GETTING STARTED
WITH AUTOMATIONS

- Outlook automations
- Xero Practice automations
- Collaborate
- Negative Email alert

THE WORLD'S MOST AUTOMATED
DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

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   The central location for automations that will transform your practice.
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THE AUTOMATION DASHBOARD

The central location for automations
that will transform your practice.

Automation Dashboard

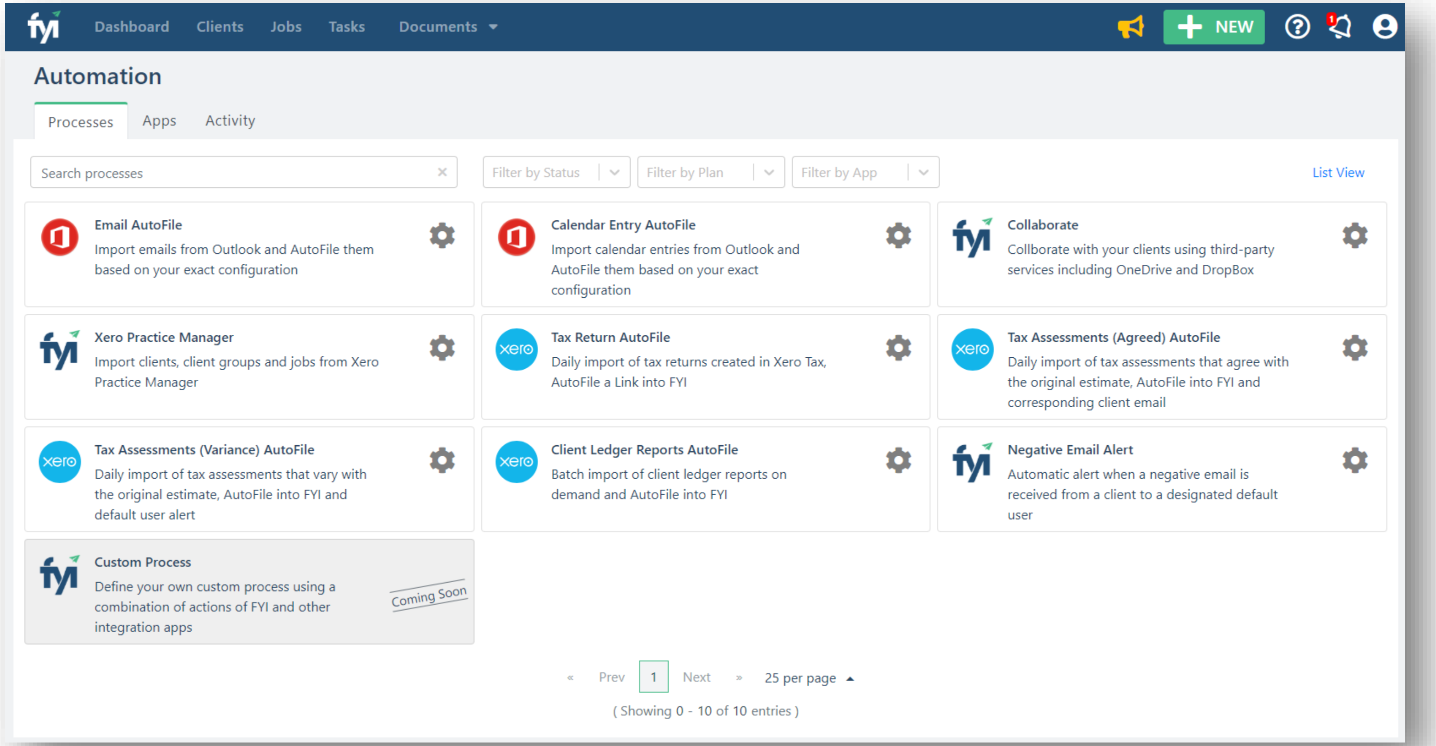
The **Automation** dashboard is where FYI's automated processes are activated and configured for your practice.

To access the dashboard from within FYI, you must be an **FYI Administrator.** Click **Settings** in the top right-hand corner, select **Practice Settings** from the drop-down menu and then **Automation**.

This is where you can;

- View, activate and maintain all the **Processes** available for your practice
- View the **Apps** that are integrated with FYI, including Xero Practice Manager, Xero Practice Ledger, OneDrive and more
- Monitor the automation processes that your practice is running via **Activity** logs and check for any errors if required.

We are actively working with integration partners across the industry to increase your automation capabilities. Watch this space – the dashboard is where new automations will appear as soon as they are available.



The Automation Dashboard

Need Help?

Visit FYI Help > Automation for more information on [Automation Dashboard]

OUTLOOK AUTOMATIONS

Auto-filing client emails, attachments and meetings, setting primary clients and in tray review.

