

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.

2. Outlook automations

Auto-filing client emails, attachments and client meetings.

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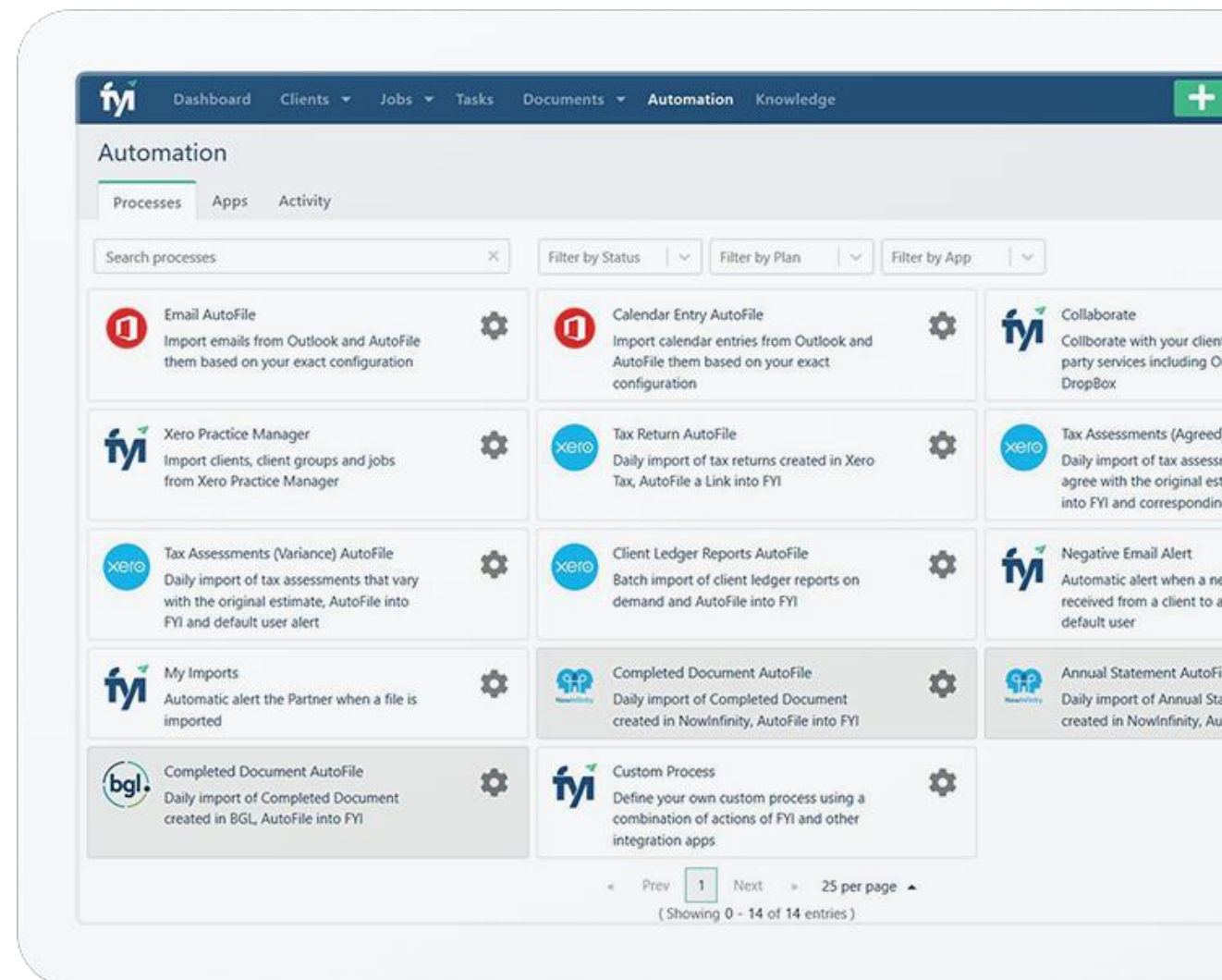
Synching with XPM, Tax Return AutoFile and Xero Ledger automations

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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.

