



# MASTERCLASS

ENHANCING YOUR WORKFLOWS



## 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.



### **JACK THIEL**

**CLIENT SUCCESS MANAGER**

Jack is a Chartered Accountant with more than 5 years working in the profession and a specialisation in SaaS technology. He leads our Client Success Team to ensure FYI clients see early and ongoing return on their investment in FYI.



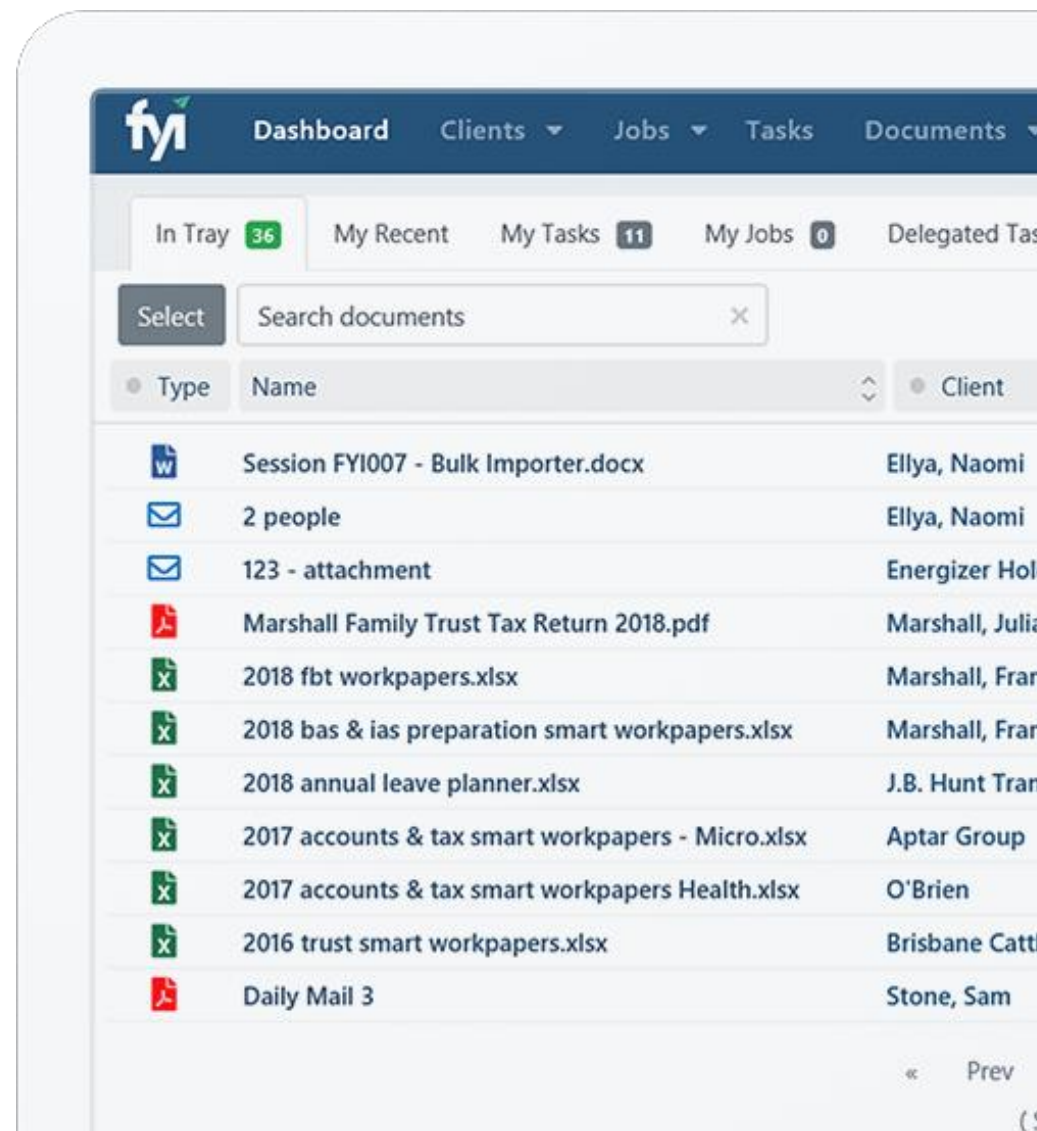
# OVERVIEW

## Enhancing Your Workflows

- The Problem Workflows Solves
- Guided Walkthrough
- Preparing your Practice
- Managing My Workflows
- Platform Update



Webinar recording and resources will be available from the **FYI Help Centre**





# THE PROBLEM FYI IS SOLVING

## Document approvals are difficult to track via Tasks...

- **High Volume:** very quickly task lists can become overwhelming
- **Over-Notifying:** too many notifications means none get the attention they deserve
- **Not Built for Purpose:** tasks are not optimised for document approvals

## FYI's Workflow solves these issues by.....

- ✓ Segregating document workflows from other ad-hoc tasks
- ✓ Summarising notifications on a periodic basis (set by you!)
- ✓ Built-for-purpose functionality created specifically for document workflows and approvals



## GUIDED WALKTHROUGH

- Show you exactly how to draft and approve a document inside of FYI





- Draft an email in FYI
- Add an attachment
- Assign it for approval
- Approve & send email

