



PRODUCT UPDATE

DECEMBER 2020



YOUR HOSTS



ROB CAMERON

CO-FOUNDER and CEO

Rob is a Chartered Accountant with experience working in suburban practices and larger firms, and at MYOB where he led the global product strategy for accountants. FYI is the fourth generation of a product concept Rob has been working on in his 20+ years developing solutions for accountants.



CASSIE KADDATZ

CLIENT SUCCESS TEAM

With more than 16 years experience in the accounting industry, Cassie has a deep understanding of the requirements for practice success across management, operations, client engagement and tech. She brings her knowledge and expertise to our product and client success teams, having been an FYI user at her last practice.



OVERVIEW

- **New** Templates and Stationery
- Collaborate
- Jobs Board
- Time Sheets
- 2021 Roadmap



Webinar recording and resources will be shared via email after this session

The screenshot displays the FYI software interface. At the top is a dark blue navigation bar with the FYI logo and menu items: Home, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this is a secondary bar with tabs: My Recent, In Tray (5), My Tasks (2), Delegated Tasks (0), My Jobs (1), and My Edits. A search bar labeled 'Search documents' is present, along with icons for search, list view (highlighted in green), user profile, and favorites. The main area shows a table of documents with columns for checkboxes, file icons, names, and clients. The table contains 7 entries. At the bottom right, there is a pagination control showing '1' of 1 page, with 'Prev' and 'Next' buttons, and a note '(Showing 0 - 7 of 7 entries)'.

<input type="checkbox"/>	Type	Name	Client
<input type="checkbox"/>		2019 ITR Workpapers	Marshall, Julia
<input type="checkbox"/>		Supporting documents - 2019 ITR	Marshall, Julia
<input type="checkbox"/>		Income Tax Return - Signed	Marshall, Julia
<input type="checkbox"/>		Checklist for Quarterly BAS	Marshall, Julia
<input type="checkbox"/>		2019 Engagement Agreement	Marshall, Julia
<input type="checkbox"/>		Engagement Letter 2019	Marshall, Julia
<input type="checkbox"/>		Collaborate Invitation	Marshall, Frank



NEW TEMPLATES AND STATIONERY






TEMPLATES & STATIONERY

WHAT'S CHANGED

 Administer from Knowledge

 Dedicated Templates cabinet

 Improved functionality

- Views
- Versioning
- Activity

 AutoFile Defaults

fyi

Home

Clients ▾

Jobs ▾

Tasks ▾

Documents ▾

Automation

Knowledge

Search groups, clients or jobs

Templates

Knowledge Base

Policies & Procedures

Practice Admin

All ▾

Search templates

✕

+

Create template

T...

Name

⌵

Modifi...

⌵

Modifi...

⌵

Status

⌵

Team

⌵



SUMMARY

New Templates and Stationery

- Now administered from Knowledge
- Stored in a dedicated cabinet with appropriate categories for your practice
- Use Views and increased functionality to monitor lifecycles
- AutoFile defaults will file documents and emails created from templates
- Assign stationery and email signatures
- Change in how to apply practice default email signature
- Email support if you interested in the early release of new templates