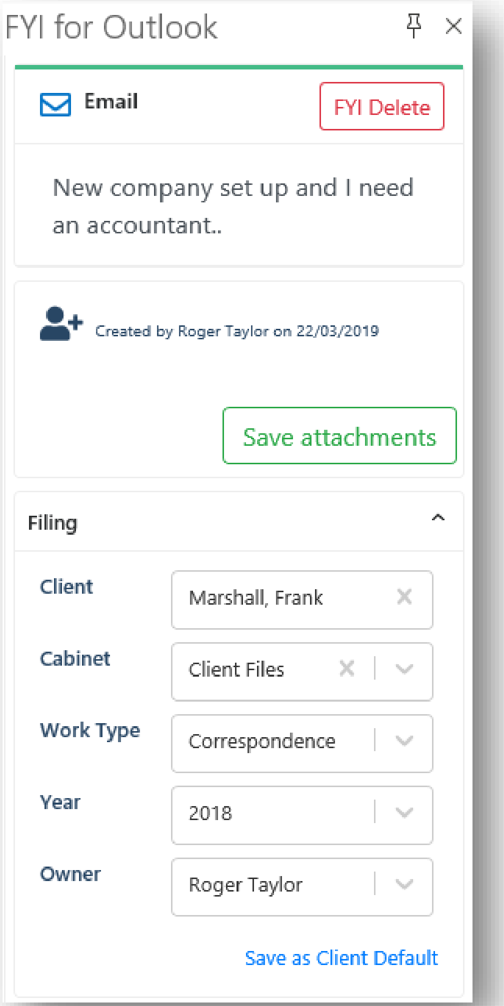
Auto-filing Client Emails

As soon as FYI is deployed, it starts to monitor your **Inbox** and **Sent** items in Outlook, looking for emails that match a **client email address** in **Xero Practice Manager**. Any client emails received or sent are automatically imported and filed in FYI for you under the relevant client.

AutoFile defaults can be set up for each client from within the **FYI Outlook Drawer** by clicking **Save as Client Default**. Without a default on the client, the AutoFile rules engine applies custom user defaults.

To avoid cluttering your client file, replies to an email thread are automatically filed in FYI based on the filing categories applied to the original email.

Email AutoFile settings define how incoming emails from Outlook are managed and auto-filed. These are set up by your FYI Administrator.



Any emails that you do not want to be available to the entire practice can be deleted from your In Tray.

Need Help?

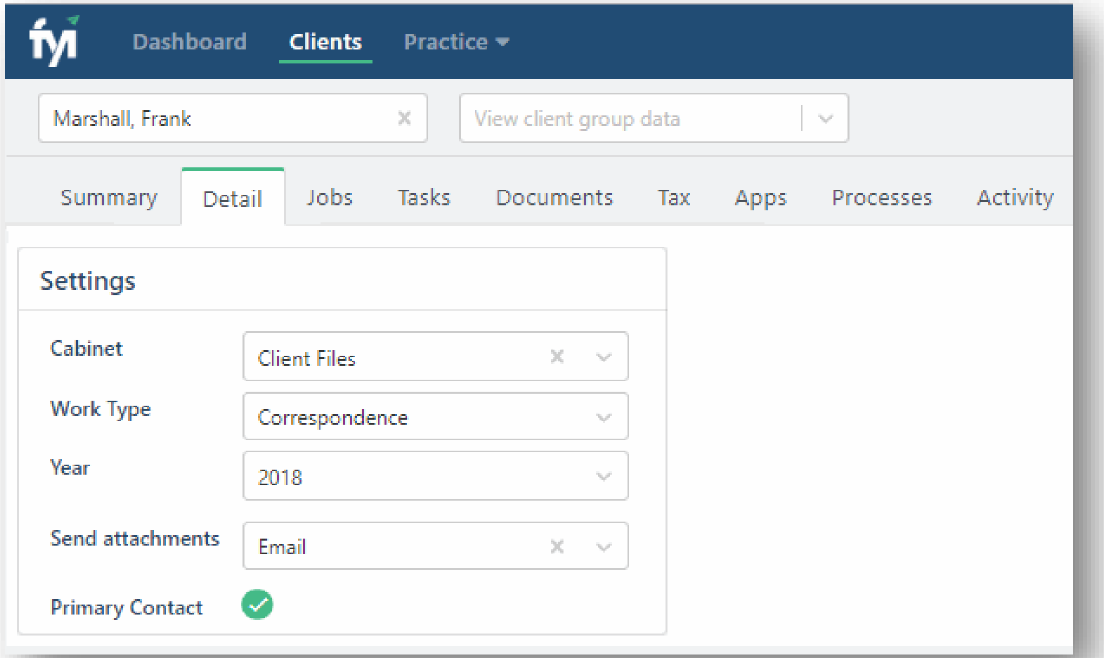
Visit FYI Help > Email Management > Filing Email from FYI for an introduction to FYI AutoFile for Client Emails

Primary Contact for a Client Group

The **Cients > Detail** tab holds a setting for **Primary Contact**.

Where the client is part of a group structure, often entities within the group will have the same email address.

By selecting one of the clients in the group as the **Primary Contact**, this client will take precedent for the purpose of auto-filing emails where duplicate emails exist.



Duplicates is a utility allowing admins to nominate the primary contact for each client group across the practice, ensuring that emails are auto-filed to the correct entity.

Need Help?

