MASTERCLASS

AUTOMATING YOUR PRACTICE

YOUR HOSTS

ROB CAMERON
CO-FOUNDER and CEO

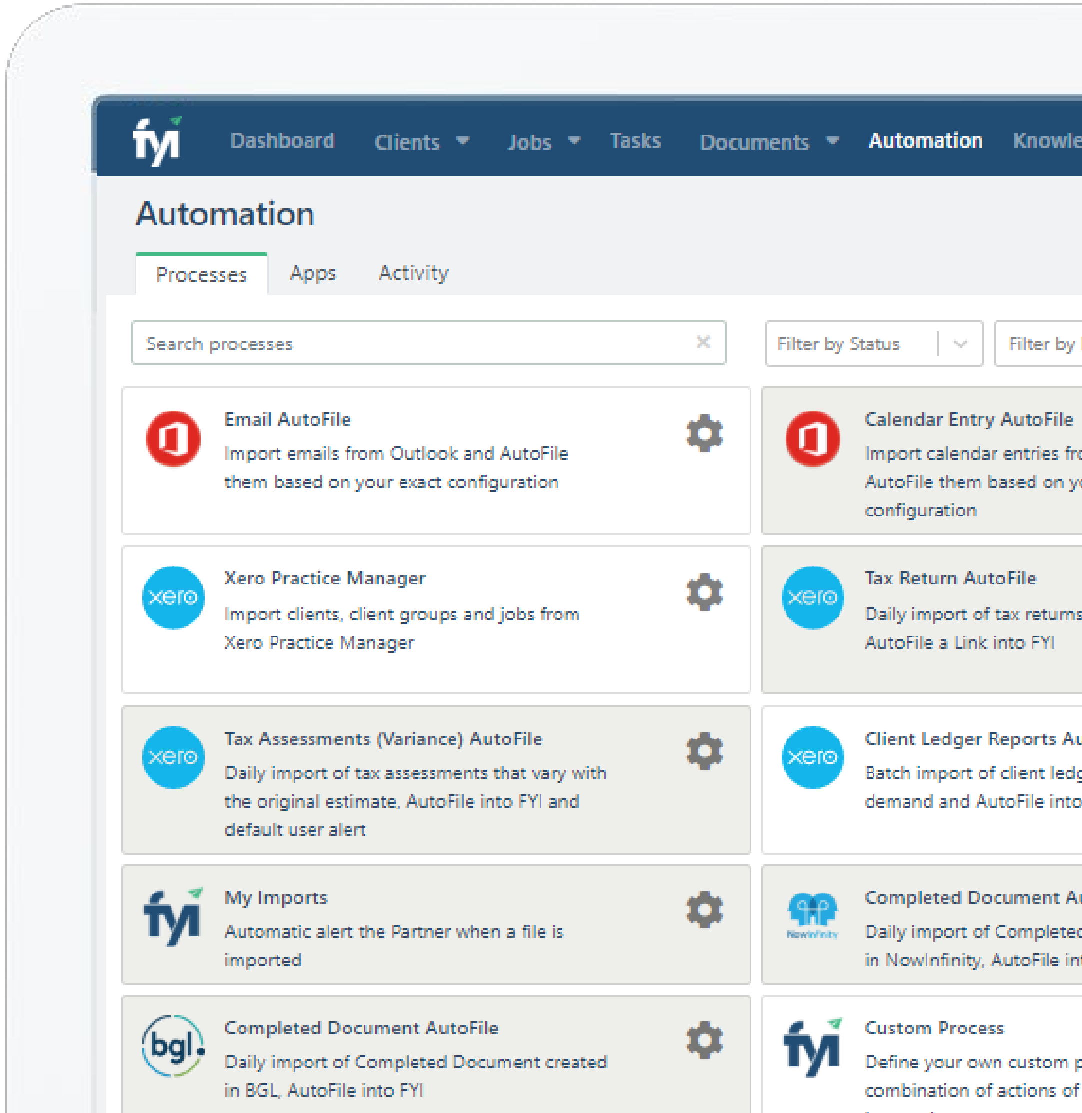
Rob is a Chartered Accountant with experience working in suburban practices and larger firms, and at MYOB where he led the global product strategy for accountants. FYI is the fourth generation of a product concept Rob has been working on in his 20+ years developing solutions for accountants.

JACK THIEL
CLIENT SUCCESS MANAGER

Jack is a Chartered Accountant with more than 5 years working in the profession and a specialisation in SaaS technology. He leads our Client Success Team to ensure FYI clients see early and ongoing return on their investment in FYI.

SERVICE UPDATE

COVID-19

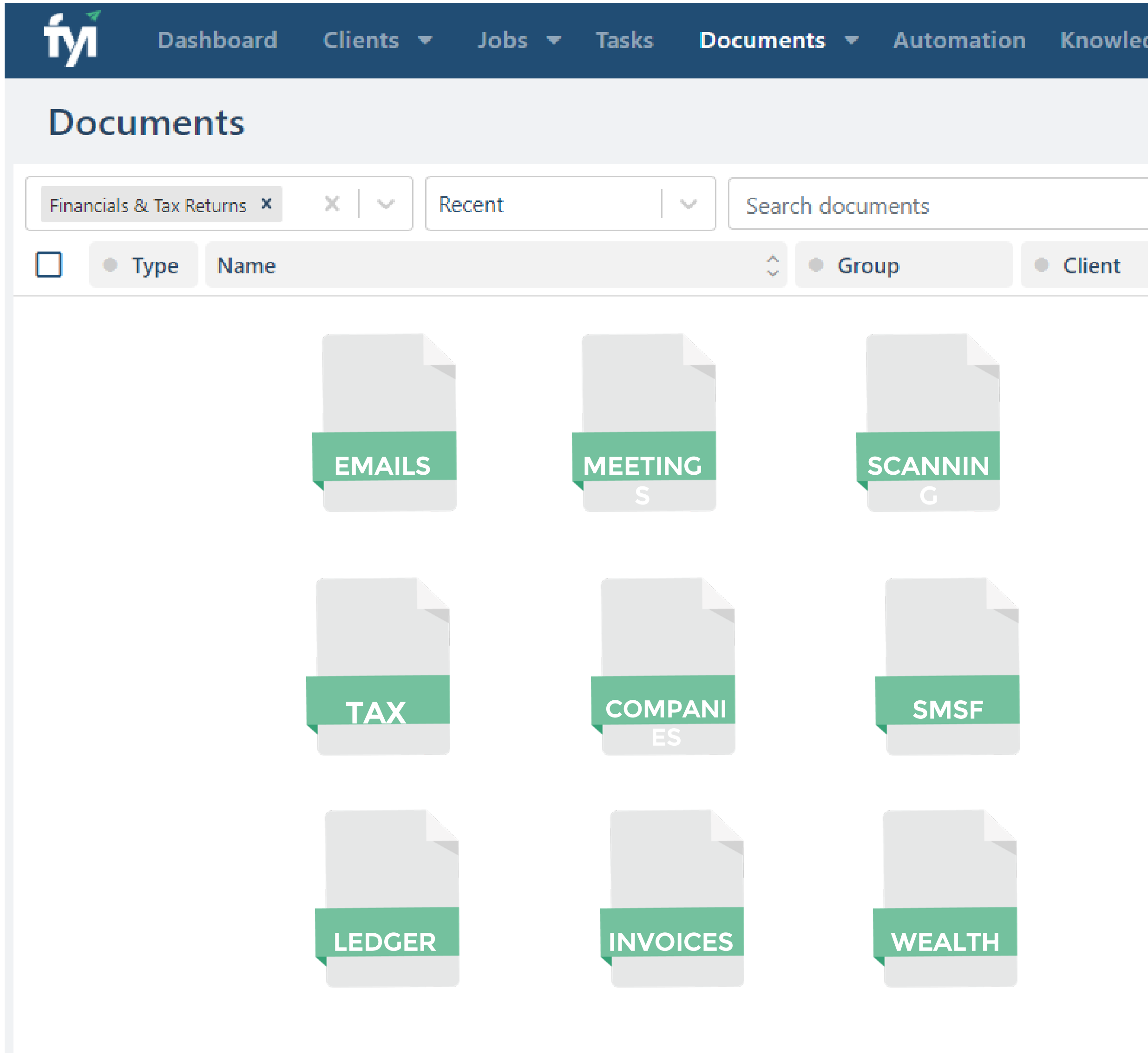


IN THIS **MASTERCLASS**

Learn how to automate your practice by configuring the following:

1. **Corporate Affairs Document AutoFile** (BGL & NowInfinity)
2. **Tax Return AutoFile** (Xero Tax)
3. **Tax Assessments AutoFile**
4. **Custom Processes**

These automations are all available to FYI **Pro Users**



THE PROBLEM
FYI IS SOLVING

Document filing from external sources tends to be…..

- **Difficult:** managing multiple to-do lists, never quite sure if you have forgotten something
- **Repetitive:** every day having to double-check things have been done
- **Inconsistent:** sometimes it simply doesn't happen!

FYI's automated processes solve these issues by…..

- Removing your to-do and putting the responsibility back on our processes.
- Performing these tasks automatically and giving you time back.
- Removing the chance for human error.

TYPES OF AUTOMATIONS

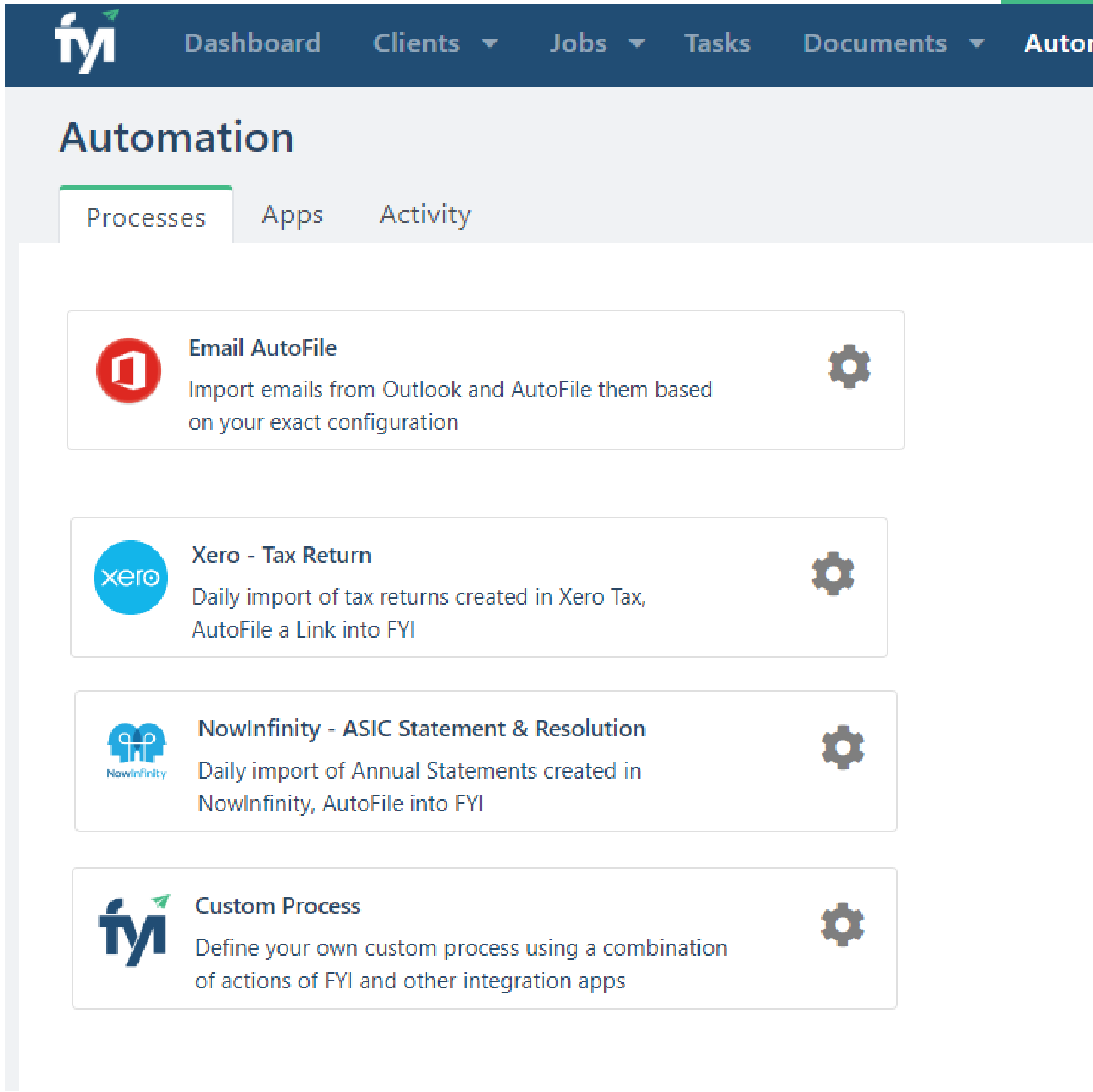
- **Background Services**

  These are built-for-purpose with limited customisation. Eg. Email AutoFile

- **Process Automations**

  These are step-based, allowing you to optimise for your unique workflows.

  This Masterclass is focused on **Process Automations**



PROCESS AUTOMATIONS

Within Process Automations there are two types:

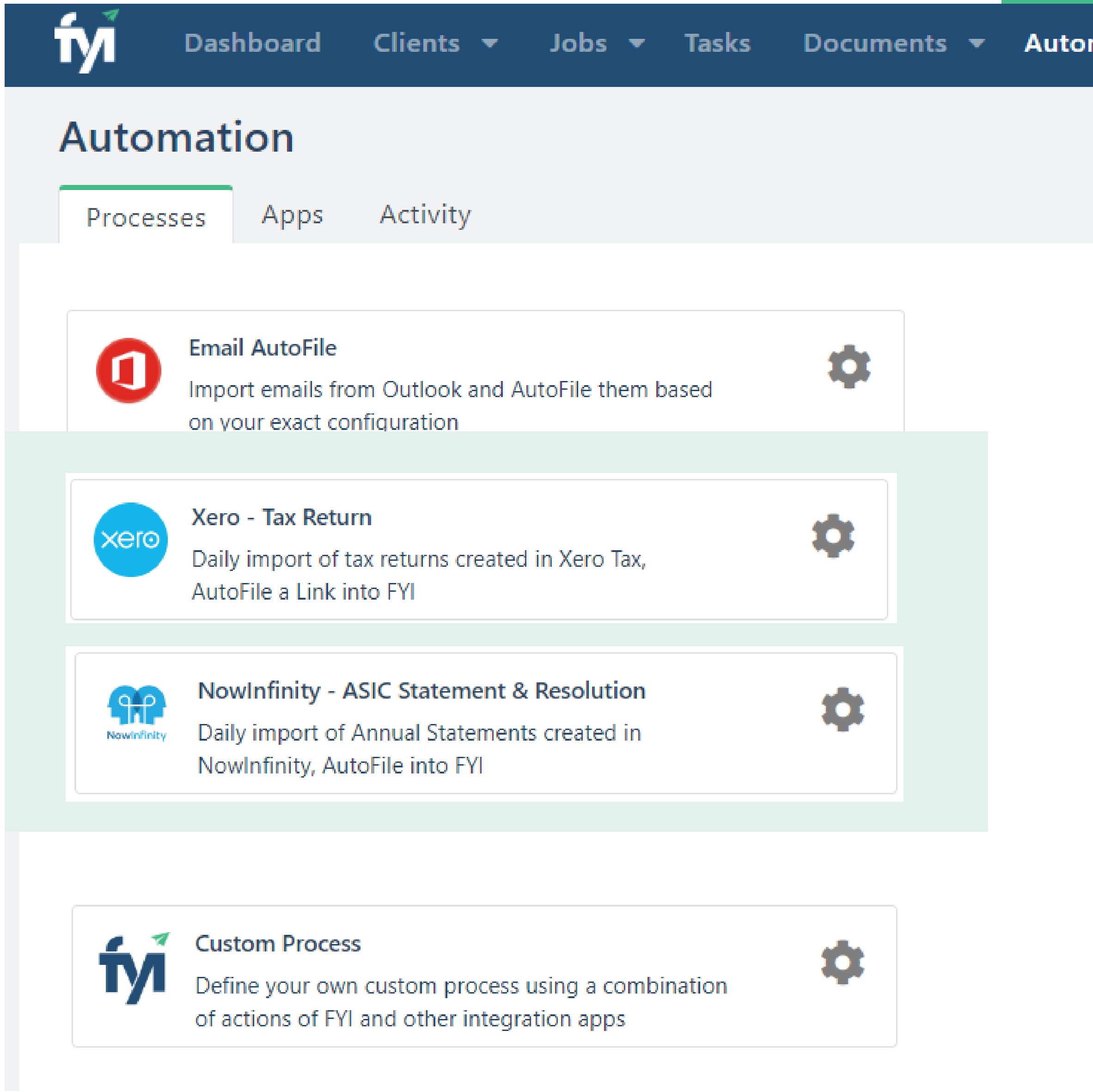
- **Default**

  Tax Return AutoFile
  ASIC document AutoFile

- **Custom**

  Blank canvas to create your own

At their core, they are both a series of **executable steps**.



