GETTING STARTED

KEY CONCEPTS FOR NEW USERS

- Navigating FYI for the First Time
- The FYI Drawer
- Creating your First Email and Letter
- Help When You Need It

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

In This Guide

1. Navigating FYI for the First Time
   Dashboard, Clients, Jobs, Tasks, Documents, Automation and Knowledge
2. The FYI Drawer
   Your new Drawer in FYI, Outlook and Office
3. Creating Your First Email and Letter
   Sending your first email and letter from within FYI
4. Help When You Need It
   FYI website resources, Help Centre, User Guides
   Email Support and the FYI Community

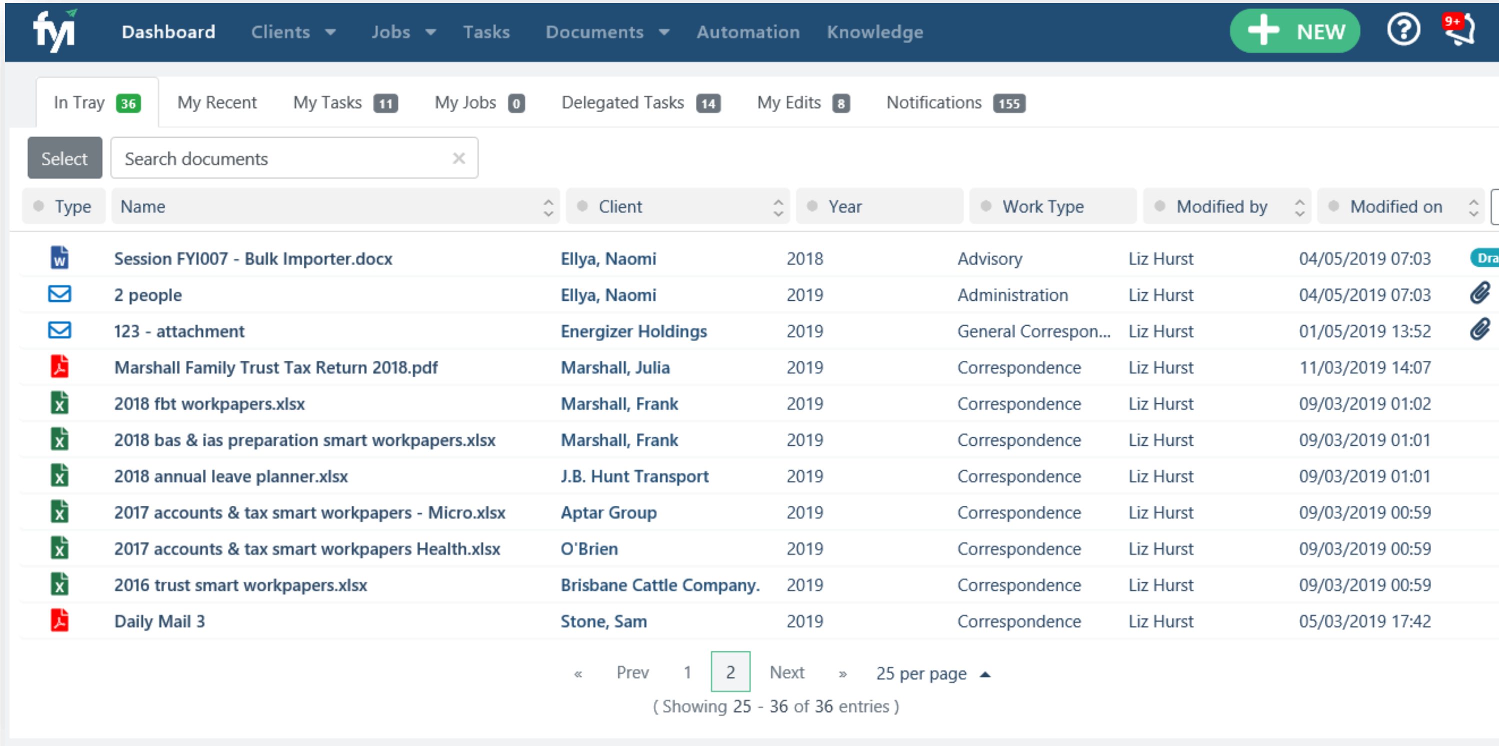
NAVIGATING FYI FOR THE FIRST TIME

Dashboard, Clients, Jobs, Tasks, Documents, Automation and Knowledge

Dashboard

The FYI **Dashboard** is your personal view of information in FYI. It displays documents and tasks that are specific to your login.

- **My Recent** shows the documents that you have recently created, modified or accessed in FYI.
- The **In Tray** lists all of your documents and emails, auto-filed and ready for you to validate which ones to make available to all FYI users across the practice.
- **My Tasks** displays tasks that have been delegated to you.
- **Delegated Tasks** displays the tasks that you have delegated to other people.
- **My Edits** shows all of the documents and emails that you currently have open for editing. When you finish editing, your document will be released so that other users can access them.
- **Notifications** displays updates on tasks. The **Alert** icon in the top right-hand corner of the dashboard shows when you have received new notifications.



The FYI Dashboard is your personalised view of information in FYI.

To re-order a tab position, simply click, hold and drag it to the order you prefer.

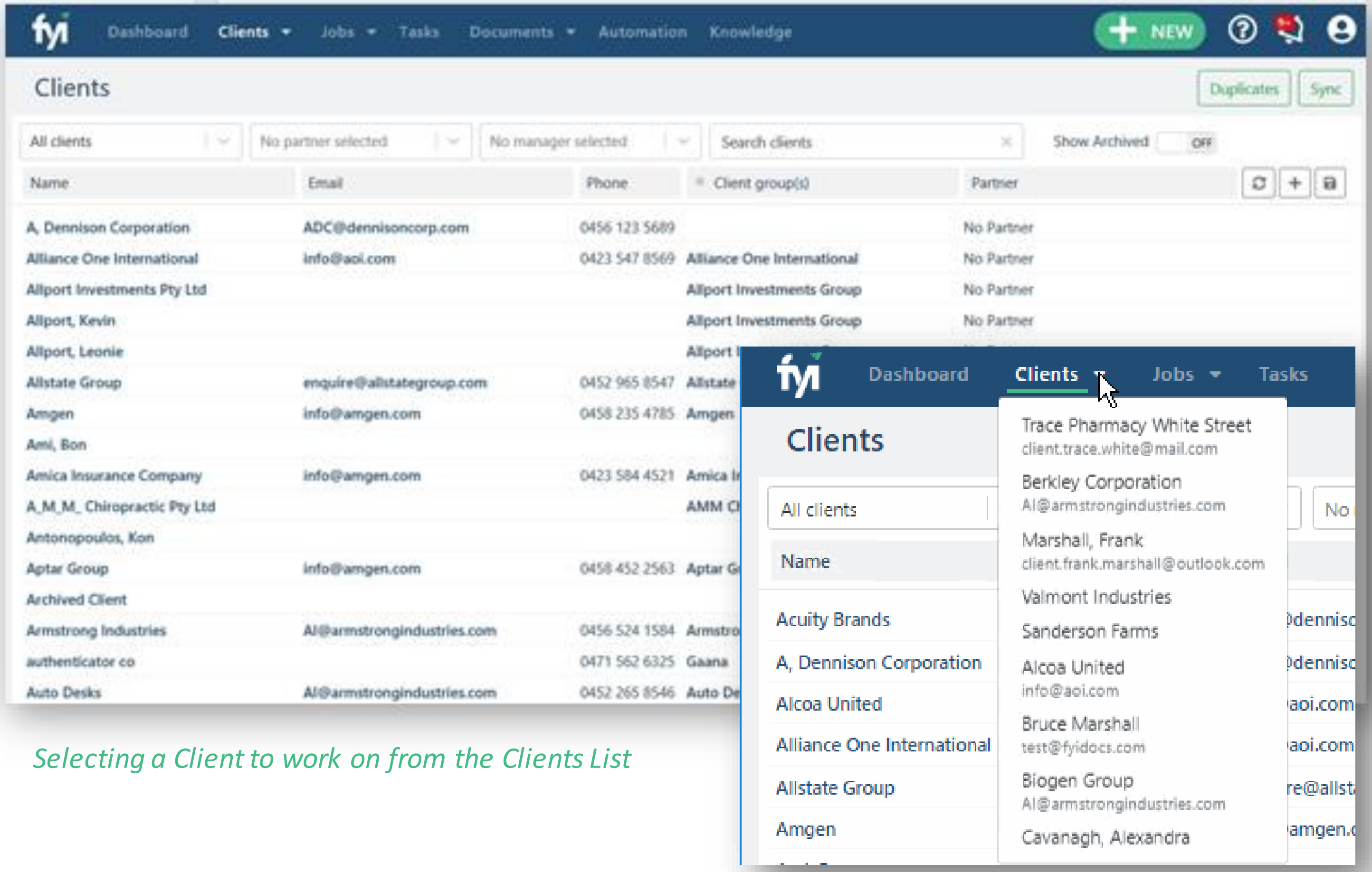
Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to [The FYI Dashboard](#).

