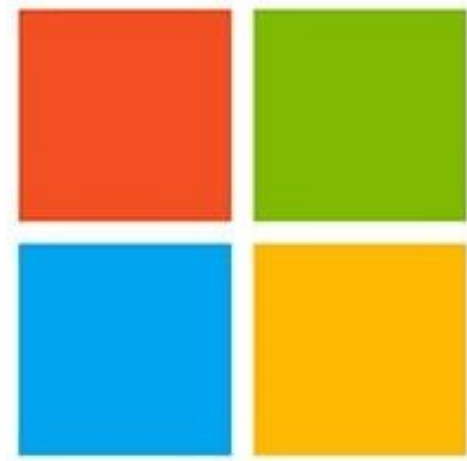
**Client
collaboration**



**Process
automation**



PLATFORM PRE-REQUISITES



Microsoft

Deep integration with **Microsoft 365** delivers intelligent auto-filing, document automation and added security



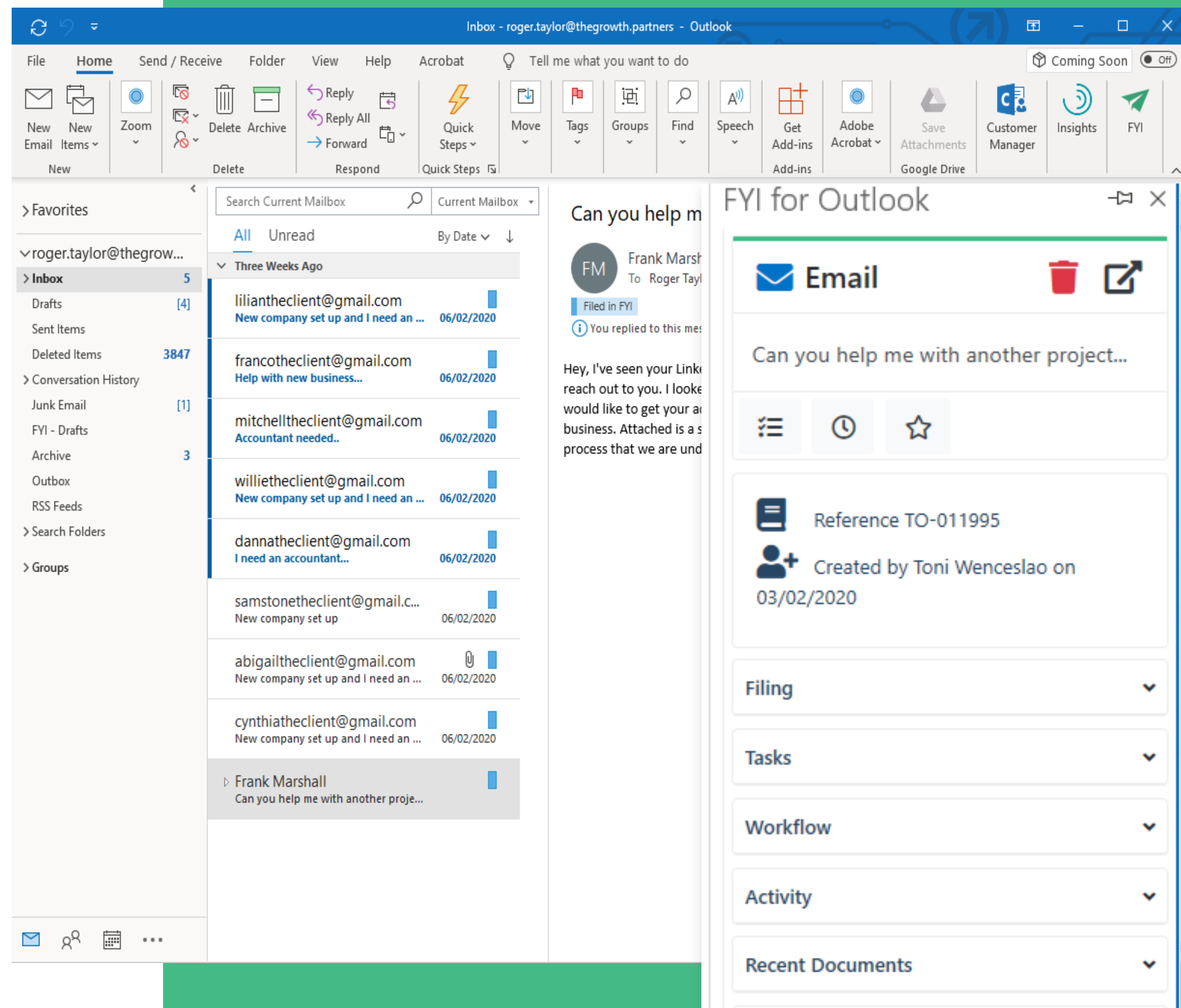
Use **Xero Practice Manager** or **Xero Tax** as your single source of client data



EMAIL MANAGEMENT

AUTOMATED EMAIL FILING



- ✈ Automatically capture and file client emails **in Outlook**
- ✈ Access email templates, assign tasks and more without leaving the email you're working on





EMAIL MANAGEMENT

AUTOMATED EMAIL FILING

-  Automatically capture and file client emails **in Outlook**
-  Access email templates, assign tasks and more without leaving the email you're working on



We've been using FYI since February 2019. The email integration is the easiest that I have ever used.

We have been pleased with the easy access to records and use of templates for standard letter and email generation.