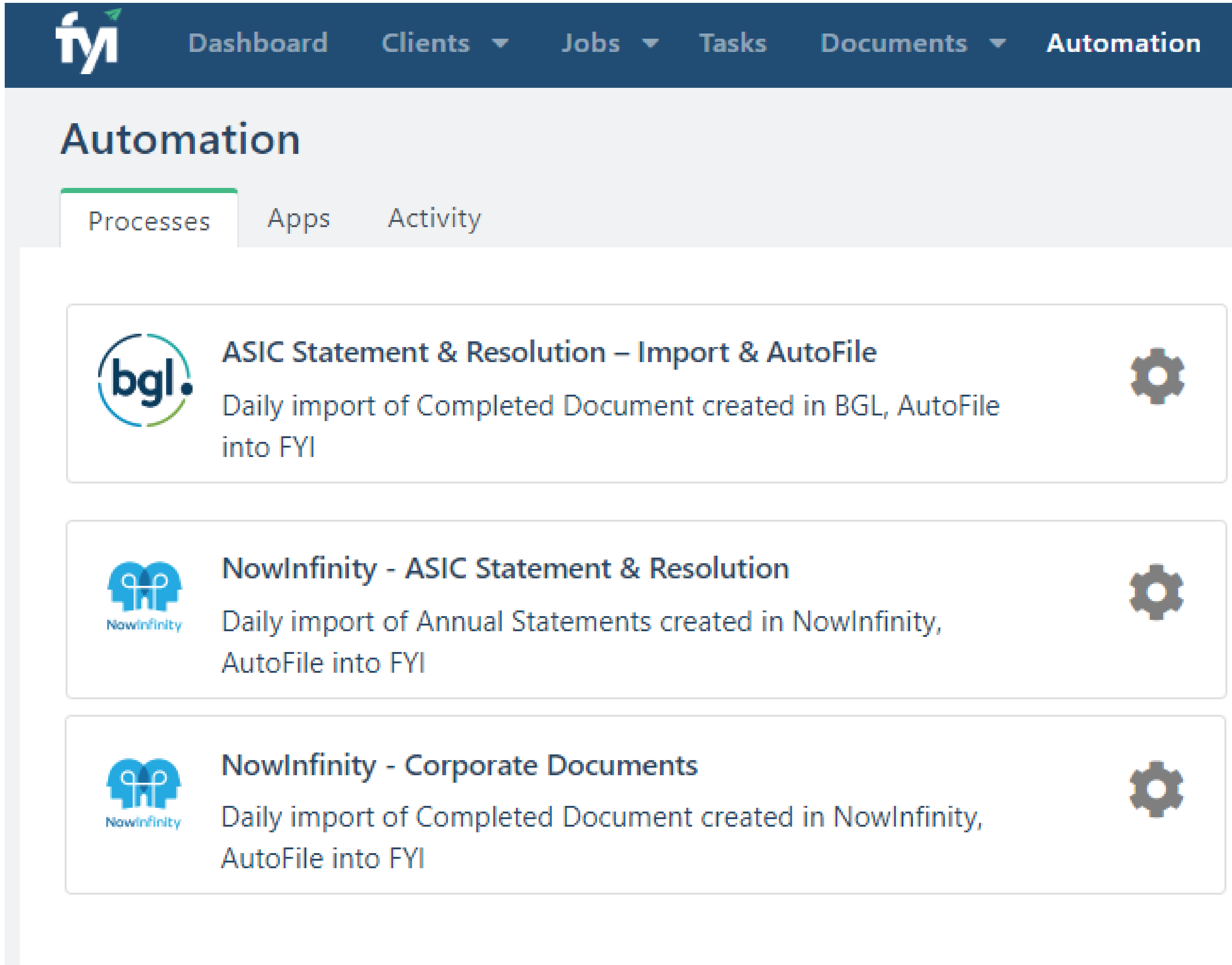
AUTOMATIC
CORPORATE AFFAIRS FILING

- BGL
- Now Infinity

FEATURE OVERVIEW

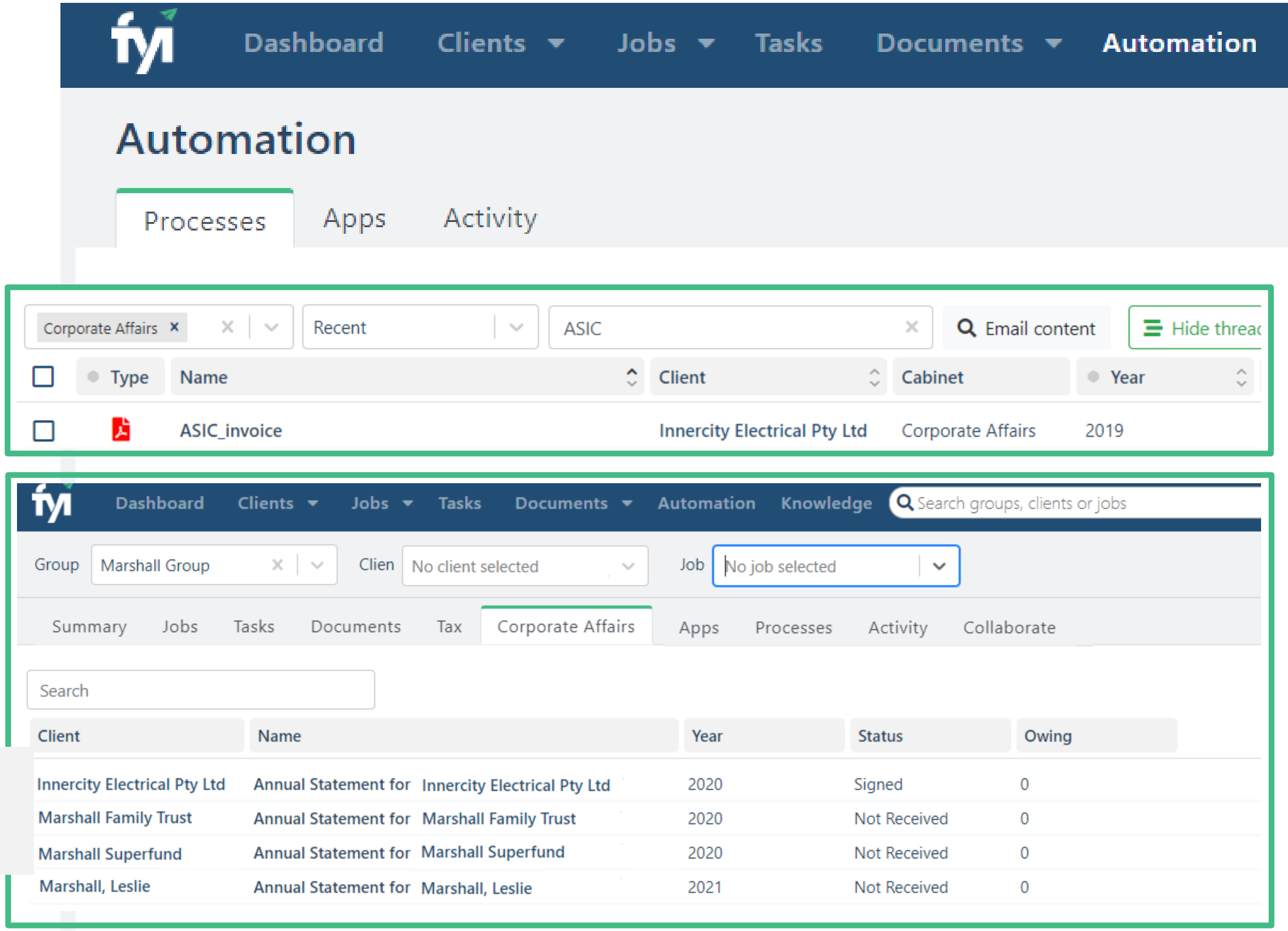
- Automatically capture and file source documents from **BGL** and **NowInfinity** twice-daily.
  - **ASIC Statements & Resolutions** from BGL and NowInfinity
  - **Corporate Documents** from NowInfinity

Note: Naming of these Automations has been updated to better represent their functions.



FEATURE
OVERVIEW

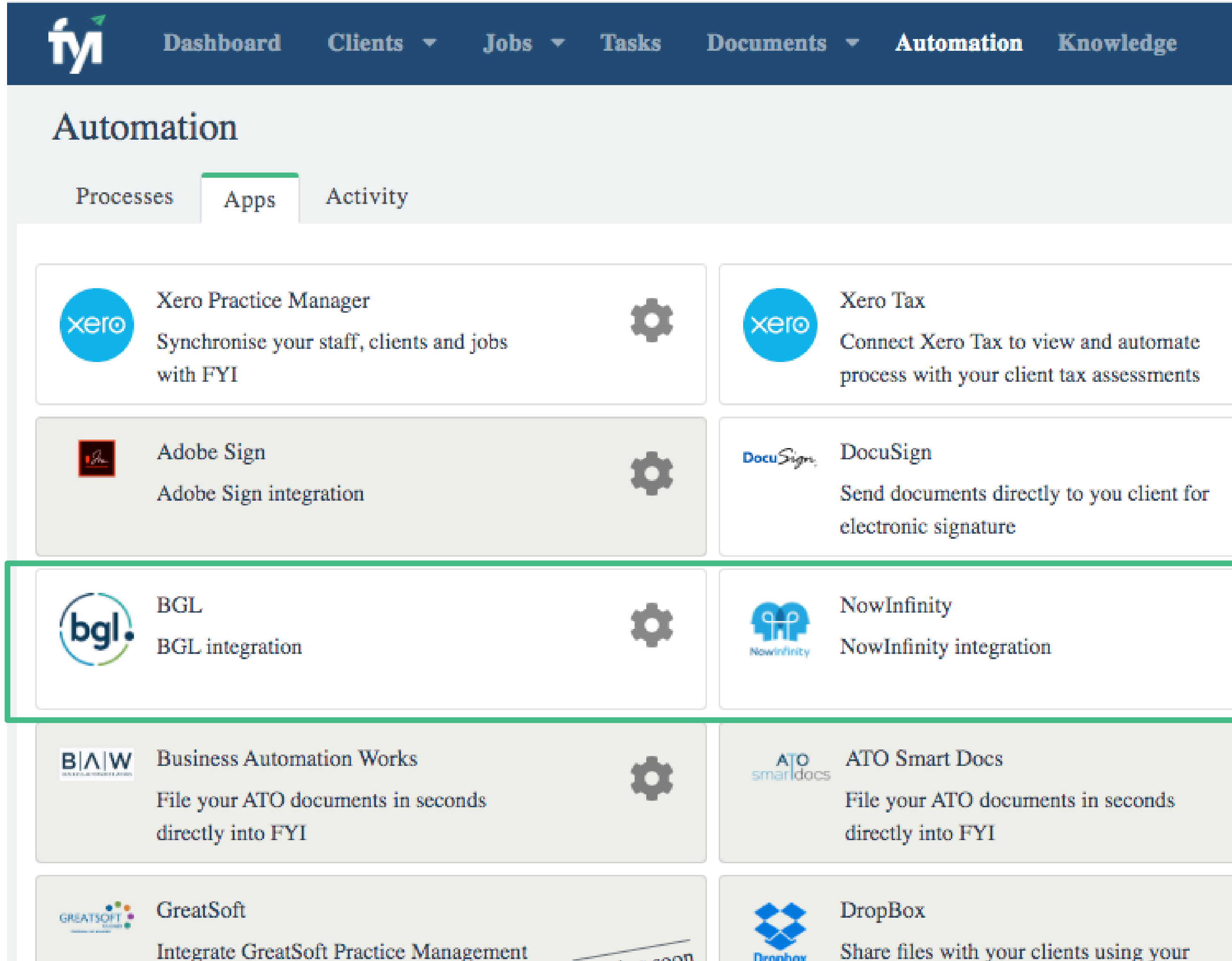
- Rest assured that important **corporate documents** have been filed in **FYI**.
- View **ASIC** annual statements, year and status from within **FYI**.
- Direct access to the **ASIC** annual statement from **FYI**.



Click here for instructions on **Displaying Information for a Client**

GETTING STARTED
TWO SIMPLE STEPS

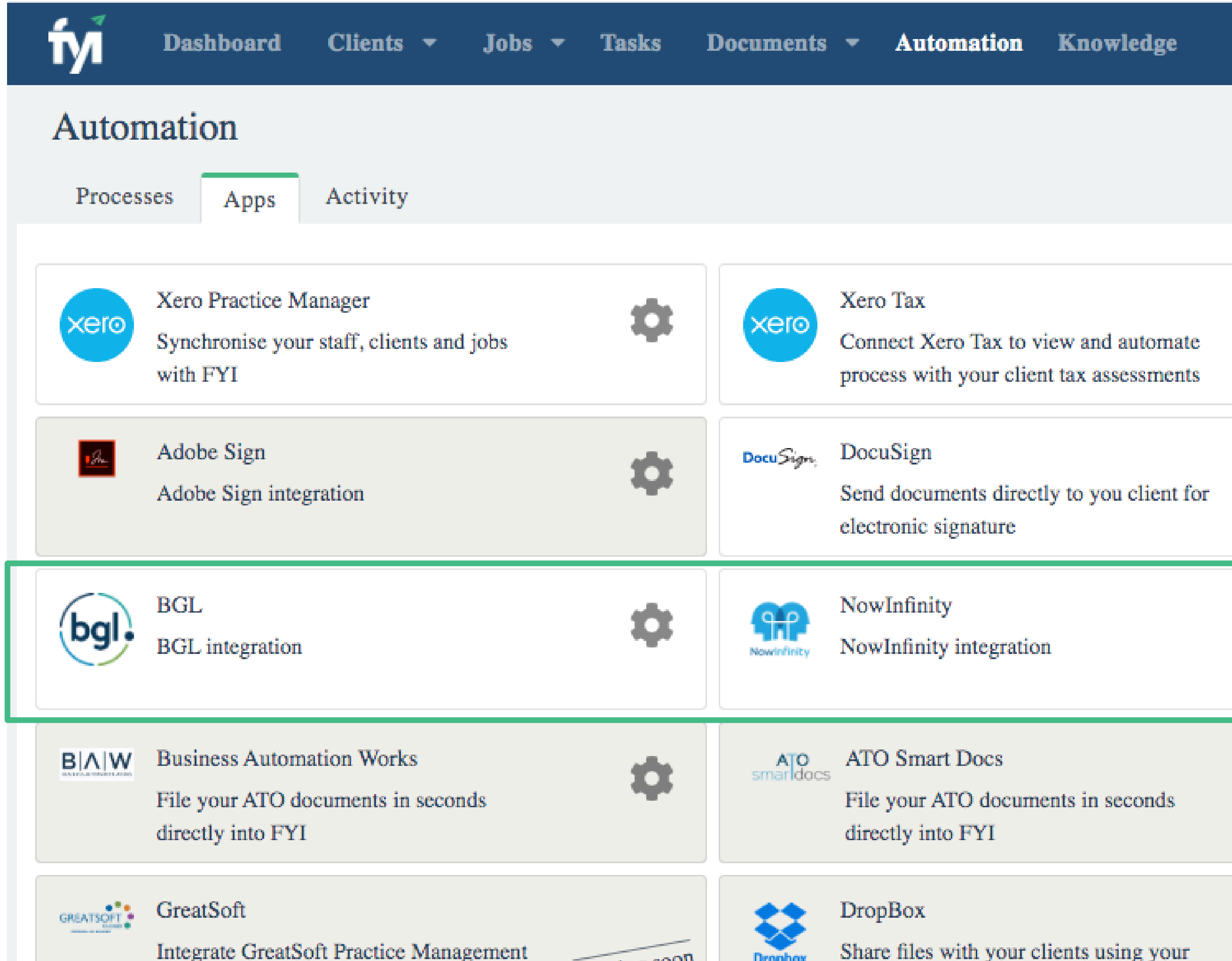
- **Step 1:** Connect your app
- **Step 2:** Set up the automation
- Start auto-filing!



[Click here](#) for instructions on how to set up your **Importing from BGL** and **Now Infinity**