Clients

Click the **Clients** menu option to display a list of all Clients across the practice, synchronised from Xero Practice Manager .

- You can change the drop-down to display **My Recently Used** Clients, or simply click the down arrow next to the Clients menu option to select from the last 20 Clients you have worked on.
- Use the **Partner** or **Manager** drop-downs to display Clients that person is responsible for.
- **Search Clients** to locate a client you wish to work on and display documents and tasks that are specific to that client.
- To view information, documents, tasks and jobs specific to an individual Client, click on a **Client Name** to access the **Workspace** for that Client.



Selecting a Client to work on from the Clients List

Click the down arrow next to the Clients menu option to select from the last 20 Clients you worked on

Need Help?

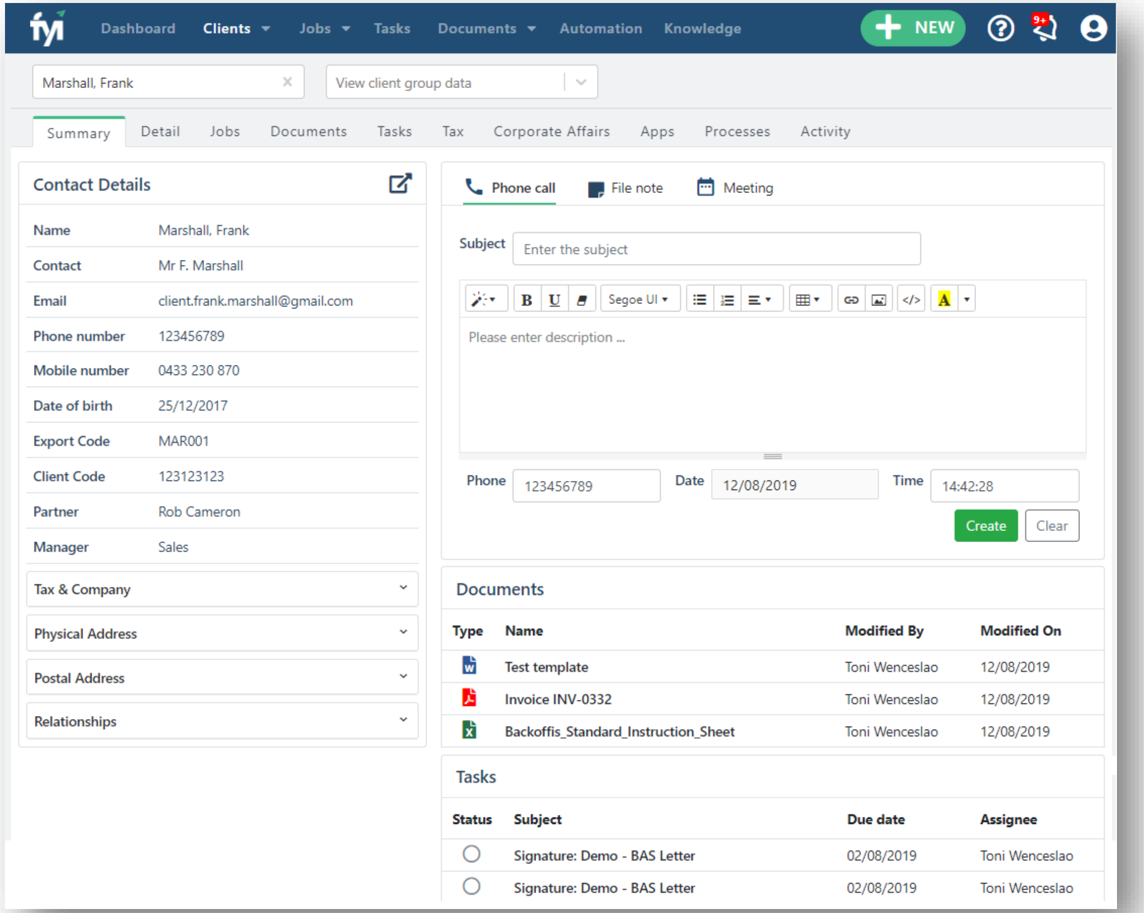
Visit FYI Help > Getting Started > Key Concepts an introduction to Clients

Clients

Click on a **Client Name** in a list to view information, documents, tasks and jobs specific to that Client.

- The **Summary** includes client and group information, contact details, recent documents and tasks related to each client. This is where you can enter details of phone calls, meetings and file notes.
- The **Detail** includes any default settings such as **Primary Contact, Cabinets** and **Categories** for documents and tasks created for the client.
- Other tabs provide access to **Jobs** that have been synchronised from Xero Practice Manager, **Documents** and **Tasks** specific to the Client, and **Tax** returns imported from Xero Tax.
- **Corporate Affairs** shows a summary of annual ASIC statements.

If you need to update client information such as name or address, it must be done in Xero Practice Manager.



An individual Client Workspace in FYI.

Need Help?

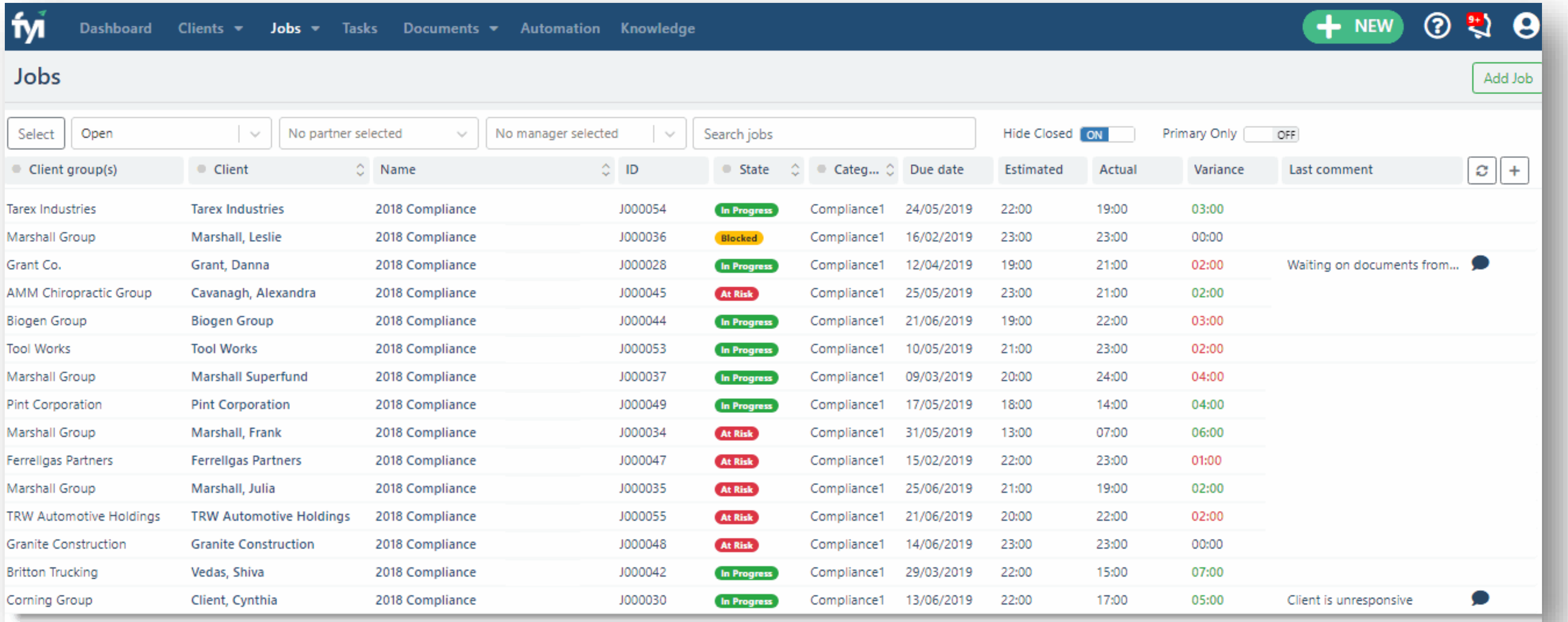
Visit FYI Help > Search and Retrieval > Using the Views for more information on the [Displaying Documents and Information for a Client]()

Jobs

Click the **Jobs** menu option to display a list of all Jobs across the practice. This is where you can access emails, documents and tasks related to a specific XPM job.

- **State** displays the state of each job according to how it is held in Xero Practice Manager – for example, In Progress, At Risk or Blocked.
- **Estimates, Actual** and **Variance** columns display time allocations imported directly from XPM.
- **Comments** can be added to each Job and the most recent Comment will be displayed in the Jobs list for instant access.

This is a handy tool for WIP meetings. Use filters and views to provide quick and easy access a set of Jobs that you'd like to review.