Bill Mancer, Director
Rise Accounting



DOCUMENT AUTOMATION

AUTO-CREATE AND AUTO-FILE DOCUMENTS

✈️ AutoFile documents, assign tasks and more without leaving the document you're working in Word, Excel or PowerPoint

✈️ Use practice stationery and templates with merge fields to improve quality and productivity

The screenshot displays the Microsoft Word interface with a document titled 'BAS_Coverletter [FYI-TO-0128... - Saved]'. The ribbon shows the 'Home' tab selected. The document content includes a logo for 'Growth Partners' (a green leaf in a circle), the date '28 February 2020', and the name 'Director Frank' with an address: '23 Sample Street, Sampleville NSW 2045'. The salutation is 'Sir,' and the subject is 'Re: Activity statement'. The body text reads: 'Please review each page of this activity statement. To confirm that all items sign and date all declarations. Your activity statement will be electronically lodged once we have received your declarations.'

Overlaid on the right is the 'FYI for Office' sidebar. It contains the following sections:




- Filing**
 - Client**: Marshall, Frank (client.frank.marshall@ou...)
 - Cabinet**: Client Service (dropdown)
 - Job**: No job selected (dropdown)
 - Show Closed Jobs**: OFF (toggle)
- Tasks** (dropdown)
- Workflow** (dropdown)
- Activity** (dropdown)
- Recent Documents** (dropdown)
- Log** (dropdown)
- 0 Add a comment** (button)
- v2.0.99** (version number)

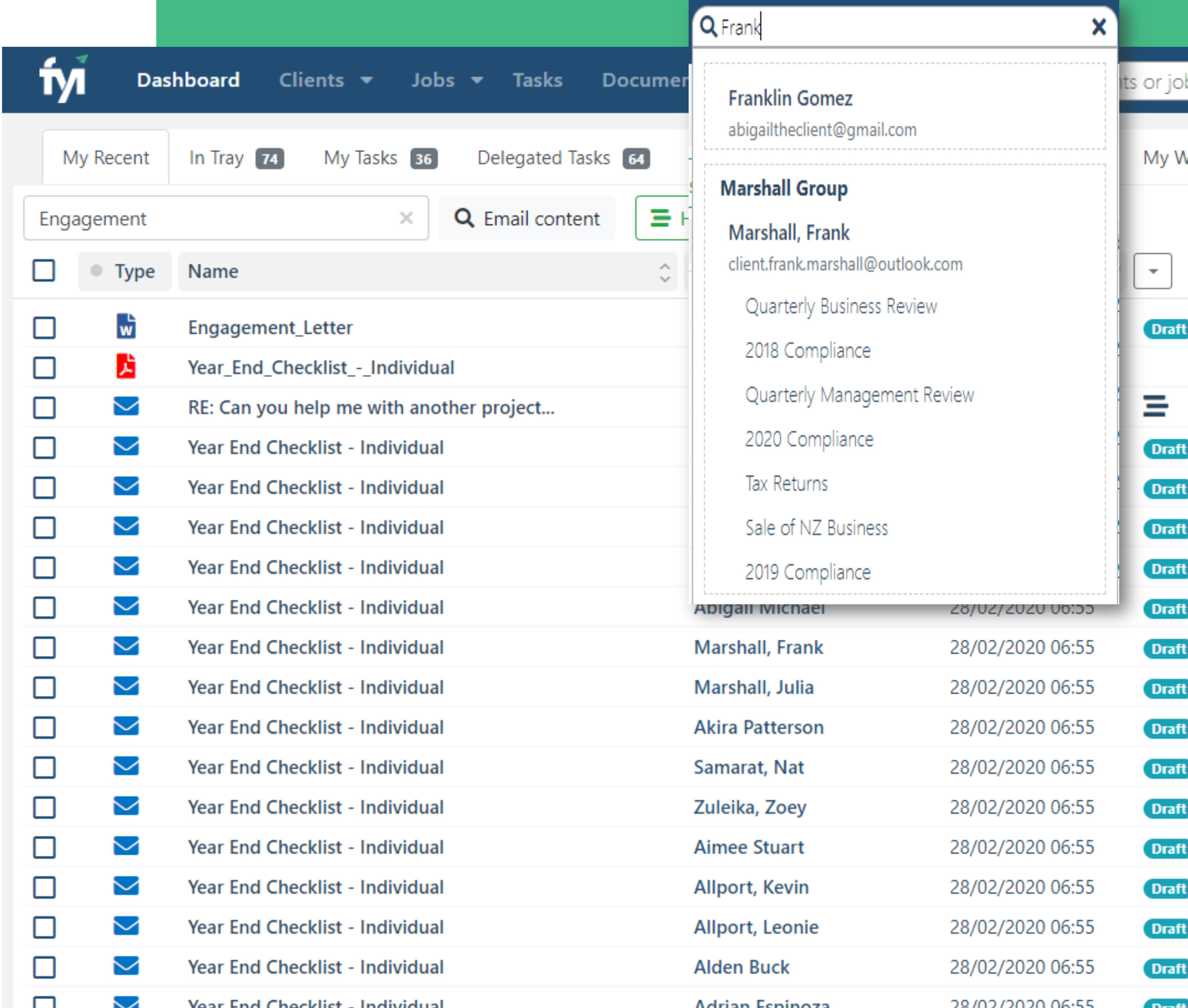
The status bar at the bottom indicates 'Page 1 of 1', '103 words', and 'English (United States)'.






