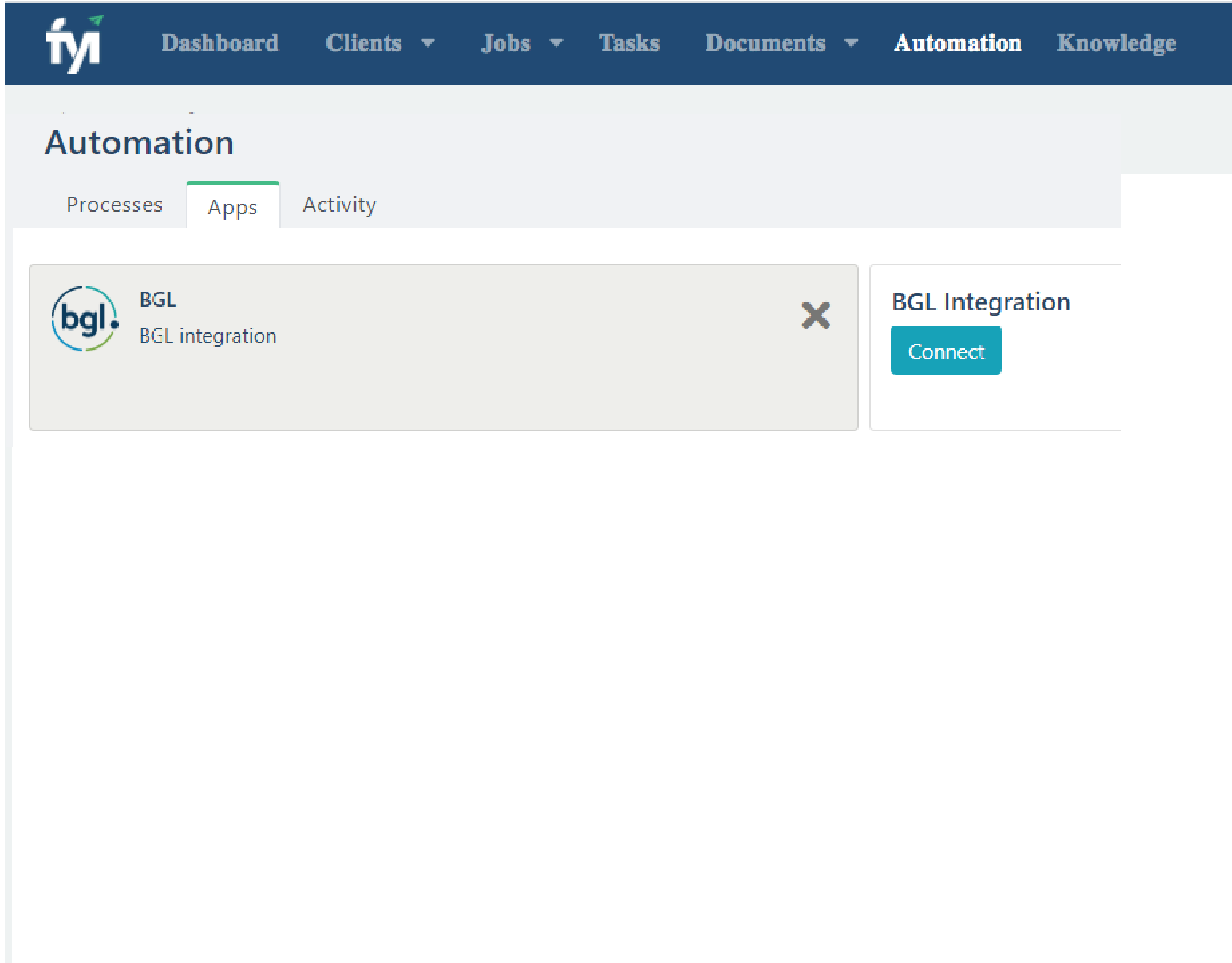
STEP 1:
CONNECTING EACH APP

- Go to Automation > Apps
- Select the icon



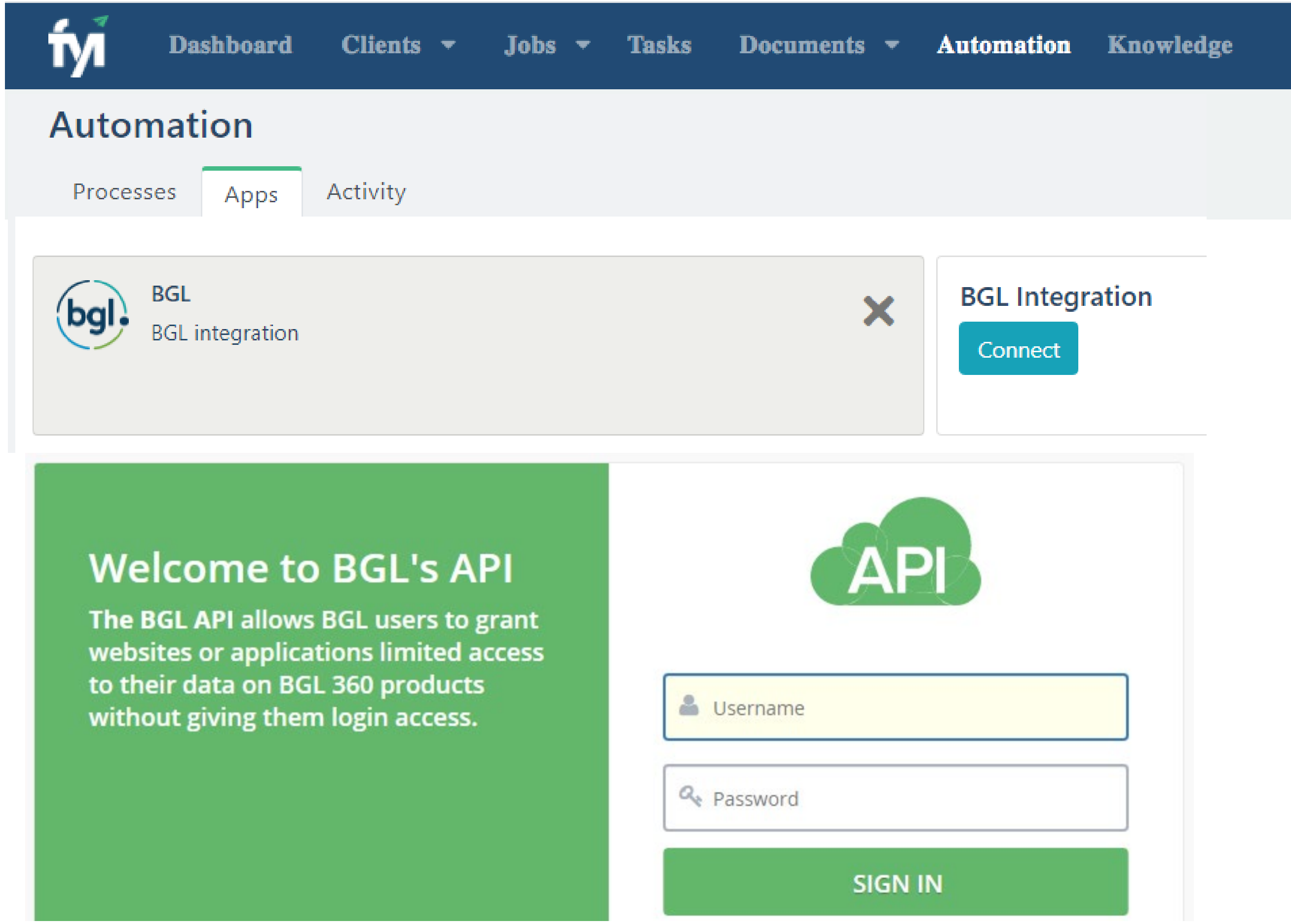
STEP 1:
CONNECTING EACH APP

- Go to Automation > Apps
- Select the icon
- Select **Connect**



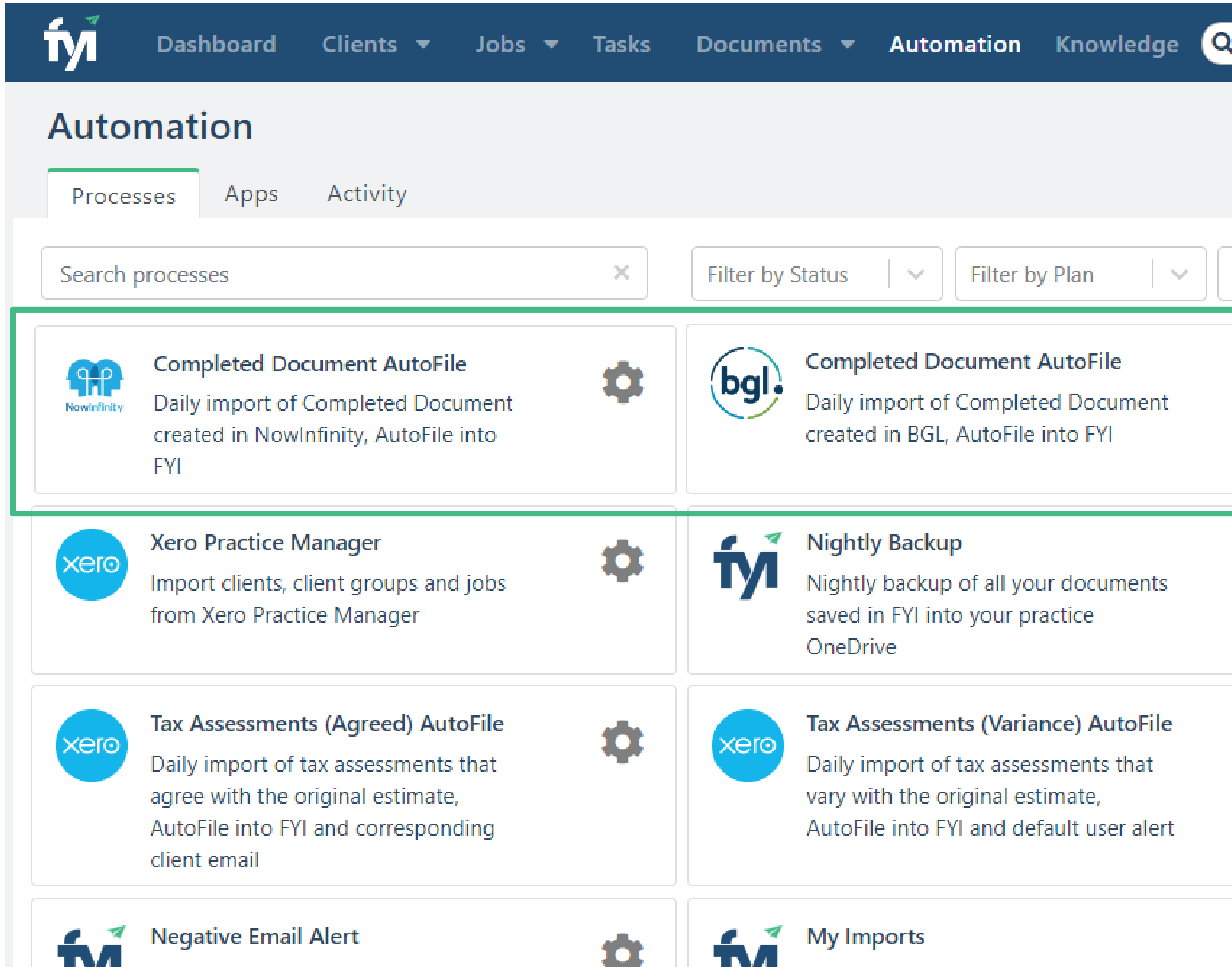
STEP 1:
CONNECTING EACH APP

- Go to Automation > Apps
- Select the icon
- Select Connect
- **Login**



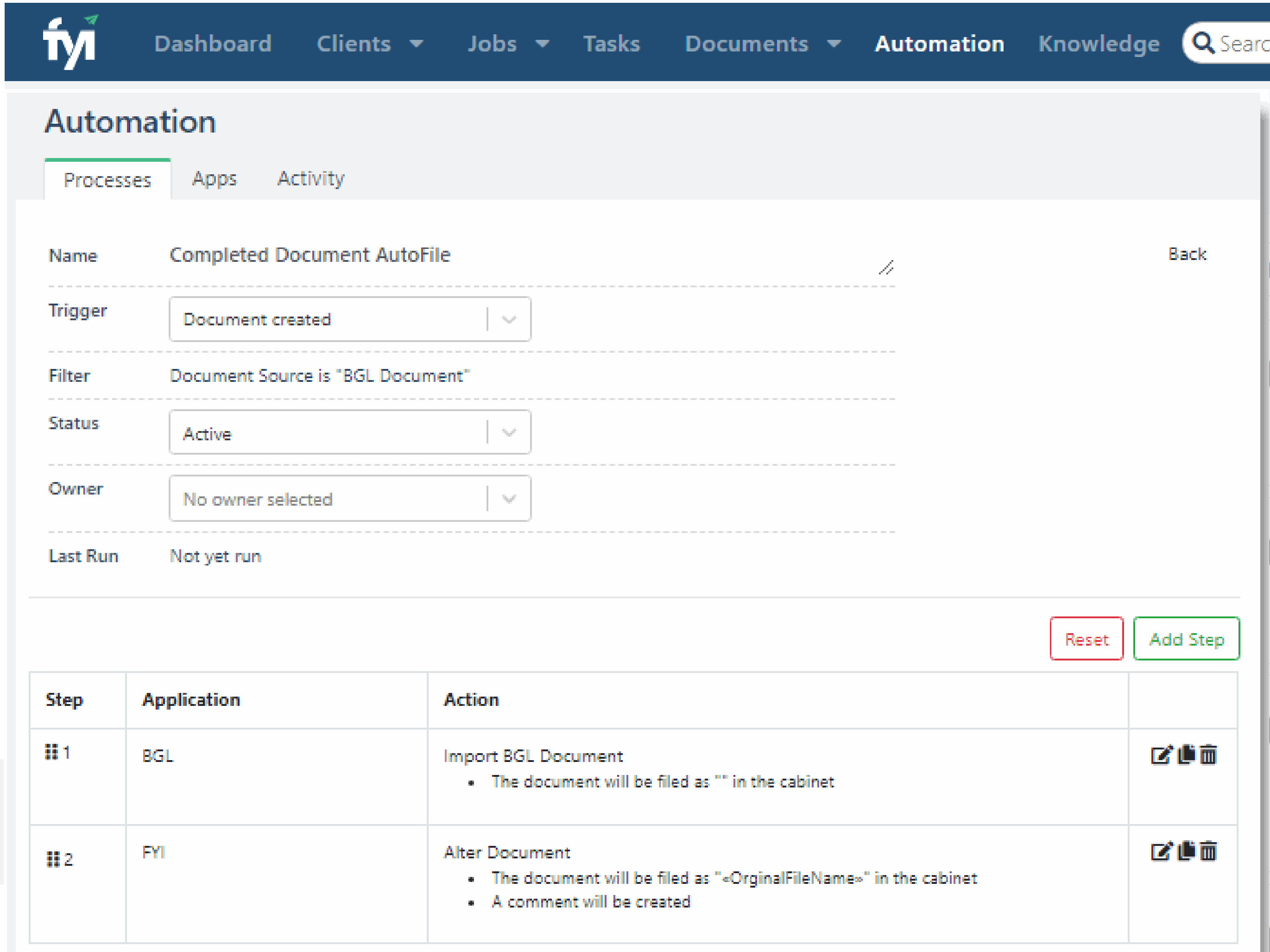
STEP 2:
SETTING UP THE AUTOMATION

- Go to Automation > Processes
- Select the icon



STEP 2:
SETTING UP THE AUTOMATION

These come pre-packaged with FYI

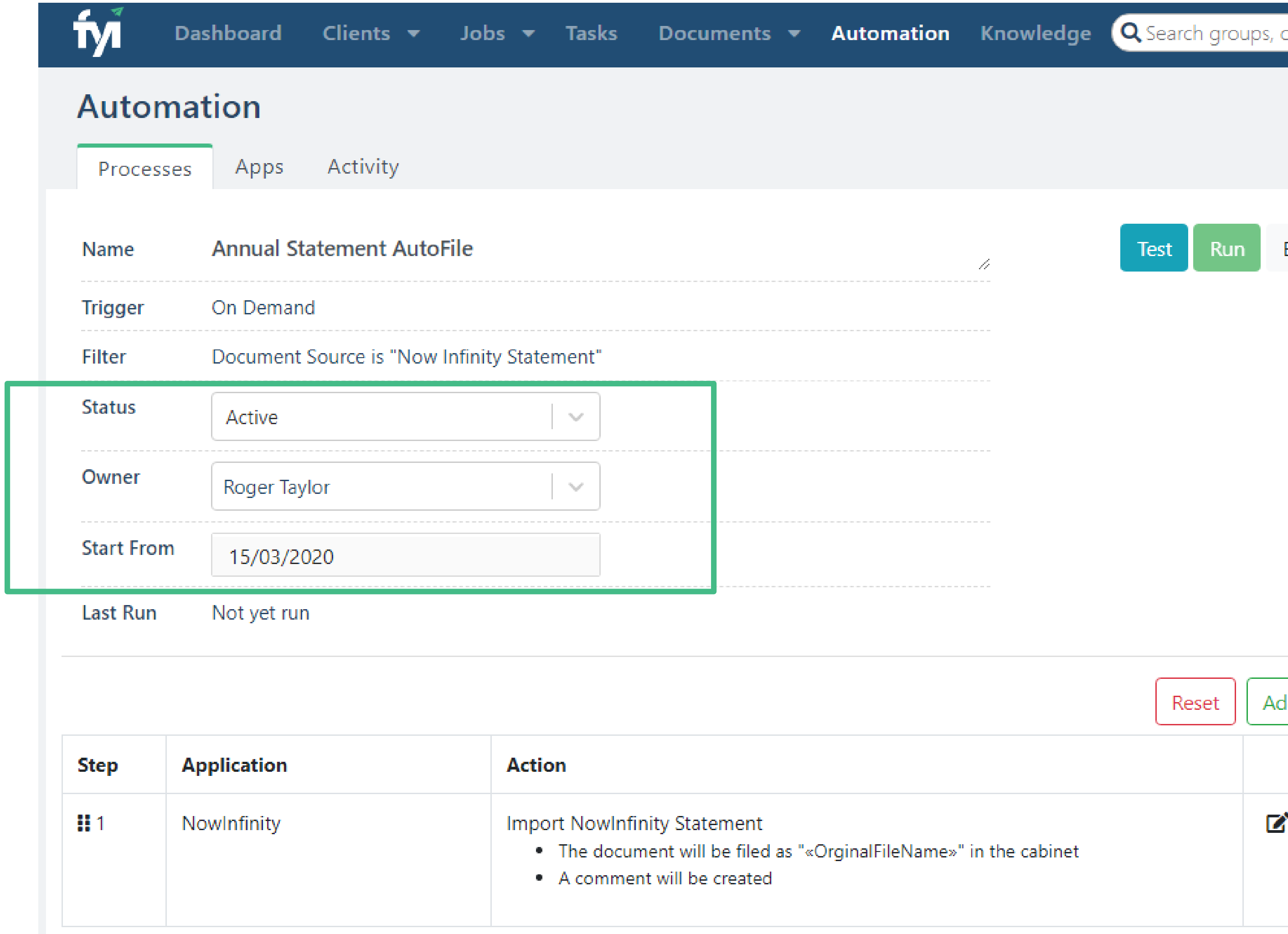


Click here for instructions on **Automation Processes**

STEP 2:
SETTING UP THE AUTOMATION

Turning them on is simple:

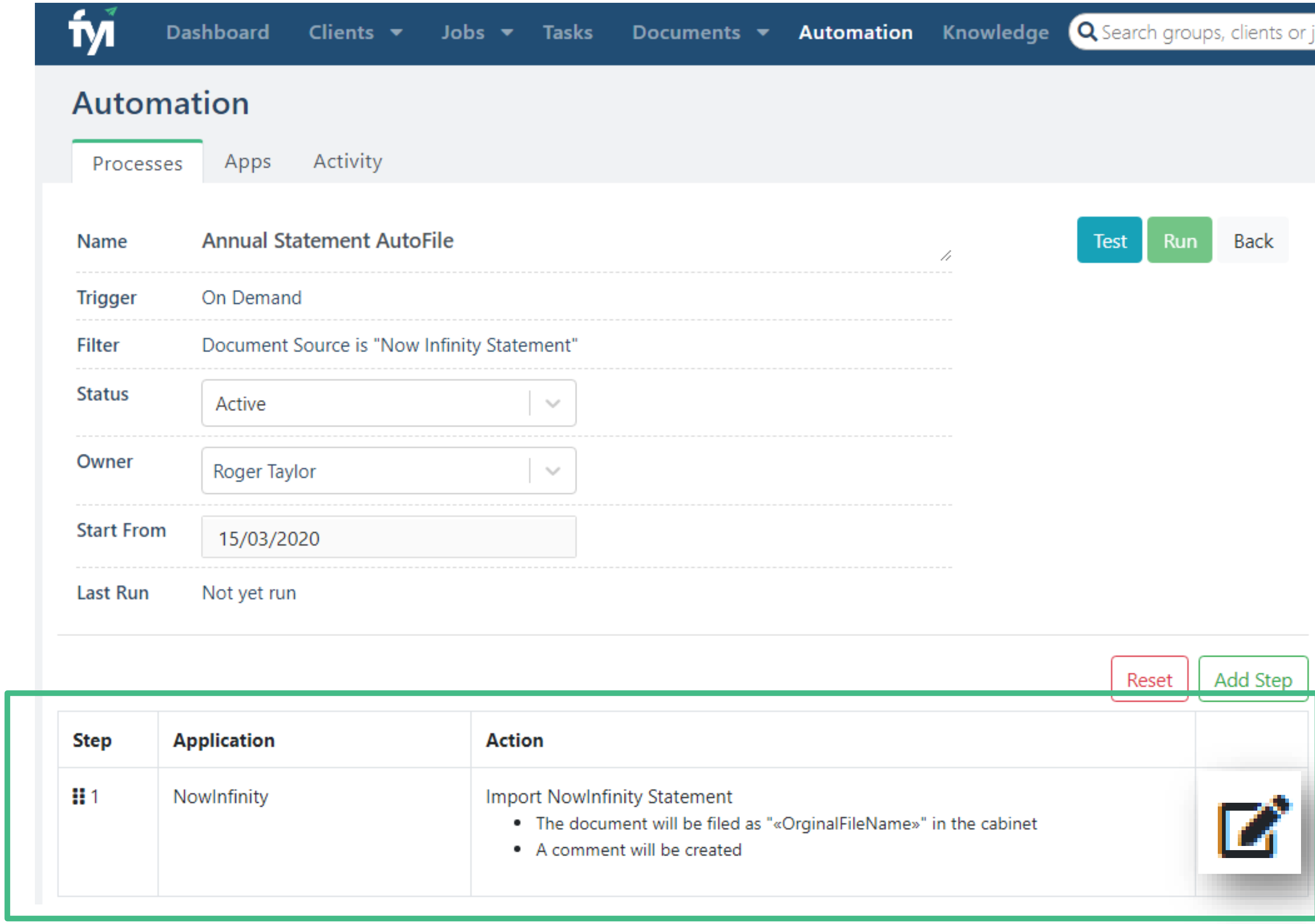
1. Update status to “**Active**”
2. Assign “**Owner**” (user to be notified)
3. Set “**Start From**” date



STEP 2:
SETTING UP THE AUTOMATION

Turning them on is simple:

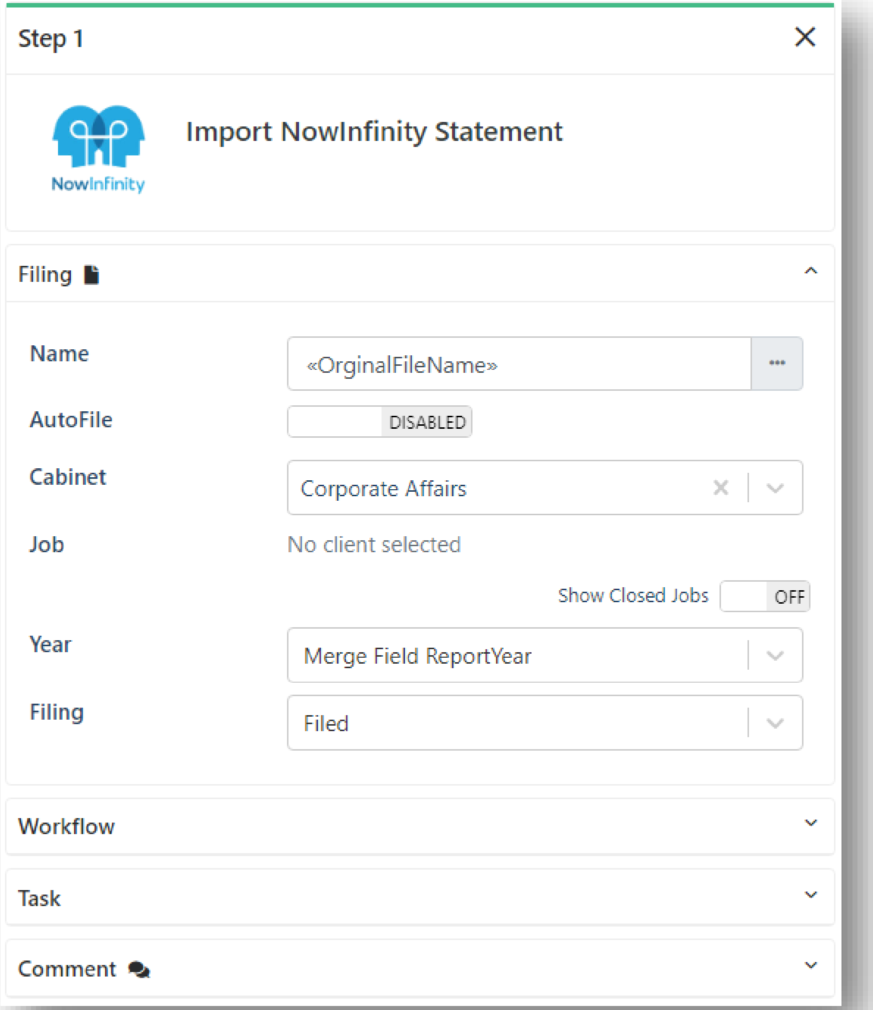
1. Update status to “**Active**”
2. Assign “**Owner**” (user to be notified)
3. Set “Start From” date
4. Select the edit step icon



STEP 2:
SETTING UP THE AUTOMATION

Turning them on is simple:

1. Update status to "**Active**"
2. Assign "**Owner**" (user to be notified)
3. Set "Start From" date
4. Select the edit step icon
5. Designate filing location

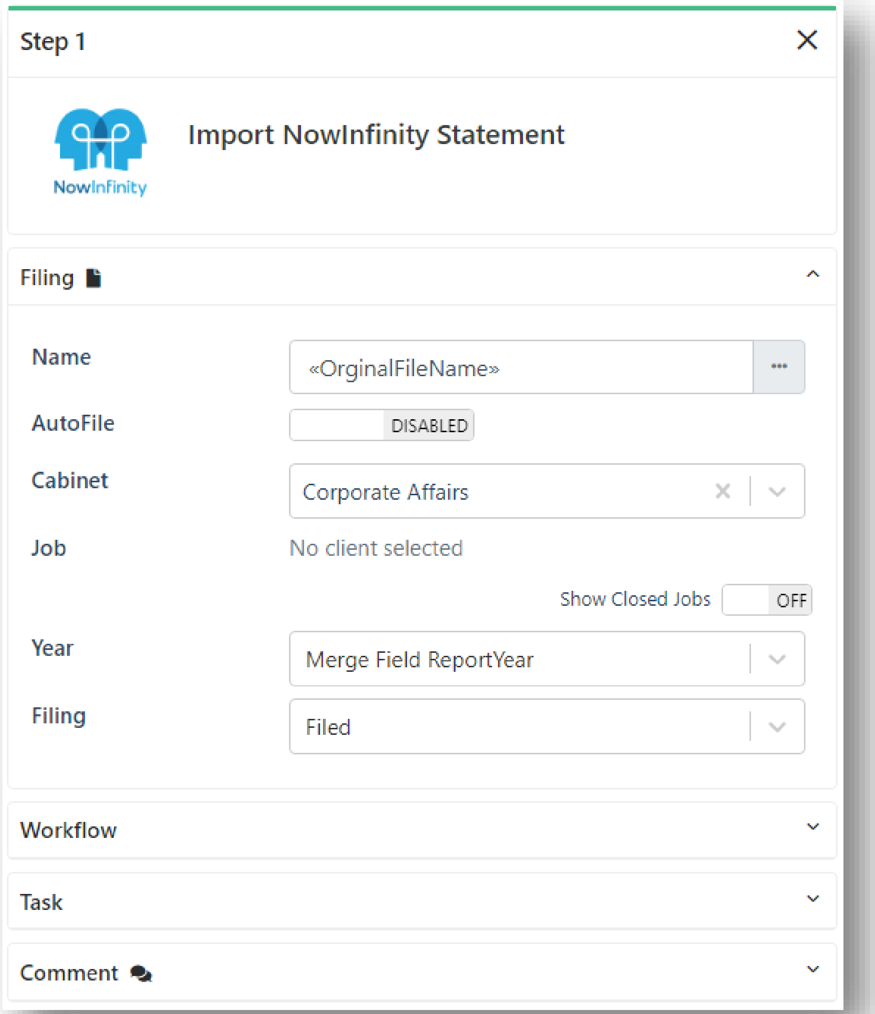


Click here for instructions on **Automation Process Steps**

STEP 2:
SETTING UP THE AUTOMATION

Turning them on is simple:

1. Update status to “**Active**”
2. Assign “**Owner**” (user to be notified)
3. Set “Start From” date
4. Select the edit step icon
5. Designate filing location
6. Customise with workflow, tasks and comments