Client group(s)	Client	Name	ID	State	Categ...	Due date	Estimated	Actual	Variance	Last comment
Tarex Industries	Tarex Industries	2018 Compliance	J000054	In Progress	Compliance1	24/05/2019	22:00	19:00	03:00	
Marshall Group	Marshall, Leslie	2018 Compliance	J000036	Blocked	Compliance1	16/02/2019	23:00	23:00	00:00	
Grant Co.	Grant, Danna	2018 Compliance	J000028	In Progress	Compliance1	12/04/2019	19:00	21:00	02:00	Waiting on documents from...
AMM Chiropractic Group	Cavanagh, Alexandra	2018 Compliance	J000045	At Risk	Compliance1	25/05/2019	23:00	21:00	02:00	
Biogen Group	Biogen Group	2018 Compliance	J000044	In Progress	Compliance1	21/06/2019	19:00	22:00	03:00	
Tool Works	Tool Works	2018 Compliance	J000053	In Progress	Compliance1	10/05/2019	21:00	23:00	02:00	
Marshall Group	Marshall Superfund	2018 Compliance	J000037	In Progress	Compliance1	09/03/2019	20:00	24:00	04:00	
Pint Corporation	Pint Corporation	2018 Compliance	J000049	In Progress	Compliance1	17/05/2019	18:00	14:00	04:00	
Marshall Group	Marshall, Frank	2018 Compliance	J000034	At Risk	Compliance1	31/05/2019	13:00	07:00	06:00	
Ferrellgas Partners	Ferrellgas Partners	2018 Compliance	J000047	At Risk	Compliance1	15/02/2019	22:00	23:00	01:00	
Marshall Group	Marshall, Julia	2018 Compliance	J000035	At Risk	Compliance1	25/06/2019	21:00	19:00	02:00	
TRW Automotive Holdings	TRW Automotive Holdings	2018 Compliance	J000055	At Risk	Compliance1	21/06/2019	20:00	22:00	02:00	
Granite Construction	Granite Construction	2018 Compliance	J000048	At Risk	Compliance1	14/06/2019	23:00	23:00	00:00	
Britton Trucking	Vedas, Shiva	2018 Compliance	J000042	In Progress	Compliance1	29/03/2019	22:00	15:00	07:00	
Corning Group	Client, Cynthia	2018 Compliance	J000030	In Progress	Compliance1	13/06/2019	22:00	17:00	05:00	Client is unresponsive

Your Jobs Workspace in FYI – Display and maintain Xero Practice Manager Jobs and file documents by Job to provide instant access to relevant information at a Job level.

Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to Jobs.

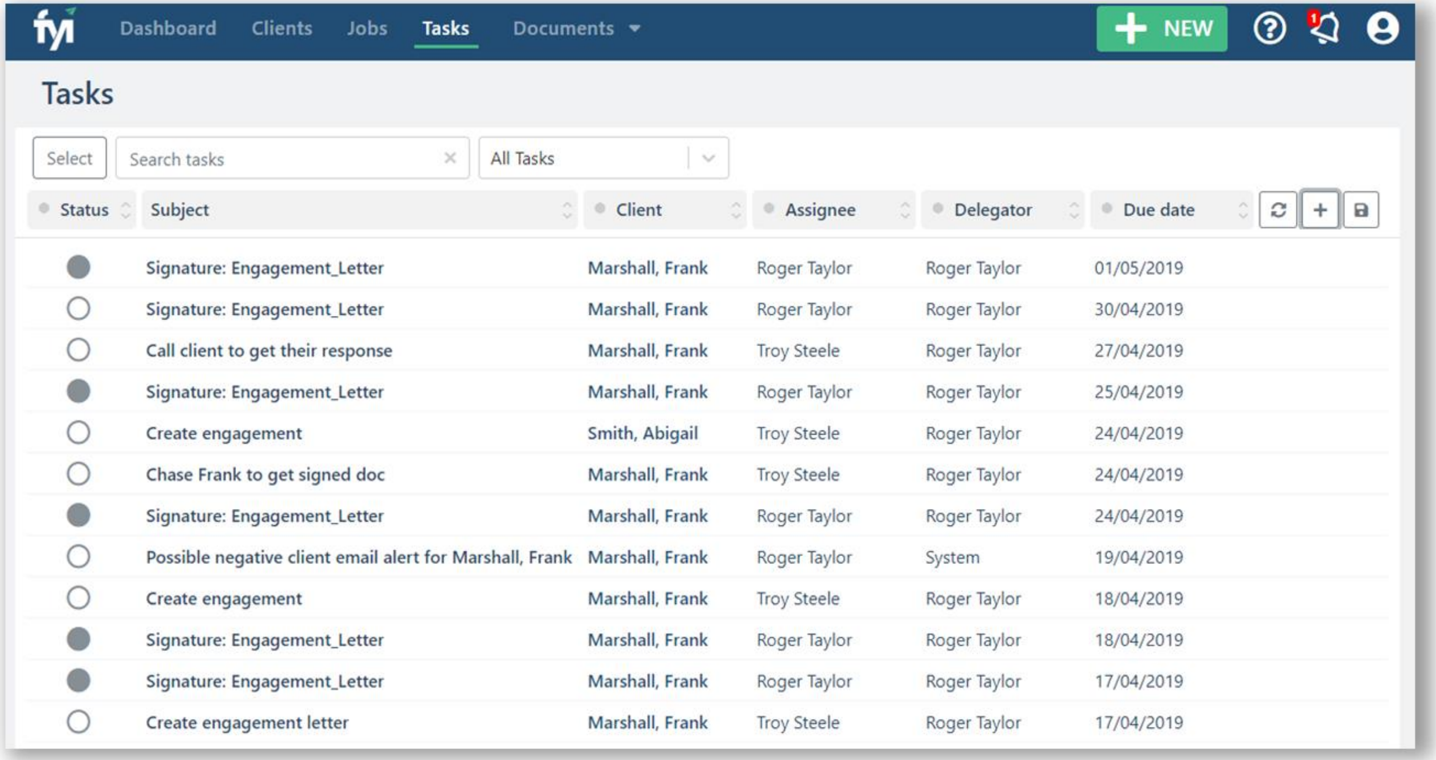
Tasks

Click the **Tasks** menu option to display outstanding tasks for all clients across the practice.

Filter the list by **Client** or by **User** to monitor workloads.

- **My Tasks** displays tasks that have been delegated to you by others, or that you have assigned to yourself.
- **Delegated Tasks** displays tasks that you have delegated to other people.
- The **Notifications** tab displays all system Notifications. For example, when you have been allocated a task or if someone updates a task that you have delegated to them.
- The **Alert** in the top right-hand corner shows when you have received a notification.

Download the **Getting Started with Tasks User Guide** and share with your team.



Status	Subject	Client	Assignee	Delegator	Due date
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	01/05/2019
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	30/04/2019
	Call client to get their response	Marshall, Frank	Troy Steele	Roger Taylor	27/04/2019
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	25/04/2019
	Create engagement	Smith, Abigail	Troy Steele	Roger Taylor	24/04/2019
	Chase Frank to get signed doc	Marshall, Frank	Troy Steele	Roger Taylor	24/04/2019
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	24/04/2019
	Possible negative client email alert for Marshall, Frank	Marshall, Frank	Roger Taylor	System	19/04/2019
	Create engagement	Marshall, Frank	Troy Steele	Roger Taylor	18/04/2019
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	18/04/2019
	Signature: Engagement_Letter	Marshall, Frank	Roger Taylor	Roger Taylor	17/04/2019
	Create engagement letter	Marshall, Frank	Troy Steele	Roger Taylor	17/04/2019

View outstanding tasks across the practice or for a selected Client. This is a handy tool for monitoring workload by client across your team.

Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to [Tasks]

Documents

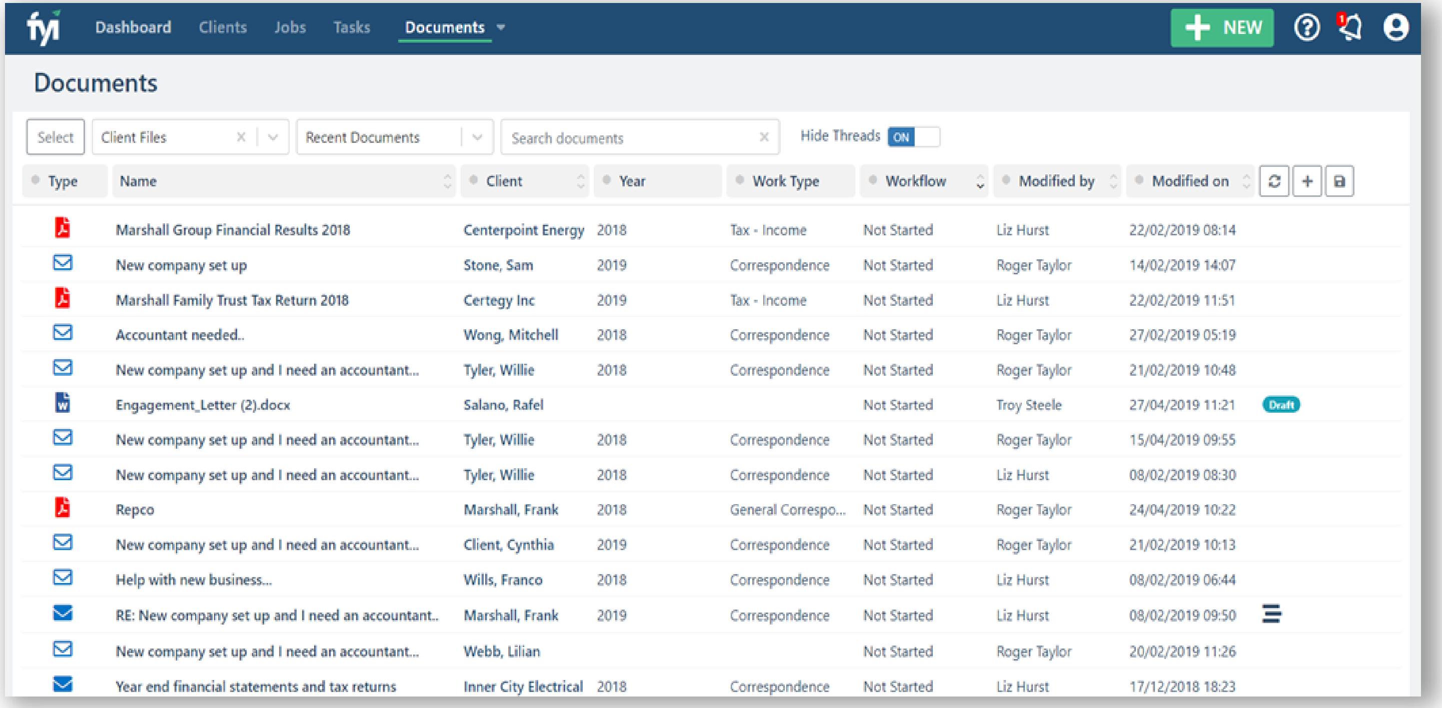
Click the **Documents** menu option to search, sort and filter documents across every client in the practice.

The **Getting Started with Document Management User Guide** provides an introduction to document and client relationship management in FYI.

Learn how to:

- Import documents into FYI
- Create documents and client interactions
- Work with documents
- Send documents to clients

Download the **Getting started with Document Management User Guide** and share with your team.



Your Documents list

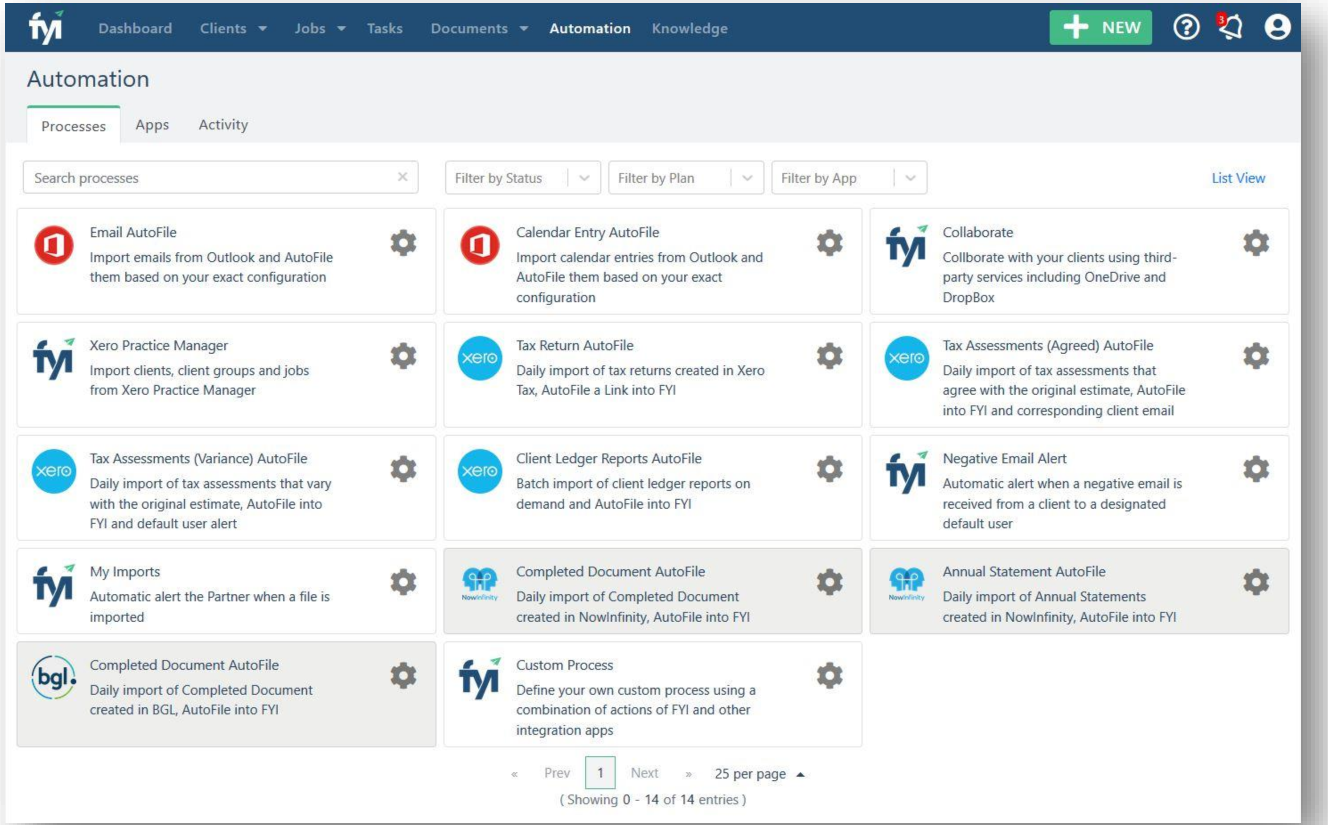
Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to Documents.

Automation

Click the **Automation** menu option to view FYI's Automation Dashboard. This is where your FYI administrator can activate and configure automations for your practice.

- **Processes** displays all the processes that are available for your practice, such as **Email AutoFile, Calendar Entry AutoFile, Tax Return AutoFile, Negative Email Alert** and more.
- **Apps** displays the apps with which FYI is integrated, such as **Xero Practice Manager, Xero Practice Ledger, One Drive, Now Infinity** and more.
- **Activity** provides a log and audit of all the automated processes that have been run across your practice.



Standard users can view the Automation Processes and Apps tabs and options available, but only an Administrator can make changes to the settings.

Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to [The Automation Dashboard]

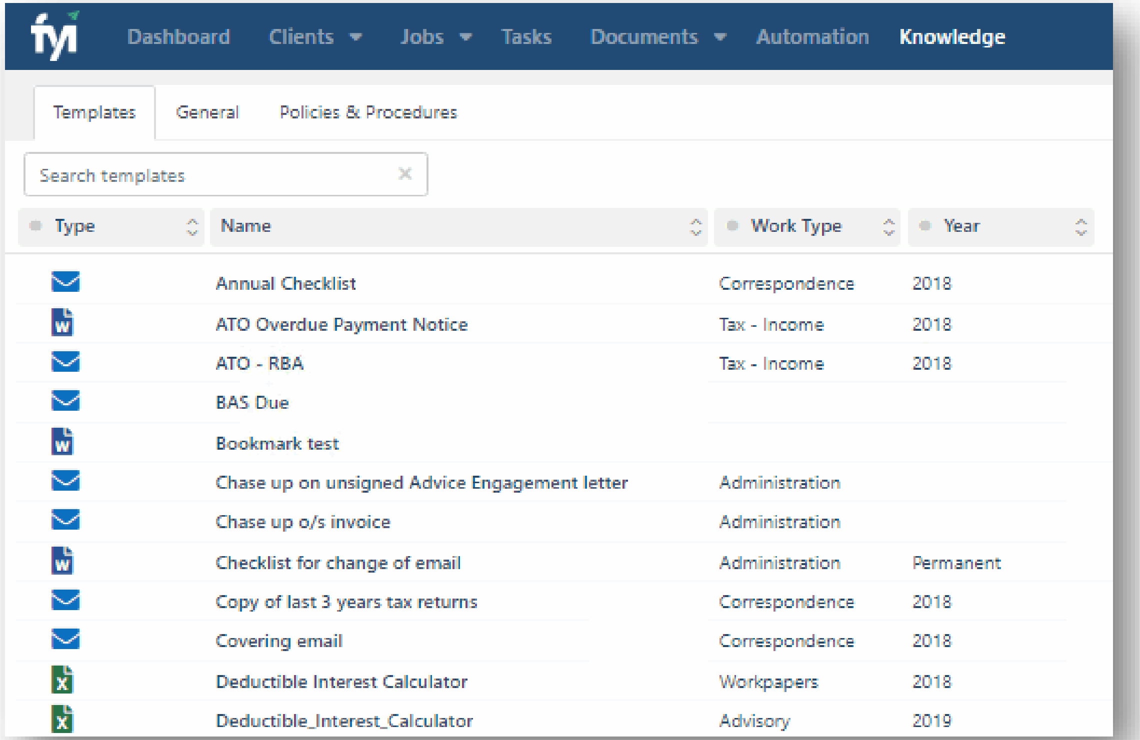
Knowledge

The Knowledge workspace is available as a resource area for your practice.

