

GETTING STARTED WITH AUTOMATIONS

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



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

www.fyidocs.com



In this Guide

1. **FYI's automation dashboard**
The central location for automations that will transform your practice.
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Auto-filing client emails, attachments and client meetings.
3. **Xero automations**
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4. **Collaborate**
Send documents to Clients securely
5. **Negative Email Alert**
Automatically detect client emails containing negative sentiment





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.

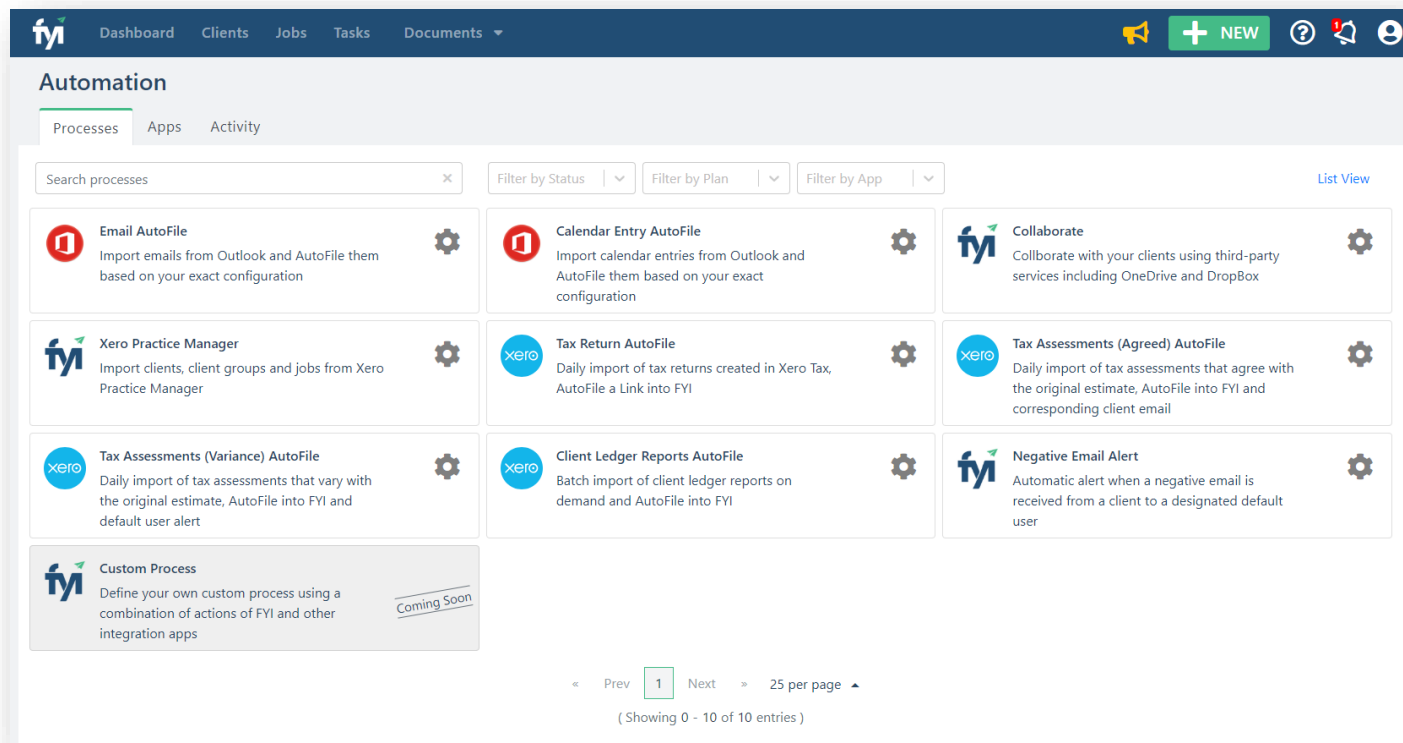
To access the dashboard from within FYI, you must be an **FYI Administrator**. Click **Settings** in the top right-hand corner, select **Practice Settings** from the drop-down menu and then **Automation**.

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.

FYI for Outlook

Email

FYI Delete

New company set up and I need an accountant..

Created by Roger Taylor on 22/03/2019

Save attachments

Filing

Client

Marshall, Frank

X

Cabinet

Client Files

X

V

Work Type

Correspondence

V

Year

2018

V

Owner

Roger Taylor

V

Save as Client Default

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 **Clients > 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.