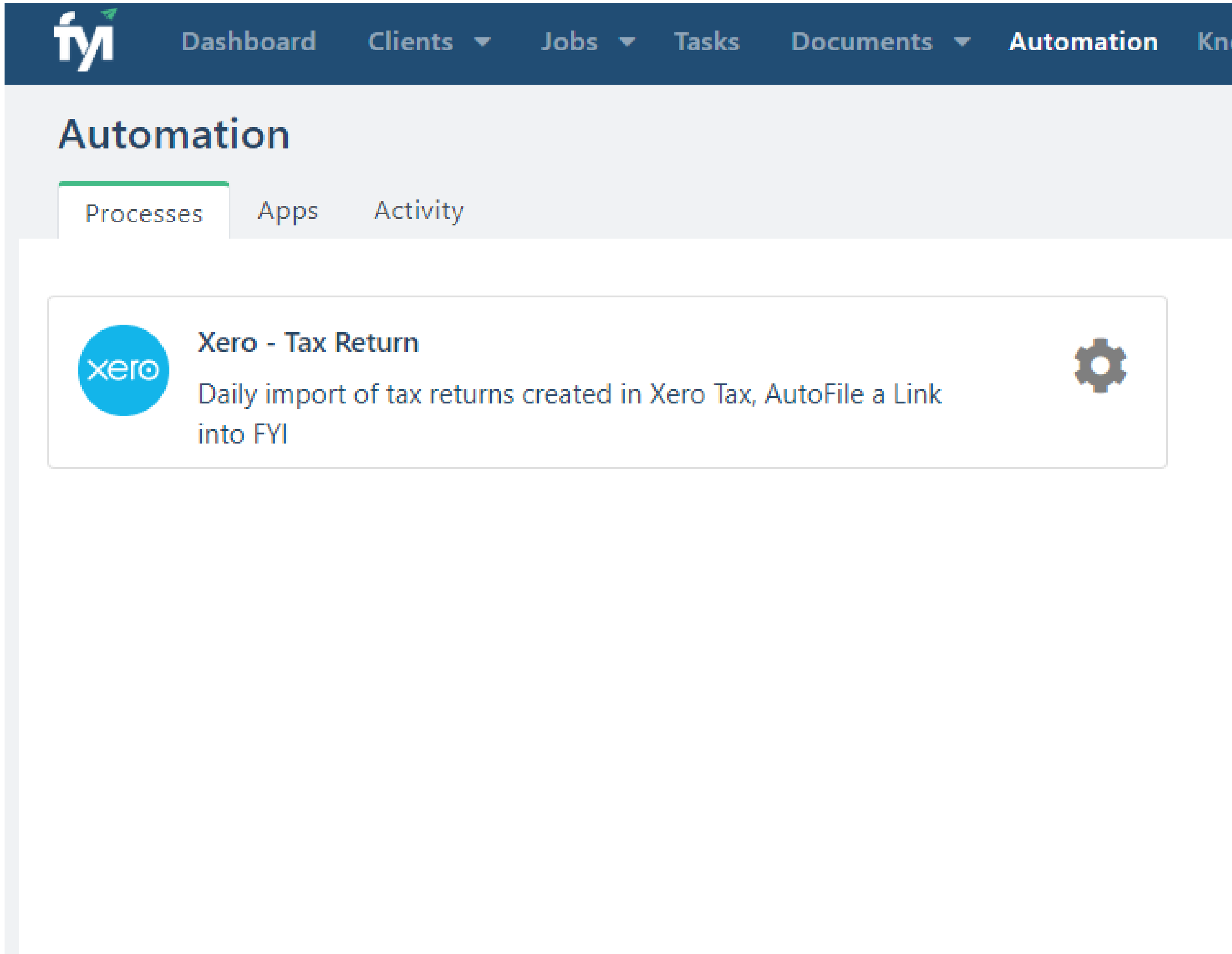


AUTOMATIC
TAX RETURN FILING

- Xero Tax

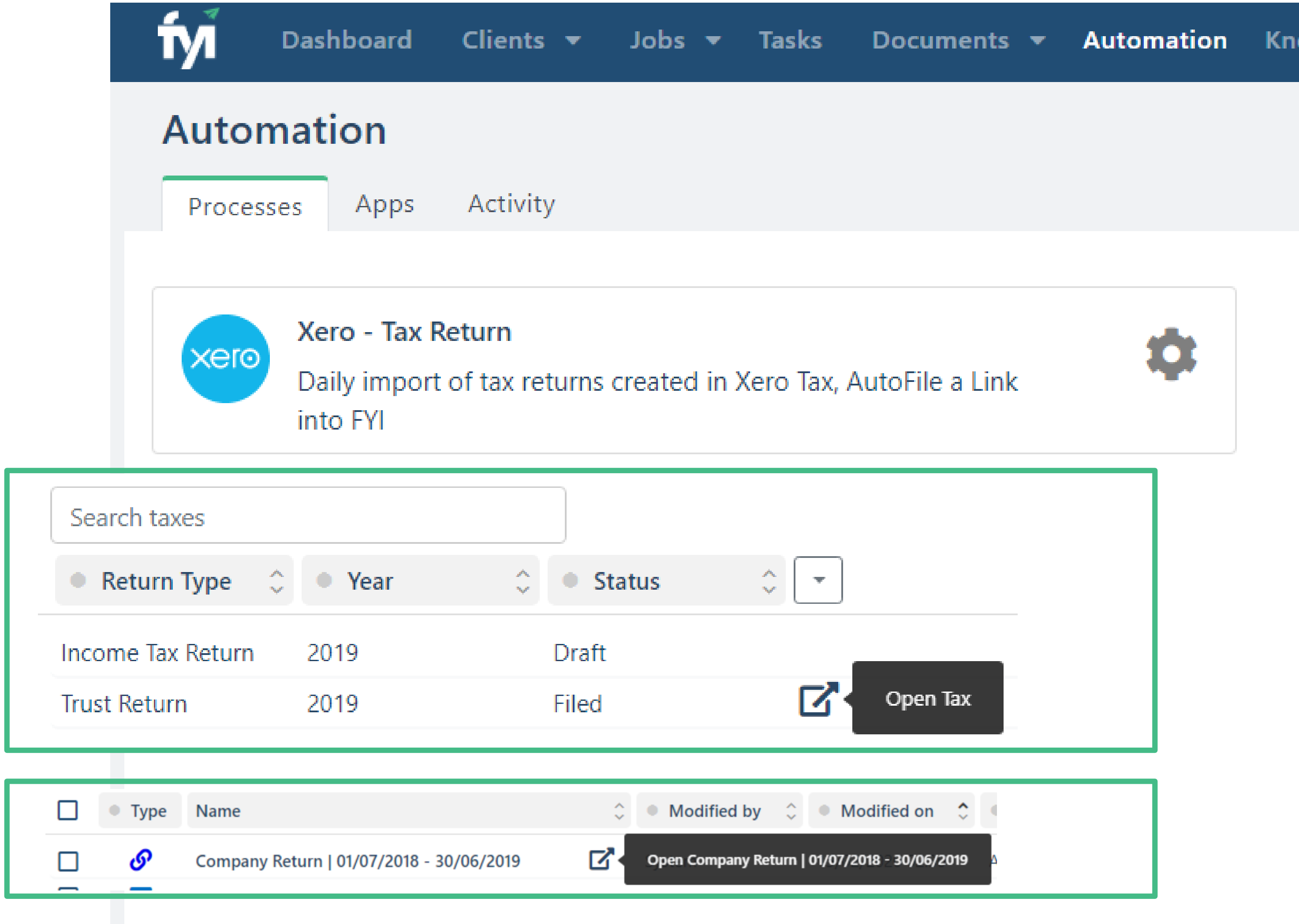
FEATURE
OVERVIEW

- Import **tax returns** from Xero Tax twice-daily
- AutoFile a link in FYI



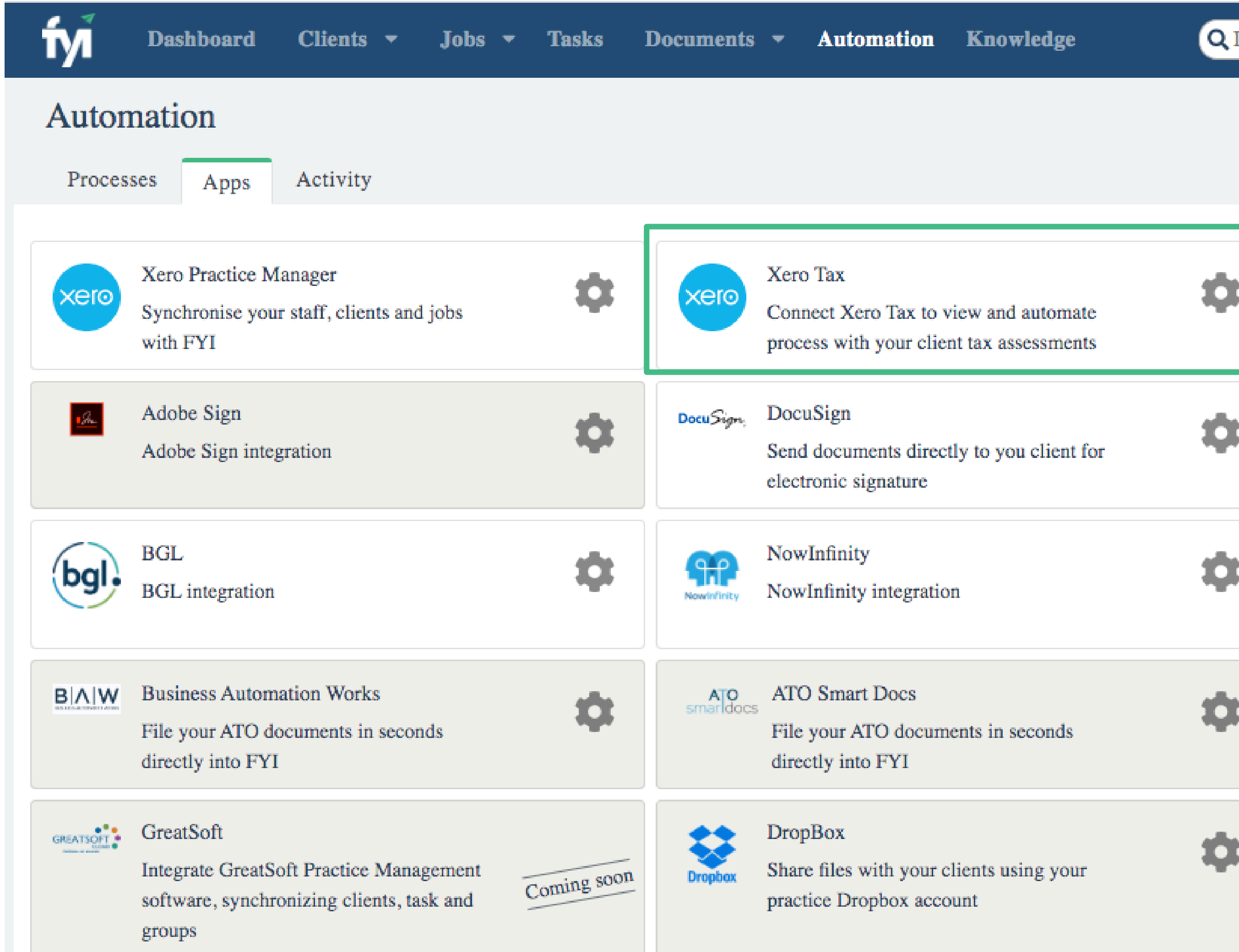
FEATURE
OVERVIEW

- View tax return **status** from within **FYI**
- Tax returns can be easily accessed via **weblinks** from within **FYI**



STEP 1:
CONNECTING XERO TAX

- Enable Xero Tax integration within Apps

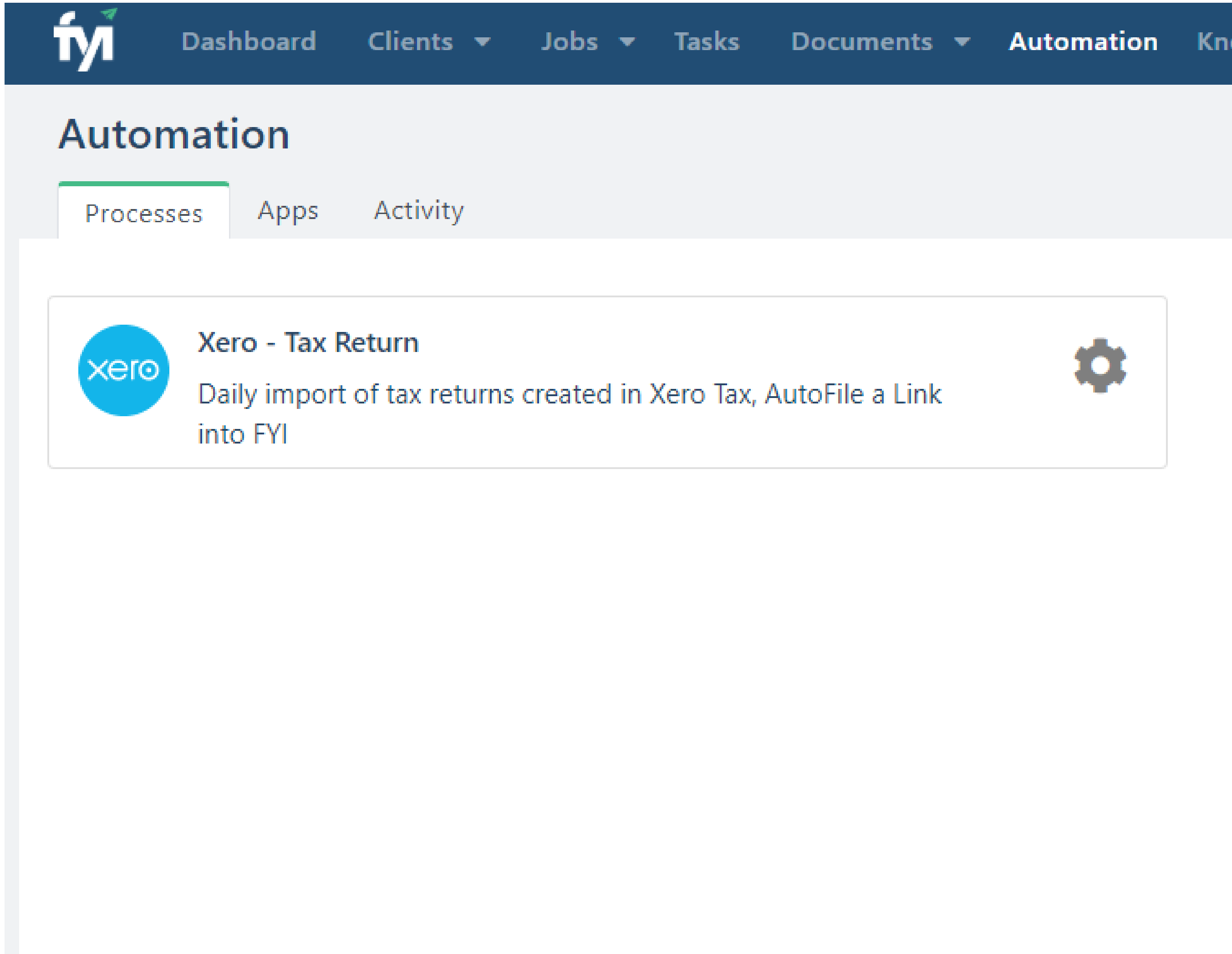


STEP 2:
SETTING UP THE AUTOMATION

This automation comes pre-packaged with FYI.

Turning it on is simple:

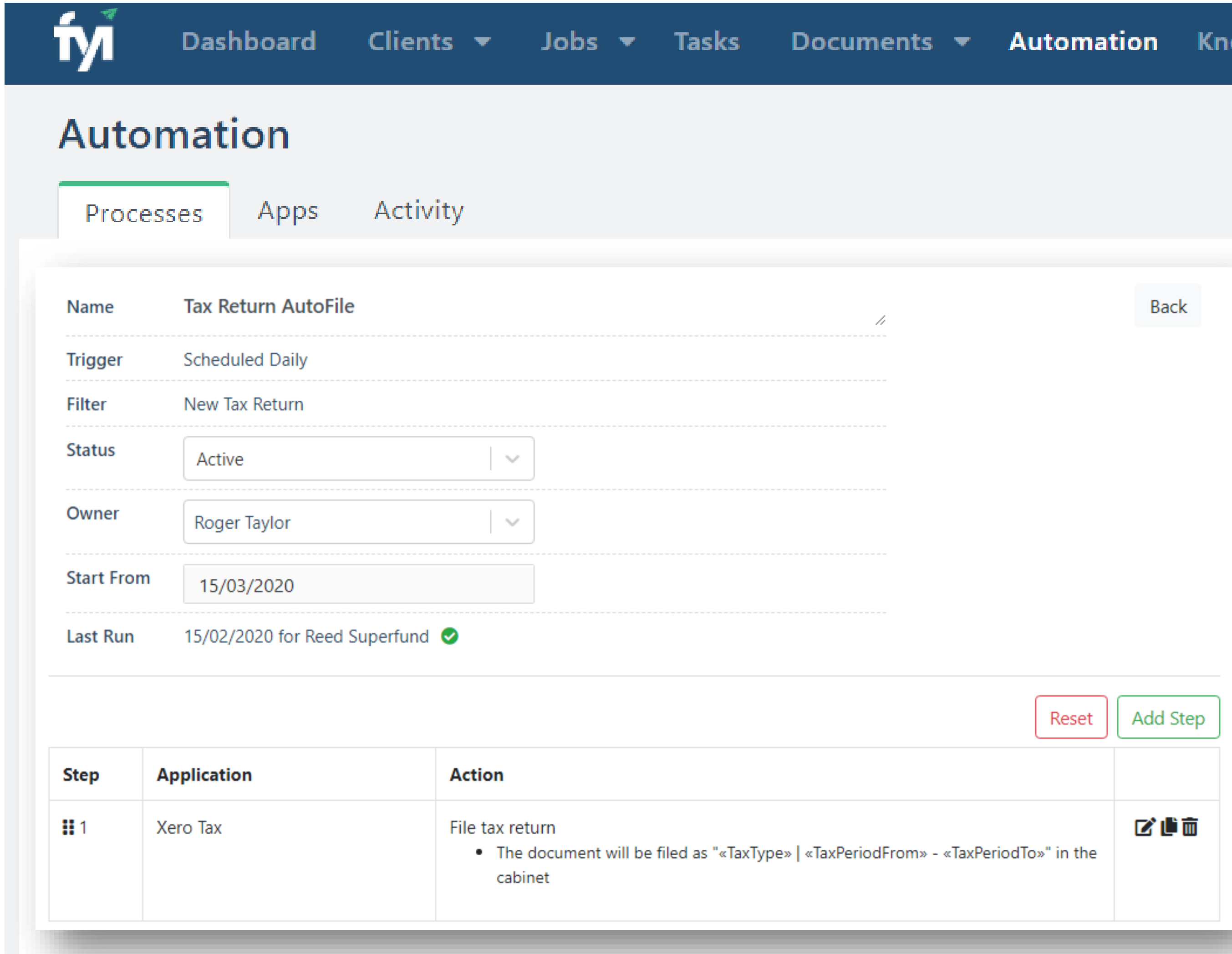
- Go to Automation > Processes
- Select the icon



Click here for more information on **Tax Return AutoFile**

STEP 2:
SETTING UP THE AUTOMATION

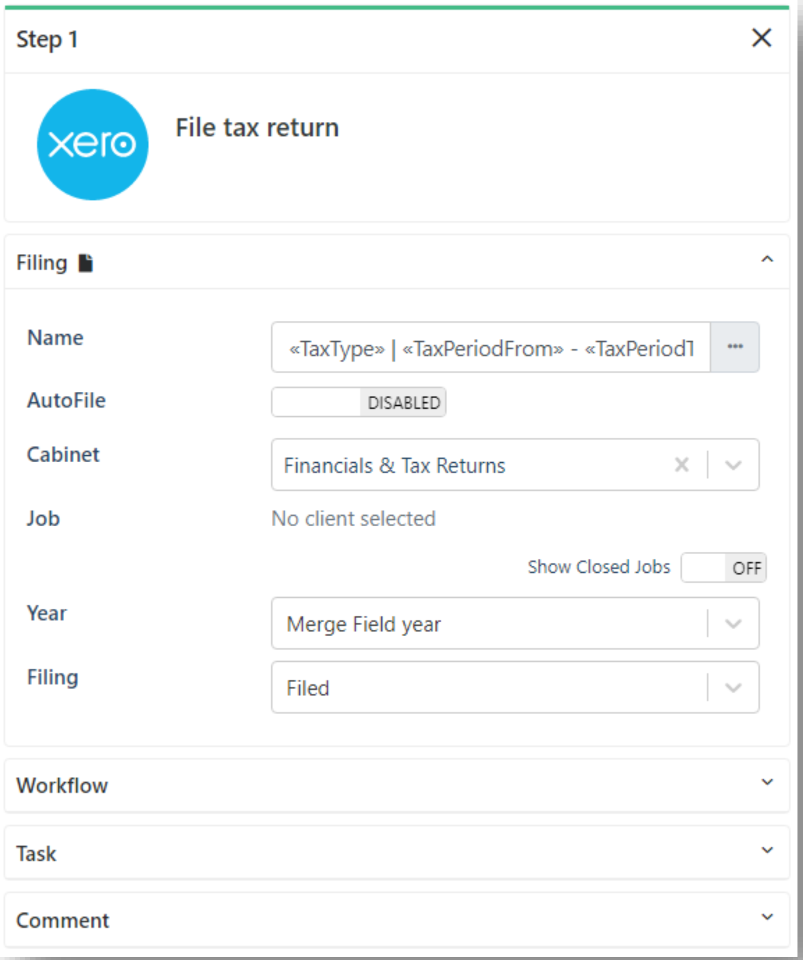
1. Update status to "**Active**"
2. Assign "**Owner**" (user to be notified)
3. Set "**Start From**" date
4. Select the **edit step** icon