Depending on your levels of access as a User, this is where you can access **Templates** that have been set up in FYI.

Templates can be added or changed by an Administrator or by a User belonging to a User Group that has **Administer Templates** enabled.

Additional Tabs can be created by your practice for Cabinets holding documents that you wish to share with specified User Groups, for example for **Policies and Procedures.**



To create an email or document from the Knowledge workspace, select the Template you wish to use and click **+ Create** to open the **Create Drawer**. This allows you to select the relevant Client and other filing details.

Need Help?

Visit FYI Help > Getting Started > Key Concepts for an introduction to the Knowledge Workspace.

THE FYI DRAWER

Your new Drawer in FYI,
Outlook and Office

Displaying the Drawer

FYI holds information related to an email, document or client interaction in **The Drawer.**

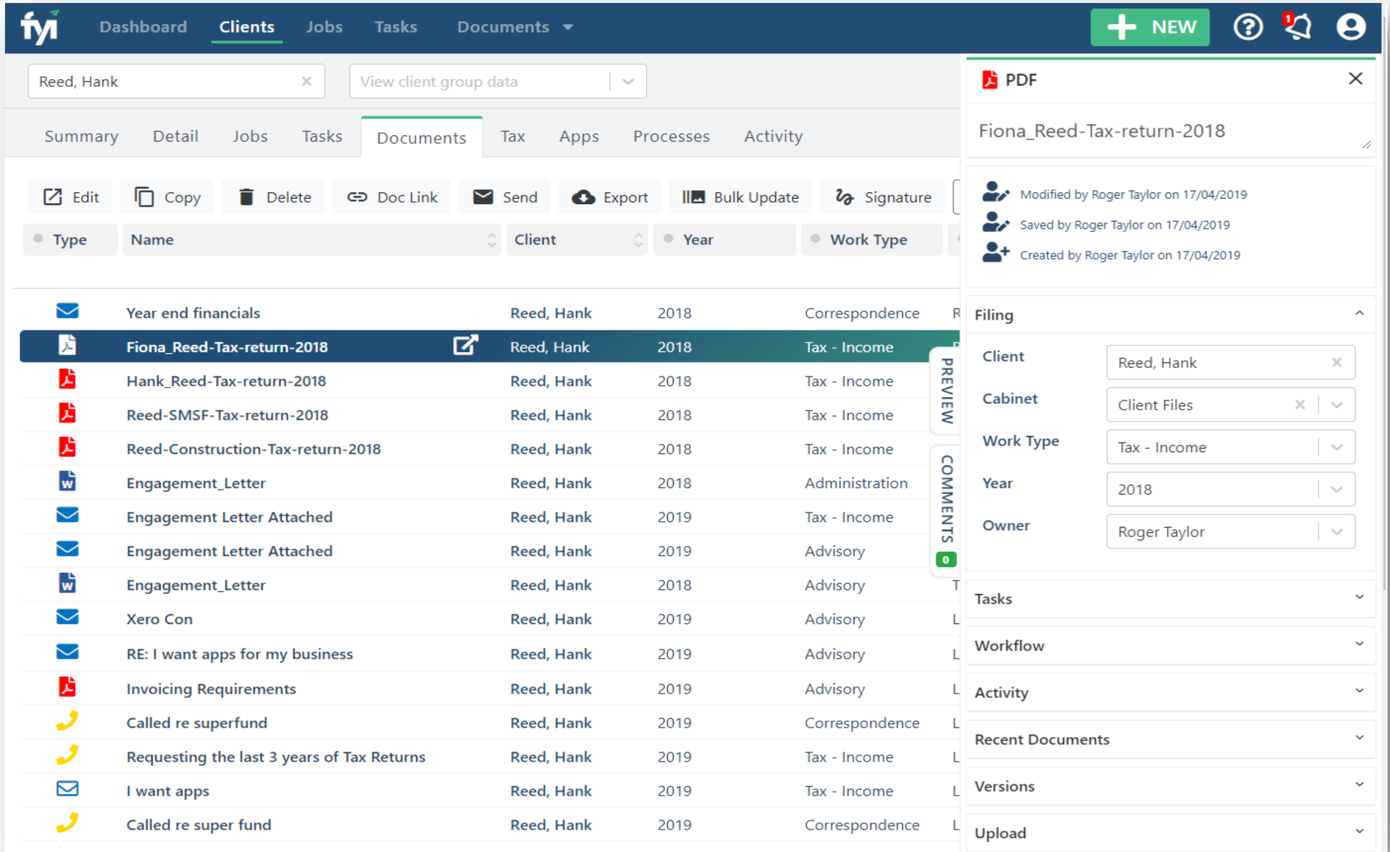
The Drawer can be displayed from within FYI, Outlook or Office.

This is where you can;

- Update **Filing** information
- Allocate **Tasks**
- Add **Comments** for your team
- Initiate a **Workflow**
- Or see recent **Activity** relating to the document

Click the **Preview** tab to view the contents of the document or email without needing to download it.

> Comments can be used to add notes and allow team members to collaborate on a document or email.



The Drawer displays when you click on a document or email in the list

Need Help?

Visit FYI Help > Document Management for information on [Displaying the Drawer in FYI, Outlook and Office]()

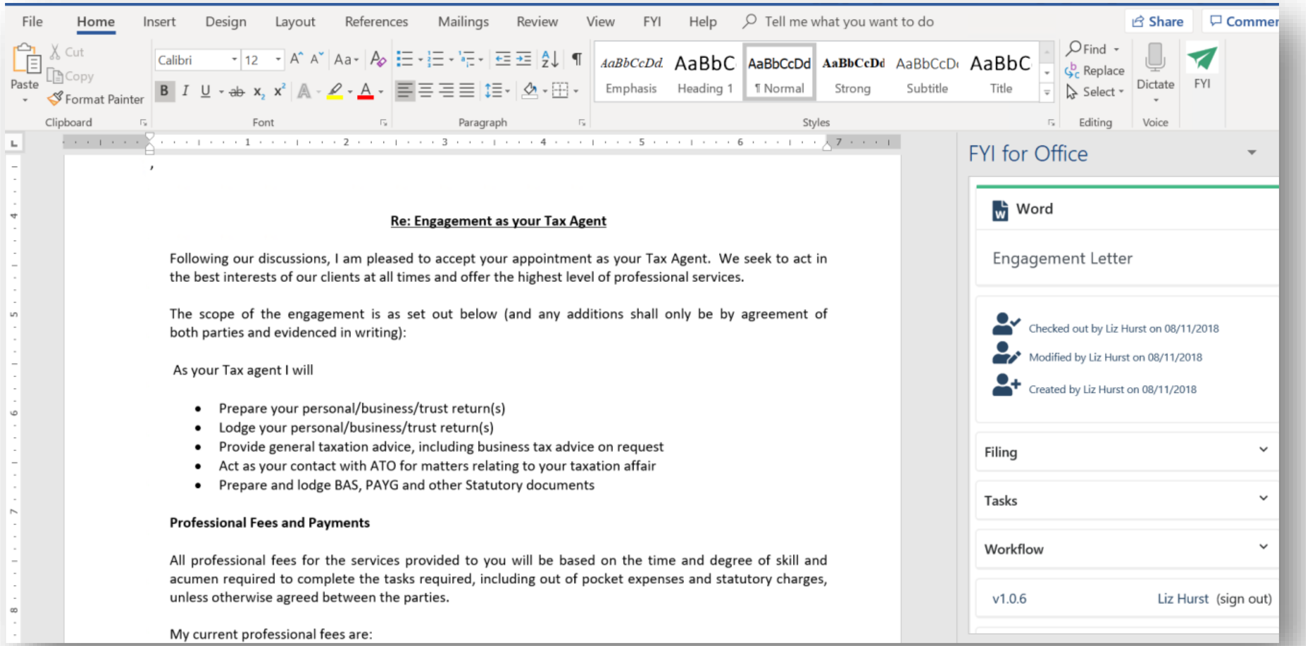
Using the FYI Drawer

You can access the FYI Drawer from within FYI, or when you create an Office document using Word, PowerPoint or Excel.