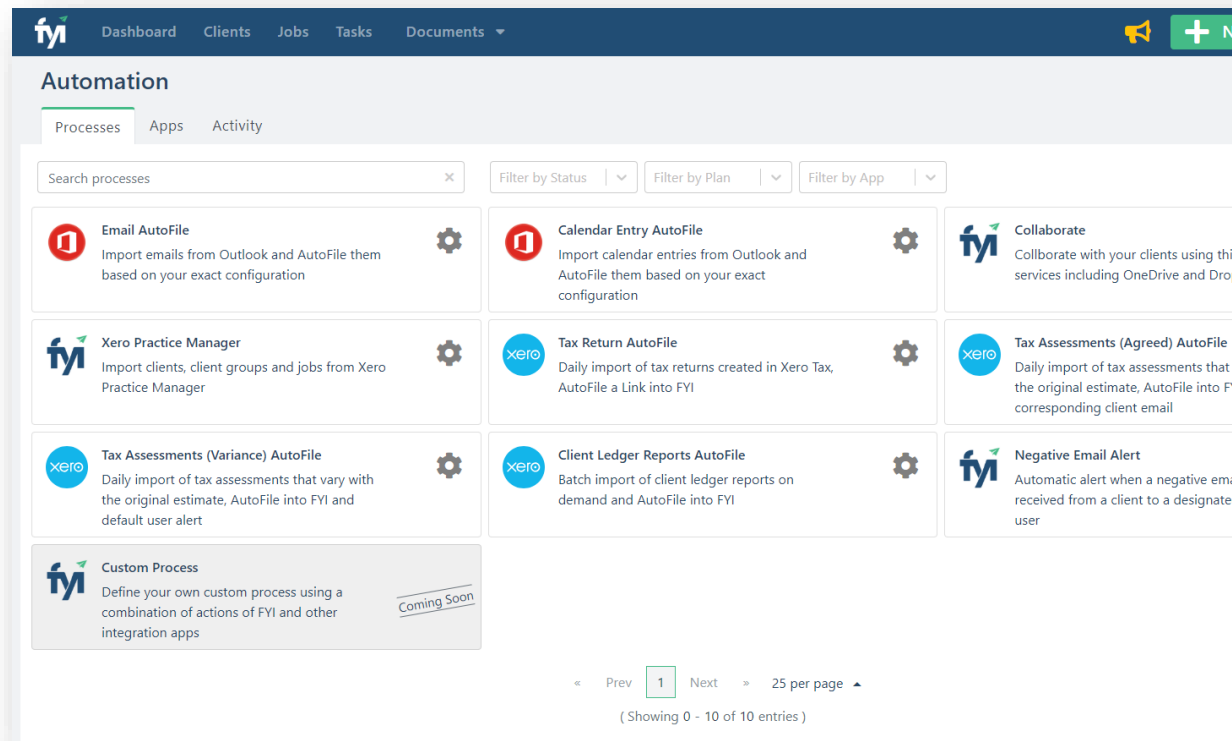
To access the dashboard from within FYI, you must be an **FYI Administrator**. Click **Settings** in the top right-hand corner, select **Practice Settings** from the drop-down menu and then **Automation**.

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





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 [Introduction to AutoFile for Outlook](#)



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.

Autofile Email

Settings | Exclusion

Email auto-filing ☒ ON
Emails from all users Outlook inboxes are automatically filed.

Exclude non-client emails ☒ ON
Exclude any email from auto-filing that have not been sent from clients.

Exclude internal emails ☒ ON
Exclude any email from auto-filing that have been sent from your internal team.

In tray review ☐ OFF
Allow each user to review auto-filed emails before they are shared with the entire practice. This review can be completed via the Outlook Inbox or the FYI In Tray by simply selecting File or Delete on each email.

Autofile email attachments ☐ OFF
Autofile attachments from your emails based on the filing of underlying email.

