



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



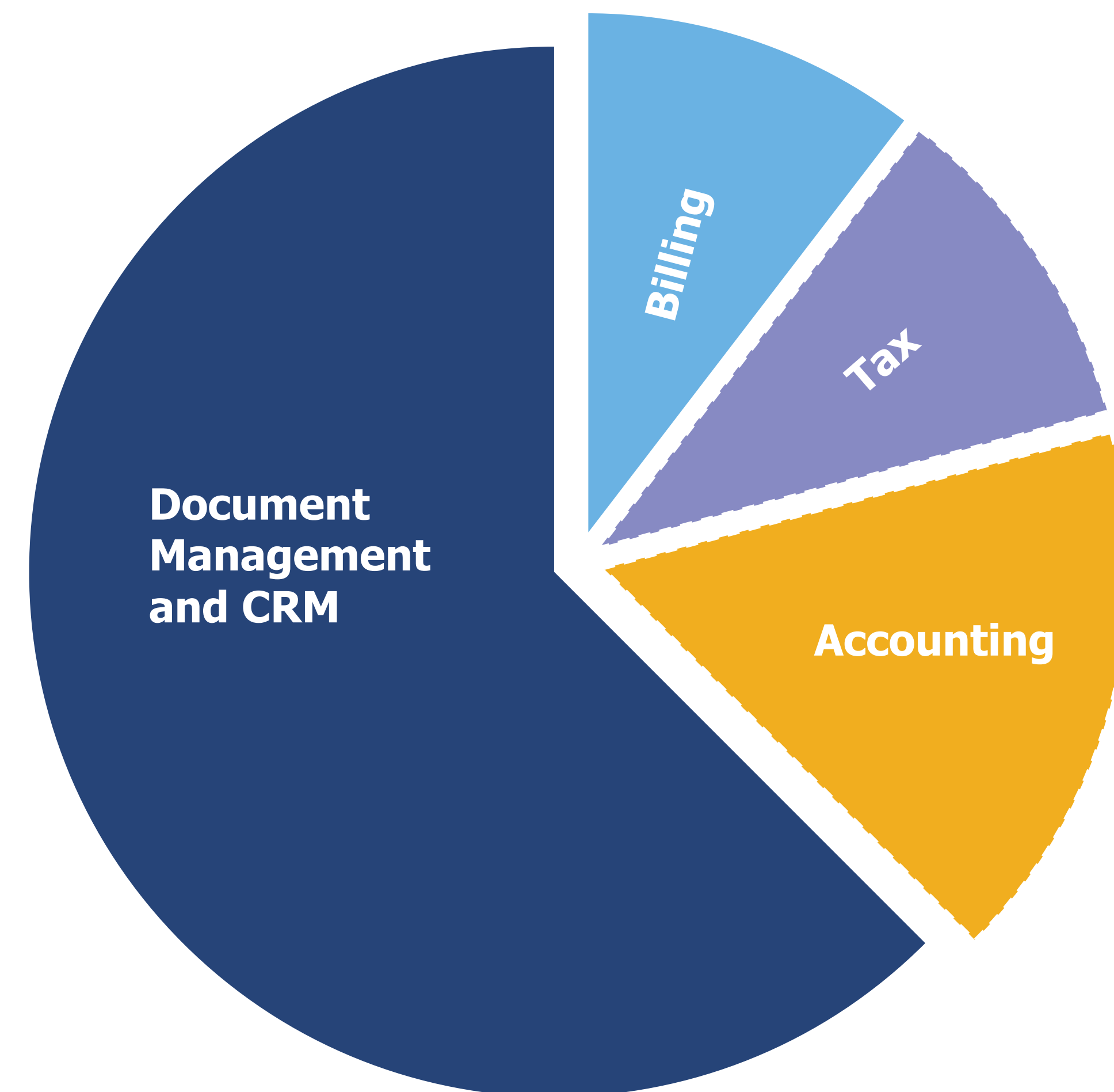
FYI is an online document management and automation engine, purpose-built for accountants.

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. The main content area features a table with columns for document type, name, client, and year. The table lists various documents, including bulk importers, tax returns, and workpapers. At the bottom right, there is a pagination control showing 'Prev', '1', '2' (highlighted), and 'Next'.

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



We believe transforming document management will deliver the next generation in productivity gains for accountants.