1. Click the **FYI icon** to display the Drawer
2. From the drawer you can:
   - Update filing information
   - Allocate Tasks
   - Initiate a Workflow
   - Or see recent Activity relating to the document

When you **Close** and **Save** a document, all of the changes are automatically saved back to FYI

Make sure you have the FYI Apps installed at a User or Practice level in order to display the Drawer in Office and Outlook



Your new FYI Drawer in Office

Need Help?

Visit FYI Help > Document Management for information on [Using the Drawer]

Using the FYI Drawer in Outlook

Thanks to deep integration with Microsoft Office, you can access FYI without ever having to leave your Outlook Inbox.

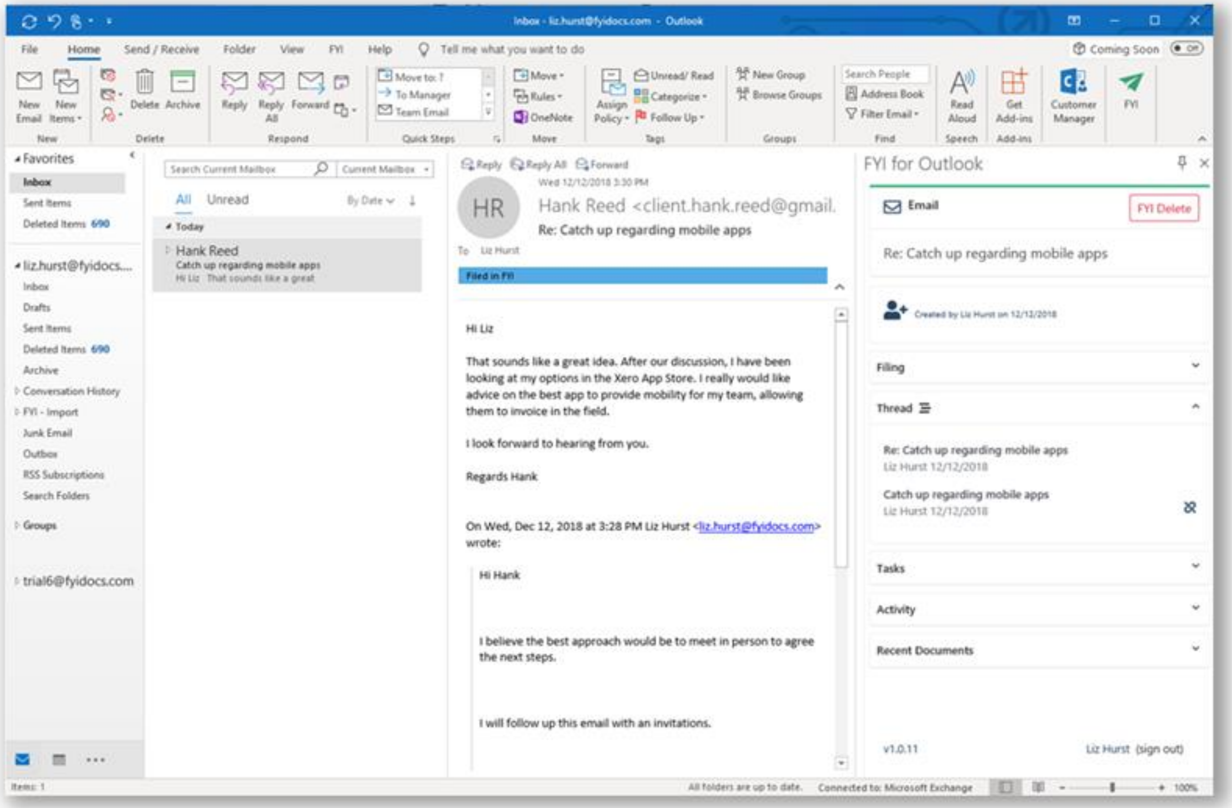
1. Click the **FYI icon** to display the **FYI Drawer**

2. From the FYI Drawer you can check or update filing details and click **Create** to make the email available to everyone in the practice.

When sending a new email to a client, open a blank email and click the **FYI Icon**.

The **FYI Drawer** will display giving you access to FYI email templates and the ability to file the email before sending it. Any replies to this email will automatically be saved to FYI.

To keep the Drawer open, click the Pin at the top of the drawer.



Your new FYI Drawer in Outlook

Need Help?

Visit FYI Help > Email Management> Filing Email from Outlook for information on [Using the FYI Drawer in Outlook]

Filing Cabinets & Categories

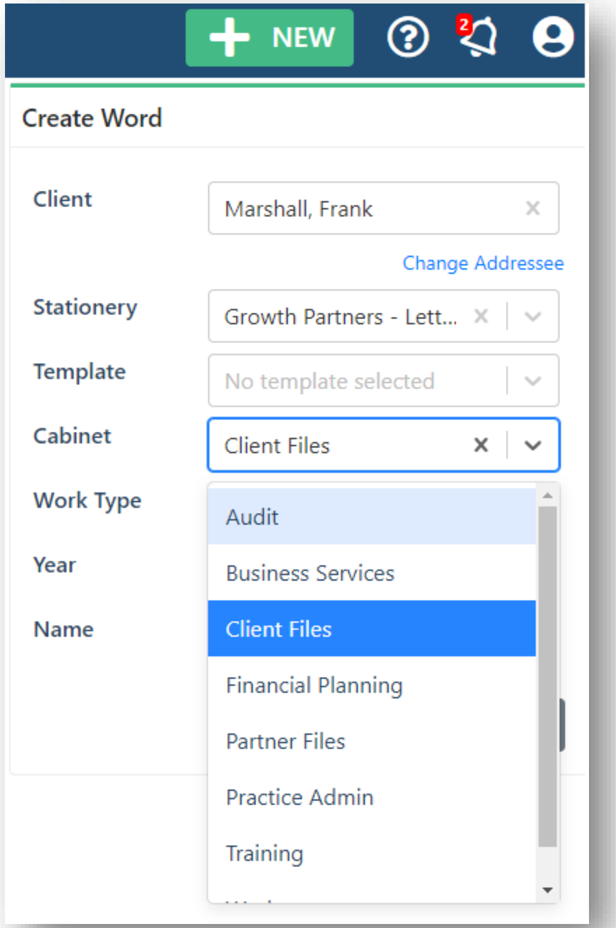
FYI documents are stored in **CABINETS** which can be configured to reflect the broad divisions of operations within your practice.

FYI comes shipped with best practice default cabinets for **Client Files, Partner Files, Practice Admin** and **Training**.

Security controls dictate which users can access documents within a Cabinet.

CATEGORIES are the way documents are tagged with meta-data to create a filing structure. Categories can be used as filters on lists when displaying the information in FYI.

FYI uses **Work Type** and **Year** as initial default Categories, but additional categories can be set up to suit the requirements of your practice – for example, Tax, Audit, Administration and more.



The filing Cabinets and Categories applied to a document can be accepted or changed from the FYI drawer

Need Help?

Visit FYI Help > Administration > Practice Set Up for an introduction to FYI's [Cabinets and Categories]