COLLABORATE




- Configure for your practice
- Using collaborate with your clients

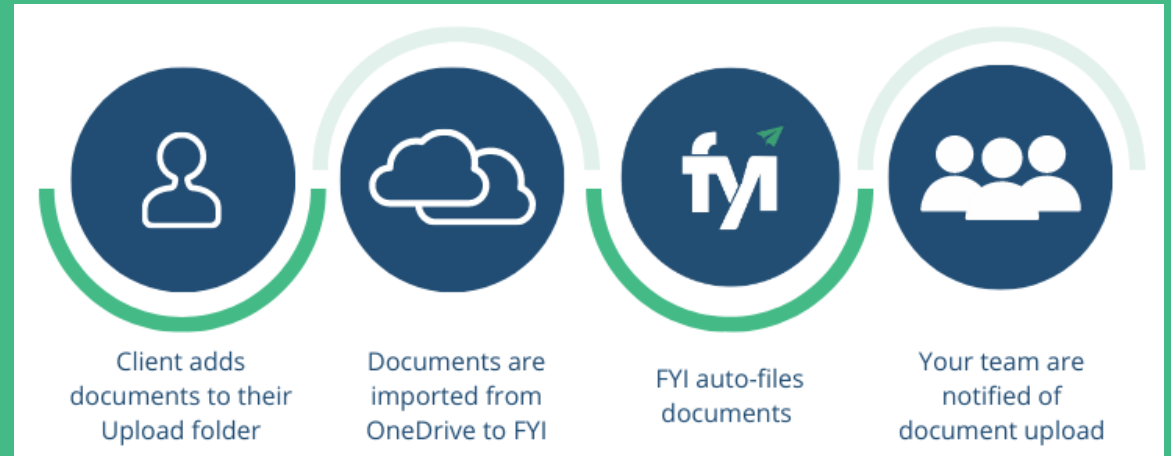




COLLABORATE

USING COLLABORATE




-  Share documents with your clients by leveraging a secure OneDrive folder
-  Clients can securely upload documents to your practice and FYI will auto-file them
-  Work on documents with team members and clients at the same time

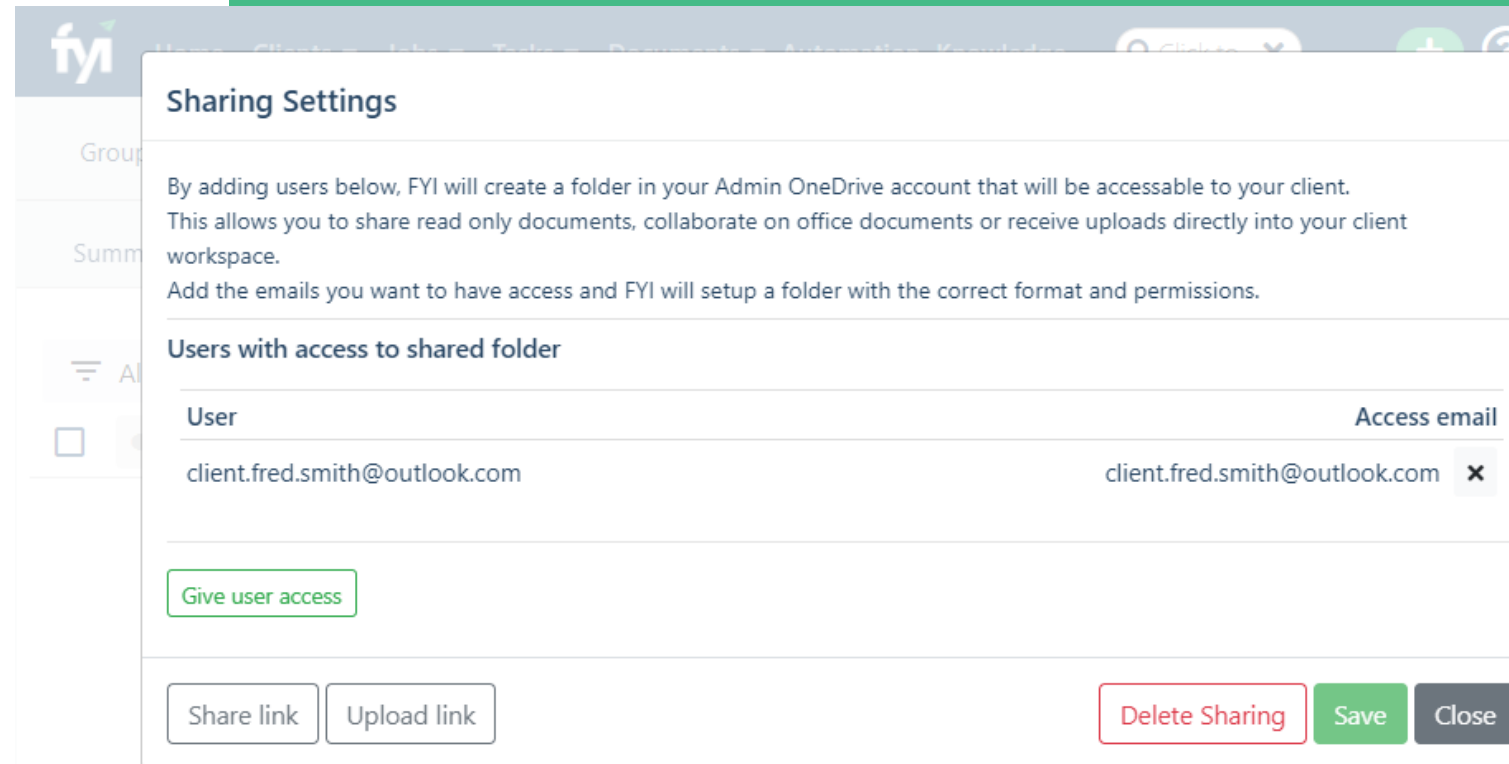




COLLABORATE

COLLABORATE WITH CLIENTS


-  Giving clients access to their shared folder
-  Co-editing a document with a client simultaneously
-  Receive documents from your client that are auto-filed in FYI and team members notified