My settings

Profile | Documents | Security | Devices

Liz Hurst's Details

Email Notifications: ☒ ON

Autofile Email Attachments: ☒ ON

Open Outlook using: Online

Open Office using: Desktop

AutoFile mode: In tray review

Close

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

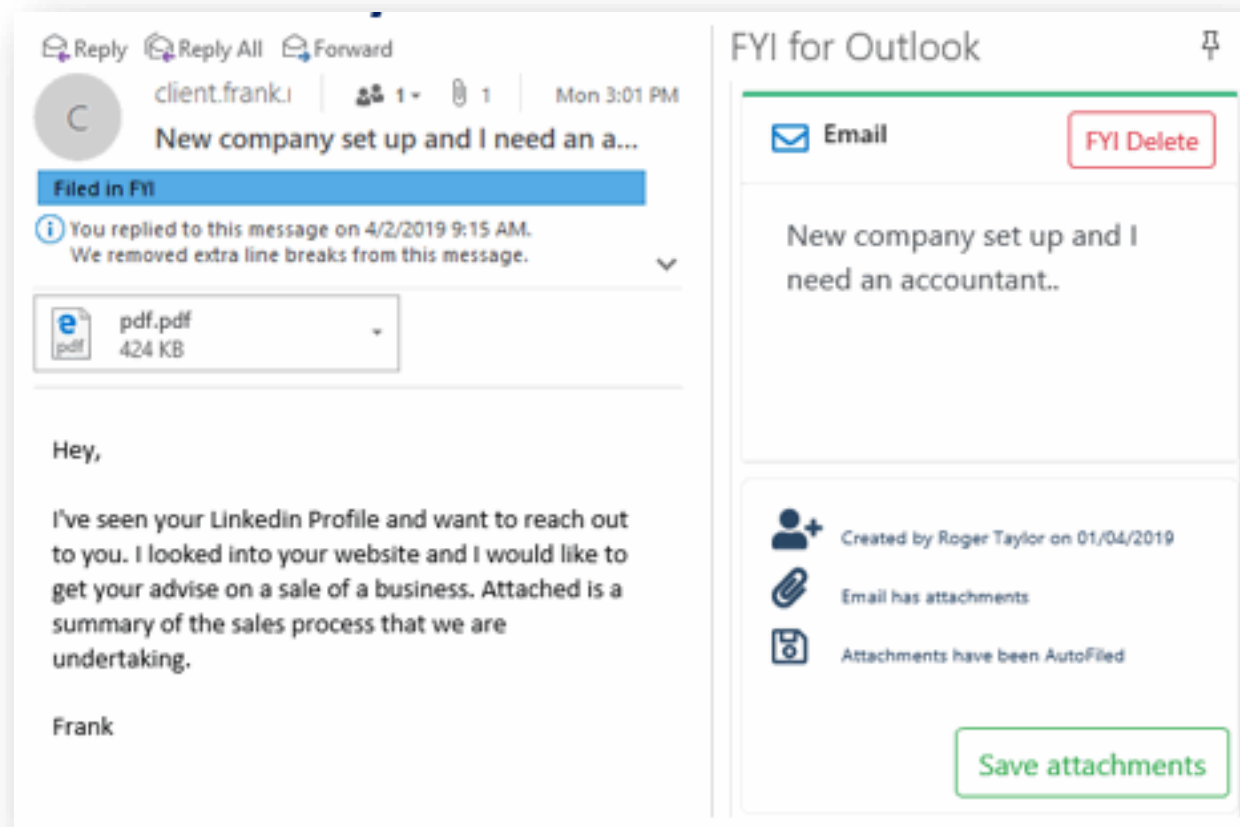
Email attachments can be auto-filed as separate documents within FYI.