WHERE TO BEGIN

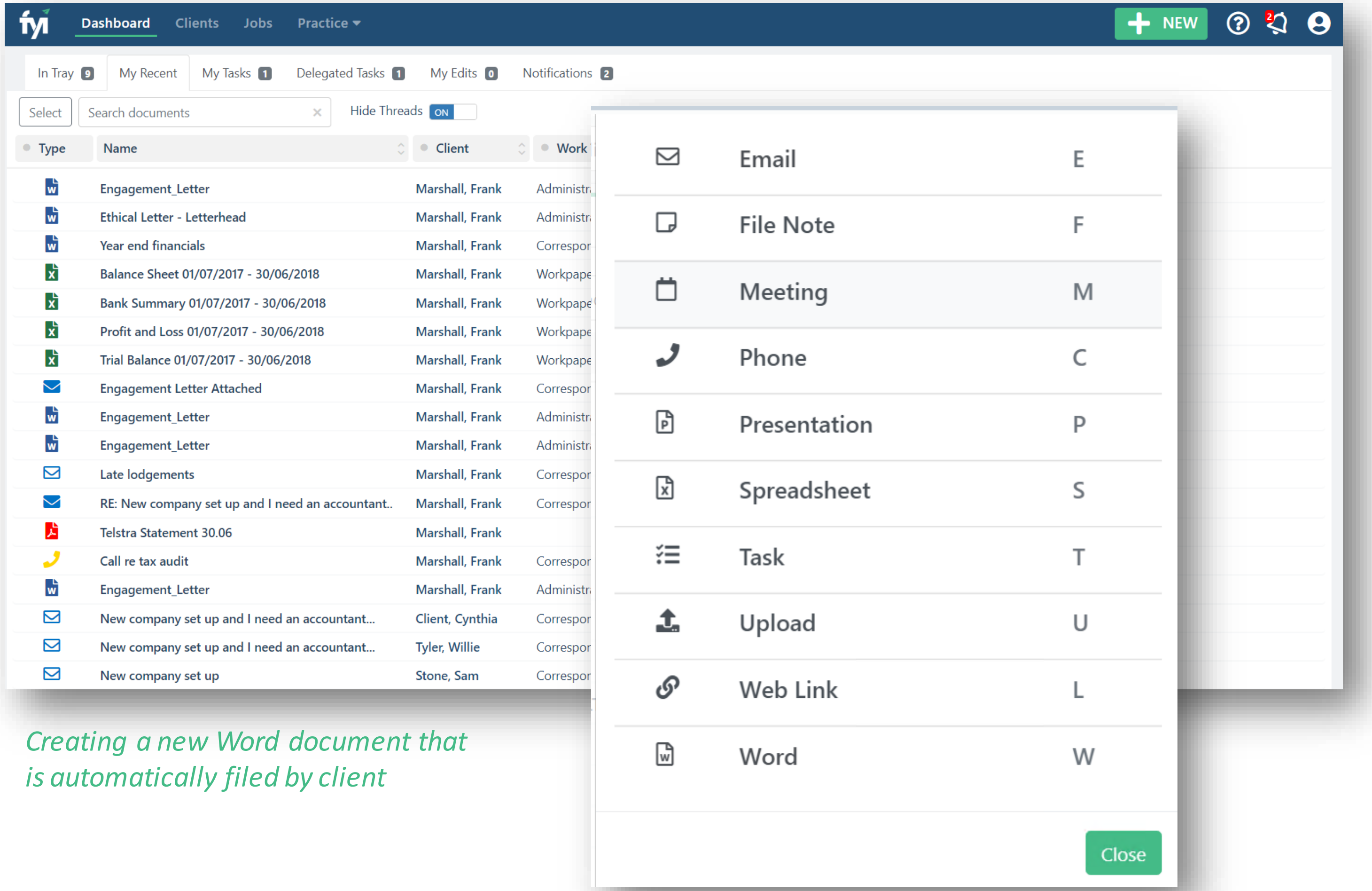
Creating your first email and letter

+ New Documents

By clicking **+New** you can create documents and file notes that are automatically filed by client.

You will be prompted to;

1. Select the type of document you wish to create:
   - Email, Word Document, Presentation or Spreadsheet
   - File Note, Meeting, Phone Call, Task etc
2. Pre-file the document, adding details such as;
   - **Client**
   - Which **Stationery** and/or **Templates** to apply
   - Which **Cabinet** to store the document in
   - Which **Categories** to tag the document with, for example, **Year** and **Work Type**
3. Click **Create** to open the document.



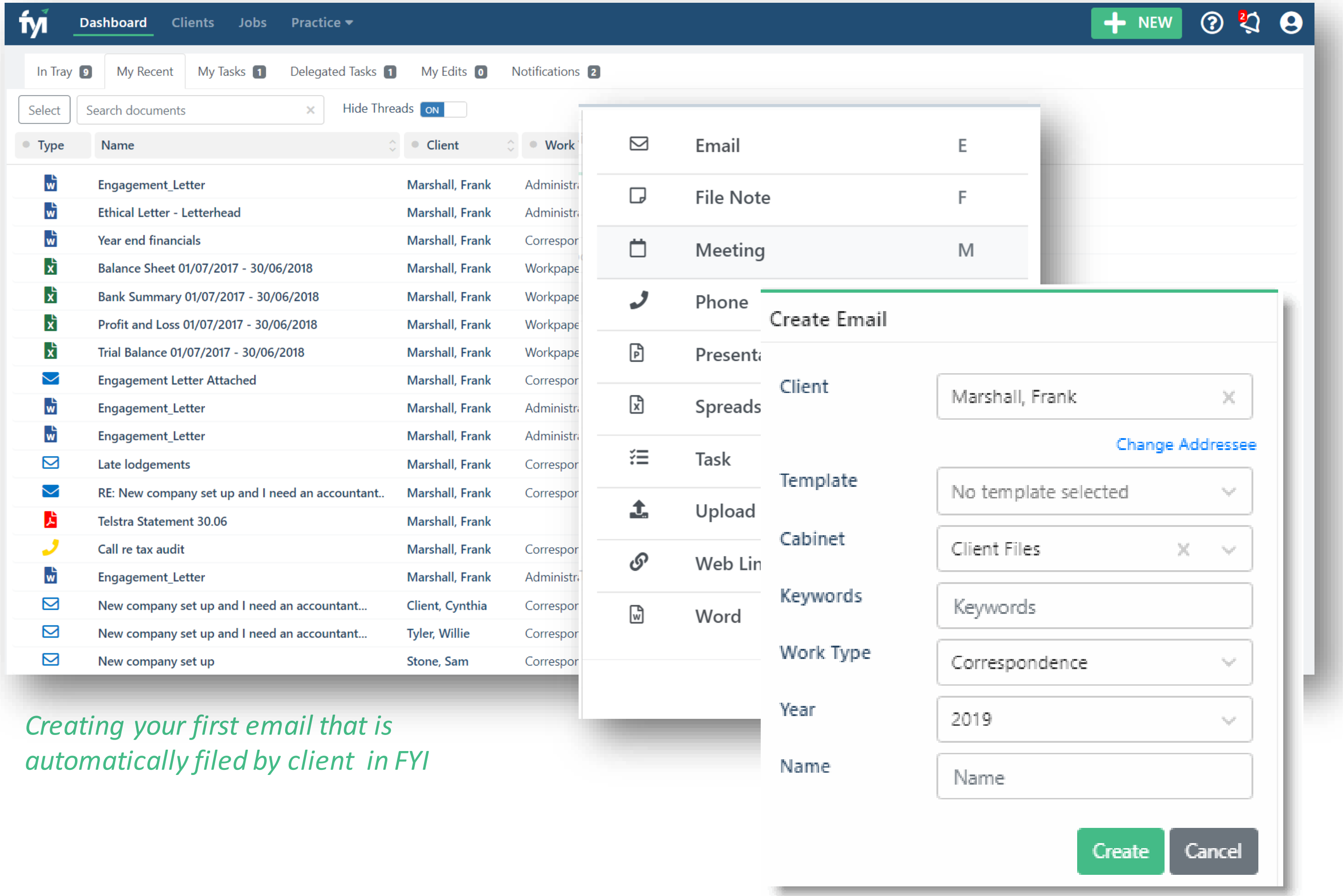
Creating a new Word document that is automatically filed by client

Need Help?

Visit FYI Help > Document Management for more information on [Creating Documents in FYI](#).

Creating your first Email in FYI

- Click **+ New** on the FYI Dashboard and select **Email** from the list of document types.
- Complete filing details in the **FYI Drawer**, including Client, Addressee, Template, Categories and more.
- Click **Create** to launch Outlook and finish drafting the email.
- When you send the email it will automatically be **filed in FYI.**



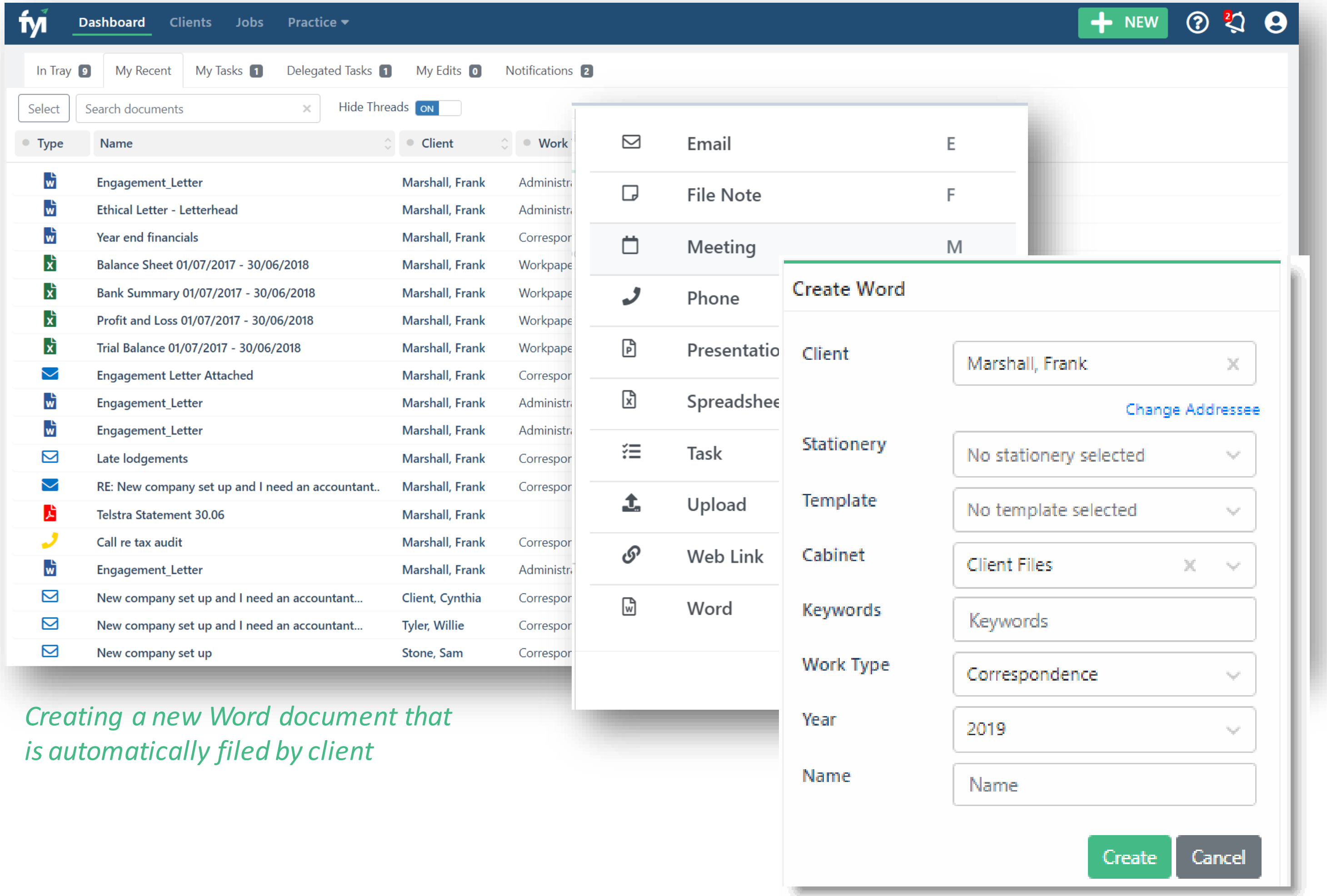
Creating your first email that is automatically filed by client in FYI