Visit FYI Help > Document Management> Creating Documents in FYI for more detailed information on [Setting Filing Defaults for a Client]

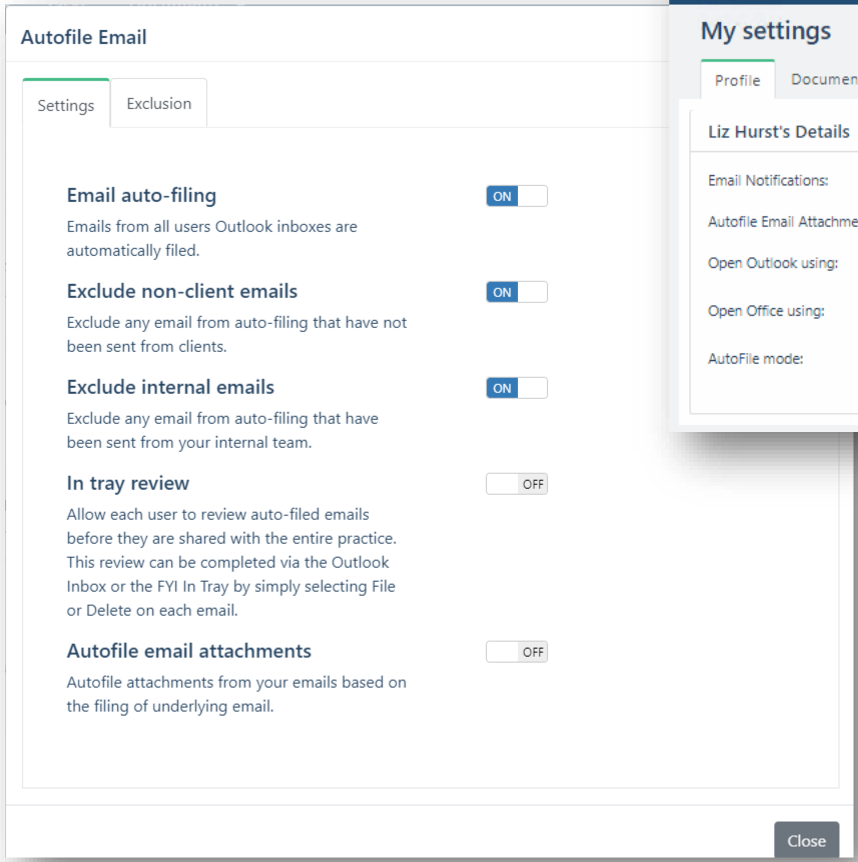
In Tray Review of Emails

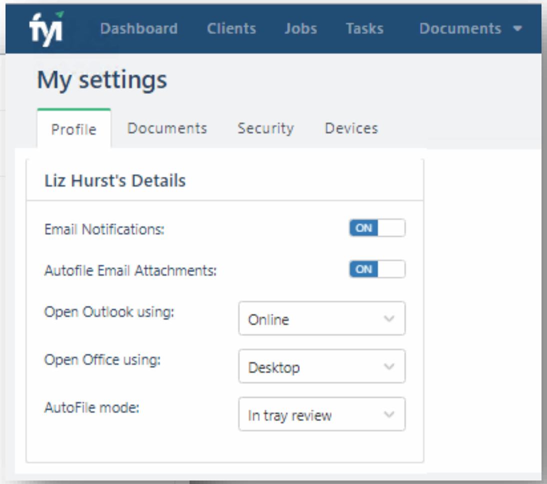
In Tray Review allows each user to review their auto-filed emails before they are available to the entire practice.

In Tray Review can either be turned on or off for the **practice** as a whole, or at a **user level**.

Most practices turn this feature **OFF** at a practice level to ensure that the majority of client emails are automatically filed in FYI and can be accessed by the broader team.

> In Tray Review is mostly used by senior team members as it gives them a higher degree of control over the filing of sensitive client emails.





Configure In Tray Review at a user level by adjusting the AutoFile mode in your Settings > Profile

Administrators can turn In Tray Review on or off for the practice as a whole via Practice Settings > Automations > Processes > Email AutoFile

Need Help?

Visit FYI Help > Getting Started > Document Management > Creating Documents in FYI for more information on [Setting AutoFile Defaults for your own Login]