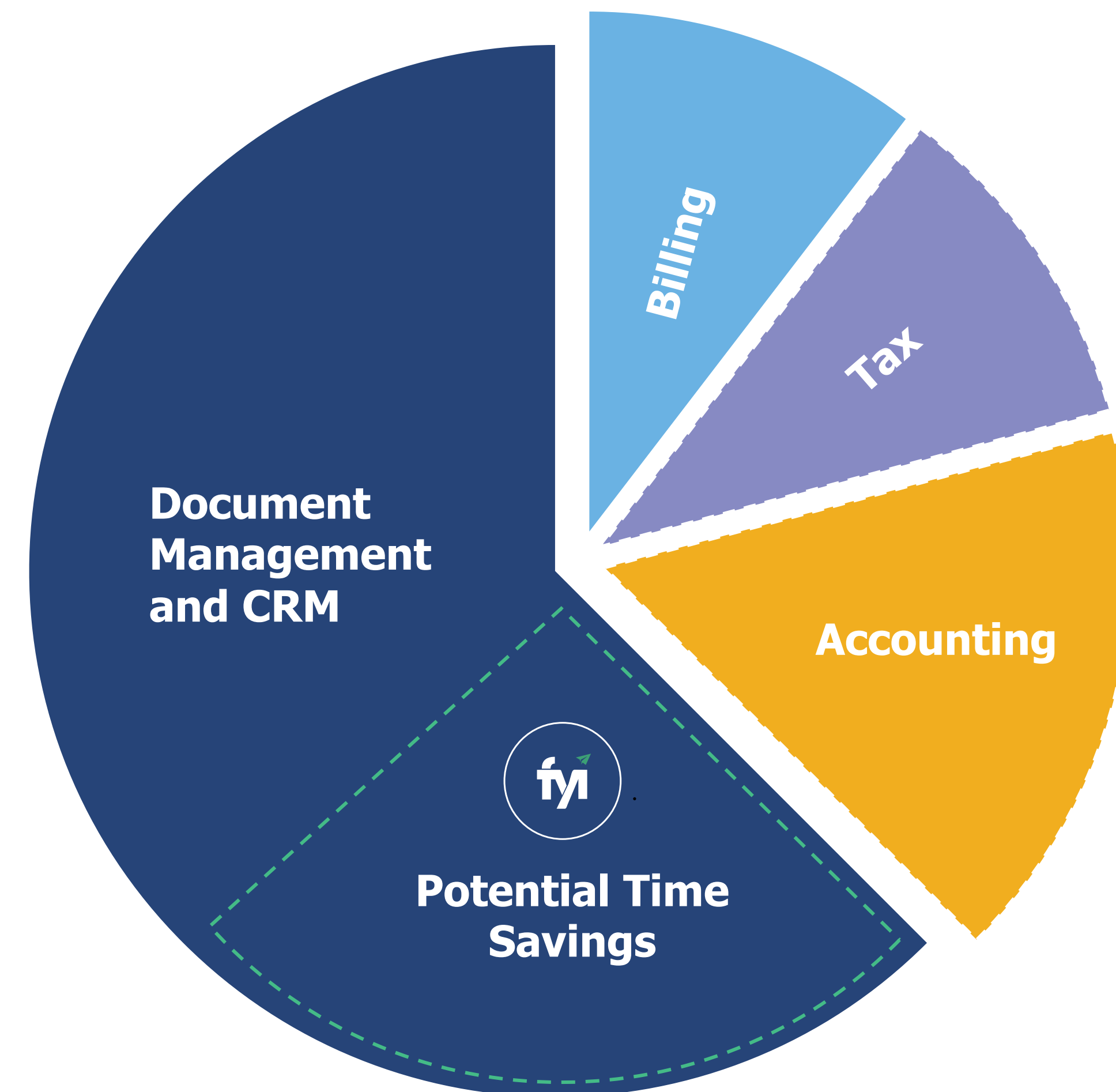


TIME SPENT BY ACCOUNTANTS

Source: FYI Compliance Time and Motion Study 2018



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

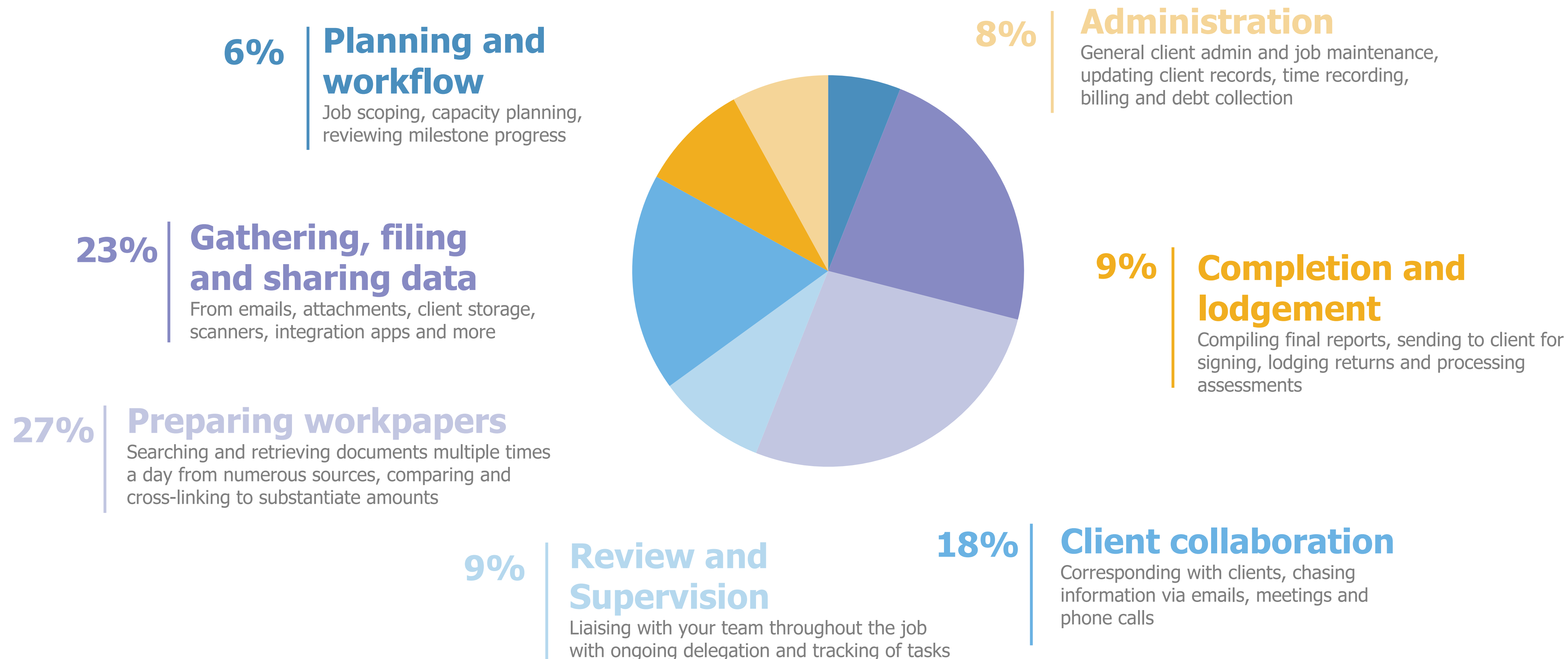


TIME SPENT BY ACCOUNTANTS

Source: FYI Compliance Time and Motion Study 2018



WHERE DOES THE TIME GO?





WHAT MAKES FYI UNIQUE?



**PROVEN RETURN
ON INVESTMENT**



**DOCUMENT
SECURITY**



**EASY
ONBOARDING**



**PROVEN RETURN
ON INVESTMENT**

SHAVE MINUTES OFF EVERY JOB

- Save more than 2 hours **for every compliance job**
- Generate time savings of up to 20% by using FYI's core feature set
- Take your productivity gains to a whole new level with FYI's custom processes



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



**Document
automation**



**Email
management**



**Client relationship
management**



**Document
workflows**



**Task
management**



**Client
collaboration**



**Search and
retrieval**



**Job
management**



**Process
automation**



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 circle with a leaf and hands), 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.'

The 'FYI for Office' sidebar is open on the right, showing the following fields:

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

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



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

Upload new signature

Recent Document

Final Review

Approved




Pending Client Signature

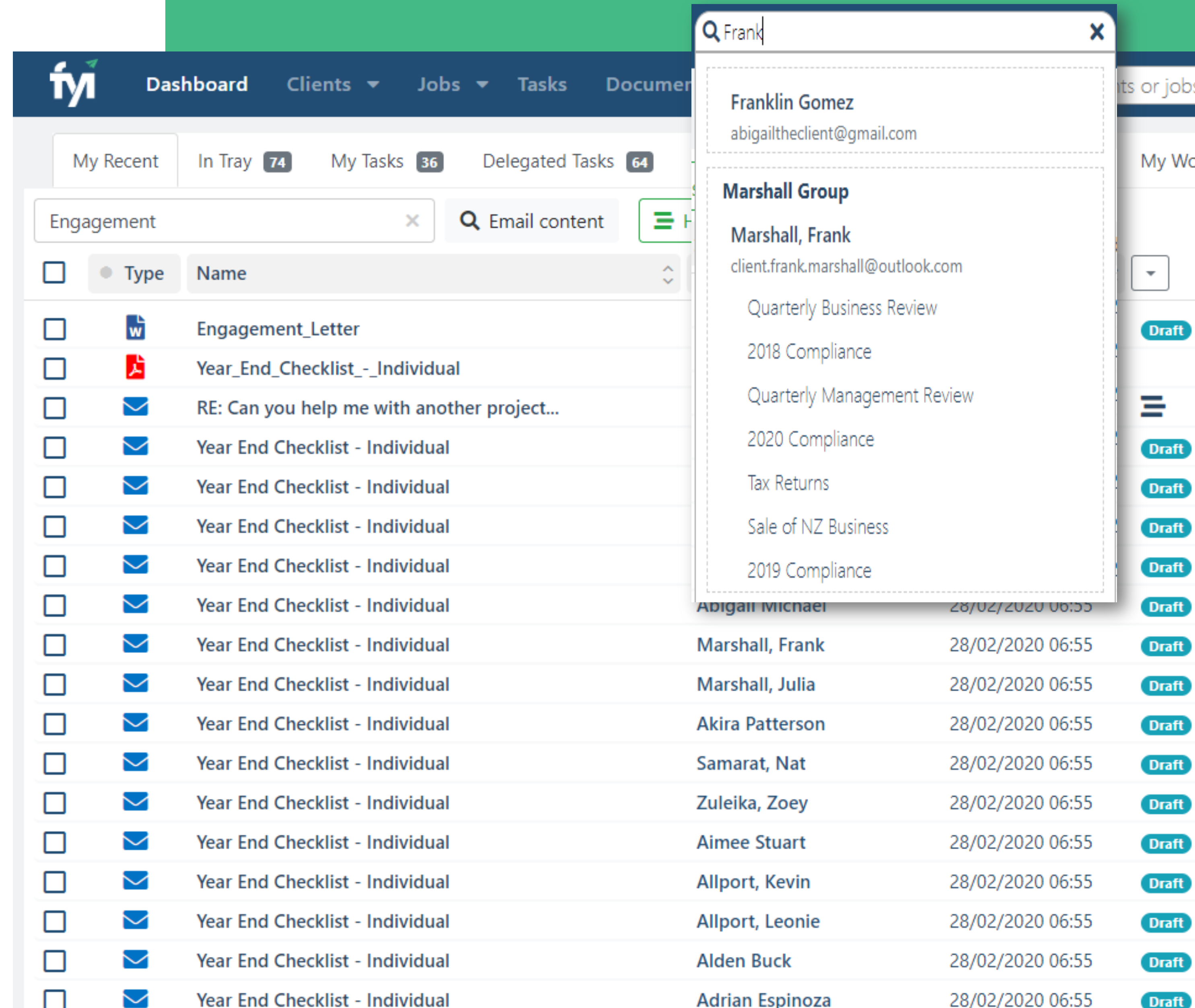
Versions



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 summary bar shows 'My Recent', 'In Tray 74', 'My Tasks 36', and 'Delegated Tasks 64'. The main content area features a search bar with 'Engagement' entered, a 'Q Email content' button, and a list of documents. The document list has columns for checkboxes, icons, and names. The names include 'Engagement_Letter', 'Year_End_Checklist_-_Individual', and 'RE: Can you help me with another project...'. A search results dropdown is open, showing 'Franklin Gomez' and 'Marshall Group' with a list of tasks like 'Quarterly Business Review', '2018 Compliance', and '2019 Compliance'. On the right, a table lists client names and dates, with 'Draft' buttons next to each entry.

Client Name	Date	Action
Franklin Gomez	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.