Need Help?

Visit FYI Help > Email Management > Sending Email for instructions on how to Create an Email in FYI.

Creating your first Letter in FYI

- Click **+ New** on the FYI Dashboard and select **Word** from the list of document types.
- Type at least three characters of the Client Name and select the **Client**
- Select your **Stationery**, eg. Your practice letterhead
- Select a **Template** that has been uploaded for your practice
- Select a filing **Cabinet** or the document, such as Client Files.
- You also have the option of entering **Keywords** to use when searching for the document.
- Select your preferred filing **Categories** for the document, for example, Correspondence for **Work Type** and 2019 for **Year.**
- Enter a **Name** to identify the document internally
- Click **Create** to launch Word and finish drafting the letter.
- When you save and close the document it will automatically be **filed in FYI.**



Creating a new Word document that is automatically filed by client

Need Help?

Visit FYI Help > Document Management for instructions on how to Create Word Documents in FYI.

HELP WHEN YOU NEED IT

FYI Website Resources, Help Centre,
Email Support and Community

Start your journey at www.fyidocs.com

The FYI website is a great place to start learning about FYI.

- Visit the video library to watch videos introducing the platform and key features
- Join a live product demonstration webinar to get a tour of the platform.
- Join the FYI Community to get news and updates on product releases and have the best of our blog delivered to your inbox.

The website also gives you access to resources including the FYI Blog, FAQs and the FYI Help Centre.

FYI video library at http://www.fyidocs.com/

Need Help?

Visit the FYI Video Library at **www.fyidocs.com**

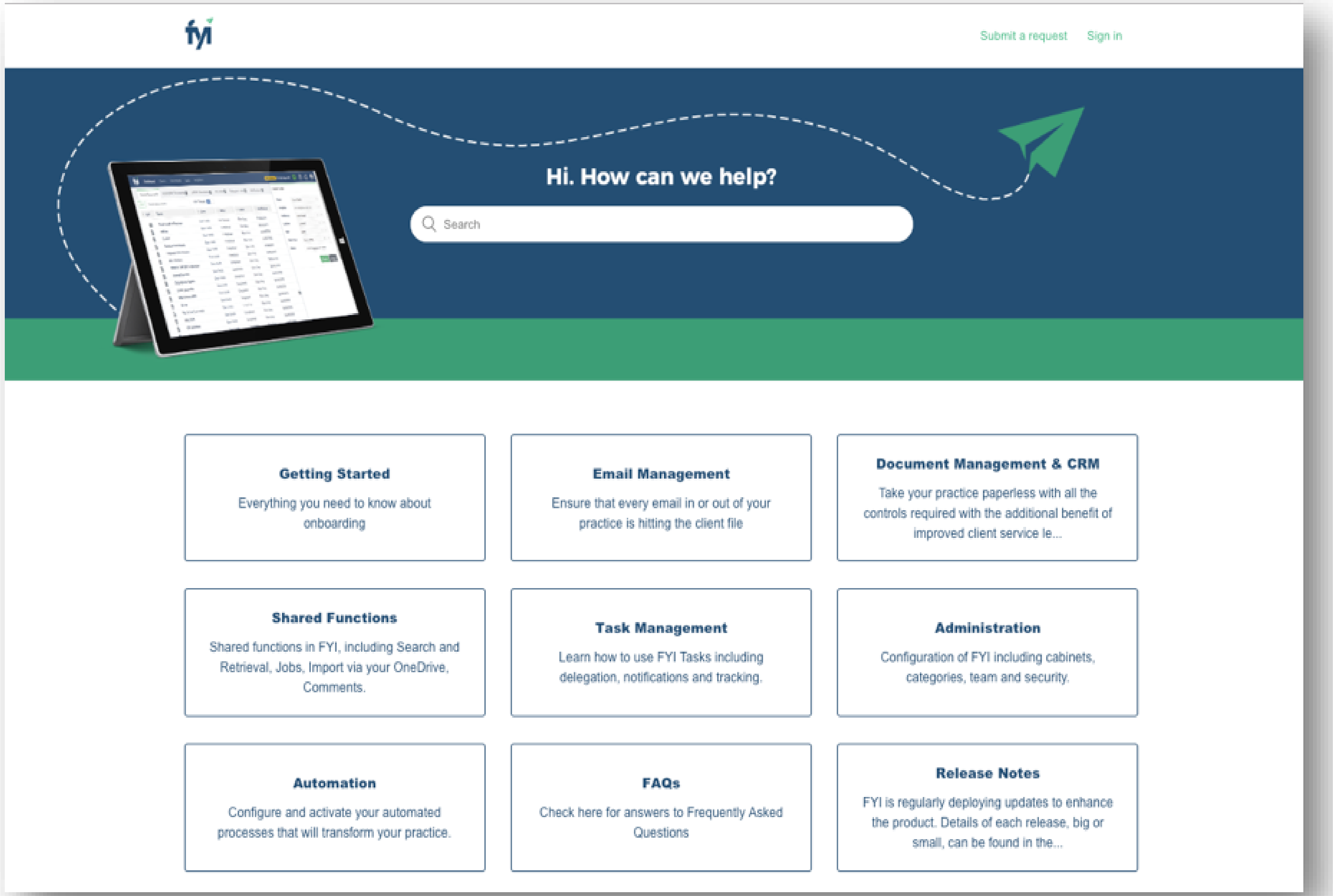
The FYI Help Centre

Available to all FYI users, the FYI Help Centre is a comprehensive knowledge base designed to assist you on your FYI journey.

It is a self-guided learning library providing detailed help articles, downloadable PDF guides and video tutorials to help you use the app to its full potential.

The following User Guides are a great place to start:

Welcome to FYI
Key Concepts for New Users
Mastering the Essentials
Getting Started with Email Management
Getting Started with Tasks
Getting Started with Document Management



FYI Help Centre at http://support.fyidocs.com/

Need Help?

Visit FYI Help > Getting Started to download [Getting Started User Guides]()

FYI Email Support

Our support team is available during business hours to answer any of your queries.
Simply email support@fyidocs.com and we will be happy to help.

Hi team,
Today is our first day getting to know the FYI system (loving it so far) and we have a few questions for you.....

Sarah,
Client Services Coordinator

Hi Sarah,
Welcome to FYI. If you are interested in learning more, visit our Help Centre at https://fyidocs.zendesk.com/hc/en-us or you can email us anytime. We're here to help you in any way we can.

Regards,
FYI Support

Q. Is there an example of how an accounting firm should set up their filing system?
A. Cabinets can be configured according to the requirements of your own practice. You can change the name of the default Cabinets, add new or remove existing ones. To learn more, refer to Managing Cabinets.

Q. How do we file our existing documents in FYI?
A. For existing documents, FYI's Bulk Import feature allows administrators to easily import historical documents via a specified OneDrive account and file them in a consistent folder hierarchy. Please click here to learn how.

Q. How do I ensure that each email I send to a client is recorded in FYI?
A. FYI monitors both your inbox and Sent items in Outlook. Any of the client interactions that you receive or send subsequent to the deployment of FYI will be automatically imported and filed in FYI. For more information on FYI's AutoFIle feature, click here.

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DOCUMENT MANAGEMENT PLATFORM

WEB APP
app.fyidocs.com

HELP CENTRE
support.fyidocs.com

EMAIL SUPPORT
support@fyidocs.com