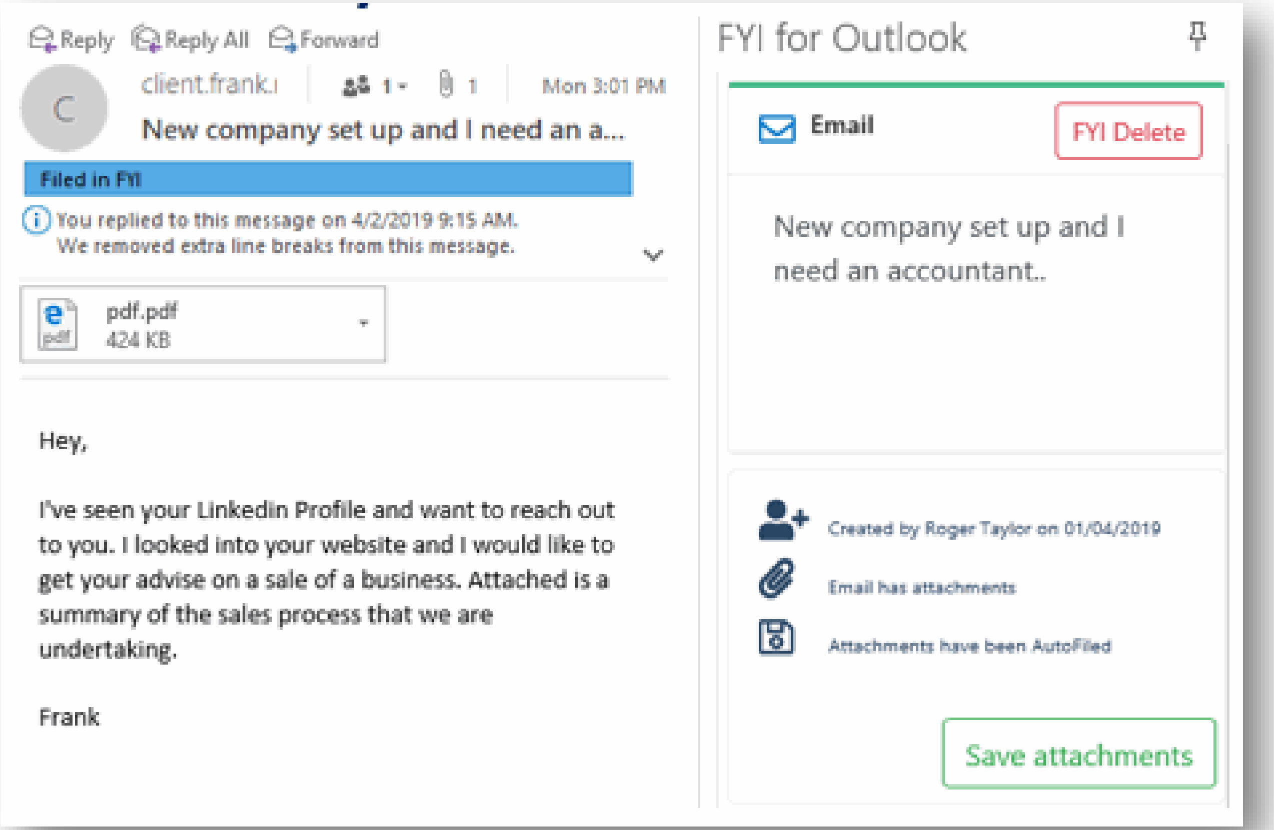
Auto-filing Email Attachments

Email attachments can be auto-filed as separate documents within FYI.

The attachment(s) are filed using the same auto-filing rules that is being applied to the email. Only genuine attachments are filed, and any attachments such as a jpg for a logo or signature are ignored.

The option to turn on auto-filing attachments is available from the Automation dashboard, from Email AutoFile.

The auto-filing of attachments can be configured across the practice or for each user via "My Settings".



Need Help?

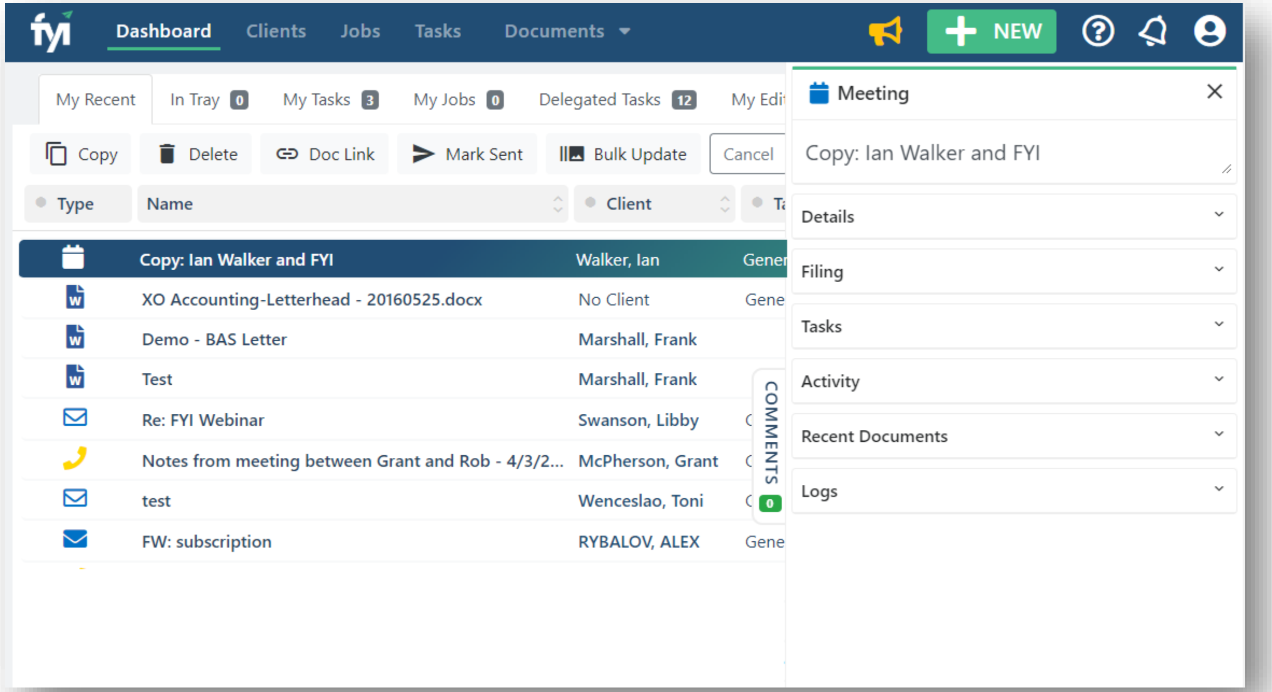
Visit FYI Help > Email Management > Filing Email from FYI for more information on Email Attachments

Auto-filing Client Meetings

The **Calendar Entry AutoFile** process automatically imports and files all client meetings from your Outlook calendar. They are created as **Meetings** in FYI. This allows your practice to automatically store a record of all client meetings.