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, there's a navigation bar with tabs: Dashboard, Clients, Jobs, Tasks, and Documents. A '+ NEW' button and several utility icons (megaphone, question mark, bell, user) are on the right. Below the navigation bar, a horizontal menu shows 'My Recent', 'In Tray' (0), 'My Tasks' (3), 'My Jobs' (0), 'Delegated Tasks' (12), and 'My Edit'. A toolbar contains icons for Copy, Delete, Doc Link, Mark Sent, Bulk Update, and Cancel. Below this is a table with columns: Type, Name, Client, and a status column. The table lists several items, including a meeting titled 'Copy: Ian Walker and FYI' with client 'Walker, Ian'. To the right of the table, a sidebar titled 'Meeting' shows details for the selected item, including 'Copy: Ian Walker and FYI', and expandable sections for Details, Filing, Tasks, Activity, Recent Documents, and Logs. A 'COMMENTS' section is also visible next to the table.

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	
Document	Test	Marshall, Frank	
Document	Re: FYI Webinar	Swanson, Libby	
Document	Notes from meeting between Grant and Rob - 4/3/2...	McPherson, Grant	
Document	test	Wenceslao, Toni	
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.

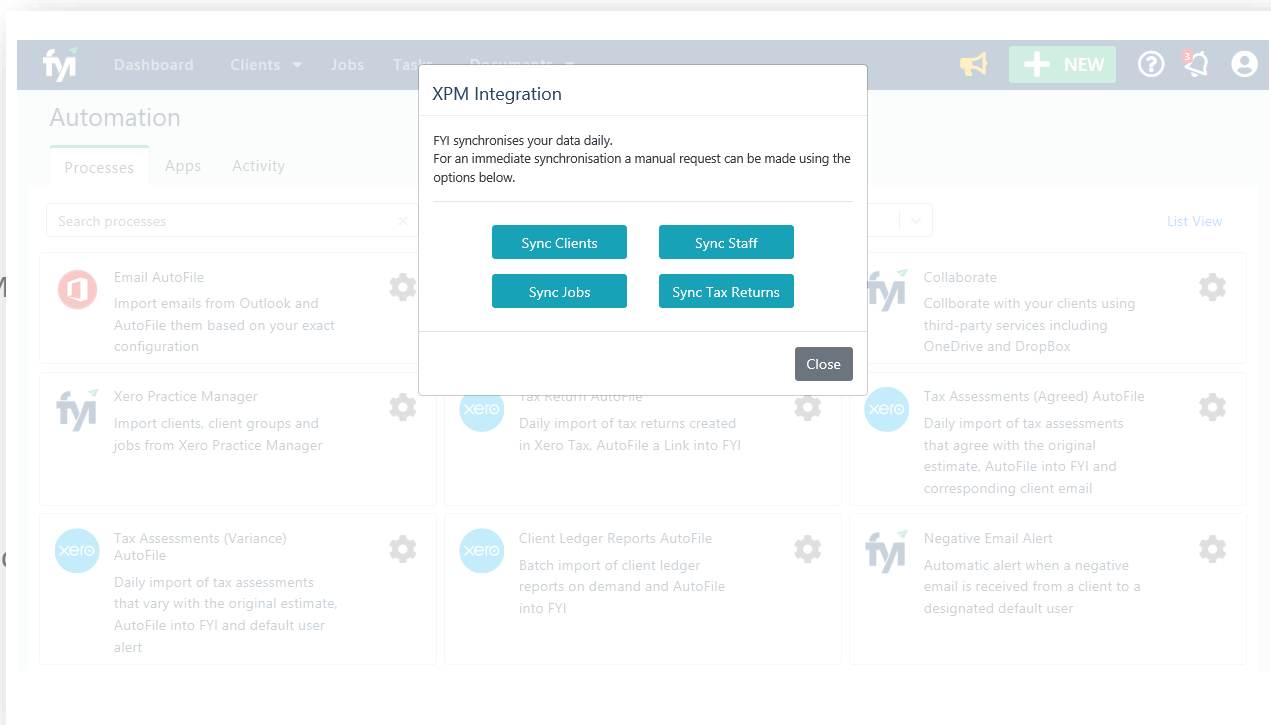
This means you don't have to maintain data in multiple locations and provides a productivity boost thanks to merge fields that are auto-completed across template documents.

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>**.