SEARCH AND RETRIEVAL

ACCESS INFORMATION IN SECONDS

-  FYI blends emails, documents and client interactions in a single client-centric database in the cloud
-  File and retrieve documents at a job level
-  Use views, sorting and filters to locate information, plus the full power of metadata and tags rather than folders



The screenshot displays the FYI software interface. At the top, there's a navigation bar with 'Dashboard', 'Clients', 'Jobs', 'Tasks', and 'Documents'. Below this, a search bar contains the text 'Engagement'. To the right of the search bar, there are tabs for 'My Recent', 'In Tray' (74), 'My Tasks' (36), and 'Delegated Tasks' (64). Below the search bar, there's a table with columns 'Type' and 'Name'. The table lists several documents, including 'Engagement_Letter', 'Year_End_Checklist_-_Individual', and 'RE: Can you help me with another project...'. A search results dropdown menu is open, showing a list of search results for 'Frank'. The results include 'Franklin Gomez' (abigailtheclient@gmail.com) and 'Marshall Group' (client.frank.marshall@outlook.com). The 'Marshall Group' results are further detailed with a list of documents: 'Quarterly Business Review', '2018 Compliance', 'Quarterly Management Review', '2020 Compliance', 'Tax Returns', 'Sale of NZ Business', and '2019 Compliance'. The bottom of the screen shows a list of documents with columns for 'Name', 'Date', and 'Status'.

Type	Name
	Engagement_Letter
	Year_End_Checklist_-_Individual
	RE: Can you help me with another project...
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual
	Year End Checklist - Individual

Name	Date	Status
Abigail Michael	28/02/2020 06:55	Draft
Marshall, Frank	28/02/2020 06:55	Draft
Marshall, Julia	28/02/2020 06:55	Draft
Akira Patterson	28/02/2020 06:55	Draft
Samarat, Nat	28/02/2020 06:55	Draft
Zuleika, Zoey	28/02/2020 06:55	Draft
Aimee Stuart	28/02/2020 06:55	Draft
Allport, Kevin	28/02/2020 06:55	Draft
Allport, Leonie	28/02/2020 06:55	Draft
Alden Buck	28/02/2020 06:55	Draft
Adrian Espinoza	28/02/2020 06:55	Draft



SEARCH AND RETRIEVAL

ACCESS INFORMATION IN SECONDS

- ✈ FYI blends emails, documents and client interactions in a single client-centric database in the cloud
- ✈ File and retrieve documents at a job level
- ✈ Use views, sorting and filters to locate information, plus the full power of metadata and tags rather than folders



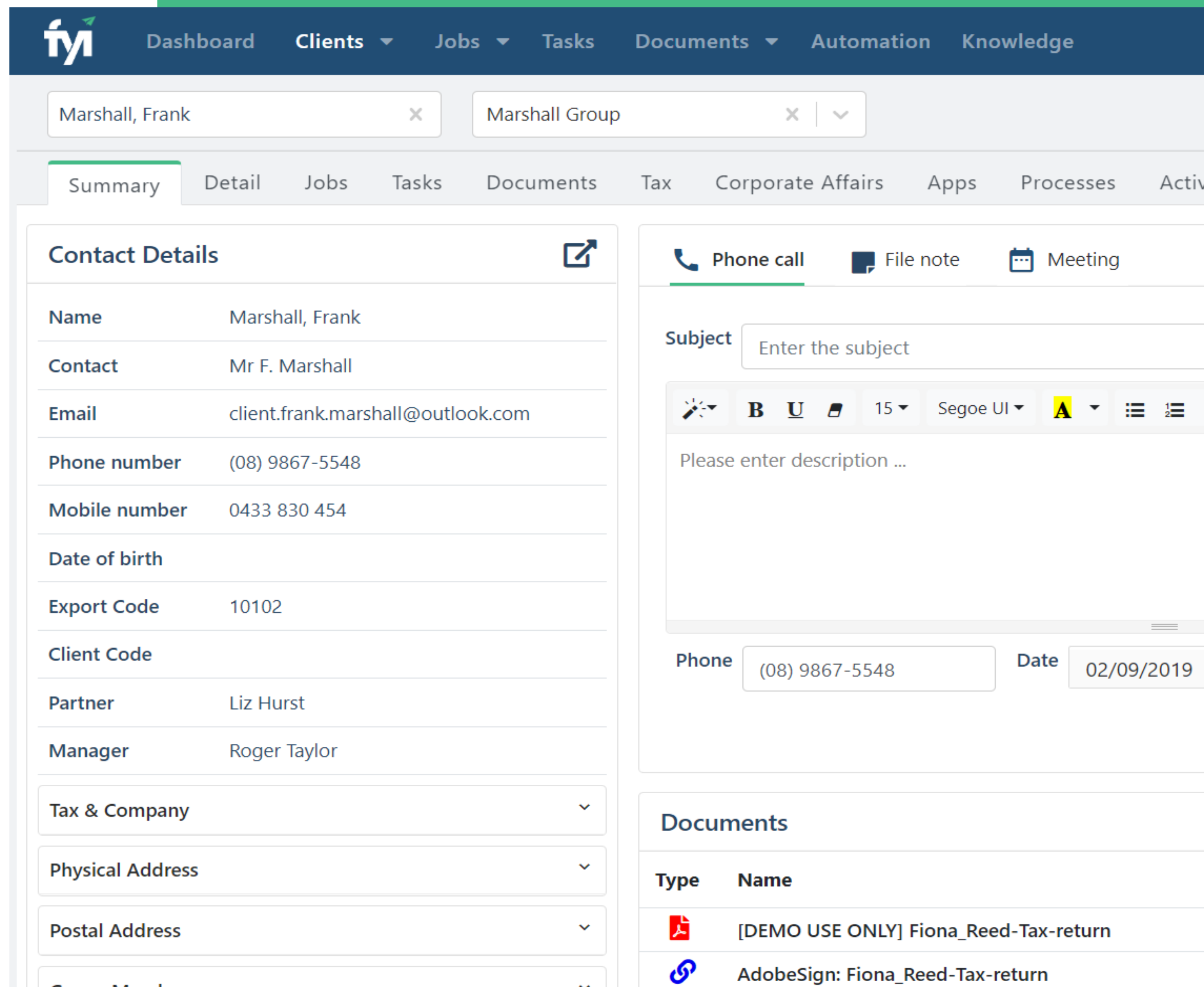
One of the biggest frustrations we have is people not finding procedures easily and filing documents in different places.