The screenshot shows the FYI software interface. At the top, there's a navigation bar with 'Dashboard', 'Clients' (selected), and 'Practice'. Below this, a search bar contains 'Marshall, Frank' and a button 'View client group data'. A horizontal tab bar includes 'Summary', 'Detail' (selected), 'Jobs', 'Tasks', 'Documents', 'Tax', 'Apps', 'Processes', and 'Activity'. The 'Settings' section is expanded, displaying the following options:

Cabinet	Client Files	X	▼
Work Type	Correspondence		▼
Year	2018		▼
Send attachments	Email	X	▼
Primary Contact	✓		

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.

The image shows two overlapping screenshots from the FYI application. The background screenshot is the 'Autofile Email' settings page, which has two tabs: 'Settings' and 'Exclusion'. Under the 'Settings' tab, there are five toggle switches: 'Email auto-filing' (ON), 'Exclude non-client emails' (ON), 'Exclude internal emails' (ON), 'In tray review' (OFF), and 'Autofile email attachments' (OFF). Each toggle has a descriptive text block below it. The foreground screenshot is a 'My settings' modal for a user named 'Liz Hurst'. It has four tabs: 'Profile', 'Documents', 'Security', and 'Devices'. The 'Profile' tab is active, showing settings for 'Email Notifications' (ON), 'Autofile Email Attachments' (ON), 'Open Outlook using:' (Online), 'Open Office using:' (Desktop), and 'AutoFile mode:' (In tray review). A 'Close' button is at the bottom right of the modal.

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

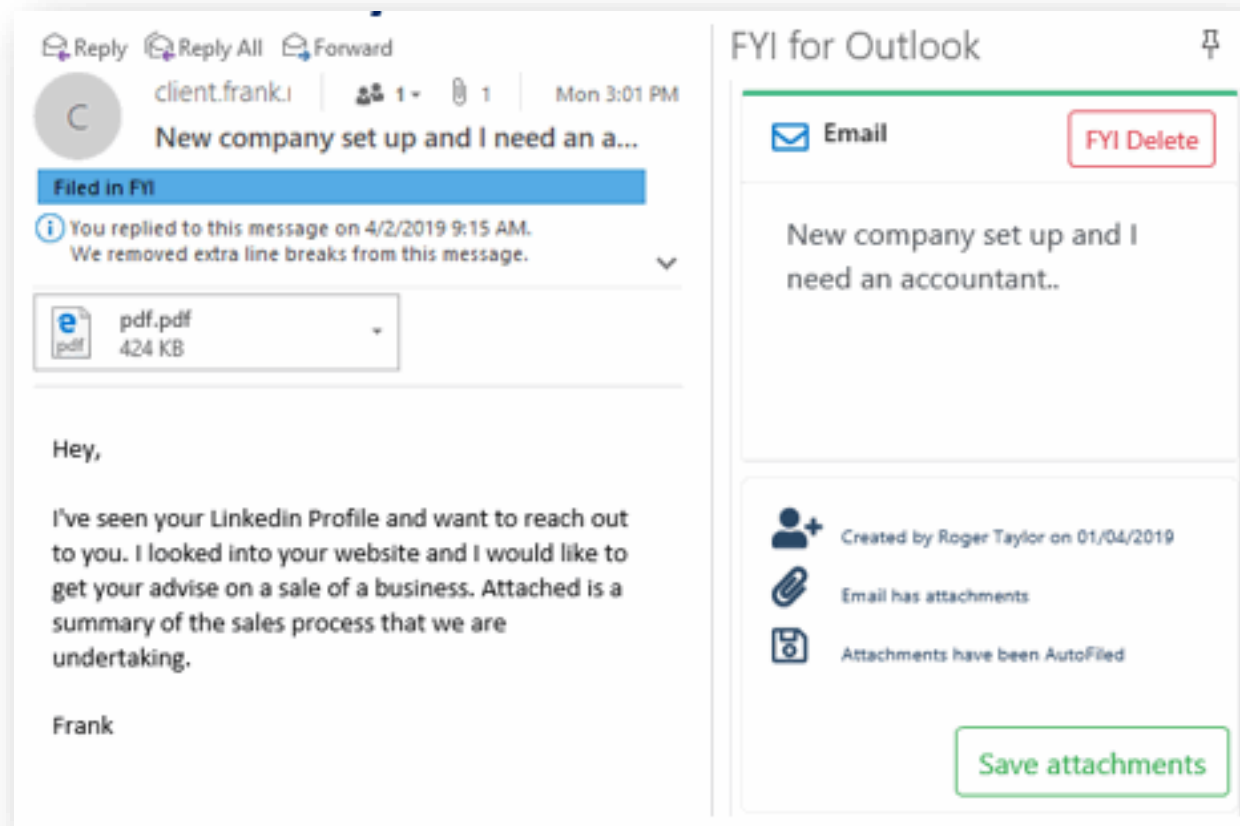
Email attachments can be auto-filed as separate documents within FYI.