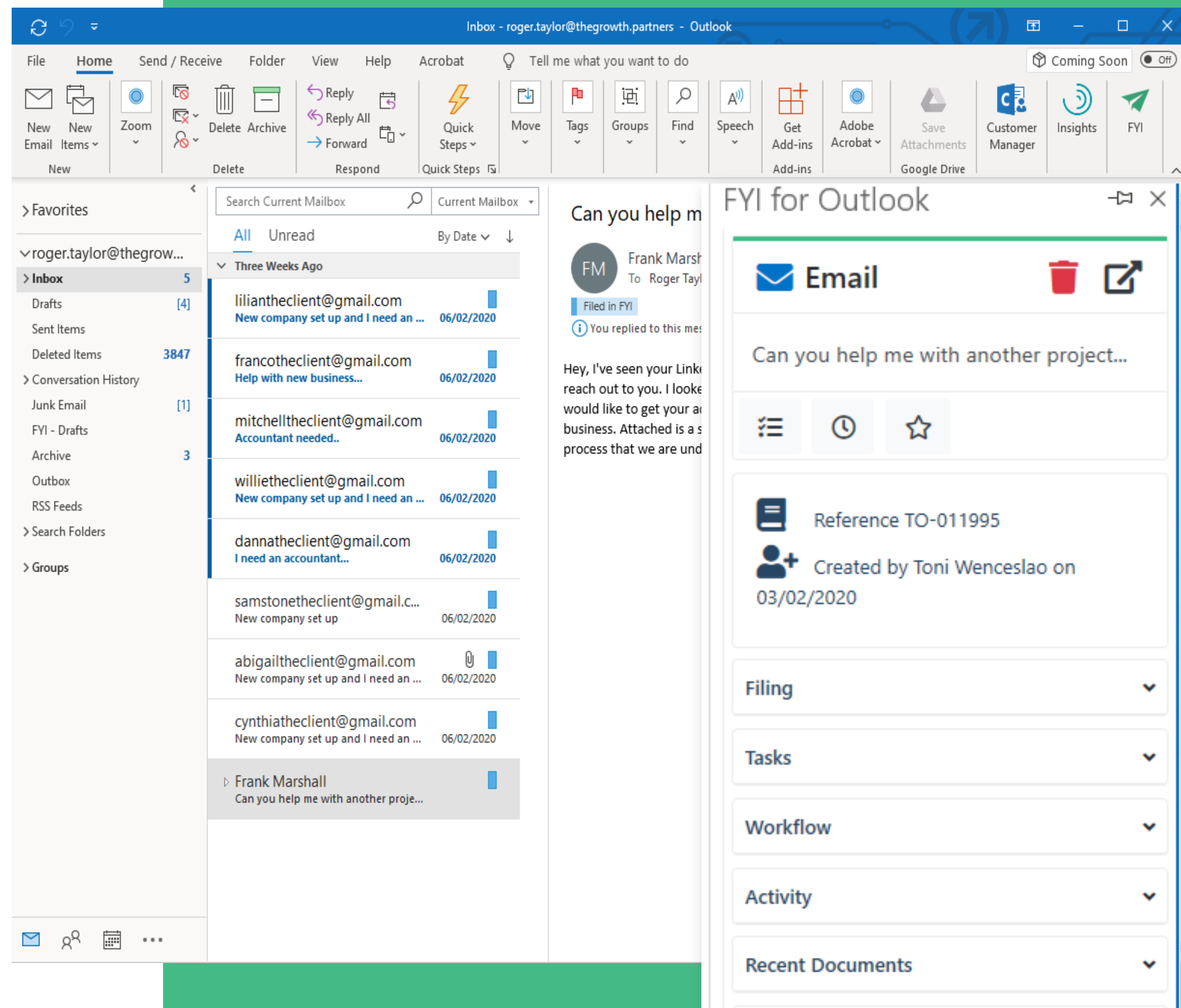
**Jason Skinner, Partner
Skinner Hamilton**



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



TASK MANAGEMENT

PRACTICE-WIDE TASKS

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

fyi

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

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

Assignee

Unassigned

Delegator

Roger Taylor

Client

No client selected

Due date

29/02/2020

Start date

Date

Status

Not started

Details

B

U

16

Segoe UI

A

Create

Cancel



JOB MANAGEMENT

TRACK WIP USING THE JOB BOARD

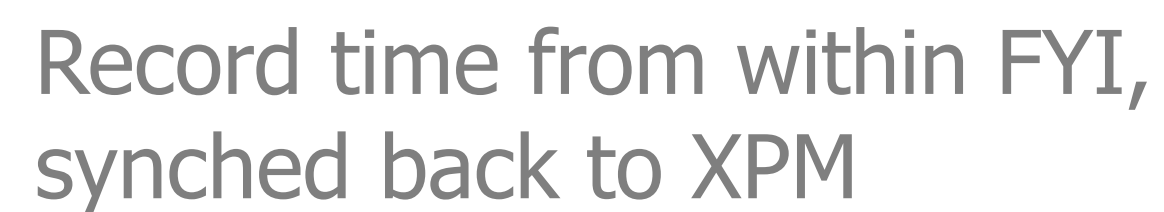


Add commentary to share
with the team

<div><div><div><div><div><div></div><div>fyi</div></div></div><div><div>Dashboard</div><div>Clients ▾</div><div><u>Jobs</u></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



MAINTAIN XPM JOBS



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 4

11/11/2019 → 17/11/2019

	Client	Job	Task	Minutes	Billable
▼ 11-Nov Monday (5.58hrs)					
▼ 12-Nov Tuesday (1hrs)					
^ 13-Nov Wednesday (5.7hrs)					
	Marshall, Frank	2019 Compliance	Task	30	True
	Marshall, Frank	2019 Compliance	Task	60	True
	Marshall, Frank	2019 Compliance	Task	12	True
	Innercity Electrical Pty Ltd	2018 Compliance	Task	60	True
	Innercity Electrical Pty Ltd	2018 Compliance	Task	60	True
	Innercity Electrical Pty Ltd	2018 Compliance	Task	120	True
▼ 14-Nov Thursday (5hrs)					



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

Dashboard
Clients
Jobs
Tasks
Documents
Automation
Knowledge

Marshall, Frank
x

Marshall Group
x
v

Summary

Detail

Jobs

Tasks

Documents

Tax

Corporate Affairs

Apps

Processes

Activities

Contact Details

Name

Marshall, Frank

Contact

Mr F. Marshall

Email

client.frank.marshall@outlook.com

Phone number

(08) 9867-5548

Mobile number

0433 830 454

Date of birth

Export Code

10102

Client Code

Partner

Liz Hurst

Manager

Roger Taylor

Tax & Company

v

Physical Address

v

Postal Address

v

Group Members

v

Phone call

File note

Meeting

Subject

Enter the subject

15 v

Segoe UI v

A v

Please enter description ...