Sharing Settings

By adding users below, FYI will create a folder in your Admin OneDrive account that will be accessible to your client. This allows you to share read only documents, collaborate on office documents or receive uploads directly into your client workspace. Add the emails you want to have access and FYI will setup a folder with the correct format and permissions.

Users with access to shared folder

User	Access email
client.fred.smith@outlook.com	client.fred.smith@outlook.com 

[Give user access](#)

[Share link](#) [Upload link](#) [Delete Sharing](#) [Save](#) [Close](#)



COLLABORATE

CONFIGURING COLLABORATE

- Decide and connect your OneDrive Admin User
- Create a Collaborate Invite email template
- Assign Administer Share Settings permissions to your team
- Configure Collaborate Settings in FYI

The screenshot displays the FYI Automation interface. A modal window titled 'Collaborate' is open, showing settings for email templates and group names. The modal includes tabs for 'Settings', 'Share', and 'Co-edit'. The 'Settings' tab is active, showing a 'Default Email Template' dropdown set to 'Collaborate Invitation' and a 'Microsoft Group Name' dropdown set to 'Standard Security Group'. At the bottom of the modal are buttons for 'Update OneDrive Access', 'Save', and 'Close'. The background shows a grid of automation processes, including 'Email AutoFile', 'Xero Practice Manager', 'Tax Assessments AutoFile', 'Client Ledger Reports AutoFile', 'Corporate Documents - Import & AutoFile', 'Completed Document Signature', 'Covid', 'Nightly Backup', 'Tax Assessments AutoFile (Agreed & Postal)', 'Negative Email Alert', 'ASIC Statement & Resolution - Import & AutoFile', 'Special Job', and 'Notification of Client Uploads'.



COLLABORATE

RECEIVE CLIENT DOCUMENTS

- ✈ Client adds documents to OneDrive Upload folder
- ✈ FYI imports and auto-files to the Client's Documents tab
- ✈ Set a summary notification to alert team members of documents received

fyi

[Home](#)
[Clients](#)
[Jobs](#)
[Tasks](#)
[Documents](#)
[Automation](#)
[Knowledge](#)