FYI's structured filing system solves these problems perfectly. Thanks for putting together such an awesome program.

**Jason Skinner, Partner
Skinner Hamilton**



- Dedicated workspace for each client
- Instant access to recent interactions
- Record meetings, phone calls and file notes





- Add tasks to an email, document, phone call or meeting
- Assign tasks to a team member and monitor progress

fy

Dashboard

Clients ▾

Jobs ▾

Tasks

Documents ▾

Automation

Knowledge

Search groups

Tasks

Select | Incomplete Tasks ▾ Search tasks

Status ▾ Subject

☐

Complete Internal BAS

☐

Call Frank to get remaining docs

☐

Call Frank to get signed docs

☐

Clear queries

☐

Please arrange engagement

☐

Review and send

☐

Review and send

☐

Review and send

☐

Review and send

☐

Review and send

☐

Review and send

☐

For Approval - Ron

☐

Signature: Facsimile_Notice_of_Assessment (2)

☐

Please call client and prepare engagement letter

☐

Please revisit return next week, once docs are received

☐

Call Frank to get remaining

☐

Call client to get reaction

☐

Please review financials

☐

Please arrange meeting + engagement letter

Create Task

Please enter a subject

AssigneeUnassigned ▾

DelegatorRoger Taylor x ▾

ClientNo client selected

Due date29/02/2020

Start dateDate

StatusNot started ▾

Details

B

U

16 ▾

Segoe UI ▾

A ▾

Create

Cancel



JOBS

MANAGE WORKFLOW USING THE JOB BOARD



Maintain XPM Jobs





Add commentary to share
with the team

<div><div><div><div><div><div></div><div></div></div><div><div></div><div></div></div></div><div><div>fyi</div><div>Dashboard</div><div>Clients</div><div>Jobs</div><div>Tasks</div><div>Documents</div></div></div></div></div>						
Jobs						
Select	All	No partner selected	No manager selected	Search jobs		
Client group(s)	Client	Name	State	Due date	Estimated	Actual
Marshall Group	Marshall, Frank	2016 Compliance	At Risk	12/12/2018	00:00	00:00
Tarex Industries	Tarex Industries	2018 Compliance	In Progress	24/05/2019	22:00	19:00
Marshall Group	Marshall, Frank	2018 Compliance	At Risk	31/05/2019	13:00	07:00
Marshall Group	Inner City Electrical	2018 Compliance	In Progress	17/04/2019	19:00	15:00
Grant Co.	Grant, Danna	2018 Compliance	In Progress	12/04/2019	19:00	21:00
TRW Automotive Hol...	TRW Automotive Hol...	2018 Compliance	At Risk	21/06/2019	20:00	22:00
Pint Corporation	Pint Corporation	2018 Compliance	In Progress	17/05/2019	18:00	14:00
Marshall Group	Marshal Superfund	2018 Compliance	In Progress	12/03/2019	13:00	15:00
Marshall Group	Marshall, Julia	2018 Compliance	At Risk	25/06/2019	21:00	19:00
The Service Masters	The Service Masters	2018 Compliance	In Progress	26/01/2019	20:00	22:00
NVG Universal	NVG Universal	2018 Compliance	In Progress	12/06/2019	23:00	20:00
Marshall Group	Marshall, Leslie	2018 Compliance	At Risk	16/02/2019	23:00	23:00
Aptar Group	Aptar Group	2018 Compliance	In Progress	26/04/2019	18:00	12:00
Ferrellgas Partners	Ferrellgas Partners	2018 Compliance	At Risk	15/02/2019	22:00	23:00



JOBS

MANAGE WORKFLOW USING THE JOB BOARD

-  Kanban view helps visualise work
-  Drag and drop to update job states

fy Dashboard Clients ▾ Jobs ▾ Tasks ▾ Documents ▾ Automation Knowledge 🔍 Search groups, c