- Draft an email in FYI
- Add an attachment
- Assign it for approval
- Approve & send email

fy

Dashboard

Clients

Jobs

Tasks

Documents

Automation

Knowledge

Search groups, clients or jobs

Documents

Workflow - Pend. Approval

Search documents

<input type="checkbox"/>	Type	Name	Client	Workflow	Approver	Owner	Modified by	Modified on	
<input type="checkbox"/>		Word for approval	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	13/06/2020 07:23	
<input type="checkbox"/>		For approval	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	13/06/2020 07:12	<span>Draft</span>
<input type="checkbox"/>		Working Papers	Marshall, Julia	Pending Approval	Roger Taylor	System	System	12/06/2020 10:28	
<input type="checkbox"/>		Working Papers	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	11/06/2020 18:05	
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	Pending Approval	Liz Hurst	Troy Steele	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Engagement Letter	Trace Family Trust	Pending Approval	Liz Hurst	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Year End Tax Letter	Stone, Stone,	Pending Approval	Liz Hurst	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		New Client Engagement	Vedas, Vedas,	Pending Approval	Roger Taylor	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Notice of Assessment - 2018	Smith, Smith,	Pending Approval	unknown	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	Pending Approval	unknown	Roger Taylor	System	11/06/2020 10:54	<span>Draft</span>
<input type="checkbox"/>		RE: Can you help me with another project...	Marshall, Julia	Pending Approval	Liz Hurst	Liz Hurst	Liz Hurst	11/06/2020 08:04	
<input type="checkbox"/>		Chase up on outstanding debt	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	11/06/2020 07:48	
<input type="checkbox"/>		Year end financials	Reed, Hank	Pending Approval	unknown	Phill Inn	Liz Hurst	11/06/2020 07:31	
<input type="checkbox"/>		Working Papers	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	11/06/2020 00:50	
<input type="checkbox"/>		MJM Welcome Letter	A M M Chiropractic Pty Ltd	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	05/06/2020 12:27	
<input type="checkbox"/>		NOA Cover Email	A M M Chiropractic Pty Ltd	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	05/06/2020 11:03	<span>Draft</span>
<input type="checkbox"/>		Year end financials	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	02/06/2020 13:44	<span>Draft</span>
<input type="checkbox"/>		Overdue Tax	Marshall, Frank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	31/05/2020 00:52	<span>Draft</span>
<input type="checkbox"/>		Year end financials	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	28/05/2020 12:09	
<input type="checkbox"/>		Notice of Assessment	Stone, Stone,	Pending Approval	Ron Silvosa	Liz Hurst	System	07/05/2020 13:49	
<input type="checkbox"/>		Engagement Letter	Default, Default,	Pending Approval	unknown	System	System	17/04/2020 09:40	
<input type="checkbox"/>		Engagement Letter	Patterson, Patterson,	Pending Approval	unknown	System	System	17/04/2020 09:40	
<input type="checkbox"/>		ASIC annual review no changes 2020	Marshall, Frank	Pending Approval	unknown	unknown	unknown	31/03/2020 12:06	
<input type="checkbox"/>		createDate	Marshall, Frank	Pending Approval	unknown	unknown	unknown	20/03/2020 10:18	
<input type="checkbox"/>		Year end financials	Allport, Kevin	Pending Approval	Liz Hurst	Troy Steele	Roger Taylor	19/03/2020 14:43	



## SUMMARY

### Takeaways to remember:

- Draft emails inside of FYI to send them for **approval**
- Update the Workflow status of any document using the **Workflow section** of the FYI Drawer
- Approvers can review and approve documents from **My Workflows**
- Approvers can **approve and send** in one action



## PREPARING YOUR PRACTICE

- Setting User Approval Level
- Configuring Summary Notifications






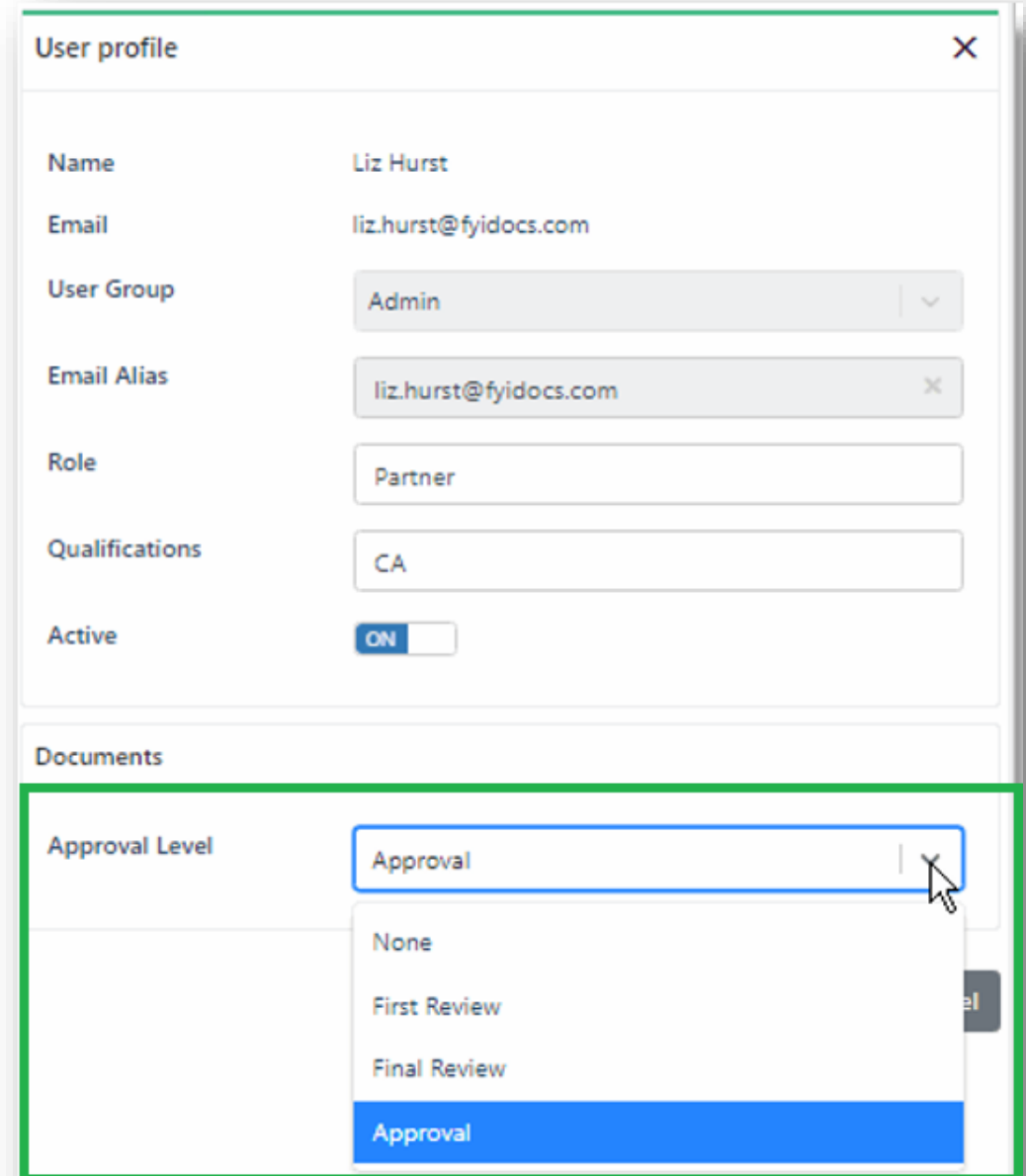


# PREPARING YOUR PRACTICE

## 1. Set User Approval Levels

- Access via Practice Settings > Admin > Users
- The Approval Level for each user can be set as one of the following:
  - None (default)
  - First Review
  - Final Review
  - Approval