Click here for more information on **Automation Processes**

STEP 2:
SETTING UP THE AUTOMATION

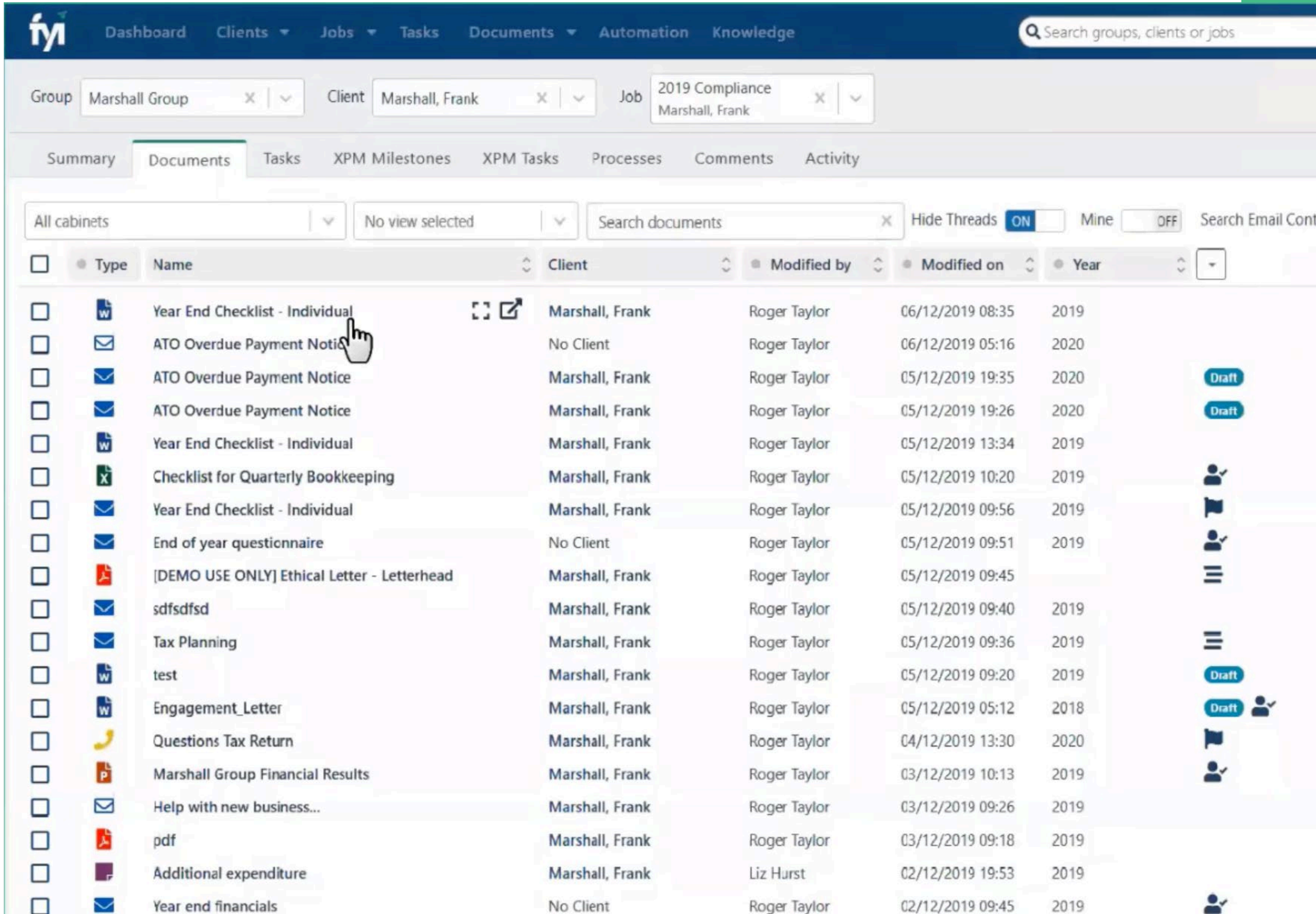
1. Update status to "**Active**"
2. Assign "**Owner**" (user to be notified)
3. Set "**Start From**" date
4. Select the **edit step** icon
5. Designate filing location
6. Customise with workflow, tasks and comments



Click here for more information on **Automation Process Steps**

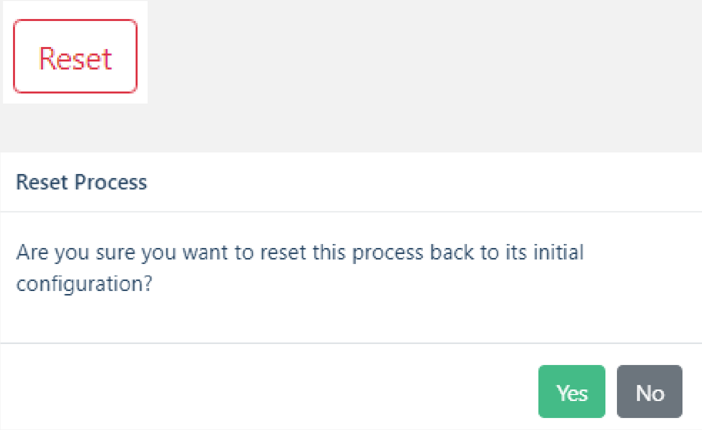
LIVE DEMO

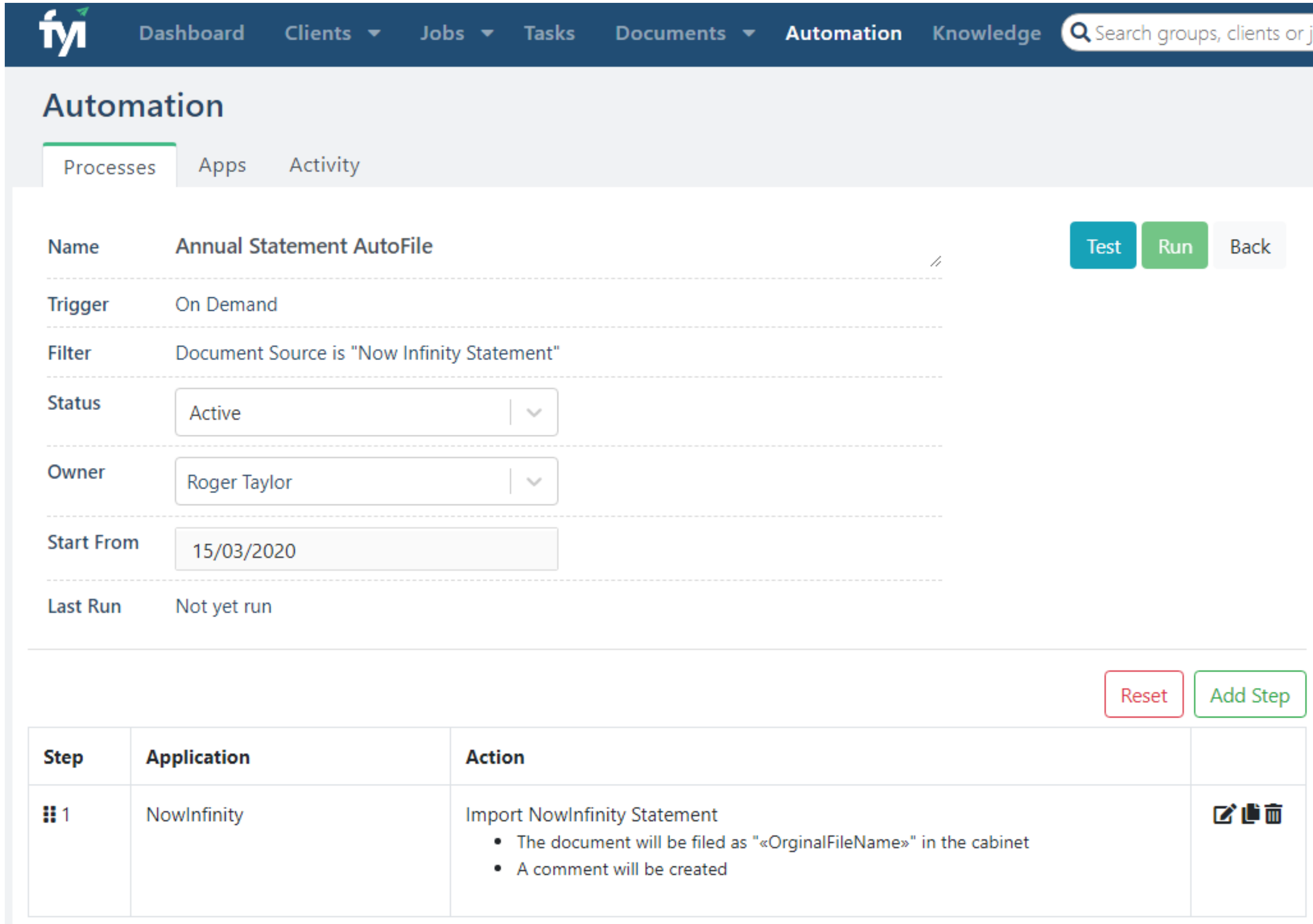
- Automatic corporate affairs filing
- Automatic tax return filing



EXISTING SETUPS

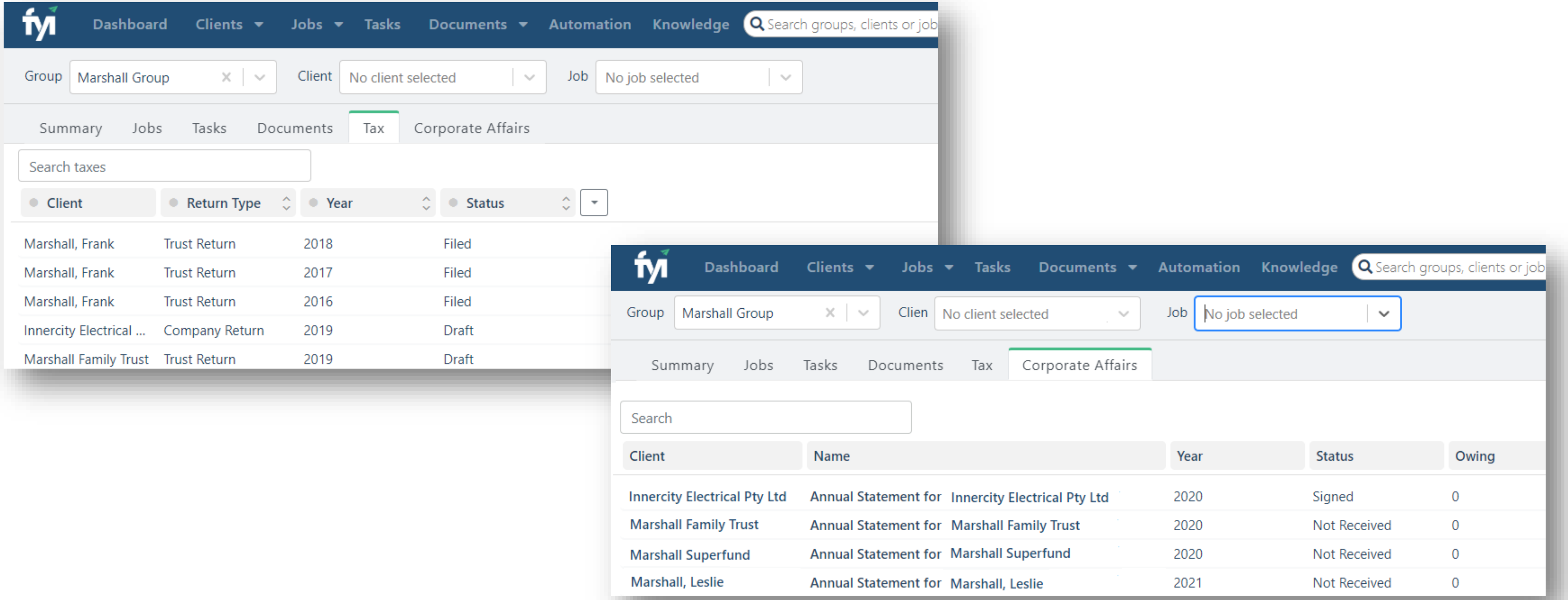
Want to start over?
Made a mistake?





TAX AND CORPORATE AFFAIRS

- Access **important** tax and corporate affairs information from the tabs within **FYI**



SUMMARY

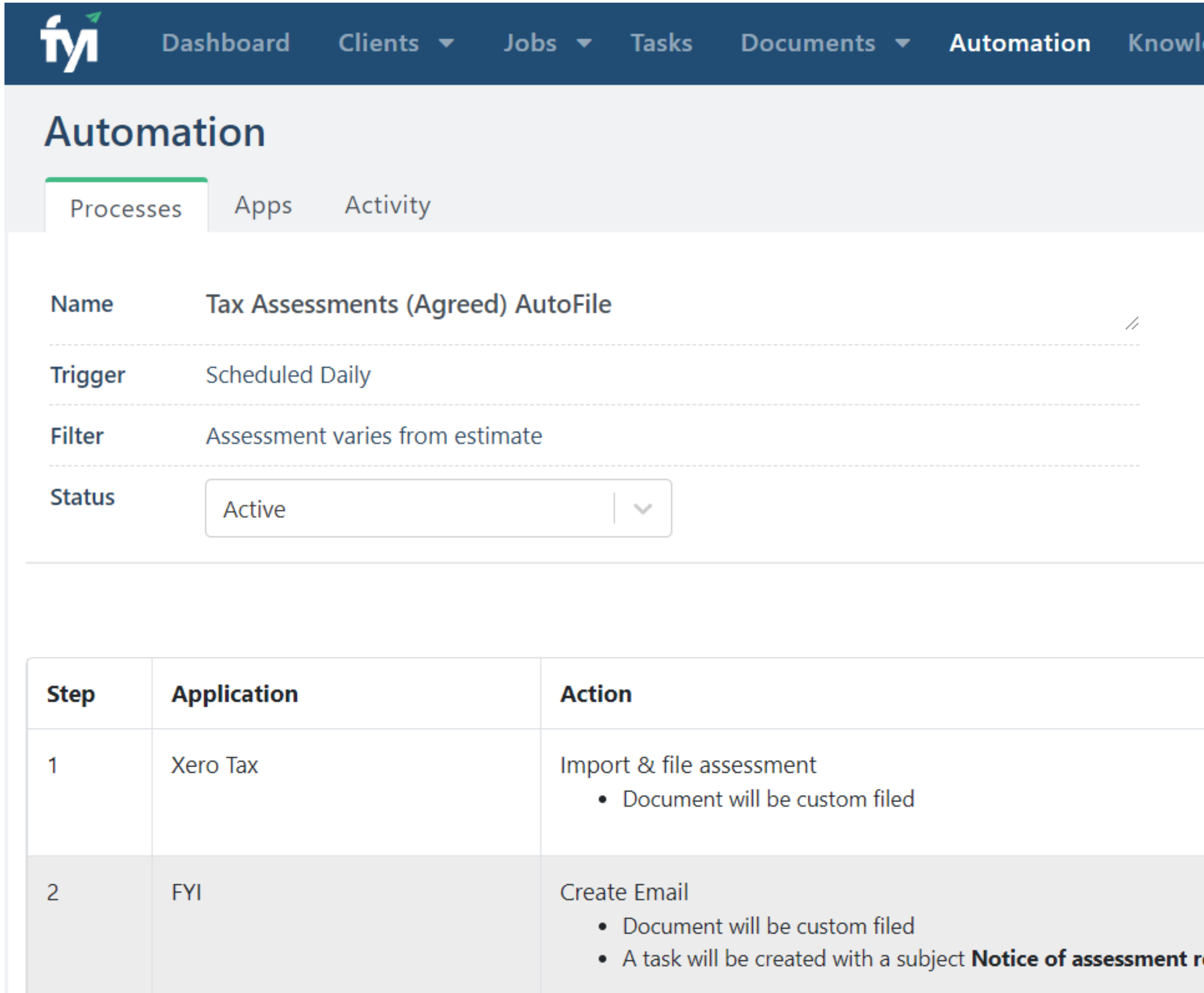
Corporate Affairs and Tax Return AutoFile

- Import frequency: twice-daily (nightly and lunchtime)
- FYI imports and files:
  - ASIC statements & resolutions
  - Client tax returns (as weblinks)
- View tax return and ASIC statement status from the tax and corporate affairs tabs
- You can reset the automation to its initial configuration

TAX ASSESSMENTS
AUTOFILE

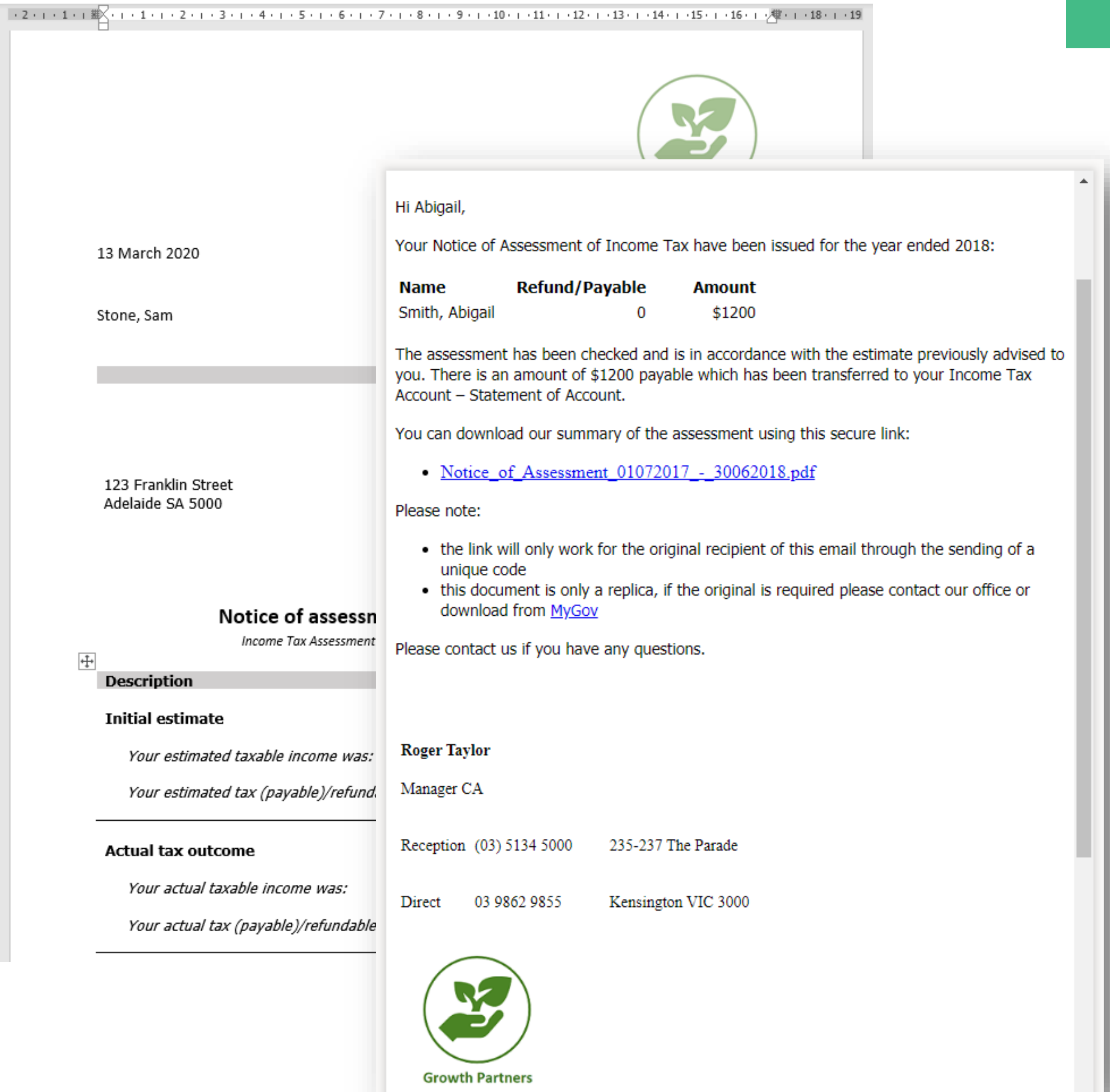
FEATURE OVERVIEW

- Daily import of **tax assessments** from the ATO
- Automatic cross-check with **Xero Tax**
- Auto-filing and auto-generation of client email correspondence.