Jobs

Open ▾ No partner selected ▾ No manager selected ▾ Hide Closed ☒

PROPOSAL ACCEPTED 51	PLANNED 50	PENDING CLIENT INFO 40	BLOCKED
Alden Buck Individual Tax Return	A M M Chiropractic Pty Ltd Individual Tax Return	Allport, Kevin 2019 Compliance	Alcoa U Individ
Anaya Gentry Individual Tax Return	Allport, Zara Individual Tax Return	Aptar Group 2018 Compliance	Allen A Individ
Aryan Foster Individual Tax Return	Atkins Kolten Individual Tax Return	Cavanagh, Alexandra 2018 Compliance	Allport Individ
Averi Gallegos Individual Tax Return	Boyle Nahla Individual Tax Return	Ferrellgas Partners 2018 Compliance	Allport Individ
Baxter Joy Individual Tax Return	Cable Vision Systems Corp Individual Tax Return	Grant, Grant, 2018 Compliance	Allport Individ
Benjamin Lucy Individual Tax Return	Cherry Haiden Individual Tax Return	Harsco Corporation 2019 Tax Planning cp	Brianna Tax Ret
Benjamin Masen Individual Tax Return	Dean Cristian Individual Tax Return	Harsco Corporation 2019 September BAS cp	The Se 2018 C



RECORD TIME SHEETS



Clients

Jobs ▼

Tasks

Documents ▼

Automation

Knowledge

My Tasks 3

My Recent

In Tray **43**

Delegated Tasks 2

My Jobs 6

My Edits 24

My Time

Notifications

11/11/2019

17/11/2019

17-Nov

Tuesday (Submitted: 7.08hrs, Draft: 0hrs)

Client	Job	XPM task	Time	Notes
Bently Henderson	Individual Tax Return	2. Prepare Return	00:50	Spreadsheet: Working Papers
Bently Henderson	Individual Tax Return	4. Client's Review	00:30	Pdf: Engagement Letter
Bently Henderson	Individual Tax Return	4. Client's Review	00:30	Email: Important - 2020 Business Ch
Cristian Lang	2020 September BAS	2. Prepare Return	01:00	Email: BAS Information Collection
A M M Chiropractic Pty Ltd	2020 Fringe Benefit Tax	1. Gather Information	00:50	Note: FBT Key Notes
Aimee Stuart	Individual Tax Return	5. Client's Open Items	01:00	Phone: Follow up call
Allen Brianna	2020 Annual Accounts	10. Follow-up	00:20	Phone: Call re Annual Accounts
Cristian Lang	2020 September BAS	1. Gather Information	00:30	Pdf: 2020 BAS Return
Boyle Jonathon	Individual Tax Return	10. Follow-up	00:45	Spreadsheet: Working Papers
Aimee Stuart	Individual Tax Return	5. Client's Open Items	00:30	Spreadsheet: Working Papers
Dean Cristian	2020 Fringe Benefit Tax	10. Follow-up	00:15	Letter: 2020 FBT return
A M M Chiropractic Pty Ltd	2020 Fringe Benefit Tax	1. Gather Information	00:05	Letter: 2020 FBT return



DOCUMENT WORKFLOWS

REVIEW AND APPROVE DOCUMENTS

- Assign authority to review and approve documents
- Auto-update the workflow status of documents
- Save time by applying digital signatures

fyi

Dashboard

Clients

Jobs

Tasks

Documents

Automation

Knowledge

Documents

Financials & Tax Returns

Recent

Type

Name

New company set up and I need an account

Year_end_financials

New_Business_-_Draft_Numbers

Year end financials

RE: Can you help me with another project...