 [Click here](#) to learn how to **Configure User Approval Levels**



User profile

Name Liz Hurst

Email liz.hurst@fyidocs.com

User Group Admin

Email Alias liz.hurst@fyidocs.com

Role Partner

Qualifications CA

Active ON

Documents

Approval Level

Approval

None

First Review

Final Review


Approval



# PREPARING YOUR PRACTICE

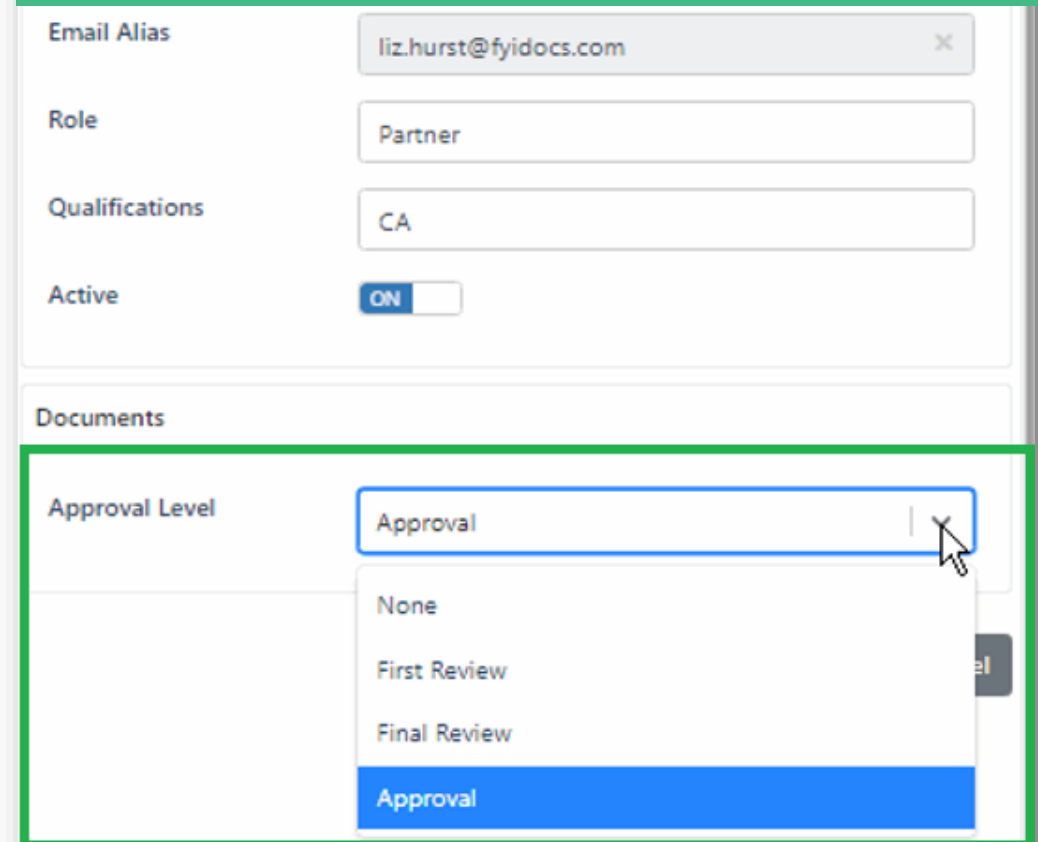
## 1. Set User Approval Levels

- Access via Practice Settings > Admin > Users
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  - None (default)
  - First Review
  - Final Review
  - Approval

 [Click here](#) to learn how to **Configure User Approval Levels**

### Tip!

Determine which documents require **approval** then **document it** and **communicate** with your team



The screenshot shows a user configuration form with the following fields:

- Email Alias:** liz.hurst@fyidocs.com
- Role:** Partner
- Qualifications:** CA
- Active:** ON

Below these fields is a section titled **Documents**. Within this section, the **Approval Level** dropdown menu is open, showing the following options:

- None
- First Review
- Final Review
- Approval (highlighted in blue)



# PREPARING YOUR PRACTICE


## 2. Configure Summary Notifications

- To **avoid excessive notifications**, resulting from document workflows, we have developed **summary notifications**
- Summary notifications "**bundle**" together recent notifications, into a single reminder
- Designed with **Approvers** in mind



[Click here](#) for more information on  
**Summary Notifications**

Step 1

 Summary Notification





Action

Notify User

Document Approver

6 documents for your attention by the Pending Approval - Scheduled ...