Editing the Calendar Entry AutoFile

1. From FYI, click **Settings** in the top right-hand corner.
2. Select **Practice settings** from the drop-down, then select **Automation**.
3. Go to the **Processes** tab.
4. In **Calendar Entry AutoFile**, click the cog icon to edit this process.
5. The setting for the Calendar Entry AutoFile either "On" or "Off".



Client Meetings are automatically imported and filed in FYI.

Need Help?

Visit FYI Help > Automation> System Processes in FYI for more detailed information on [Calendar Entry Autofile]

XERO AUTOMATIONS

Synching with XPM, Tax Return AutoFile and Xero Ledger automations

Synching with XPM

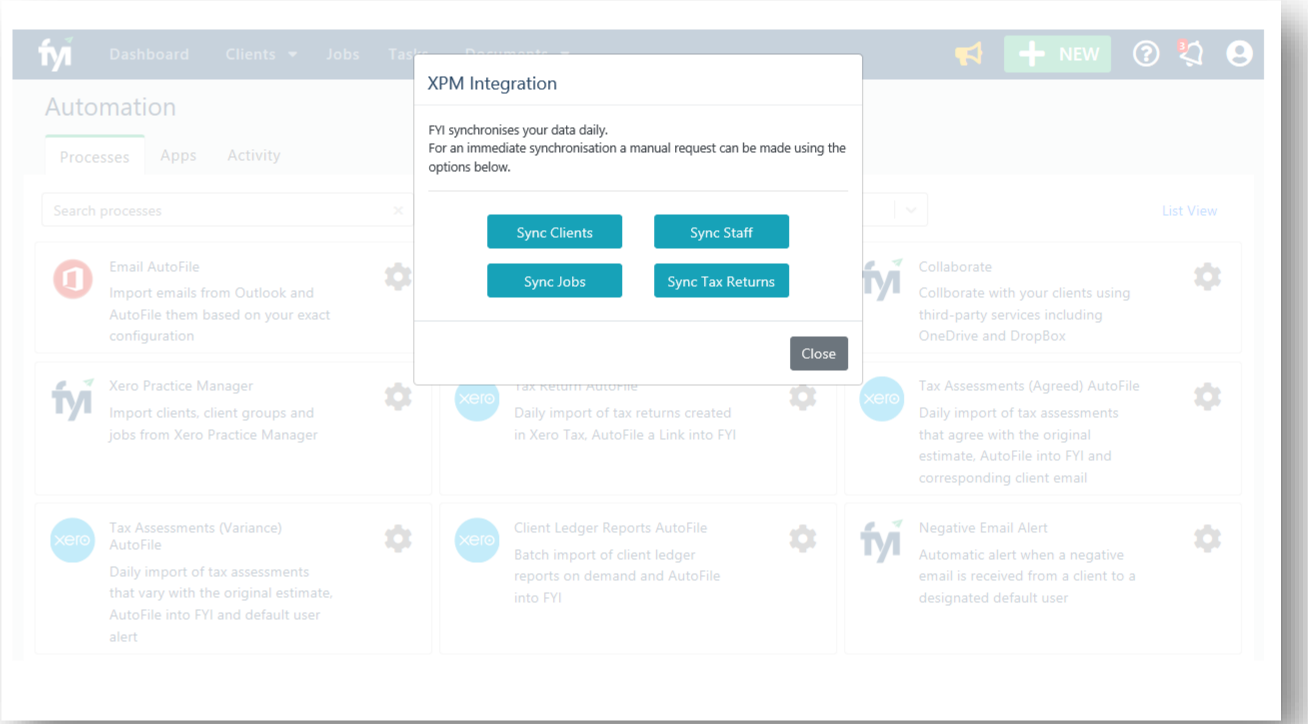
FYI synchronises with **Xero Practice Manager** on a daily basis and updates your **Client, Staff, Jobs** and **Tax Return** information.

This means you don't have to maintain data in multiple locations and provides a productivity boost thanks to merge fields that are auto-completed across template documents.

For an instant update, administrators can run a **manual sync** with XPM from the Automation dashboard.

1. From FYI, click **Settings** in the top right-hand corner.
2. Select **Practice settings** from the drop-down, then select **Automation**.
3. Go to the **Processes** tab.
4. In **Xero Practice Manager**, click the cog icon to run a manual sync of **Clients, Staff, Jobs** or **Tax Returns**

XPM continues to be your single source of truth for client information. Any change in XPM is automatically reflected in FYI.



XPM data synchronisation from the Automation dashboard

Need Help?