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".

The screenshot displays the FYI software interface. At the top is a navigation bar with tabs for Dashboard, Clients, Jobs, Tasks, and Documents. Below this is a sub-navigation bar with filters like My Recent, In Tray (0), My Tasks (3), My Jobs (0), Delegated Tasks (12), and My Edit. A toolbar contains actions such as Copy, Delete, Doc Link, Mark Sent, Bulk Update, and Cancel. The main area features a table with columns for Type, Name, Client, and a status icon. The table lists several items, including a meeting titled 'Copy: Ian Walker and FYI' associated with client 'Walker, Ian'. To the right of the table is a sidebar with expandable sections: Meeting (selected), Details, Filing, Tasks, Activity, Recent Documents, and Logs. The 'Meeting' section shows the title 'Copy: Ian Walker and FYI'.

Type	Name	Client	Status
Meeting	Copy: Ian Walker and FYI	Walker, Ian	Generated
Document	XO Accounting-Letterhead - 20160525.docx	No Client	Generated
Document	Demo - BAS Letter	Marshall, Frank	Generated
Document	Test	Marshall, Frank	Generated
Document	Re: FYI Webinar	Swanson, Libby	Generated
Document	Notes from meeting between Grant and Rob - 4/3/2...	McPherson, Grant	Generated
Document	test	Wenceslao, Toni	Generated
Document	FW: subscription	RYBALOV, ALEX	Generated

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

Syncing with XPM, Tax Return AutoFile
and Xero Ledger automations





Syncing with XPM

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

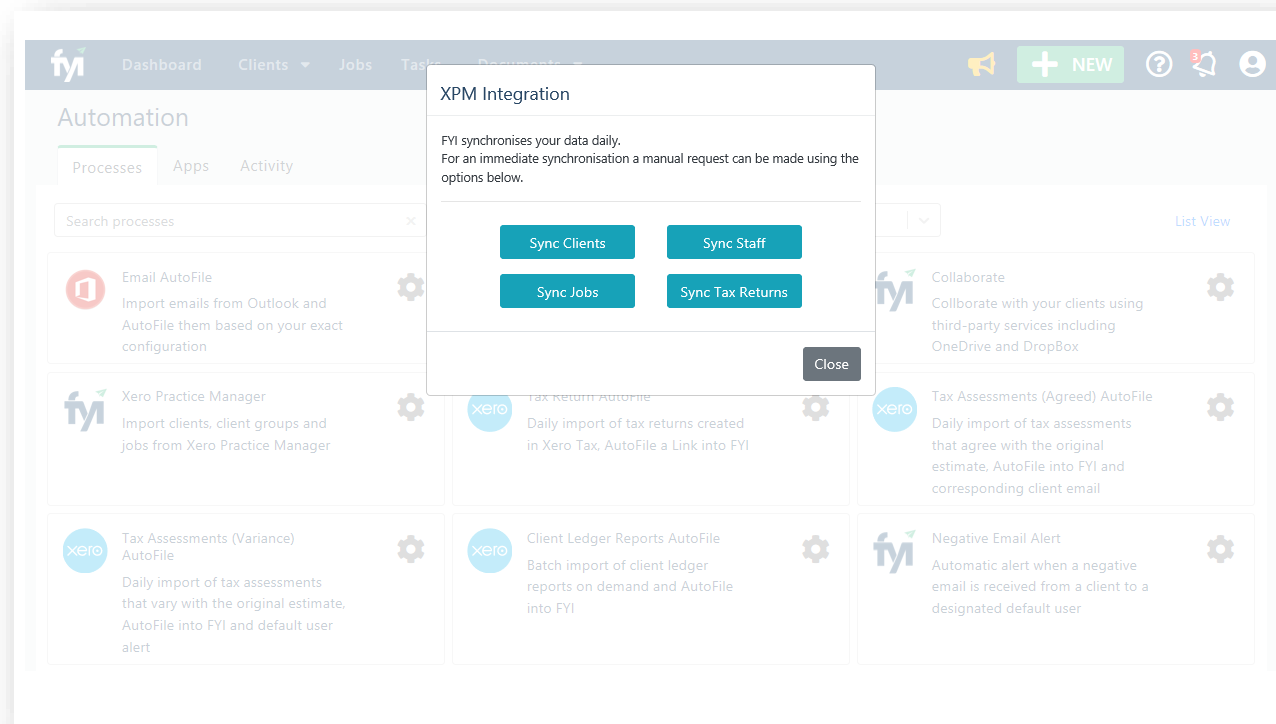
This means you don't have to maintain data in multiple locations and provides a productivity boost thanks to merge fields that are auto-completed across template documents.