FYI Docs <no-reply@fyidocs.com>  
To Liz Hurst

Fri 7:10 AM

Hi Liz Hurst,

[Click here for a list of 6 documents for your attention by the Pending Approval - Scheduled Summary Notification automation as at 19/06/2020 07:10 AEST.](#)



## LIVE DEMO

- Create new views
- Configure a summary notification automation
- Use a document view as a process filter

Dashboard

Clients

Jobs

Tasks

Documents

Automation

Knowledge

Search groups, clients or jobs

Automation

Processes

Apps

Process History

Name

Scheduled reminder - Pending Approvals

Test

Back

Trigger

Schedule

Every 8 hours  
from 2 Jun 2020

Filter

Document

View

Workflow - Pend. Approval

Status

Active

Owner

Roger Taylor

Start From

11/06/2020

Last Run

Not yet run

Reset

Add Step

Step	Application	Action	
1	FYI	Summary Notification	



## SUMMARY

### Takeaways to remember:

- Get an FYI Admin to update user **Approval Levels**
- **Document a process** for when each of the workflow states should be used
- Configure a **summary notification** automation to avoid excessive notifications to approvers
- Use **document view** as filters on an automation



# DRAFTING DOCUMENTS IN FYI

- Why draft documents and emails in FYI
- How to draft documents and emails in FYI
- Requesting approval on a document
- Recent enhancements to email drafting





# DRAFTING DOCUMENTS IN FYI

## 1. Why draft documents and emails in FYI

- Benefit from **AutoFiling**
- Leverage **templates**
- Easily **co-edit** with team members
- **Workflow** the document



[Click here](#) for a video tutorial on **Creating Emails in FYI**

Email

File Note

Meeting

Pdf

Phone

Presentation

Spreadsheet

Task

Time Sheet

Upload

Web Link

Word

Create Email

Client

Marshall, Frank  
client.frank.marshall@outlook.com

Change To

Email

Marshall, Frank  
client.frank.marshall@outlook.com

x | v

Template

Year end financials

x | v

Name

Year end financials

Cabinet

Final Reports & Returns

x | v

Year

2020

| v

Job

2020 Compliance

x | v

Show Closed Jobs

OFF

Tags

No tags selected

| v

Save or Send

Draft in FYI

x | v

Attachments (1 item / 629 KB)

Collated Files  
629 KB

x

Add Document

Send Attachments

Email

x | v

Include as PDF

ON








# DRAFTING DOCUMENTS IN FYI

## 3. How to request approval in FYI

From any email or document drafted in FYI:

- Update the workflow status to **Pending Approval**
- Select an **Approver**
- **That's it!**

 [Click here](#) for a more information on **Requesting Approvals**

Email

Year end financials

Reference RT-030492

Created by Roger Taylor on 23/06/2020

Filing

Attachments 1 to be sent

Tasks

Time

Workflow

Status

Pending Approval

Approver

Roger Taylor

Owner

Me



# DRAFTING DOCUMENTS IN FYI

For those interested in drafting emails in FYI, we have recently released **several enhancements**:

- Addressees & CCs
  - Access to client contacts
  - Add CC's from within FYI
- Attachments
  - Easily add/remove attachments
- New HTML editor for cleaner formatting



[Click here](#) for more information on  
**Creating an Email in FYI**

**Email Description**

Draft in Outlook

From: Roger Taylor <roger.taylor@thegrowth.partners>  
To: Marshall, Frank <client.frank.marshall@outlook.com>

Dear Frank

Trust you are well

Please find below the financial statements for the year end 30 June 2020.

{{ Attachment }}


For more information please visit [www.growthpartners.com/terms](http://www.growthpartners.com/terms).

Regards,

{{ AuthorName }}

{{ AuthorRole }} {{ AuthorQualifications }}

Direct {{ AuthorPhone }}

  
**Growth Partners**

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**Email**

Year end financials

Reference RT-030492

Created by Roger Taylor on 23/06/2020

Filing

Attachments **1 to be sent**

☐ 2020 Financial Statements  
Bruce Marshall

Tasks

Time

Workflow

Activity

Recent Documents

People

abigailtheclient@gmail.com To X

frank@gmail.com CC X

Please select an email or enter new one X



## SUMMARY

### Takeaways to remember:

- Draft documents and emails in FYI for greater functionality:
  - Benefit from **automatic filing**
  - Leverage **templates**
  - **Workflow** between users
- FYI's new **HTML editor** makes formatting emails (and email templates!) easy



# MANAGING MY WORKFLOWS

- My Workflows
- For Approvers
- For Owners





# MANAGING MY WORKFLOWS

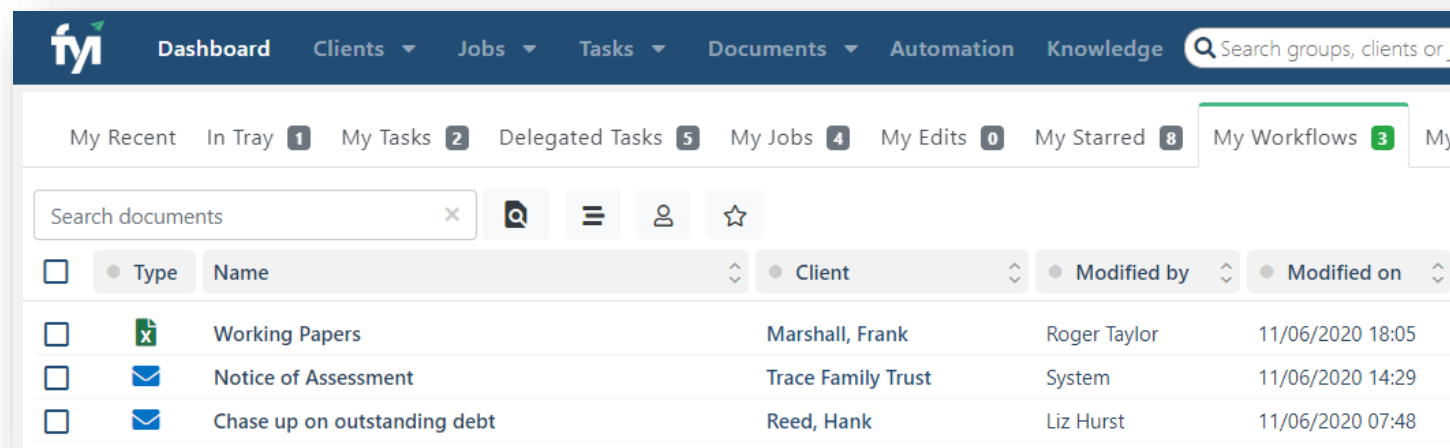
**My Workflows** is a built for purpose workspace inside of your dashboard.