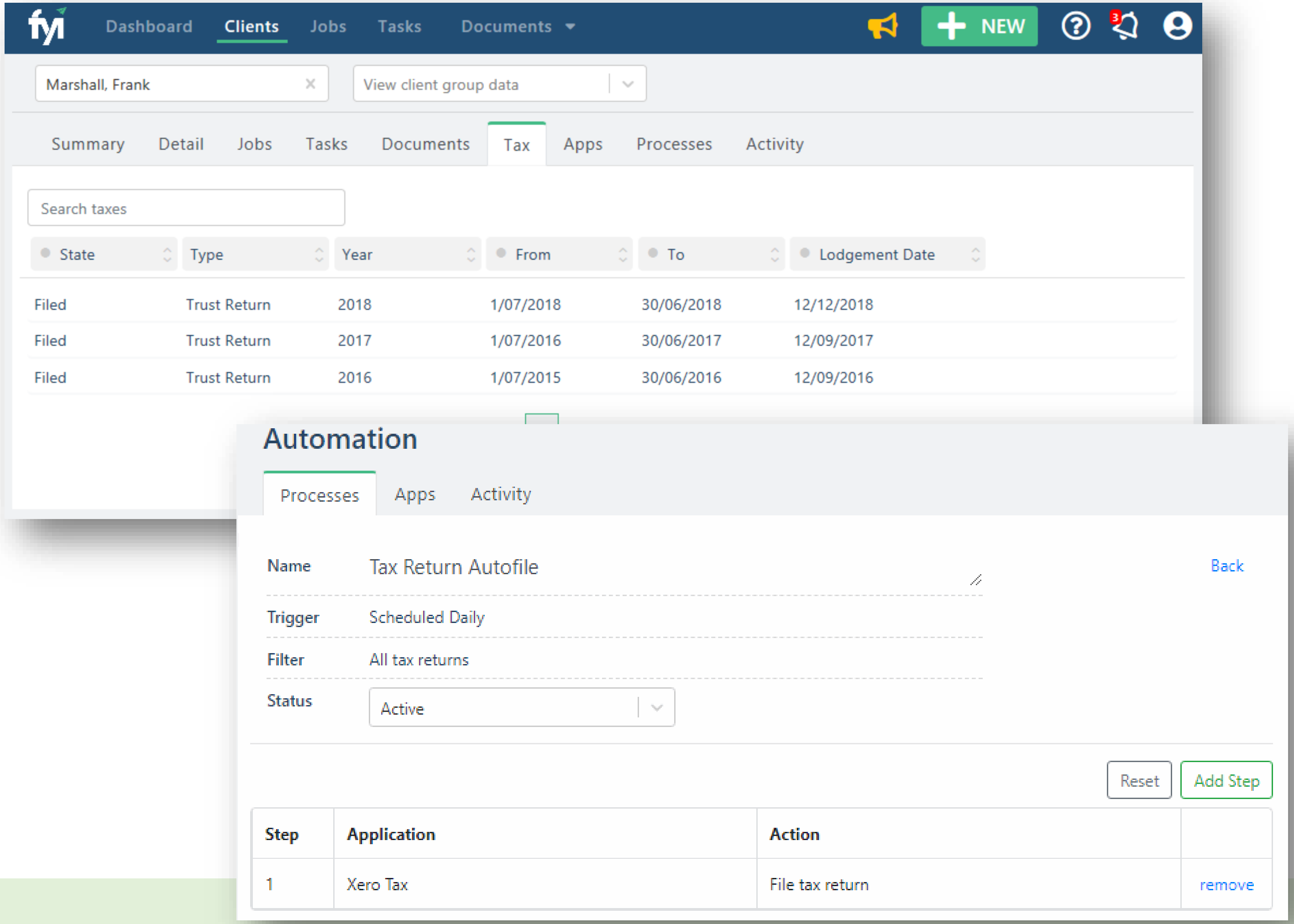
Visit FYI Help > Automation for information on [Xero Practice Automations]

Auto-filing Tax Returns

The **Tax Return AutoFile** process automatically files batches of tax returns received via Xero Tax.

Once your Administrator has set up the process, Tax Return AutoFile will call out to Xero Tax on a scheduled daily basis to retrieve all newly issued returns since the process was last run.

The tax returns display in FYI in the **Clients-Tax** tab.



Editing the Tax Return AutoFile

1. From FYI, click **Settings** in the top right-hand corner.
2. Select **Practice settings** from the drop-down, then select **Automation**.
3. Go to the **Processes** tab.
4. In **Tax Return AutoFile**, click the cog icon to edit this process.

Filing settings allow you to use merge fields such as <Tax Period From> and <Tax Period To> in the file name and to automatically file the document in the relevant <Tax Year>.

Need Help?

Visit FYI Help > Automation for more information on [Xero Tax Automations]