Documents




Client Upload

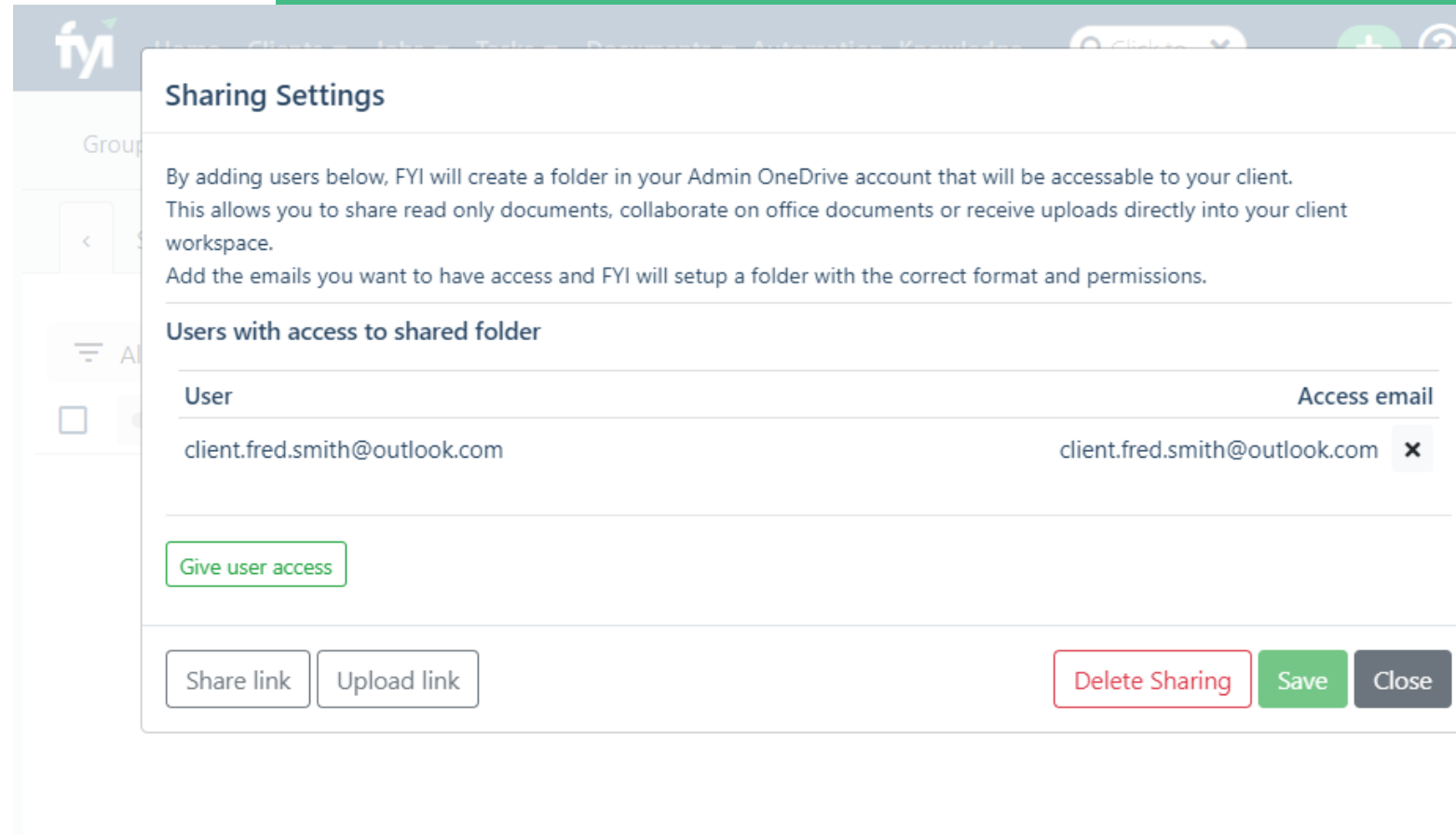
	T...	Name		Client	Source	Cabinet	Year
<input type="checkbox"/>		Income Tax Return - Signed		HI Jay	Client Upload	Final Reports ...	2020
<input type="checkbox"/>		September 2020 BAS		HI Jay	Client Upload	Workpapers	2021
<input type="checkbox"/>		Wage Summary Sept 20		HI Jay	Client Upload	Workpapers	2021
<input type="checkbox"/>		Invoice		HI Jay	Client Upload	Workpapers	2021
<input type="checkbox"/>		2020 Engagement Agreement		EF Gee	Client Upload	Final Reports ...	2020
<input type="checkbox"/>		October 19 Statement		The Growth Partners	Client Upload	Workpapers	2021
<input type="checkbox"/>		September 19 Statement		The Growth Partners	Client Upload	Workpapers	2021
<input type="checkbox"/>		January 2020 Statement		The Growth Partners	Client Upload	Workpapers	2021
<input type="checkbox"/>		July 2019 Statement		The Growth Partners	Client Upload	Workpapers	2021
<input type="checkbox"/>		August 2019 Statement		The Growth Partners	Client Upload	Workpapers	2021
<input type="checkbox"/>		December 2019 Statement		The Growth Partners	Client Upload	Workpapers	2021



COLLABORATE

REMOVE ACCESS

-  Remove access to a specific document
-  Remove folder access for a user
-  Remove folder access for **all** users





SUMMARY

Configuring Collaborate

- Decide on your OneDrive Admin User
- Discuss Microsoft groups with your IT team
- Consider your Share and Co-edit Structures to minimise future changes

Collaborating with Clients and Team

- Share documents and folders with clients and stakeholders
- Co-edit documents with client and/or your team simultaneously
- Have your client upload their documents for auto-filing in FYI
- Improved functionality to remove access to documents and users



BULK CREATE **TIME SHEETS**





BULK TIME MY RECENTS

- ✈ Filter My Recents to desired date, select documents and use the **Time Entry** function to create bulk time entries
- ✈ Available client and jobs details are pre-filled
- ✈ Post directly to XPM





USING THE **JOBS BOARD**





JOBS AND TIME

WHY A JOBS BOARD?