## Which documents appear in My Workflows?

- You are the **Owner** and the workflow status either:
  - **Pending Approval**
  - **Changes Requested**


OR

- You are the **Approver** and the workflow status is **Pending Approval**



The screenshot shows the 'My Workflows' section of a dashboard. At the top is a navigation bar with the 'fyi' logo and links to Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. A search bar is on the right. Below the navigation bar is a tabbed interface with tabs for My Recent, In Tray (1), My Tasks (2), Delegated Tasks (5), My Jobs (4), My Edits (0), My Starred (8), and My Workflows (3). The 'My Workflows' tab is active. Below the tabs is a search bar for documents and icons for search, menu, user, and star. A table lists the workflows with columns for checkboxes, Type, Name, Client, Modified by, and Modified on.

<input type="checkbox"/>	Type	Name	Client	Modified by	Modified on
<input type="checkbox"/>		Working Papers	Marshall, Frank	Roger Taylor	11/06/2020 18:05
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	System	11/06/2020 14:29
<input type="checkbox"/>		Chase up on outstanding debt	Reed, Hank	Liz Hurst	11/06/2020 07:48

 [Click here](#) for more information on **My Workflows**



# MANAGING MY WORKFLOWS

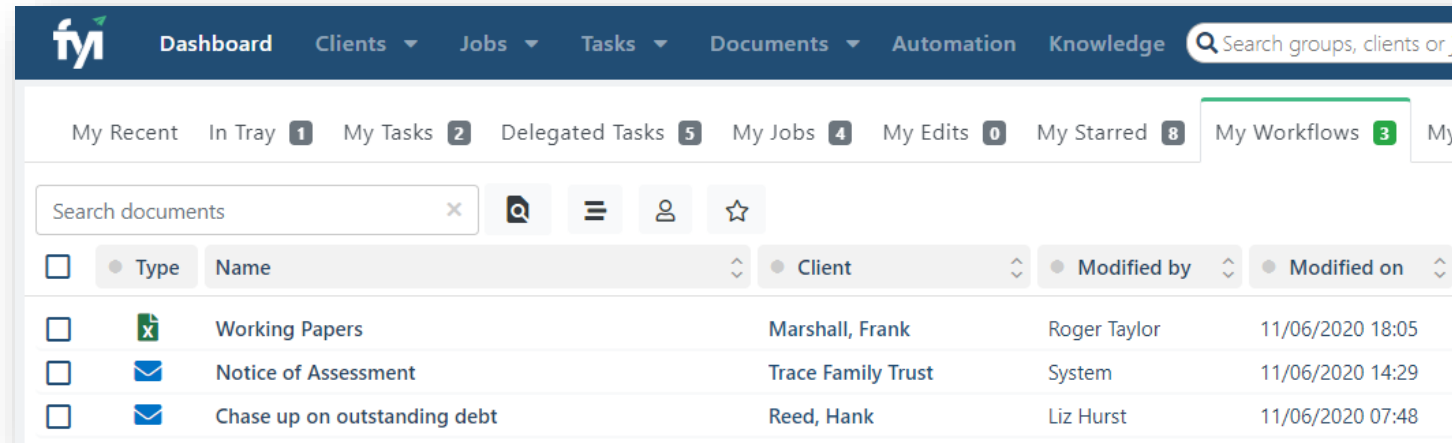
**My Workflows** is a built for purpose workspace inside of your dashboard.

Split into two views to help you see which documents are:

- For your attention
  - i.e. **Approvers** where status is **Pending Approval**
- Awaiting action from another user
  - i.e. **Owners** where status is **Pending Approval**


## Tip!

When you enter **My Workflows** the first document for your attention will instantly appear in **preview** mode



The screenshot shows the 'My Workflows' section of a dashboard. At the top, there's a navigation bar with the 'fyi' logo and links to Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. A search bar is on the right. Below the navigation bar, there's a row of tabs: My Recent, In Tray (1), My Tasks (2), Delegated Tasks (5), My Jobs (4), My Edits (0), My Starred (8), and My Workflows (3). The 'My Workflows' tab is selected. Below the tabs, there's a search bar for documents and icons for search, list view, user, and star. A table follows with columns: Type, Name, Client, Modified by, and Modified on. The table contains three rows of data.

<input type="checkbox"/>	Type	Name	Client	Modified by	Modified on
<input type="checkbox"/>		Working Papers	Marshall, Frank	Roger Taylor	11/06/2020 18:05
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	System	11/06/2020 14:29
<input type="checkbox"/>		Chase up on outstanding debt	Reed, Hank	Liz Hurst	11/06/2020 07:48