FEATURE OVERVIEW

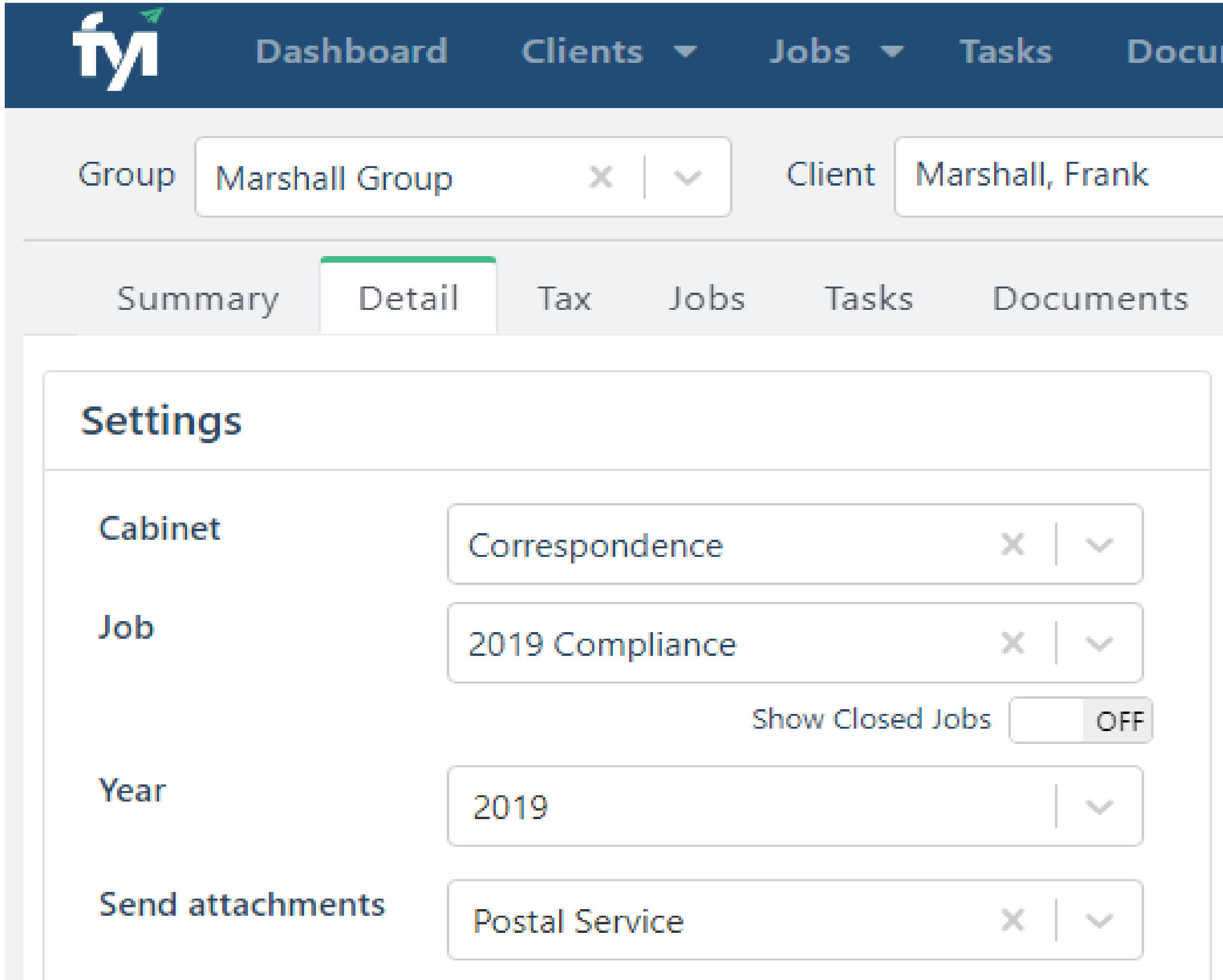
- No need to manually cross-check NOAs against **Xero Tax**
- Time savings through **FYI's** automatic generation of templated letter and email correspondence



FEATURE
OVERVIEW

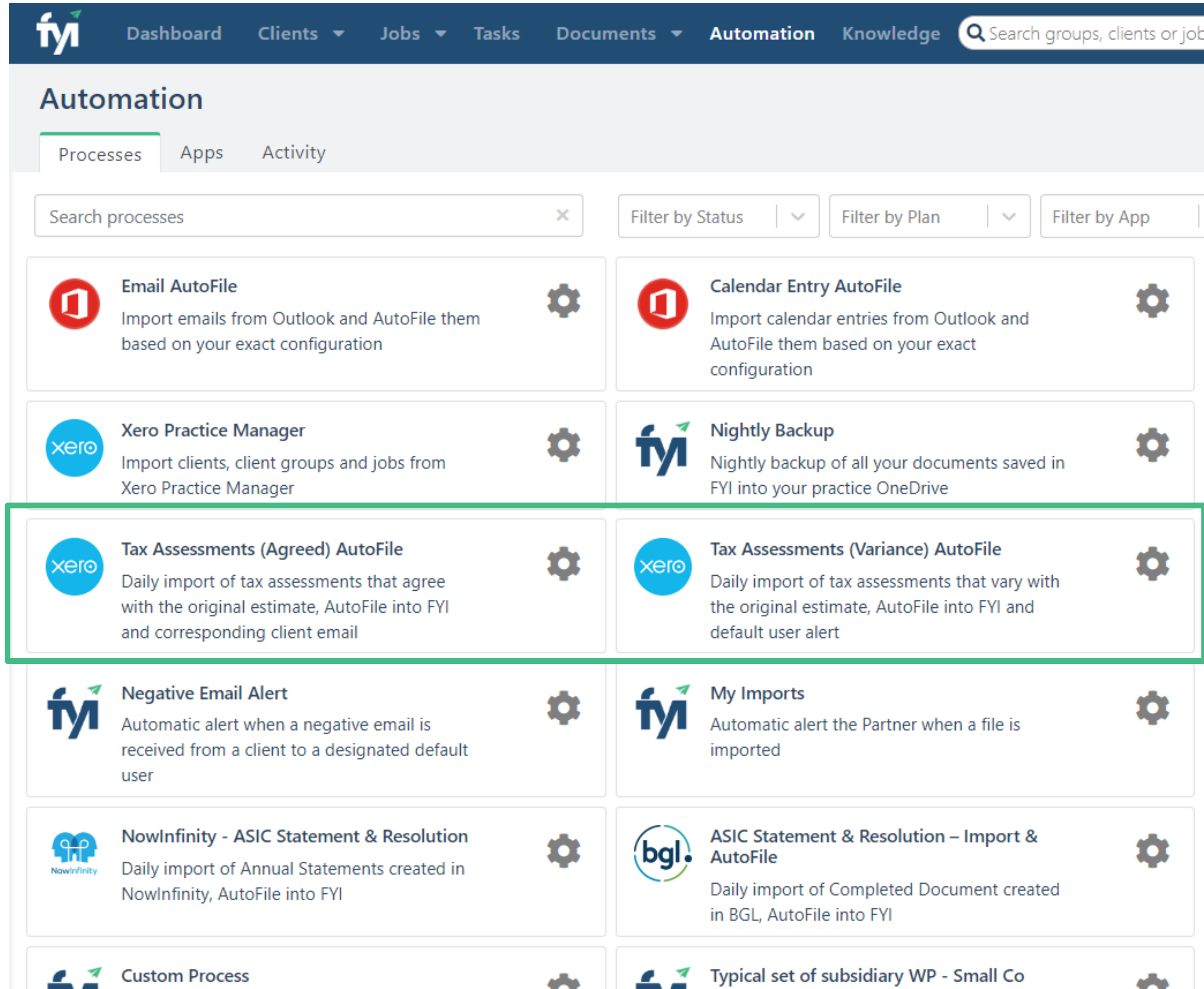
Three default processes covering:

- **Agreed & Non Postal**
  - Assessment agrees with Estimate
  - Preferred comms not postal
  - Email address exists
- **Agreed & Postal**
  - Assessment agrees with Estimate
  - Preferred comms is postal OR
  - Email address doesn’t exist
- **Variance**
  - Assessment varies with Estimate



GETTING STARTED
TWO SIMPLE STEPS

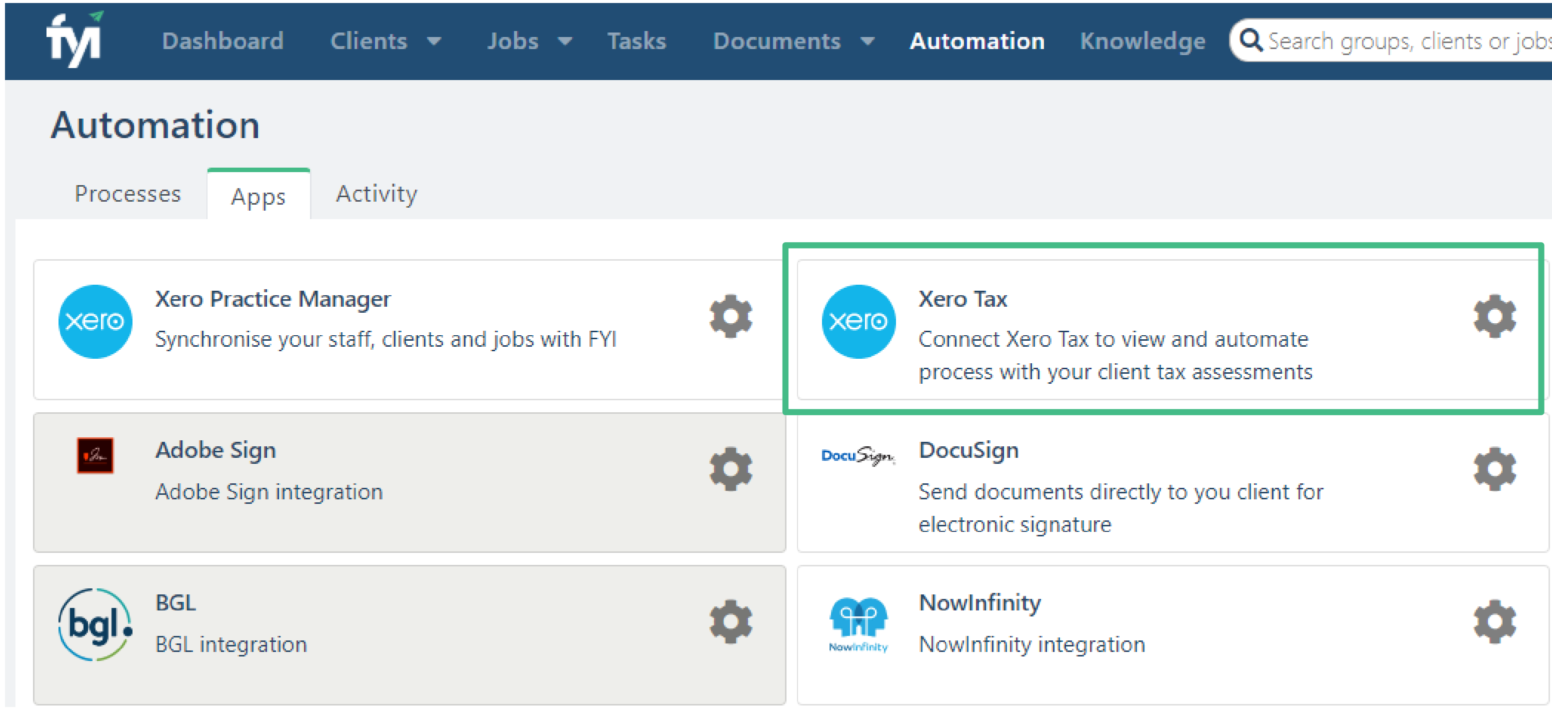
- **Step 1:**
  Connect your app
- **Step 2:**
  Set up the automations for both "**Agreed**" and "**Variance**"
- Start auto-filing!



Click here for information on **Tax Assessments AutoFile**

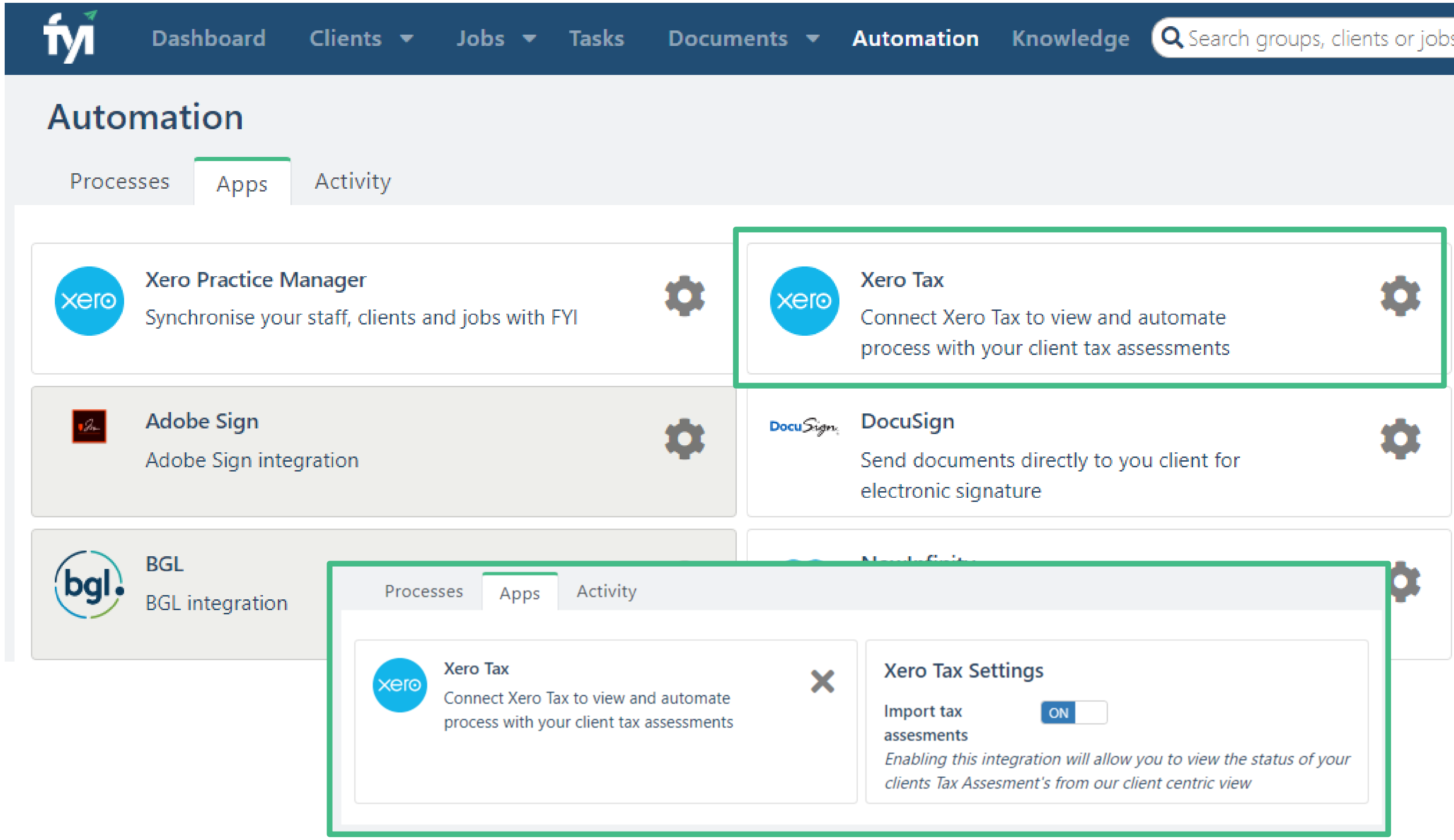
STEP 1:
CONNECTING EACH APP

- Go to Automation > Apps
- Select the ⚙ icon



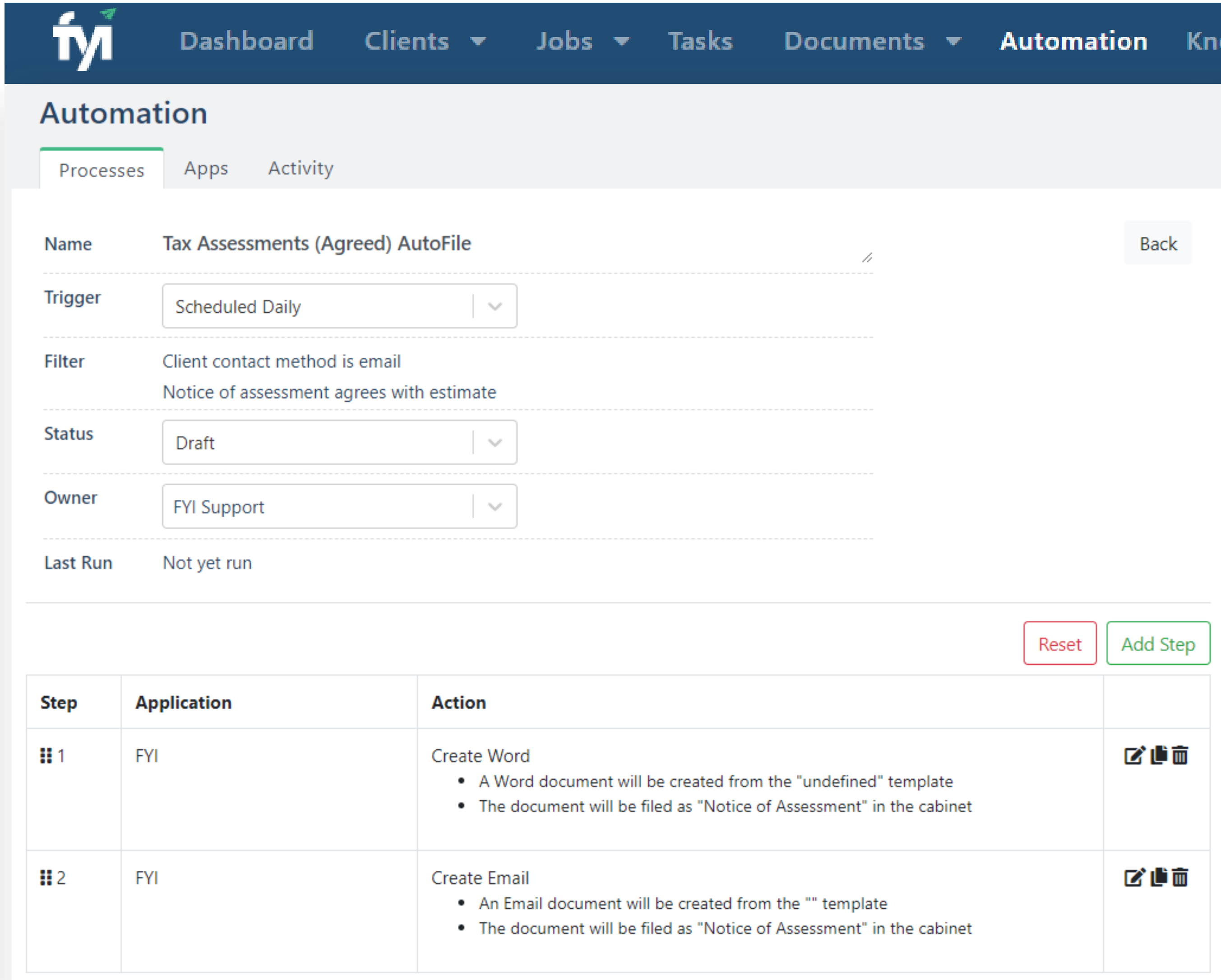
STEP 1:
CONNECTING EACH APP

- Go to Automation > Apps
- Select the icon
- Turn **On**
  Import tax assessments



STEP 2:
SETTING UP THE AUTOMATION

1. Update status to "**Active**"
2. Assign "**Owner**" (user to be notified)
3. Set "**Start From**" date
4. Select the edit step icon
5. Designate filing location
6. Then we can customise…



Click here for more information on **Automation Processes**
Click here for information on **Automation Process Steps**

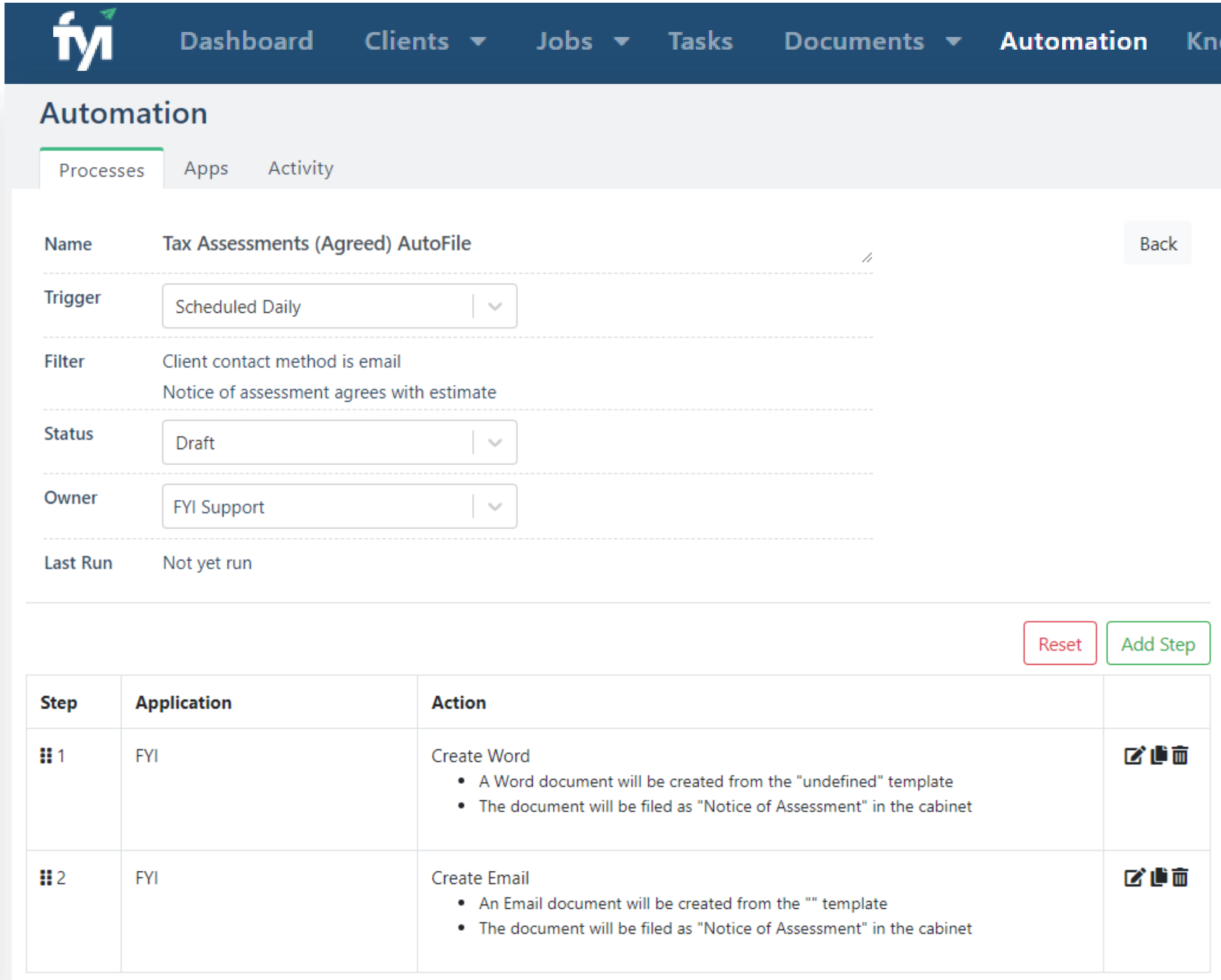
STEP 2:
SETTING UP THE AUTOMATION

Set up separate email and letter templates for the "Agreed" and "Variance" processes to use.