Introduction to New Business

Year end financials

Leonie Allport Tax Return 2019

Kiwi Home Builders Ltd Tax Return 2019

Leonie Allport Tax Return 2017

Leonie Allport Tax Return 2018

Kiwi Home Builders Ltd Tax Return 2018

Kevin Allport Tax Return 2019

Kiwi Home Builders Ltd Tax Return 2017

Kevin Allport Tax Return 2018

Kevin Allport Tax Return 2017

Allport Investments Ltd Tax Return 2019

Profile

Documents

Security

Devices

Approval signature

Your digital signature used for document approval

Li Harst

Upload new signature

Recent Document

Versions

Final Review



Approved

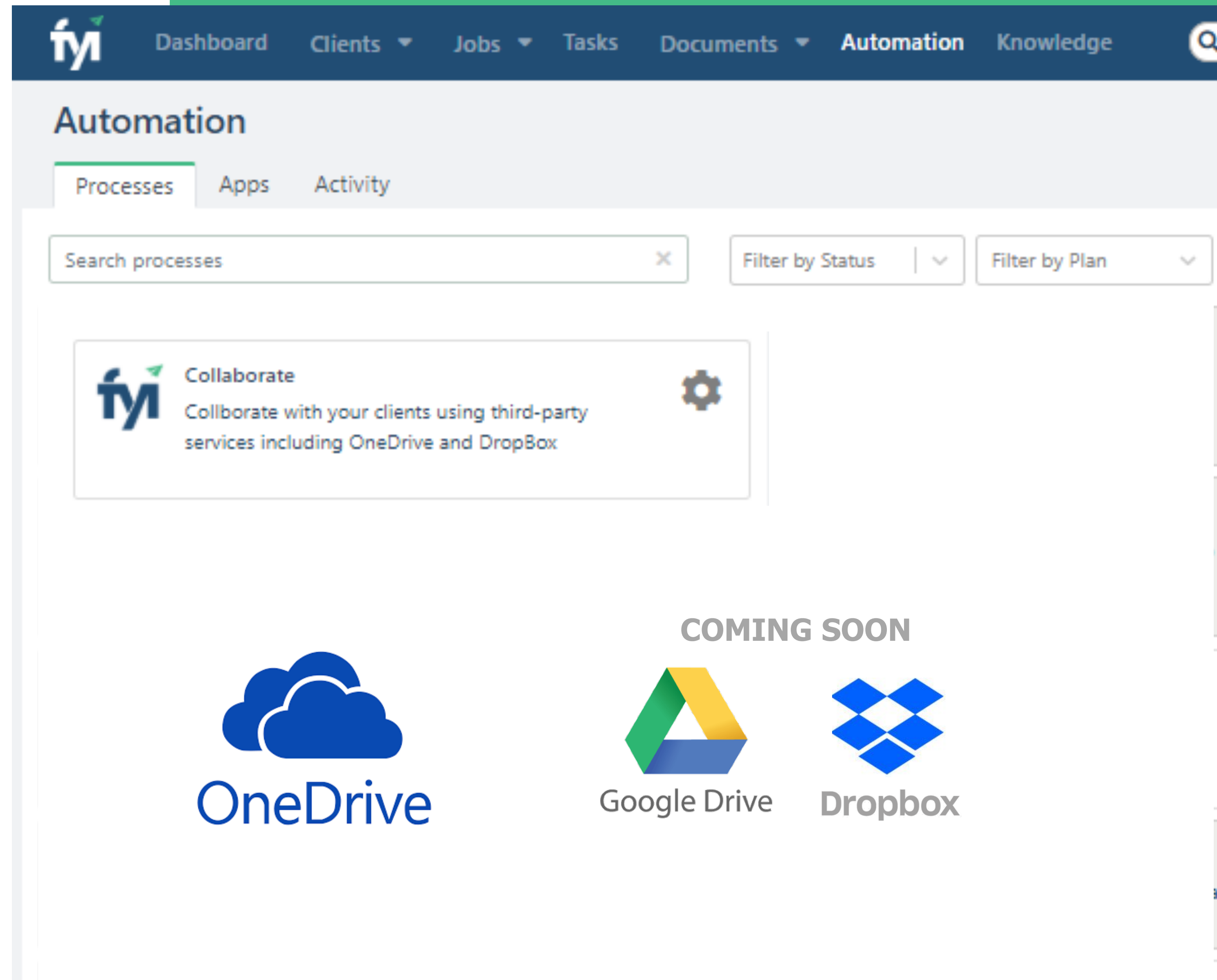
Pending Client Signature



CLIENT COLLABORATION

SEND DOCUMENTS TO CLIENTS SECURELY

-  Collaborate with your clients based on their preference
-  Leverage sophisticated cloud platforms built for the purpose of collaboration





PROCESS AUTOMATIONS

BEST OF BREED INTEGRATIONS

- ✈ FYI is deeply integrated with **Office 365** to deliver document and email automation
- ✈ Synch your clients, client groups, and jobs from **Xero Practice Manager**
- ✈ Integrate with a growing number of industry-leading apps to deliver powerful process automations.

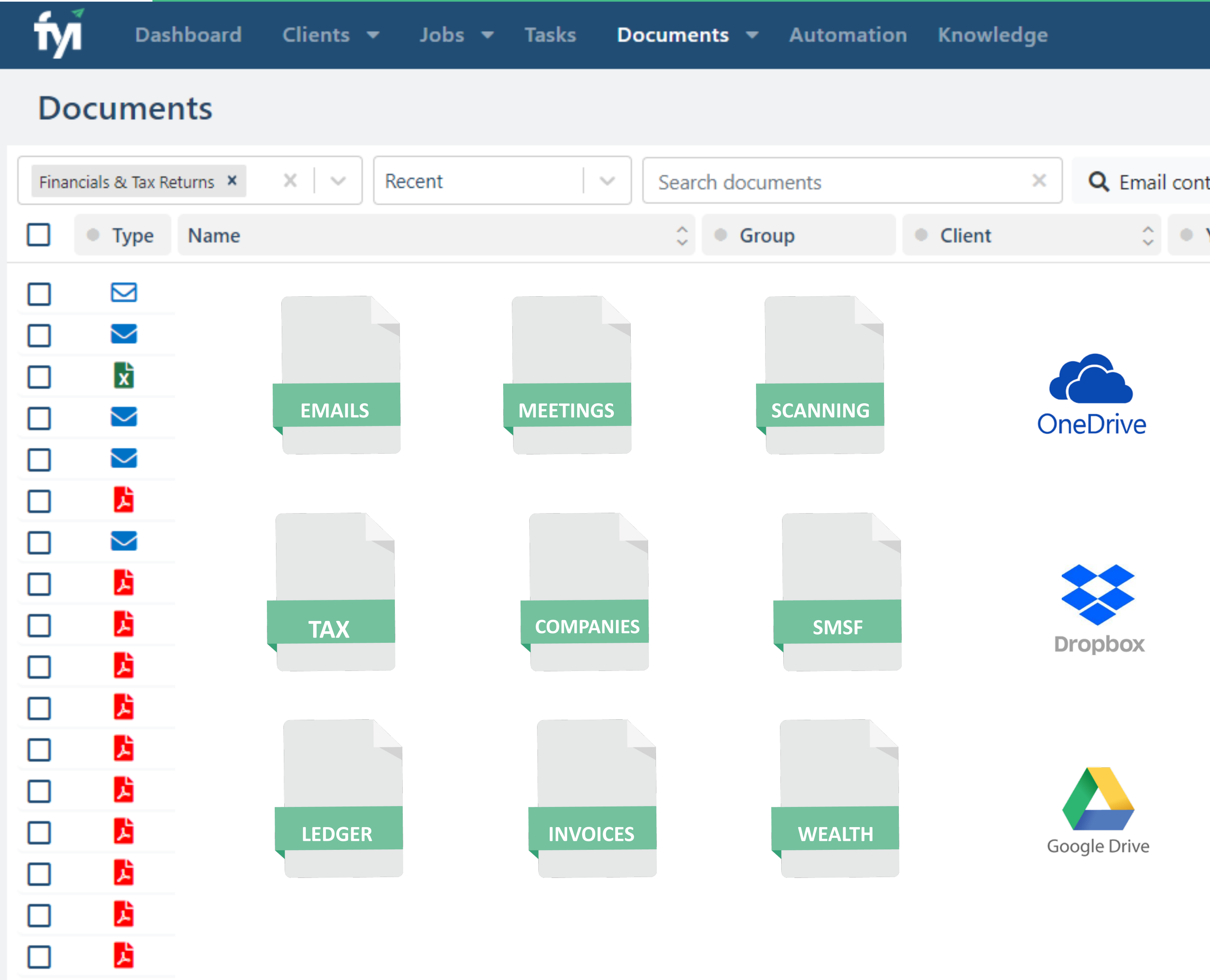
The screenshot displays the FYI Automation interface. At the top is a dark blue navigation bar with the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this is a light gray header for the 'Automation' section, with tabs for Processes, Apps, and Activity. The main content area is titled 'PLATFORM PRE-REQUISITES' and 'INTEGRATIONS'. It features a grid of logos for various integrated applications: Office 365 (orange circle), Xero (blue circle), Zapier (orange text with asterisk), ATO (blue circle with 'ato' text), BGL (blue circle with 'bgl.' text), NowInfinity (blue circle with two heads), GreatSoft Cloud (blue text with 'FREEDOM OF CHOICE' tagline), Adobe Sign (red square with signature), DocuSign (black rectangle with white text), and THE GAP (red and gray overlapping circles).