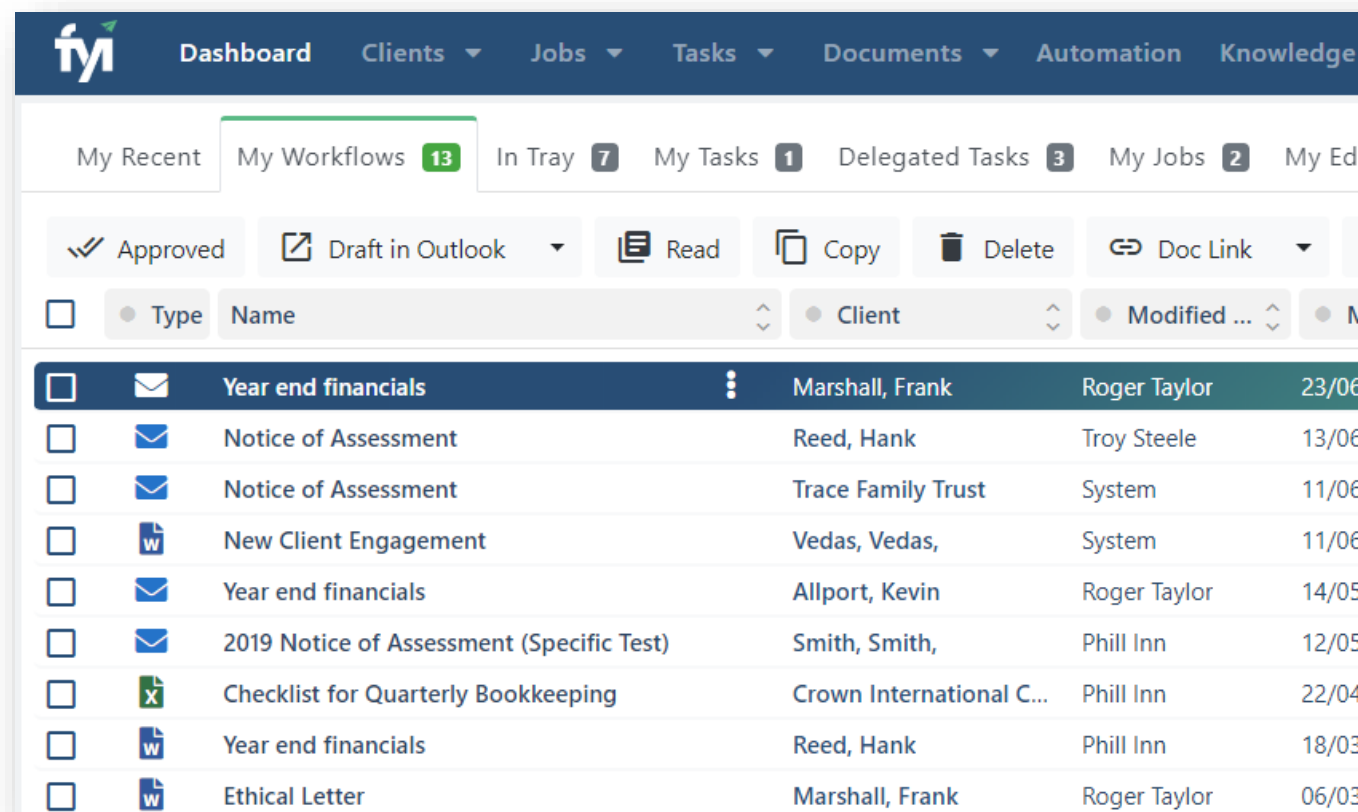
 [Click here](#) for more information on **My Workflows**



# MANAGING MY WORKFLOWS

## For Approvers:

- See a list of documents awaiting your **Approval** in **My Workflows**
- **Preview, edit and update** as required
- Get notified of new documents for pending your approval, via the **Summary Notification** automation



fyi Dashboard Clients Jobs Tasks Documents Automation Knowledge					
My Recent My Workflows 13 In Tray 7 My Tasks 1 Delegated Tasks 3 My Jobs 2 My Ed					
✓ Approved Draft in Outlook Read Copy Delete Doc Link					
Type Name Client Modified ...					
<input checked="" type="checkbox"/>	✉	Year end financials	Marshall, Frank	Roger Taylor	23/06
<input type="checkbox"/>	✉	Notice of Assessment	Reed, Hank	Troy Steele	13/06
<input type="checkbox"/>	✉	Notice of Assessment	Trace Family Trust	System	11/06
<input type="checkbox"/>	📄	New Client Engagement	Vedas, Vedas,	System	11/06
<input type="checkbox"/>	✉	Year end financials	Allport, Kevin	Roger Taylor	14/05
<input type="checkbox"/>	✉	2019 Notice of Assessment (Specific Test)	Smith, Smith,	Phill Inn	12/05
<input type="checkbox"/>	📄	Checklist for Quarterly Bookkeeping	Crown International C...	Phill Inn	22/04
<input type="checkbox"/>	📄	Year end financials	Reed, Hank	Phill Inn	18/03
<input type="checkbox"/>	📄	Ethical Letter	Marshall, Frank	Roger Taylor	06/03



[Click here](#) for more information on  
**Requesting Changes**



# MANAGING MY WORKFLOWS

## For Approvers:

- Send documents back to the Document **Owner** by updating the Workflow Status to:
  - **Changes Requested** OR
  - **Approved**

The screenshot displays two overlapping windows from a software application. The 'Spreadsheet Preview' window on the left shows a document titled 'Point Sheet' with a 'Growth Partners' logo and a table for 'Description of Points:'. The table has two columns: 'W/P Ref.' and 'Point'. The 'Spreadsheet' window on the right shows the document's metadata and workflow status. The 'Workflow' section is highlighted with a green border, showing the status set to 'Changes Requested', the approver as 'Phill Inn', and the owner as 'Roger Taylor'. A comment box contains the text: 'Roger Taylor, Phill Inn has requested change to your document.' and a green 'Comment' button is visible.

**Spreadsheet Preview**

Approved

**Growth Partners**

Description of Points:

W/P Ref.	Point

**Spreadsheet**

Working Papers

Finish Co-editing

Started Co-editing on 11/06/2020  
Filing changed by Phill Inn on 15/06/2020  
Last saved by Roger Taylor on 11/06/2020  
Created by System on 11/06/2020

Filing  
Tasks  
Time

**Workflow**

Status: Changes Requested  
Approver: Phill Inn  
Owner: Roger Taylor

Comment: Roger Taylor, Phill Inn has requested change to your document.

Type @ to notify someone in your team Characters left: 960

Comment

Activity





# MANAGING MY WORKFLOWS

## For Approvers:

- Send documents back to the Document **Owner** by updating the Workflow Status to:
  - **Changes Requested** OR
  - **Approved**
- FYI will prefill a comment, tagging the document **owner** to **notify** them of the change
- **Customise comments** as needed



[Click here](#) for more information on  
**Requesting Changes**

The screenshot displays the FYI workflow management interface. On the left, a 'Spreadsheet Preview' window shows a document titled 'Point Sheet' with a 'Growth Partners' logo. The spreadsheet has columns for 'Description of Point' and 'W/P Ref.'. On the right, a 'Spreadsheet' window shows a 'Working Papers' section with a 'Finish Co-editing' button and a list of actions: 'Started Co-editing on 11/06/2020', 'Filing changed by Phill Inn on 15/06/2020', 'Last saved by Roger Taylor on 11/06/2020', and 'Created by System on 11/06/2020'. In the foreground, a 'Workflow' modal form is open, showing the 'Status' as 'Changes Requested', the 'Approver' as 'Roger Taylor', and the 'Owner' as 'Phill Inn'. The 'Comment' section contains a pre-filled message: 'Phill Inn, Roger Taylor has requested change to your document. Almost there, just fix up the formatting and it will be ready for approval.' Below the comment is a text input field with a placeholder 'Type @ to notify someone in your team' and a character count 'Characters left: 882'. A green 'Comment' button with a right-pointing arrow is at the bottom.