Phone

(08) 9867-5548

Date

02/09/2019

Documents

Type

Name



[DEMO USE ONLY] Fiona_Reed-Tax-return

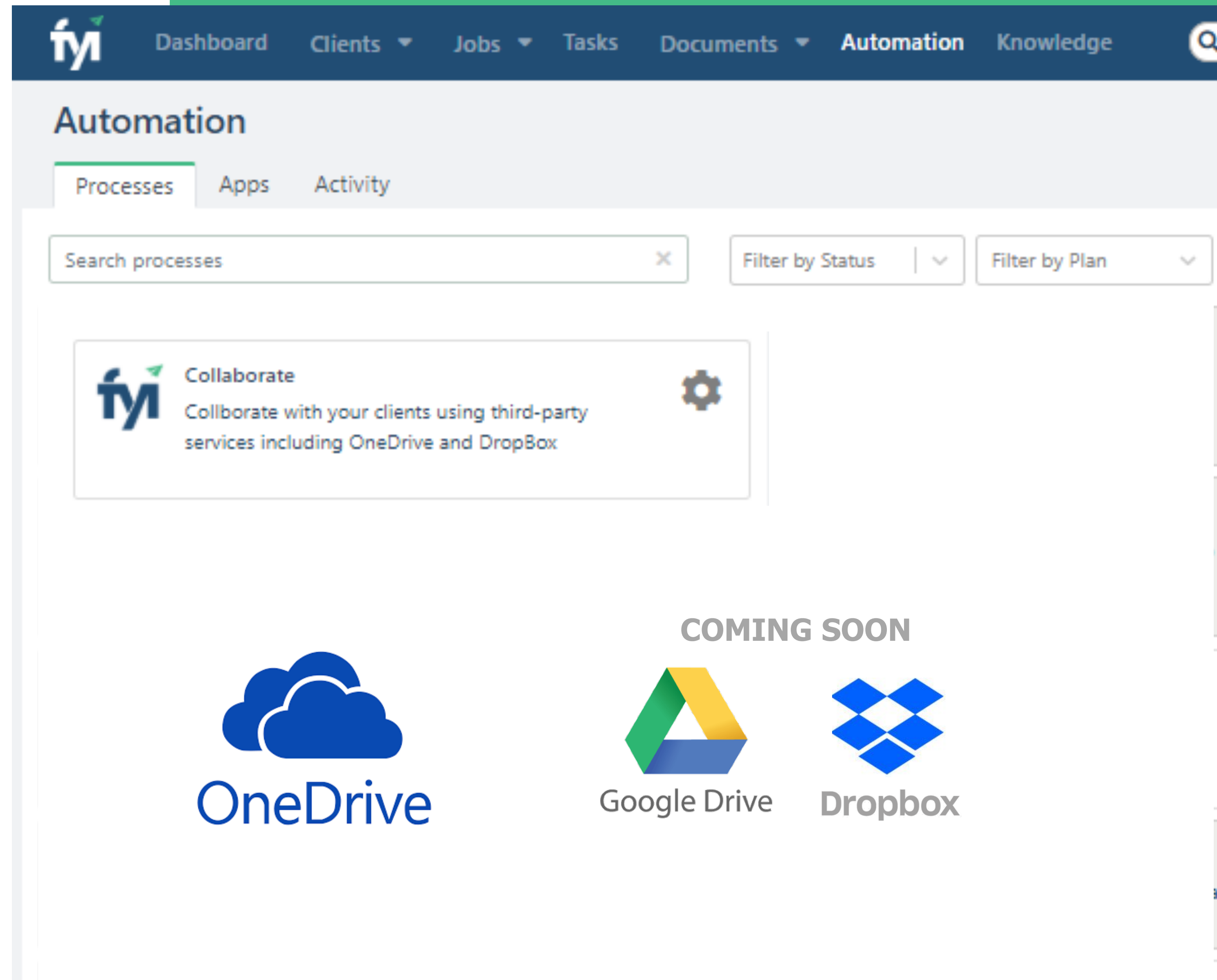
AdobeSign: Fiona_Reed-Tax-return



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 web application's 'Automation' section. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. The 'Automation' page has three tabs: Processes, Apps, and Activity. The 'Apps' tab is selected, showing a grid of integrations. The grid is organized into two columns: 'PLATFORM PRE-REQUISITES' and 'INTEGRATIONS'. The 'PLATFORM PRE-REQUISITES' column features logos for Office 365 and Xero. The 'INTEGRATIONS' column features logos for Zapier, ATO, BGL, NowInfinity, GreatSoft Cloud, Adobe Sign, DocuSign, and The Gap. The GreatSoft Cloud logo includes the tagline 'FREEDOM OF CHOICE'.