PROCESS AUTOMATIONS

AUTOMATIC DOCUMENT IMPORTS

✈ Automatically capture and file source documents from BGL, OneDrive, and in the near future, from DropBox and Drive.





PROCESS AUTOMATIONS

DEEP INTEGRATION WITH XERO

✈ Import **tax returns** from Xero Tax daily, auto-filing a link in FYI

✈ Batch-create, import and auto-file consistently named sets of reports from your **Client's Xero Ledger** with a single click


The screenshot displays the 'Automation' section of the FYI software interface. At the top, a dark blue navigation bar contains the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this, the 'Automation' page has three tabs: 'Processes' (selected), 'Apps', and 'Activity'. A search bar labeled 'Search processes' and two filter dropdowns, 'Filter by Status' and 'Filter by Plan', are located at the top of the process list. The list contains eight automation processes, each with a logo, a title, a description, and a settings gear icon:

- Xero Practice Manager**: Import clients, client groups and jobs from Xero Practice Manager.
- Calendar Entry AutoFile**: Import calendar entries from Outlook and AutoFile them based on your exact configuration.
- Tax Return AutoFile**: Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI.
- Email AutoFile**: Import emails from Outlook and AutoFile them based on your exact configuration.
- Client Ledger Reports AutoFile**: Batch import of client ledger reports on demand and AutoFile into FYI.
- Tax Assessments (Variance) AutoFile**: Daily import of tax assessments that vary from the original estimate, AutoFile into FYI and trigger a default user alert.
- My Imports**: Automatic alert the Partner when a file is imported.
- Completed Document AutoFile**: Daily import of Completed Document created in NowInfinity, AutoFile into FYI.



PROCESS AUTOMATIONS

TAX ASSESSMENTS

-  Daily import **tax assessments** from the ATO, with automatic cross-check with **Xero Tax**, filing and generation of client email correspondence.

fyi

Dashboard
Clients
Jobs
Tasks
Documents
Automation
Knowledge

Automation

Processes
Apps
Activity

Name

Tax Assessments (Agreed) AutoFile

Trigger

Scheduled Daily

Filter

Assessment varies from estimate

Status

Active

Step	Application	Action
1	Xero Tax	Import & file assessment <ul style="list-style-type: none"> Document will be custom filed
2	FYI	Create Email <ul style="list-style-type: none"> Document will be custom filed A task will be created with a subject Notice of assessment ready for review



✈️ Design your own automated processes across client service, marketing, practice admin, HR and more

✈ Limited only by your imagination
to automate any repetitive tasks
across the practice

fyi

Dashboard
Clients ▾
Jobs ▾
Tasks
Documents ▾
Automation
Knowledge

Automation

Processes
Apps
Activity

Name
Year end checklist - Individuals

TestRunBack

Trigger
Manual

Filter

StructureIndividual

Status
Active

Owner
Roger Taylor

Last Run
Last Friday at 09:24 for Michael, Abigail





ResetAdd Step

Step	Application	Action	
1	FYI	Create Word <ul style="list-style-type: none"> A Word document will be created from the "Year End Checklist - Individual" template The document will be filed as "Year End Checklist - Individual" in the Workpapers cabinet 	
2	FYI	Create Email <ul style="list-style-type: none"> An Email document will be created from the "Year End Checklist - Individual" template, and immediately sent The document will be filed as "Year End Checklist - Individual" in the 	



EASY ONBOARDING

PROVEN IMPLEMENTATION PROCESS

-  **Discovery**
-  **Configure FYI for your practice**
-  **Migrate historical documents**
-  **Training and change management**



**We have
successfully
migrated data
from a growing
number of
platforms.....**

SuiteFiles

myob

nimbus[®]
PORTAL SOLUTIONS

 Google Drive

 **SharePoint**

 **Dropbox**

 **HowNow**

sage HandiSoft

VirtualCabinet 





IN-PRODUCT SUPPORT

- › Be guided through the onboarding process in-product.
- › Take your practice from trial to live, with links and guides to setup key features and arrange document migration.