Spreadsheet Preview

Approved

Spreadsheet

Working Papers

Finish Co-editing

Started Co-editing on 11/06/2020

Filing changed by Phill Inn on 15/06/2020

Last saved by Roger Taylor on 11/06/2020

Created by System on 11/06/2020

Workflow

Status: Changes Requested

Approver: Roger Taylor

Owner: Phill Inn

Comment

Phill Inn, Roger Taylor has requested change to your document.

Almost there, just fix up the formatting and it will be ready for approval.

Type @ to notify someone in your team

Characters left: 882

Comment



# MANAGING MY WORKFLOWS

## For Approvers:

- On emails, you can send them yourself and the workflow status will automatically update to **Approved**

The screenshot displays an email client interface. The main window shows an email draft titled "Email Description". The "To" field is populated with "Marshall, Frank <client.frank.marshall@outlook.com>". The email body contains the following text:

Dear Frank

Trust you are well.

Please find below your complete financials and tax returns for the year end 30 June 2020.

{{ AttachmentLinks }}


For more information please see our terms or service: [www.growthpartners.com/terms](http://www.growthpartners.com/terms).

Regards,

**{{ AuthorName }}**

{{ AuthorRole }} {{ AuthorQualifications }}

Direct {{ AuthorPhone }}



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The right sidebar contains a list of workflow-related options: "Email", "Year end financials", "Reference RT-030492", "Created by Roger Taylor on 23/06/2020", "Filing", "Attachments 1 to be sent", "Tasks", "Time", "Workflow", "Activity", "Recent Documents", and "People".



# MANAGING MY WORKFLOWS

## For Owners:

- See a list of your documents that you have marked as **Pending Approval**

And separately view...

- A list of documents that your **Approvers** have marked as **Changes Requested**
- Get notified of changes to your documents, via **comments** from your **Approver**



[Click here](#) for more information on  
**Notifications**

The image shows a stack of three overlapping 'Workflow' modal windows. The top-most window is in focus and displays the following fields: 'Status' with a dropdown menu showing 'Approved'; 'Approver' with a dropdown menu showing 'Phill Inn'; 'Owner' with a dropdown menu showing 'Liz Hurst'; and a 'Comment' text area containing the text 'Liz Hurst, Phill Inn has approved your document.' Below the comment area is a green button labeled 'Comment' with a right-pointing arrow. At the bottom right of the modal, it says 'Characters left: 974'. The background windows show the same form but are slightly faded and offset.



## LIVE DEMO

- Review documents in My Workflows
- Request changes
- Approve and send
- Change the owner

fyi Dashboard Clients Jobs Tasks Documents Automation Knowledge Search groups, clients or jobs									
Documents									
Workflow - Pend. Approval Search documents									
	Type	Name	Client	Workflow	Approver	Owner	Modified by	Modified on	
<input type="checkbox"/>		Word for approval	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	13/06/2020 07:23	
<input type="checkbox"/>		For approval	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	13/06/2020 07:12	<span>Draft</span>
<input type="checkbox"/>		Working Papers	Marshall, Julia	Pending Approval	Roger Taylor	System	System	12/06/2020 10:28	
<input type="checkbox"/>		Working Papers	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	11/06/2020 18:05	
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	Pending Approval	Liz Hurst	Troy Steele	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Engagement Letter	Trace Family Trust	Pending Approval	Liz Hurst	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Year End Tax Letter	Stone, Stone,	Pending Approval	Liz Hurst	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		New Client Engagement	Vedas, Vedas,	Pending Approval	Roger Taylor	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Notice of Assessment - 2018	Smith, Smith,	Pending Approval	unknown	Liz Hurst	System	11/06/2020 14:29	<span>Draft</span>
<input type="checkbox"/>		Notice of Assessment	Trace Family Trust	Pending Approval	unknown	Roger Taylor	System	11/06/2020 10:54	<span>Draft</span>
<input type="checkbox"/>		RE: Can you help me with another project...	Marshall, Julia	Pending Approval	Liz Hurst	Liz Hurst	Liz Hurst	11/06/2020 08:04	
<input type="checkbox"/>		Chase up on outstanding debt	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	11/06/2020 07:48	
<input type="checkbox"/>		Year end financials	Reed, Hank	Pending Approval	unknown	Phill Inn	Liz Hurst	11/06/2020 07:31	
<input type="checkbox"/>		Working Papers	Reed, Hank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	11/06/2020 00:50	
<input type="checkbox"/>		MJM Welcome Letter	A M M Chiropractic Pty Ltd	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	05/06/2020 12:27	
<input type="checkbox"/>		NOA Cover Email	A M M Chiropractic Pty Ltd	Pending Approval	Liz Hurst	Troy Steele	Troy Steele	05/06/2020 11:03	<span>Draft</span>
<input type="checkbox"/>		Year end financials	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	02/06/2020 13:44	<span>Draft</span>
<input type="checkbox"/>		Overdue Tax	Marshall, Frank	Pending Approval	Liz Hurst	Troy Steele	Liz Hurst	31/05/2020 00:52	<span>Draft</span>
<input type="checkbox"/>		Year end financials	Marshall, Frank	Pending Approval	Liz Hurst	Roger Taylor	Roger Taylor	28/05/2020 12:09	
<input type="checkbox"/>		Notice of Assessment	Stone, Stone,	Pending Approval	Ron Silvana	Liz Hurst	System	07/05/2020 13:49	
<input type="checkbox"/>		Engagement Letter	Default, Default,	Pending Approval	unknown	System	System	17/04/2020 09:40	
<input type="checkbox"/>		Engagement Letter	Patterson, Patterson,	Pending Approval	unknown	System	System	17/04/2020 09:40	
<input type="checkbox"/>		ASIC annual review no changes 2020	Marshall, Frank	Pending Approval	unknown	unknown	unknown	31/03/2020 12:06	
<input type="checkbox"/>		createDate	Marshall, Frank	Pending Approval	unknown	unknown	unknown	20/03/2020 10:18	
<input type="checkbox"/>		Year end financials	Allport, Kevin	Pending Approval	Liz Hurst	Troy Steele	Roger Taylor	19/03/2020 14:43	