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>**.

fyi

Dashboard

Clients

Jobs

Tasks

Documents

🔊

+ NEW

?

🔔

👤

Marshall, Frank

View client group data

Summary

Detail

Jobs

Tasks

Documents

Tax

Apps

Processes

Activity

Search taxes

State

Type

Year

From

To

Lodgement Date

Filed	Trust Return	2018	1/07/2018	30/06/2018	12/12/2018
Filed	Trust Return	2017	1/07/2016	30/06/2017	12/09/2017
Filed	Trust Return	2016	1/07/2015	30/06/2016	12/09/2016

Automation

Processes

Apps

Activity

Name

Tax Return Autofile

Back

Trigger

Scheduled Daily

Filter

All tax returns

Status

Active

Reset

Add Step

Step	Application	Action	
1	Xero Tax	File tax return	remove

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.

The screenshot displays the FYI software interface with the 'Automation' tab selected. The main panel shows the 'Client Ledger Reports Autofile' process configuration. The 'Trigger' is set to 'On Demand', the 'Filter' is 'No filter', and the 'Status' is 'Active'. Below this is a table with 4 steps, each representing a different report to be imported from Xero.

Step	Application	Action
1	Xero Ledger	Import Profit & Loss Report
2	Xero Ledger	Import Balance Sheet Report
3	Xero Ledger	Import Bank Summary Report
4	Xero Ledger	Import Trial Balance Report

To the right, a 'Step 3' configuration panel is open, showing settings for the 'Import Bank Summary Report'. It includes fields for 'Name' (Bank Summary <ReportPer), 'Autofile' (DISABLED), 'Cabinet' (Demonstration), 'Year' (2018), 'Work Type' (Workpapers), and 'Filing' (Filed). A 'Close' button is at the bottom right of this panel.

Below the main configuration, a 'Clients' tab is active, showing a list of clients. The client 'Marshall, Frank' is selected, and the 'Processes' sub-tab is chosen. This sub-tab displays the 'Client Ledger Reports Autofile' process with a brief description and a 'Run' button.

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

The composite image illustrates the 'Send via OneDrive' automation process. It features three main components:

- Documents Table:** A screenshot of the 'Documents' tab in the FYI interface. It shows a table with columns for 'Type', 'Name', 'Client', 'Year', and 'Work Type'. Two documents are listed: 'Engagement_Letter' and 'Repco Statement 30062018', both associated with 'Marshall, Frank' and the year '2018'.
- Email Composition:** A screenshot of an email being composed. The 'From' field is 'liz.hurst@fyidocs.com', the 'To' field is 'client.frank.marshall@gmail.com', and the 'Subject' is 'Corporate Secretarial Change Letter'. The email body includes a greeting 'Dear Frank', a request for a link, and a bullet point with a link to 'Corporate Secretarial Change Letter.pdf'.
- Send Configuration Dialog:** A screenshot of the 'Send' configuration dialog. It shows the 'Client' as 'Marshall, Frank', the 'Template' as 'No template selected', the 'Cabinet' as 'Client Files', the 'Work Type' as 'Correspondence', and the 'Year' as '2018'. The 'Send via' dropdown is set to 'OneDrive', and the 'Selected Document' is 'Engagement_Letter (39 KB)'. The 'Workflow' dropdown is also visible.

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 and nominate the relevant Client manager to receive the email alert.

The screenshot displays the 'Automation' section of the FYI interface. The 'Processes' tab is selected, showing a table with one process: 'Negative Email Alert'. The process details are as follows:

Step	Application	Action
1	FYI	Alter Document

The process configuration includes the following fields:

- Name:** Negative Email Alert
- Trigger:** Email has arrived
- Filter:** Sentiment is "NEGATIVE", Document Type is "Email", Delivery Status is "Received"
- Status:** Active

The 'Task' configuration for Step 1 is shown on the right:

- Task Name:** Alter Document
- Filing:** (dropdown)
- Workflow:** (dropdown)
- Create a task:** YES
- Subject:** Possible negative client em
- Assignee:** Manager
- Due date:** 3 days
- Status:** Not started

The 'Details' section at the bottom shows a preview of the email alert message: "The linked email from «Name» has been flagged for your review based on possible negative comments".

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

Need Help?

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



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