 Dashboard Clients ▾ Jobs ▾ Tasks Documents ▾ Automation Knowledge

TRIAL 24 DAYS
ONBOARDING 0 / 5

+ NEW

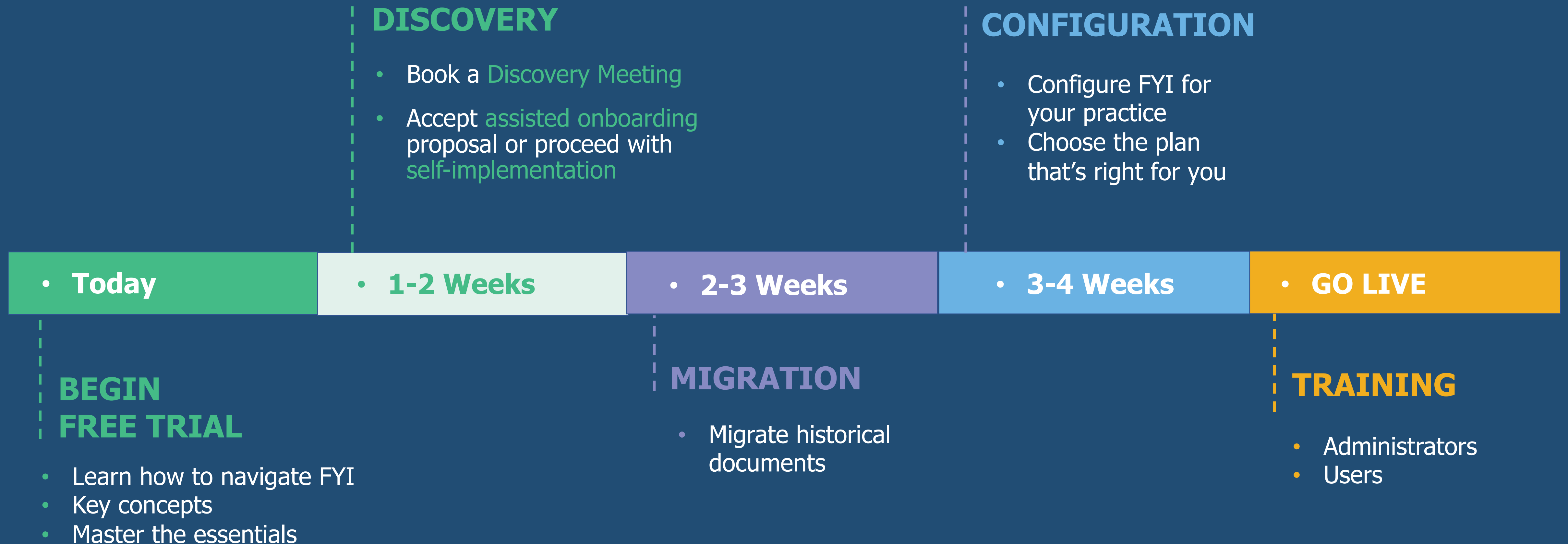
Welcome FYI Support

This is your onboarding workspace. Here you can work your way through the setup of FYI for your practice, including the migration of historical documents.

- ✓ Introduction ▾
- ✓ Discovery ▾
- ✓ Billing ▾
- ✓ Migrate Documents *Coming Soon* ▾
- ✓ Refile Documents *Coming Soon* ▾
- ✓ Final Setup ▾
- ✓ Training ▾



ONBOARDING PROCESS





“

The transition from MYOB AE to FYI was seamless. The FYI team walked us through every step. No question asked was too hard. We have been using FYI for a week and the time saved already outweighs initial costs.

Rebecca Raeburn



“

This has been the most simple transition that I have ever experienced in moving systems. You have done a great job in getting us prepared. The onboarding went really well with minimal issues after migration, and you have great fixes for those. Our staff are now using the system and really love it.

Jos Pemberton





4,000
USERS
AND GROWING





“

Changing document management systems was a huge call for our practice. It wasn't until we came across FYI that we were able to find the best fit for our needs.

The migration of documents and implementation was efficient and effective. Our team jumped on it from day one and we wouldn't go back!

**Sam Horsman, Principal
PJS Financial**

“

We've been a client of FYI since January 2019, and are delighted with the product and its evolving road map.

The level of client service and responsiveness to enhancements has been impressive.

FYI is certainly an industry leader and best practice solution.

**Robert Moore, Director
Invigor8 Accountants and Advisors**



FYI blew me away. It's more than a document management solution It's a way of re-casting all of your processes internally and automating them. And it's an absolute game-changer.



Rob Stone
National Partner Director, Xero



God, I love this program!

Jeremy Coverdale, Partner
Coverdale Business Solutions



START YOUR
30-DAY FREE TRIAL
TODAY
FYIDOCES.COM



FYIDOCs.COM