The screenshot displays the FYI software interface. At the top, a dark blue navigation bar includes the FYI logo, a 'Dashboard' link, and tabs for 'Clients', 'Jobs', 'Tasks', and 'Documents'. On the right of this bar are a megaphone icon, a green '+ NEW' button, and a help icon. Below the navigation bar, a search bar contains 'Marshall, Frank' and a dropdown menu shows 'View client group data'. A secondary navigation bar below the search bar includes tabs for 'Summary', 'Detail', 'Jobs', 'Tasks', 'Documents', 'Tax' (which is selected), 'Apps', 'Processes', and 'Activity'. Under the 'Tax' tab, there is a 'Search taxes' input field and a table with columns: State, Type, Year, From, To, and Lodgement Date. The table contains three rows of data for 'Trust Return' filings from 2016 to 2018. An 'Automation' modal window is overlaid on the right side of the screen. It has tabs for 'Processes', 'Apps', and 'Activity', with 'Processes' selected. The modal shows settings for the 'Tax Return Autofile' process: Name (Tax Return Autofile), Trigger (Scheduled Daily), Filter (All tax returns), and Status (Active). At the bottom of the modal is a table with columns 'Step', 'Application', and 'Action', containing one row for 'Xero Tax' with the action 'File tax return'.

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

Step	Application	Action
1	Xero Tax	File tax return

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 Automation interface. The top navigation bar includes 'Dashboard', 'Clients', and 'Practice'. The 'Automation' section is active, showing a list of processes. The 'Client Ledger Reports Autofile' process is highlighted, with details: Name: Client Ledger Reports Autofile, Trigger: On Demand, Filter: No filter, Status: Active. Below this is a table with 4 steps, each representing a different report type (Profit & Loss, Balance Sheet, Bank Summary, Trial Balance) imported from Xero Ledger. A 'Run' button is visible next to the process name. On the right, a configuration panel for 'Step 3' shows settings for 'Import Bank Summary Report', including Name, Autofile (DISABLED), Cabinet (Demonstration), Year (2018), Work Type (Workpapers), and Filing (Filed). A 'Close' button is at the bottom right of the configuration panel.

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

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

Marshall, Frank X View client group data

Summary Detail Jobs Tasks Documents Tax Apps Processes Activity

1 item(s) selected Delete Send Mark Sent Export Bulk Update Cancel

Type	Name	Client	Year	Work Type
<input checked="" type="checkbox"/>	Engagement_Letter	Marshall, Frank	2018	Administration
<input type="checkbox"/>	Repco Statement 30062018	Marshall, Frank	2018	Correspondence

From: liz.hurst@fyidocs.com

To: client.frank.marshall@gmail.com

Subject: Corporate Secretarial Change Letter

Send

Dear Frank

Please find attached a link to the Corporate Secretarial Change Letter you requested.

- [Corporate Secretarial Change Letter.pdf](#)

Microsoft

Request Verification Code

You've received a secure link to:

Engagement_Letter.pdf

To verify your identity, we'll send a code to you at client.frank.marshall@gmail.com.

Send Code

By clicking Send Code you allow Growth Partners to use your email address in accordance with their privacy statement. Growth Partners has not provided links to their terms for you to review.

Send

Client: Marshall, Frank X Change Addressee

Template: No template selected

Cabinet: Client Files X

Work Type: Correspondence

Year: 2018

Name: Name

Include as PDF: ON

Send via: OneDrive X

Selected Document: Engagement_Letter (39 KB) X

Workflow: Workflow

Create Cancel

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.

Automation

Processes Apps Activity

NameNegative Email Alert

TriggerEmail has arrived

FilterSentiment is "NEGATIVE"
Document Type is "Email"
Delivery Status is "Received"

StatusActive

Step	Application	Action
1	FYI	Alter Document

Step 1

Alter Document

Filing

Workflow

Task

Create a taskYES

SubjectPossible negative client em

AssigneeManager

Due date3 days

StatusNot started

Details

BNormal16

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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HELP CENTRE

fyidocs.zendesk.com

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support@fyidocs.com