PLATFORM PRE-REQUISITES

- Office 365
- Xero

INTEGRATIONS

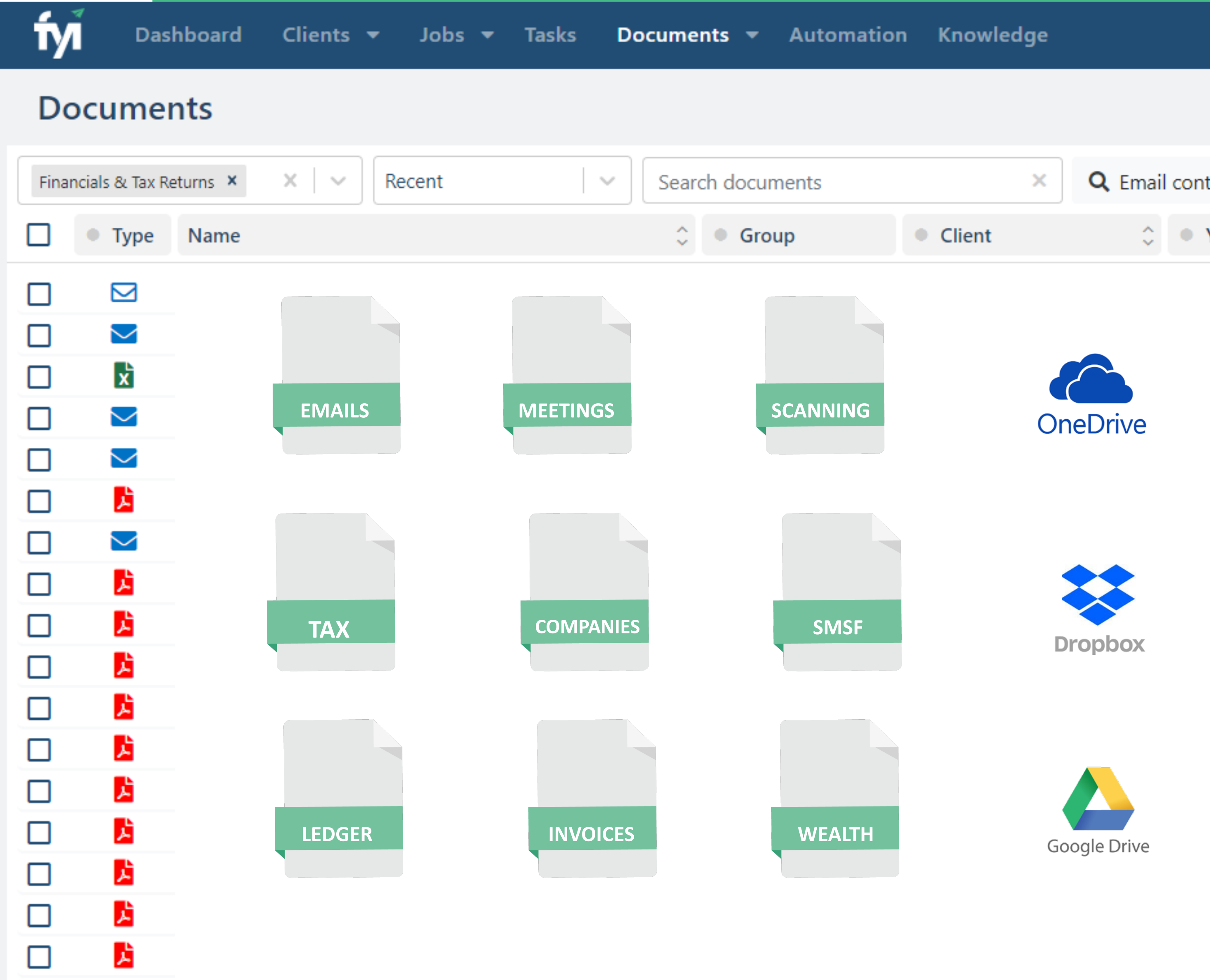
- Zapier
- ATO
- BGL
- NowInfinity
- GREATSOFT CLOUD (FREEDOM OF CHOICE)
- Adobe Sign
- DocuSign
- THE GAP



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 v the original estimate, AutoFile into FYI and default user alert.
- My Imports**: Automatic alert the Partner when a file is imported.
- Completed Document AutoFile**: Daily import of Completed Document cre 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

Structure

Individual

Status

Active

Owner

Roger Taylor

Last Run

Last Friday at 09:24 for Michael, Abigail

Reset

Add 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 	



WHAT MAKES FYI UNIQUE?