## SUMMARY

### Takeaways to remember:

- **My Workflows** shows documents that are:
  - Pending your **Approval**
  - Require you to make **Changes** AND
  - Awaiting **Approval** from an **Approver**
- Approvers receive **summary notifications**
- Owners receive **individual notifications** via comments



## ADVANCED WORKFLOW FUNCTIONALITY

- Default Status
- Pending Client Signature & Client Signed Status
- Read-only States





# ADVANCED WORKFLOW FUNCTIONALITY

## Default Workflow Status:

- By default, a new document created or uploaded to FYI will have the Workflow Status **Not Started**

### Tip!

If creating a document as part of a custom process, you can set its Workflow Status!



[Click here](#) for more information on **Automatic Workflow States**

Email

ATO Correspondence Email

Reference PI-000499

Created by Phill Inn on 16/06/2020

Filing

Attachments

Tasks

Time

Workflow

Status

Not Started

Approver

No approver selected

Owner

Phill Inn



# ADVANCED WORKFLOW FUNCTIONALITY

## Digital Signing:

- When sent for signing the Workflow Status is **automatically** be updated to **Pending Client Signature**

Send for Signature

Service

Adobe

Client

Marshall, Frank  
client.frank.marshall@outlook.com

Emails

Marshall, Frank  
client.frank.marshall@outlook.com

client.frank.marshall@outlook.com Signer

Service Status

Draft

Subject

Tax Return PDF

Message

2020 Tax Return for your review.  
  
Any questions, just let me know.

Workflow

Status

Pending Client Signature

Include reference

ON

Tax Return PDF

519 KB

Create

Cancel






# ADVANCED WORKFLOW FUNCTIONALITY

## Digital Signing:

- When sent for signing the Workflow Status is **automatically** be updated to **Pending Client Signature**
- Once signed the document is **automatically** imported to FYI and the Workflow Status is updated to **Client Signed**

 [Click here](#) for more information on **Automatic Workflow States**

Send for Signature

Service PDF

Client Tax Return

Emails

Service Reference RT-030101

Subject Filing changed by System on 15/06/2020

Message Last saved by Roger Taylor on 15/06/2020

Created by System on 15/06/2020

Filing

Thread

Tasks

Time

Workflow

Status Client Signed



# ADVANCED WORKFLOW FUNCTIONALITY

There are various **Read-only** states:

Status	Who Can Edit?	Who Can Change Status?
<b>Completed</b>	No Users	All Users
Approved	No Users	Users with <b>Approval</b>
Pending Client Signature	No Users	Users with <b>Approval</b>
Client Signed	No Users	Users with <b>Approval</b>

## Tip!

If you want a document to be **read-only**, but it doesn't require approval. Use the **Completed** workflow status – its accessible to all users.



[Click here](#) to learn who can **Edit a Document and Change Status.**



## SUMMARY

### Takeaways to remember:

- By default, every document is assigned to “**Not Started**” status
- Documents sent for signing, and documents signed, will **automatically** update the **Workflow Status**
- Any user can mark a document as **Completed** and subsequently return it to **in-progress**



# PLATFORM UPDATE

- New Releases & Roadmap
- Poll





# PLATFORM UPDATE FROM YOUR FEEDBACK



## **New HTML Editor [Out Now]**

Applies to email templates, draft emails, file notes, phone calls and meeting records. Provides for added functionality and cleaner formatting



## **Attachment Enhancements [Out Now]**

Outbound attachments will no longer be filed, minimising the opportunity for duplicates



## **Client Security [Out Now]**

General focus on improving email AutoFile (incorporate XPM contacts, in-tray improvements etc.)



# PLATFORM UPDATE

## NEW AND UPCOMING RELEASES



### **Co-Edit [Out Now]**

Internal users can now work together on FYI documents!



### **Collaborate [Coming Soon]**

Collaborate with your clients on documents, and allow them to upload documents directly into their client file in FYI!



### **Views as Automation Filters [Out Now]**

As already discussed, you can now use document views as filters on custom processes. This feature also extends to job views!



## SUMMARY

### POLL:

We love to hear your feedback. It goes along way in developing our feature roadmap.

So, if you could only pick one, which of these core features would you like us to focus on next?

1. Custom Processes
2. Email AutoFile
3. Templates & Stationery



## NEXT STEPS







## WHAT TO TAKE AWAY FROM THIS SESSION

To get Workflows up and running in your practice:

- Configure user **approval levels**
- Create and save new **document views** based on workflow states
- Configure a **summary notification** automation for approvers
- Begin **drafting emails in FYI** to leverage FYI's workflow functionality



# ADDITIONAL RESOURCES AVAILABLE

- Summary of content
- Webinar recording
- Presentation slides

**Hi. How can we help?**

Q Search

<b>Getting Started</b> Start a free trial, navigate FYI, master the essentials.	<b>Search and Retrieval</b> Locate documents in seconds using views, sorts and filters to get the full power of metadata and search.	<b>Document Automation</b> Store documents with enforced filing and all the controls you'd expect from a paperless office.
<b>Workflows</b> Enable the review and approval of documents. Use Comments to collaborate with your team.	<b>Email Management</b> Automatically capture and file client emails, access email templates and more.	<b>Client Relationship Management</b> Work from a dedicated client workspace to view documents, jobs, tasks and automations related to a client or group.
<b>Task Management</b> Delegate, update and complete tasks. View outstanding tasks across the entire practice.	<b>Job Management</b> Display and maintain XPM jobs within FYI. Add commentary, file documents, add tasks and time sheets at a job level.	<b>Process Automation</b> Time-saving automations across document creation, email communication, filing and more!

## Learning Resources

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

**VISIT THE HELP CENTRE  
FOR MORE INFORMATION**

[support.fyidocs.com](https://support.fyidocs.com)



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