Xero Ledger Integration

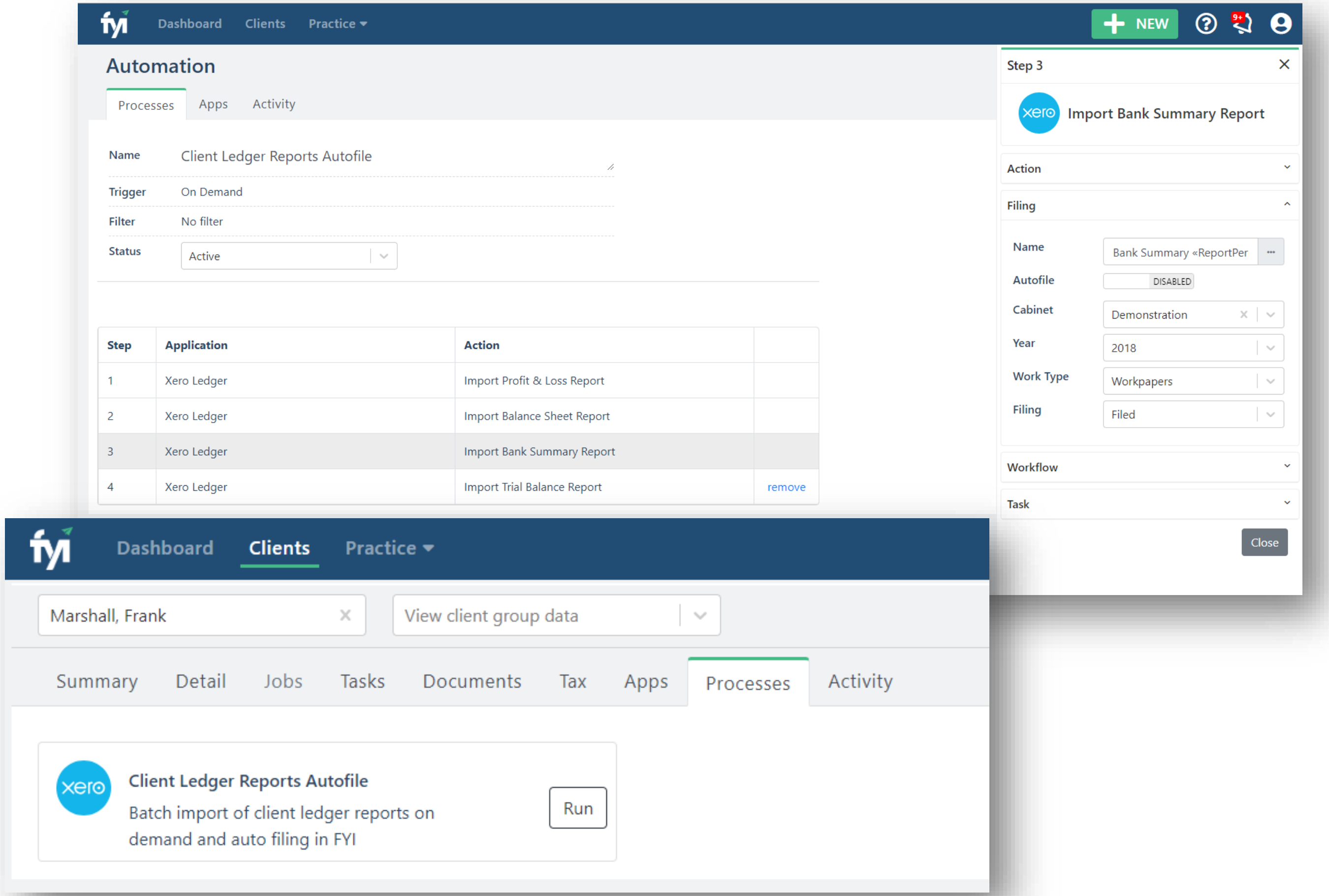
The automation engine in FYI provides the ability to import and AutoFile batches of reports from your **Client's Xero Ledger.**

Reports that can be automated include;

- Profit and Loss
- Balance Sheet
- Bank Summary
- Trial Balance

With a single click, all reports are automatically named and filed in FYI according to practice preference.

If amounts in the ledger change, simply re-run the batch to create a new version of the reports in FYI.



Need Help?

Visit FYI Help > Automation for more information on [Xero Ledger Automations]