- ✈ Easily identify bottlenecks
- ✈ Easy way to update job states
- ✈ Filter by Partner and Manager
- ✈ Column filters set in Jobs List carry over to Jobs Board

The screenshot displays the FYI Jobs Board interface. At the top, there is a navigation bar with the FYI logo and links to Home, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. A search bar is located on the right. Below the navigation bar, the 'Jobs' section is highlighted. The interface features three main columns, each with a title and a count of items:

- PROPOSAL ACCEPTED (2)**
 - International Flavors & Fragrances
International Flavors & Fragrances
2019 June BAS
 - Boyle Jonathon
Jonathon Group
Individual Tax Return
- PENDING CLIENT INFO (8)**
 - Abigail Michael (Sync)
RECORDING - SYNC
 - J.B. Hunt Transport
J.B. Hunt Transport
2019 September BAS
 - Allen Brianna
2020 Annual Accounts
 - Kiwi Home Builders Ltd
The Kiwi House Building Co
2019 Annual Accounts
 - Aimee Stuart
Stuart Group
- IN PROGRESS (3)**
 - J.B. Hunt Transport
J.B. Hunt Transport
2019 June BAS
 - Allport Investments Ltd
The Kiwi House Building Co
2019 Compliance
 - Kiwi Home Builders Ltd
The Kiwi House Building Co
2019 December BAS



PRODUCT UPDATE





NEW FEATURES

DECEMBER 2020

- Relative Date Filtering
- FYI Reports





SEARCH AND RETRIEVAL

View Filters

Relative Dates

- ✈ Filter using any date with relative calculation
- ✈ Could be used for:
 - Overdue Tasks
 - Overdue Jobs
 - Identifying clients at risk
- ✈ Live Demo

Home
Clients
Jobs
Tasks
Documents
Automation
Knowledge
Practice

Documents

All

Search documents

Type	Name	
	Engagement Letter	
	Collaborate Invitation	
	Engagement Letter	
	RE: Can you help me with another proj...	
	Working Papers	
	Cover Letter	
	RE: Can you help me with another proj...	
	Engagement Letter 1	
	SIGNED - TR2	
	Individual Return Checklist	
	Year end individual checklist	
	Individual Return Checklist	
	Financials	
	SIGNED - TR1	
	Year end financials	
	Engagement Letter	
	Engagement Letter #1	
	Engagement Letter #1	
	Engagement Letter #1	

Select Date Range

☐ Fixed
☒ Relative

Older Than 90 Days

Today
Yesterday
Tomorrow
Last Week
Next Week
Older Than 90 Days
Past
Future

Group	Client	Category	Engagements
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Wealth	
Marshall Group	Marshall, Frank	Wealth	
Marshall Group	Marshall, Frank	Client Files	Engagements
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Correspondence	
Marshall Group	Marshall, Frank	Correspondence	



NEW FEATURES





H1 2021





JOBS AND TIME




Billing AutoTime

-  Default time on automation steps
-  Defined activities such as "receiving & filing emails"
-  Calendar entry auto capture
-  Goal: 80% time automated

fyi Dashboard 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
























Insights Capacity Planning

-  AutoTime is an enabler
-  User roles on jobs & automations
-  Each job linked to automation

fyi Home Clients ▾ Jobs ▾ Tasks ▾ Documents ▾ Automation Knowledge Practice

Automation

Processes Apps Process History

 Email AutoFile Import emails from Outlook and AutoFile them based on your exact configuration 	 Calendar Entry AutoFile Import calendar entries from Outlook and AutoFile them based on your exact configuration
 Xero Practice Manager Import clients, client groups and jobs from Xero Practice Manager 	 Nightly Backup Nightly backup of all your documents saved in FYI into your practice OneDrive
 Tax Assessments AutoFile (Agreed & Not Postal) Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email 	 Tax Assessments AutoFile (Agreed & Postal) Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email
 Client Ledger Reports AutoFile Batch import of client ledger reports on demand and AutoFile into FYI 	 Negative Email Alert Automatic alert when a negative email is received from a client to a designated default user
 Corporate Documents - Import & AutoFile Daily import of Completed Document created in NowInfinity, AutoFile into FYI 	 ASIC Statement & Resolution – Import & AutoFile Daily import of Annual Statements created in NowInfinity, AutoFile into FYI
 Completed Document Signature Import of Signed Document from AdobeSign 	 Internal Reports - Task
 Practice Reports 	 Update Job