Then add them as follows:

- **On Step #1: Create Word**

    a) Select the edit icon



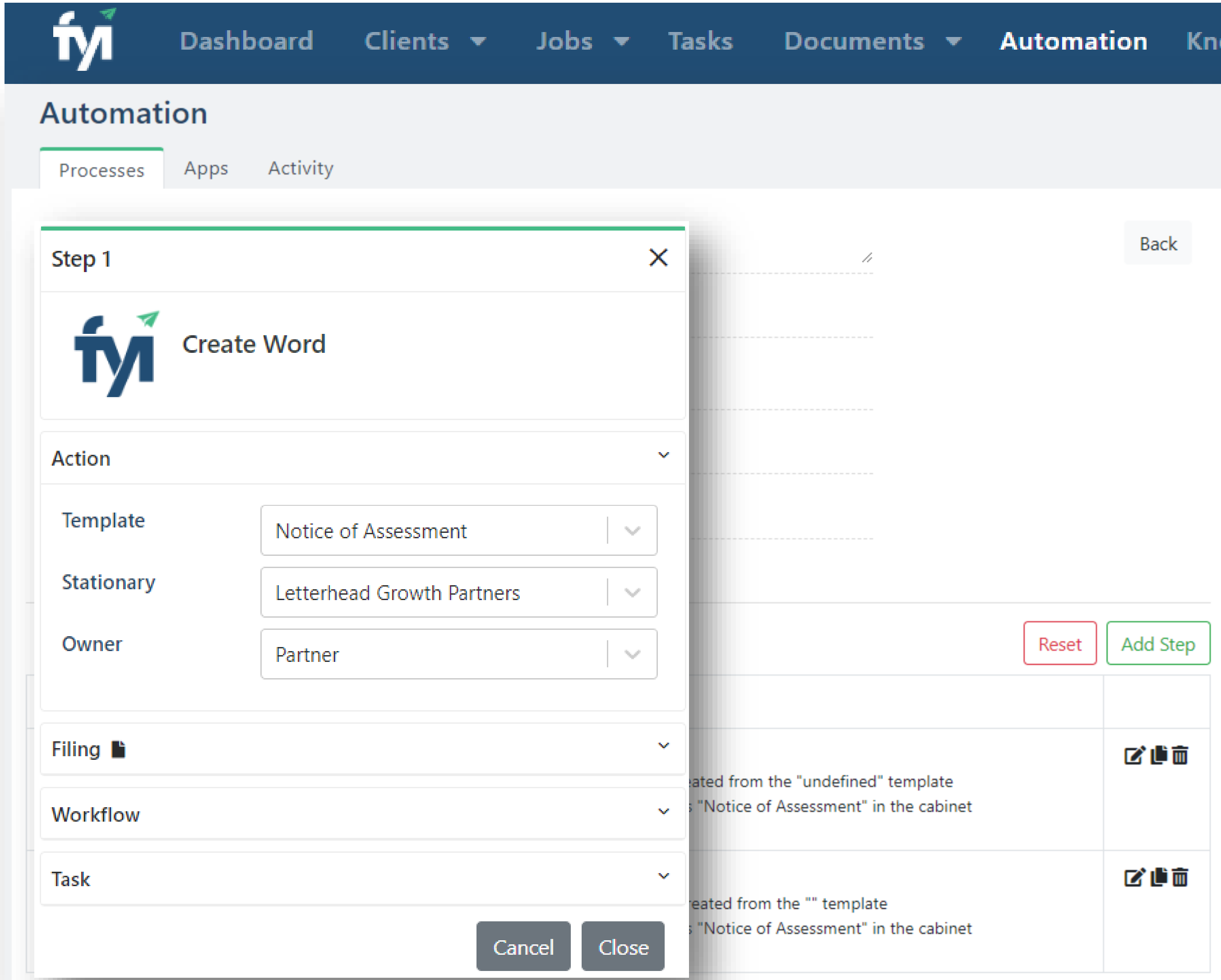
Click here for more information on **Templates**
Click here for information on **Email Templates**

STEP 2:
SETTING UP THE AUTOMATION

Set up separate email and letter templates for the “Agreed” and “Variance” processes to use.

Then add them as follows:

- **On Step #1: Create Word**
  a) Select the edit icon
  b) Update the template & stationery

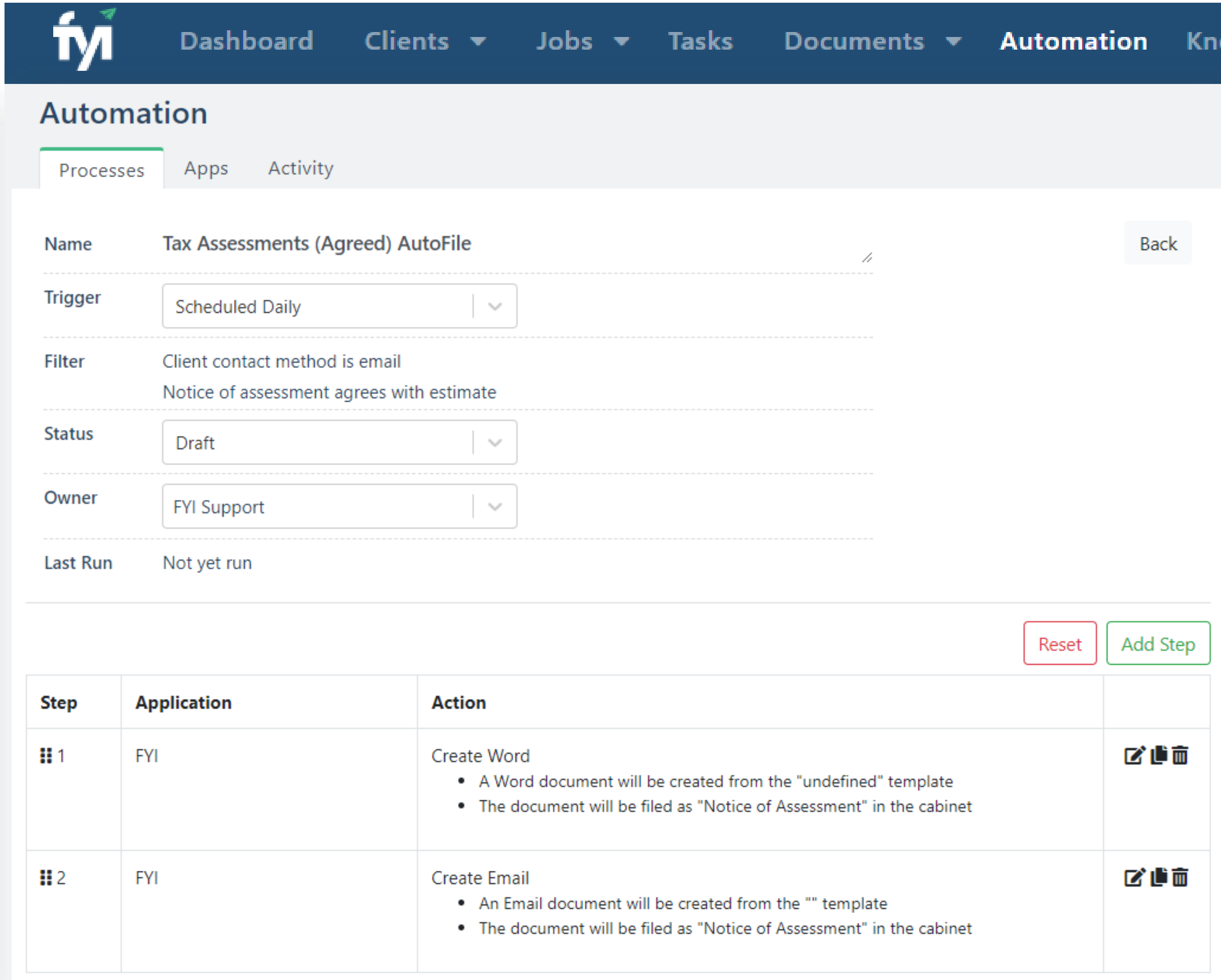


STEP 2:
SETTING UP THE AUTOMATION

Set up separate email and letter templates for the “Agreed” and “Variance” processes to use.

Then add them as follows:

- **On Step #2: Create Email**
  a) Select the edit icon

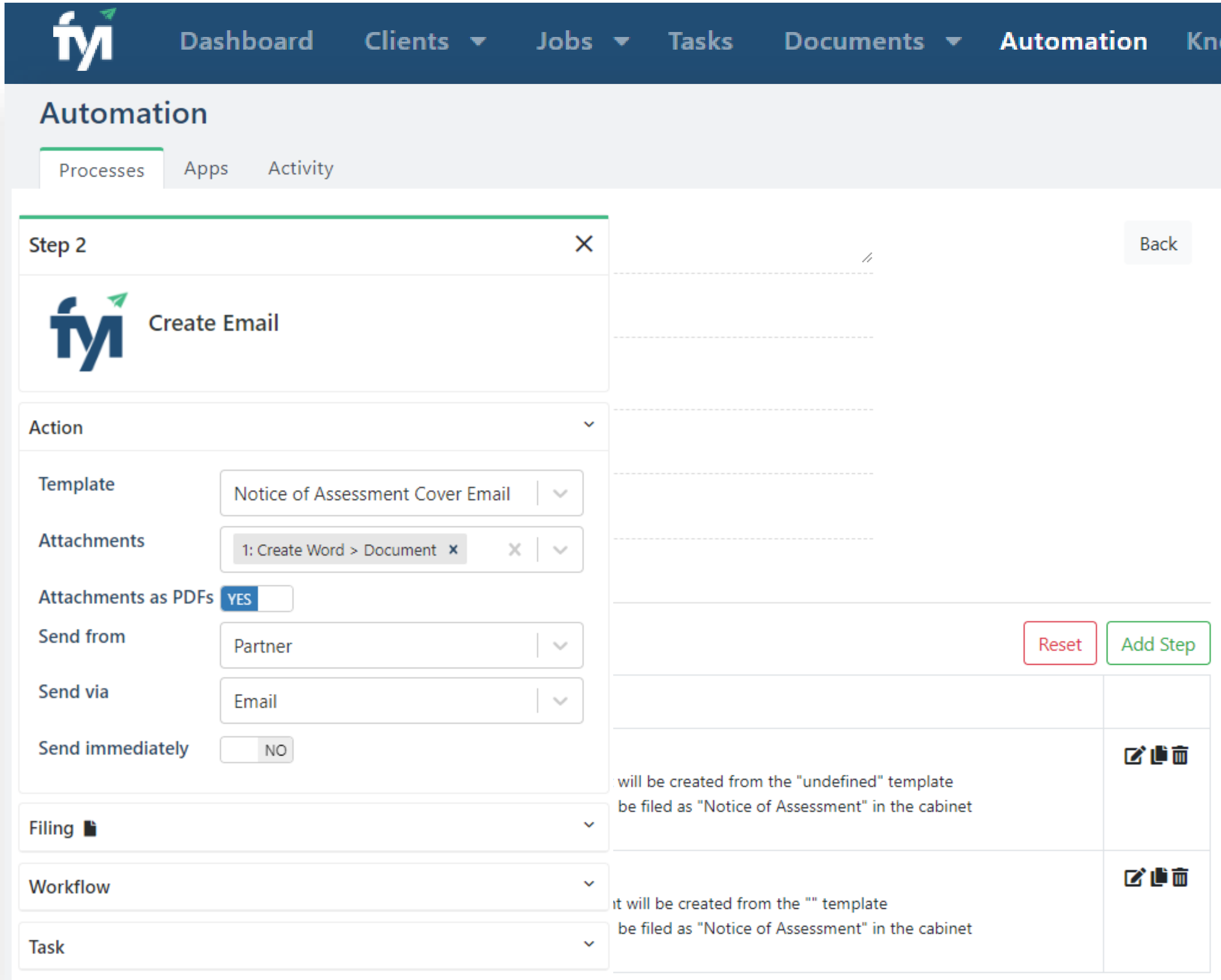


STEP 2:
SETTING UP THE AUTOMATION

Set up separate email and letter templates for the "Agreed" and "Variance" processes to use.

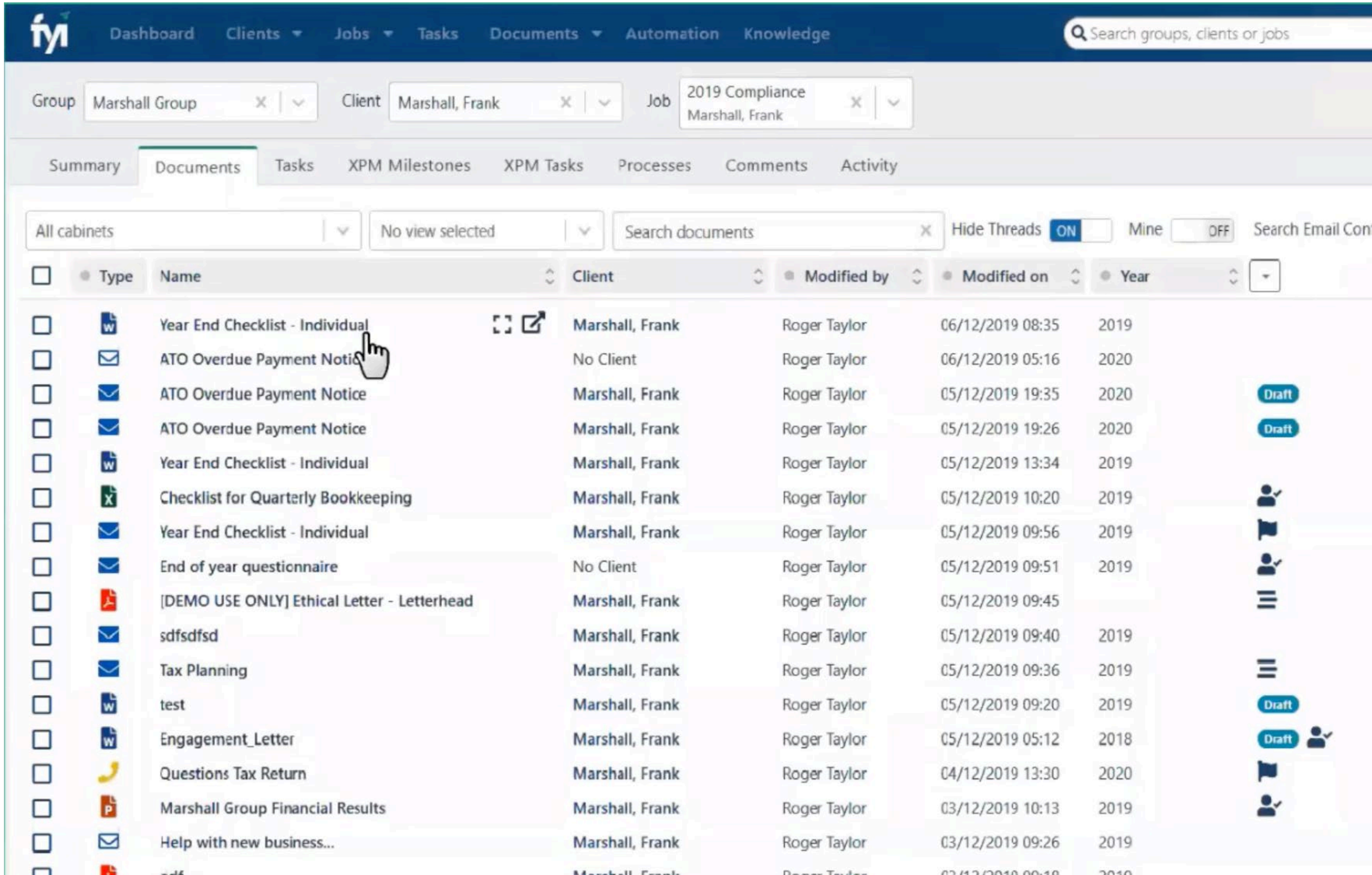
Then add them as follows:

- **On Step #2: Create Email**
  a) Select the edit icon 
  b) Update the template
  c) Attach the Word document
  d) Set your preferences



LIVE DEMO

- Tax assessments AutoFile



SUMMARY

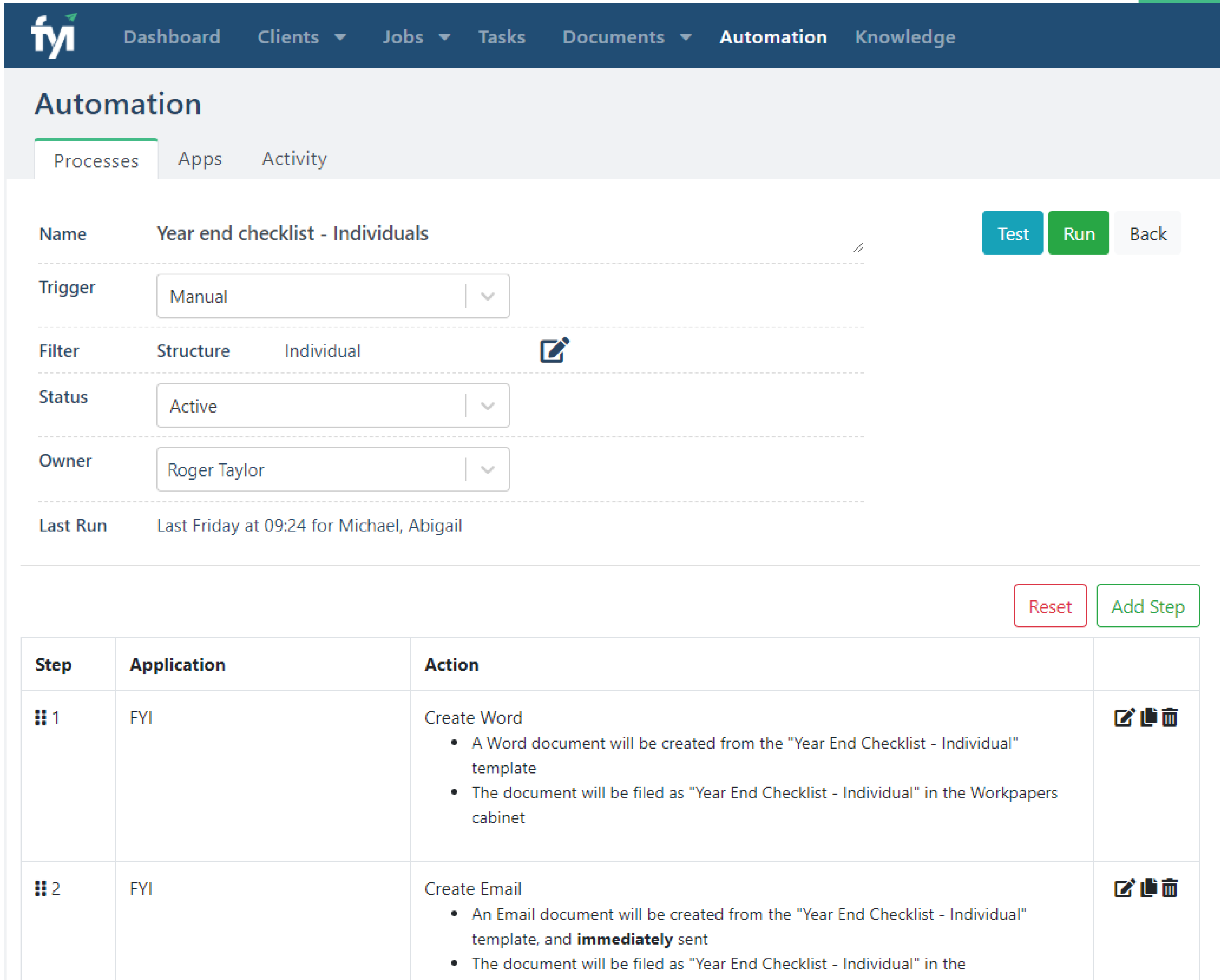
Tax Assessments AutoFile

- Choose an appropriate owner
- Define cabinet and categories to ensure appropriate filing
- Consider if a task should follow

CUSTOM PROCESSES

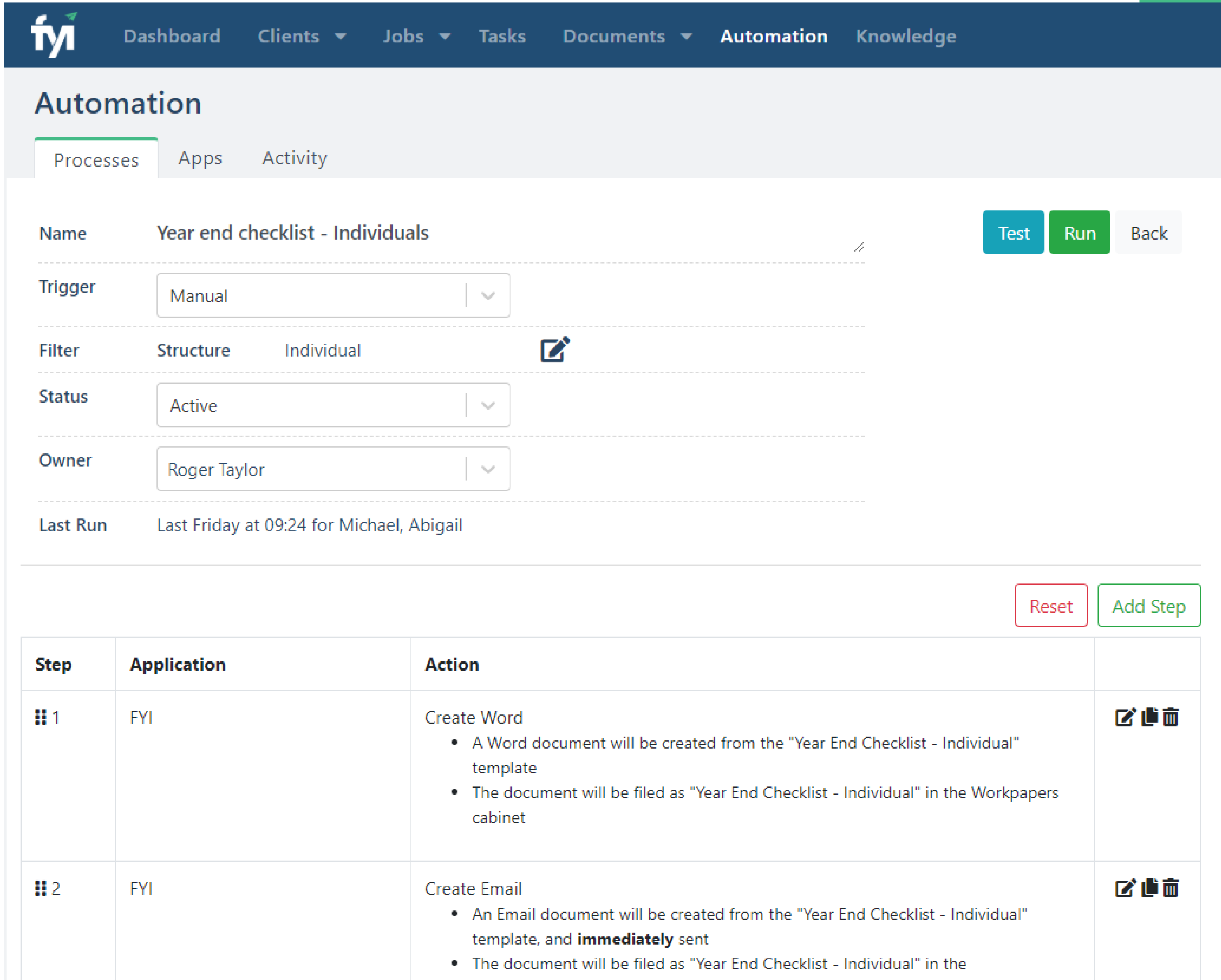
FEATURE OVERVIEW

- Design **personalised** automated processes across client service, marketing, practice admin, HR and more
- Run processes for your **entire client base** or a desired segment
- Limited only by your imagination to **automate** any **repetitive tasks** across the practice