COLLABORATE

Send documents to clients securely

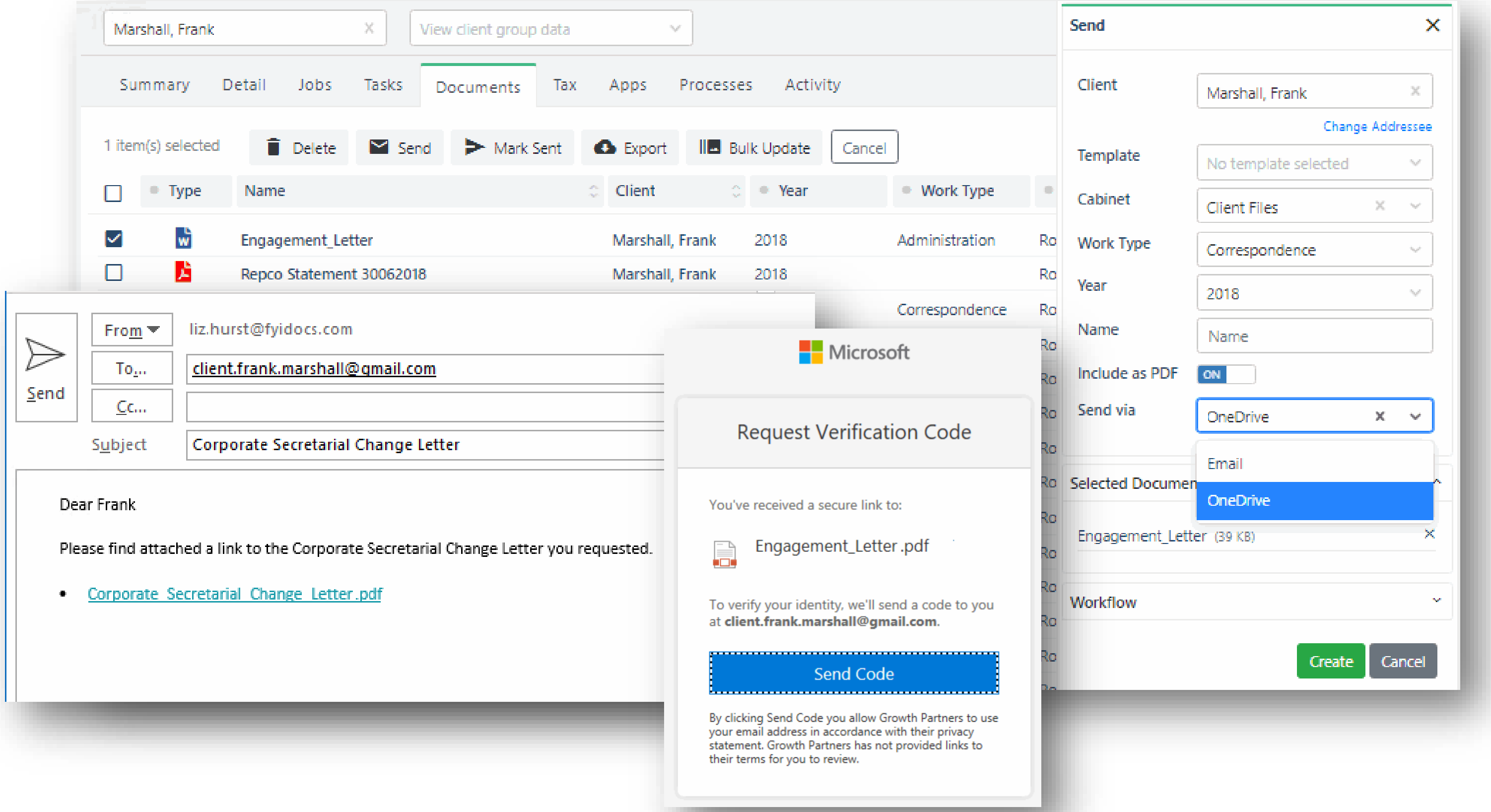
Sending documents via OneDrive

The **Collaborate** automation allows you to securely send documents to clients via your practice's OneDrive account. This provides an alternative to email when sending sensitive attachments.

Send via OneDrive sends an email with a hyperlink to the document that has been placed in a Client folder within your practice's OneDrive.

An email to the Client is created including a secure link to each document. Clicking on the link prompts a request for a verification code which must be entered to access linked documents

> An FYI Administrator needs to set up the Collaborate automation for your practice so you can Send via OneDrive



Using the Collaborate automation to send documents via OneDrive

Need Help?

Visit FYI Help > Automation for more information on Collaborate

NEGATIVE EMAIL ALERT

Automatically detect client emails containing negative sentiment

Negative Email Alert

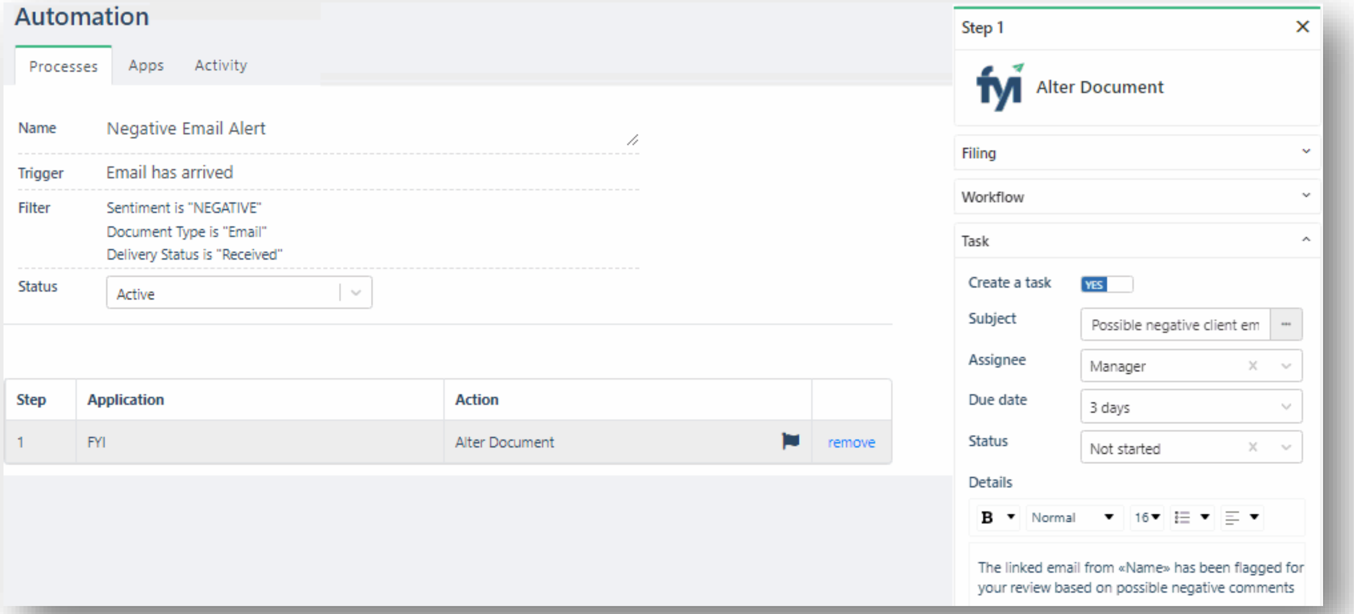
The **Negative Email Alert** process creates an automatic alert for any inbound client email that is highly likely to contain negative sentiment.

Partners can rest assured knowing that any unhappy client emails will be brought to their attention instantly so that suitable action can be taken.

The Administrator can activate the alert as follows;

1. From FYI, click **Settings** in the top right-hand corner.
2. Select **Practice settings** from the drop-down, then select **Automation**.
3. Go to the **Processes** tab.
4. In **Negative Email Alert,** click the cog icon to edit this process.

> The only configuration required is to create a task an nominate the relevant Client manager to receive the email alert.



If a client email containing negative sentiment arrives, a task will automatically be created and assigned to the sentior manager to review.

Need Help?

Visit FYI Help > Automation for information on [Negative Email Alerts]

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