**PROVEN RETURN
ON INVESTMENT**



**DOCUMENT
SECURITY**



**EASY
ONBOARDING**



PROTECT YOUR DOCUMENTS IN THE CLOUD



DOCUMENT SECURITY



**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**



EASY ONBOARDING

TRANSITION TO FYI WITH OUR PROVEN IMPLEMENTATION PROCESS

- **Discovery**
- **Assisted or self-guided onboarding**
- **Migration of historical documents**
- **Configuration of FYI for your practice**
- **Training and change management**



IN-PRODUCT SUPPORT

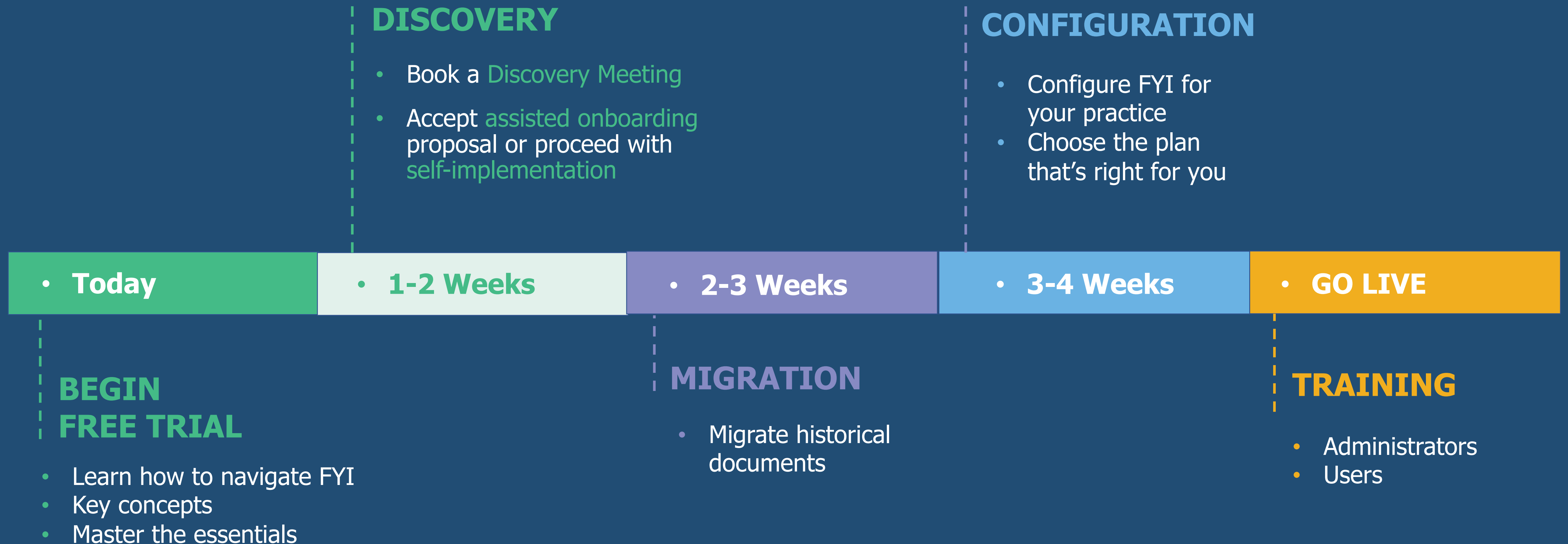
- › Be guided through the onboarding process in-product.
- › Take your practice from trial to live, with links and guides to setup key features and arrange document migration.

The screenshot shows the FYI in-product support onboarding interface. At the top, there is a navigation bar with the FYI logo, a 'Dashboard' link, and several menu items: 'Clients', 'Jobs', 'Tasks', 'Documents', 'Automation', and 'Knowledge'. On the right side of the navigation bar, there is a yellow badge that says 'ONBOARDING 0 / 5' and a green button with a plus sign and the word 'NEW'. Below the navigation bar, the main content area is titled 'Welcome FYI Support'. It contains a paragraph: '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.' Below this paragraph is a list of onboarding steps, each with a checkmark icon and a dropdown arrow:

- 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



TOOHEY REID

DIFFERENT THINKING



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





PRICING TO MATCH YOUR JOURNEY TO **FULL PROCESS AUTOMATION**

STARTER

Email & Task
Management

\$10

Per user/month

INTERMEDIATE

Document
Management

\$30

Per user/month

PRO

Process
Automation

\$50

Per user/month



2,000
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



WHY FYI

FEATURES

INTEGRATION

PRICING

LOGIN

30-DAY FREE TRIAL

Australia

New Zealand



YOUR 30-DAY FREE TRIAL

- ✈ Onboard in minutes.
- ✈ Access all of FYI's market leading features.
- ✈ No credit card required.
- ✈ Cancel anytime.

FYI delivers a step change in practice automation and efficiency

DELL



FYIDOCs.COM