PRACTICE

Insights Practice Reporting

- ✈️ Extend FYI Reports with Power BI for enhanced insights
- ✈️ Sophisticated, blended reports
- ✈️ Customisable

tm

Home

Clients

Jobs

Tasks

Documents

Automation

Knowledge

Practice

Search groups, clients or jobs

Automation

Processes

Apps

Process History

Name

Practice Reports

Trigger

Manual

Filter

Client

Growth Partners Internal

Status

Active

Owner

Liz Hurst

Start From

01/12/2020

Last Run

Today at 11:13 for Growth Partners Internal

[View history](#)

Test

Run

Back

Step	Application	Action	
1	FYI Reports	<div>Jobs Report</div> <ul style="list-style-type: none">The document will be filed as "Jobs Summary Report" in the Practice Admin cabinet	<div></div> <div></div> <div></div>
2	FYI Reports	<div>Jobs Report</div> <ul style="list-style-type: none">The document will be filed as "Jobs By Partner Manager" in the Practice Admin cabinetA comment will be created	<div></div> <div></div> <div></div>
3	FYI Reports	<div>Jobs Report</div> <ul style="list-style-type: none">The document will be filed as "Timesheets By Team Member" in the Practice Admin	<div></div> <div></div> <div></div>



NEXT STEPS










WHAT TO TAKE AWAY FROM THIS SESSION

- ✓ Consider when your practice will migrate to the new templates and stationery
- ✓ Set up Collaborate to start sharing and co-editing with your clients
- ✓ Use the Jobs Board for a more visual way to manage your workflow
- ✓ Start drafting your time sheets based on what you've recently worked on in FYI



SUPPORT

HELP CENTRE

-  [Document templates and stationery](#)
-  [Email templates and signatures](#)
-  [Collaborate](#)
-  [Jobs Board](#)
-  [Creating bulk time entries](#)



[Submit a request](#) [Sign in](#)

Hi. How can we help?

 Search

Getting Started

Start a free trial, navigate FYI, learn the essentials.

Onboarding

Follow our process to configure FYI, migrate your documents and onboard your team.

Learning Resources

Access our growing library of masterclasses, training webinars and tutorials.

Emails

Automatically capture and file client emails. Store centrally for the practice. Use email templates and more.

Documents

Automate the creation and filing of documents. Use templates and powerful add-ins across the Office suite.

Search and Retrieval

Locate documents in seconds using views, sorts and filters to get the full power of metadata and search.

Clients

Work from a dedicated client workspace to view documents, jobs, tasks and automations related to a client or group.

Tasks and Comments

Create, delegate and view tasks. Notifications when tasks are completed. Use Comments for questions and commentary.

Jobs and Time

Display and maintain XPM jobs within FYI. File documents at a job level. Add commentary and tasks. Add time.

Workflows

Enable the review and approval of emails and documents. Assign approval authority to partners or managers.

Collaborate

Collaborate with your team and clients. Use co-edit, share documents securely, receive documents from clients.

Process Automation

Use time-saving automations across document creation, import, filing, email communication and more!



FYI COMMUNITY

FACEBOOK USER COMMUNITY

➤ Created as a forum to discuss features and best practices to ensure your practice is getting the most out of FYI

➤ Join the [FYI User Community](#) today



FYI User Community

🔒 Private group · 83 members

About Discussion Announcements Rooms Members Media



Cassie Kaddatz shared a link.



🛡️ Admin · 30 November at 10:09 · 🌐

Happy Monday Community!

Let's start the week off with a 🚀 New Feature 🚀

In case you missed it over the weekend, the team released conditional/filtered categories for cabinets. This gives you the ability to assign specific category options to specific cabinets! ... [See more](#)

Search by name			Add Category
Name	Available in Templates		
Admin Type	No		remove
Corporate Compliance	No		remove

About

Welcome to the FYI User Community!

This group has been created for all ac users to discuss FYI features and best share insig... [See more](#)

🔒 Private

Only members can see who's in the group and what they post

👁 Visible

Anyone can find this group.



WELL DESERVED REST...

- ✓ The FYI Team will be taking a well deserved break over the Christmas/New Year period. We will be closed public holidays & have minimal staff during the holiday period monitoring Support.

**VISIT THE HELP CENTRE
FOR MORE INFORMATION**

support.fyidocs.com



THE WORLD'S MOST AUTOMATED
DOCUMENT MANAGEMENT PLATFORM