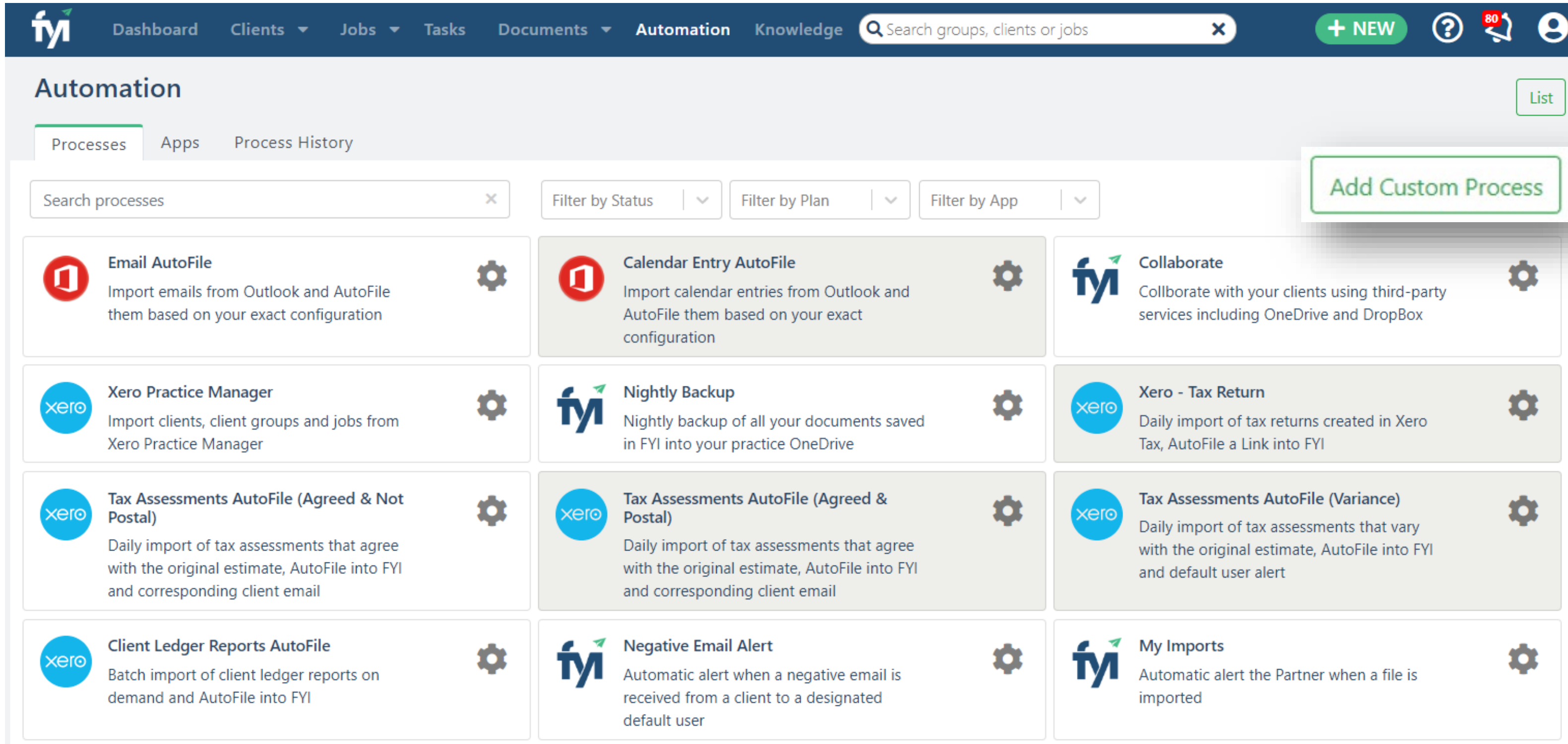
FEATURE
OVERVIEW

- Rest assured that **repetitive** (weekly, monthly and annual) tasks are assigned to those responsible
- Reduce **manual** data entry, leveraging merge fields to automate document-generation
- **Save time** and ensure consistency by processing emails and documents in bulk



CUSTOM PROCESSES

- **Step 1:**
  Add Custom Process

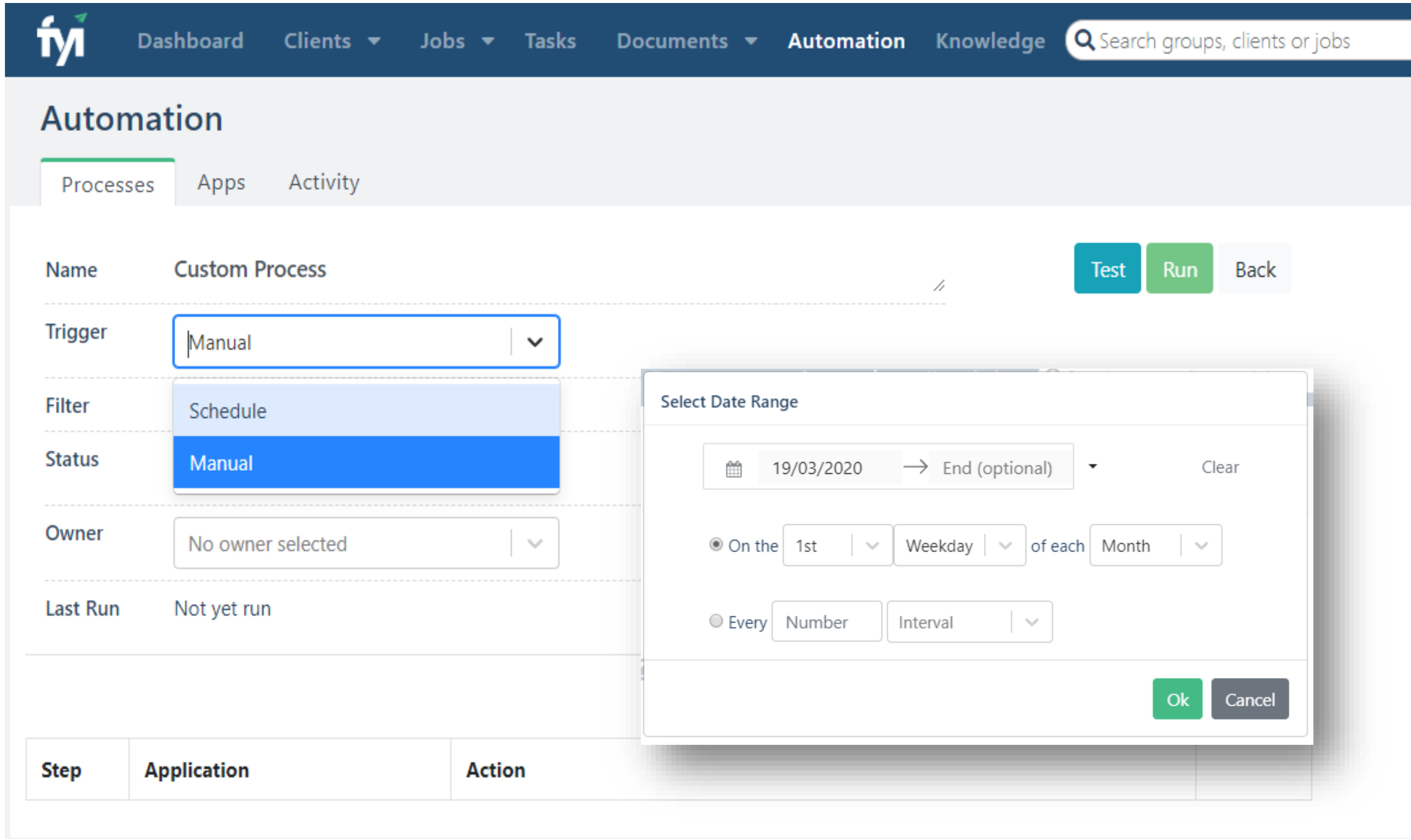


Click here for information on **Custom Processes**

CREATING A CUSTOM PROCESS

- **Step 1:**
  Add Custom Process

- **Step 2:**
  Select **trigger** on demand or scheduled

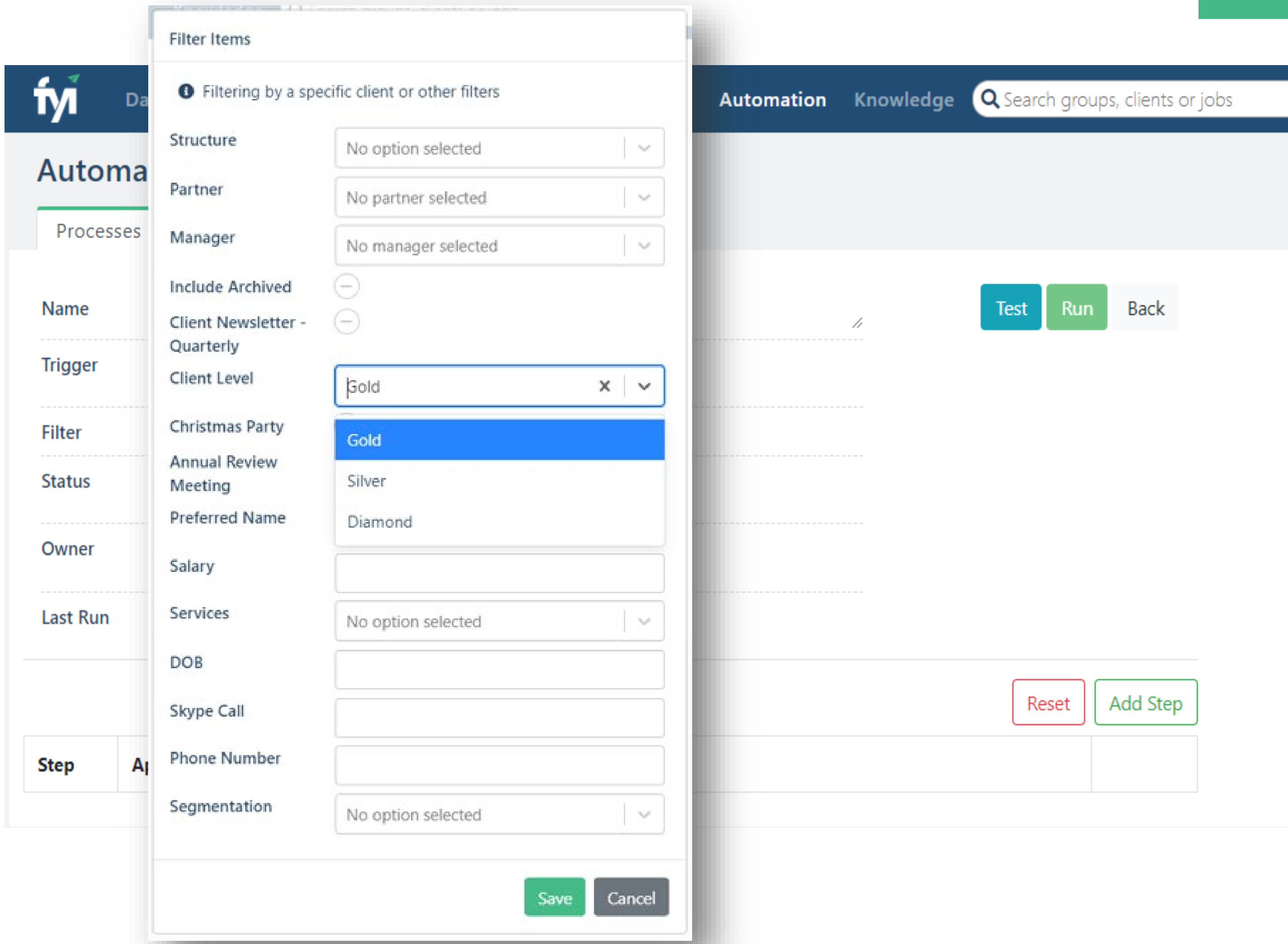


CREATING A
CUSTOM PROCESS

- **Step 1:**
  Add Custom Process

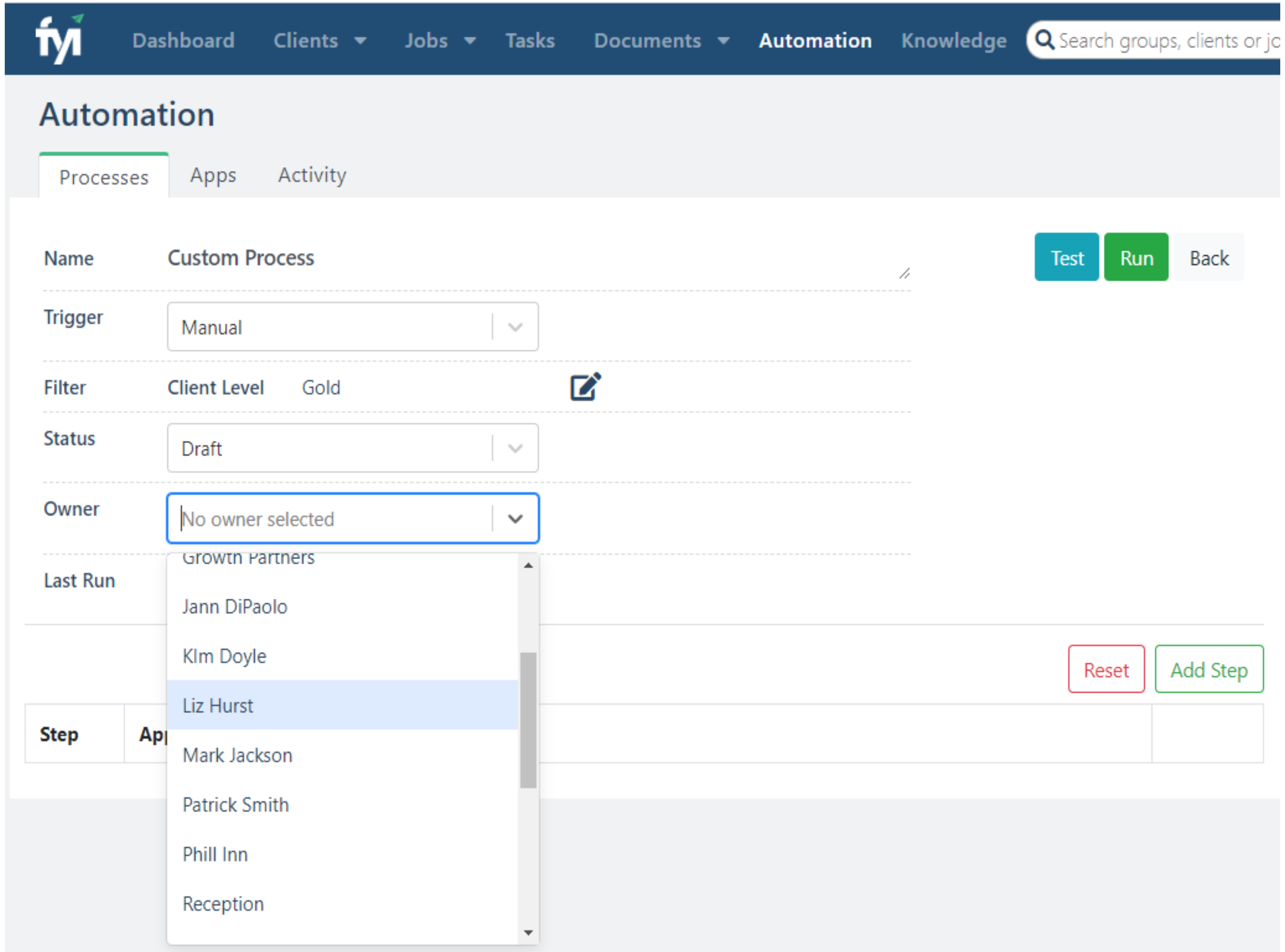
- **Step 2:**
  Select **trigger** on demand or scheduled

- **Step 3:**
  Add **filter** based on client segment



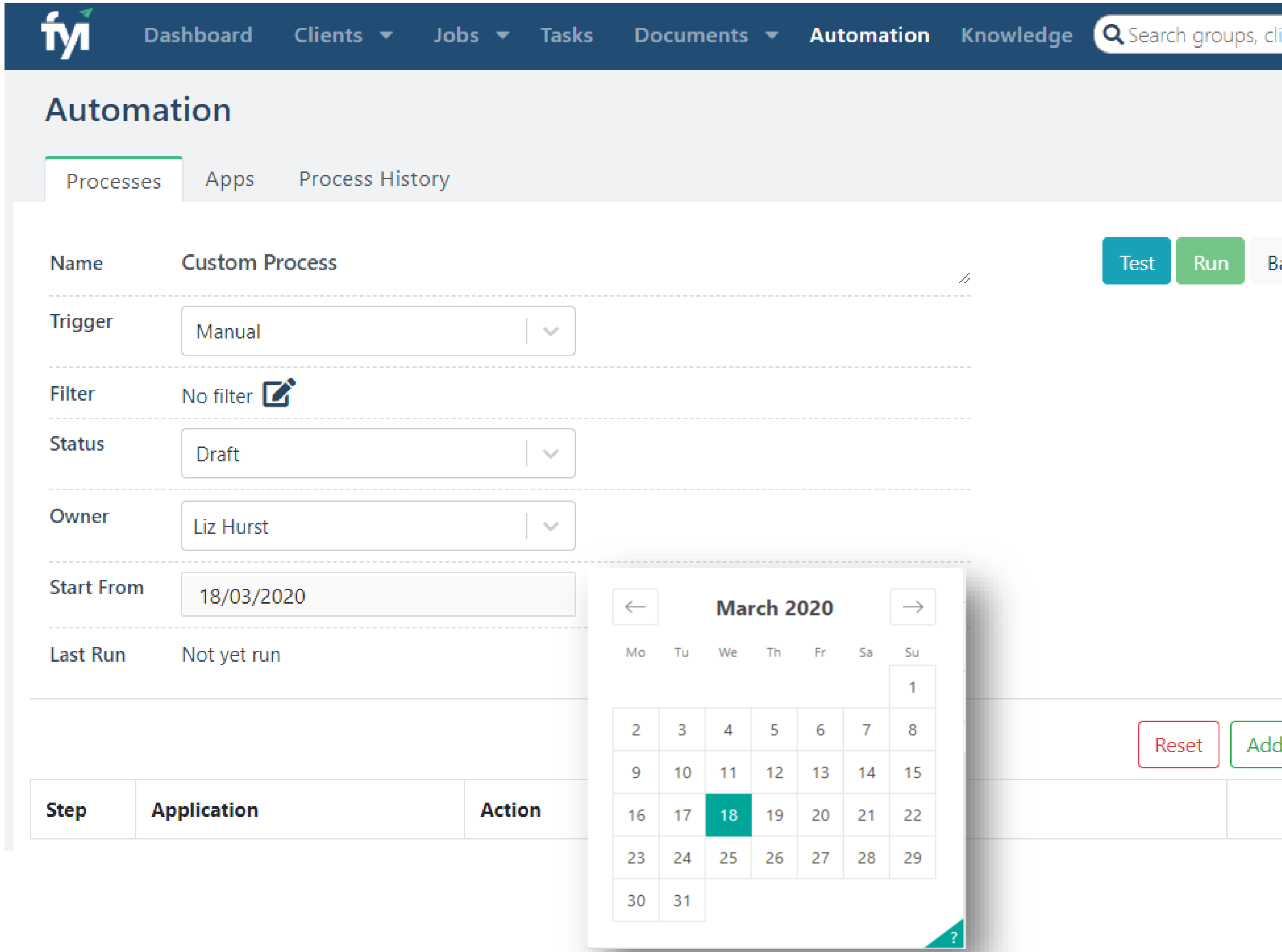
CREATING A
CUSTOM PROCESS

- **Step 1:**
  Add Custom Process
- **Step 2:**
  Select **trigger** on demand or scheduled
- **Step 3:**
  Add **filter** based on client segment
- **Step 4:**
  Set the **owner**



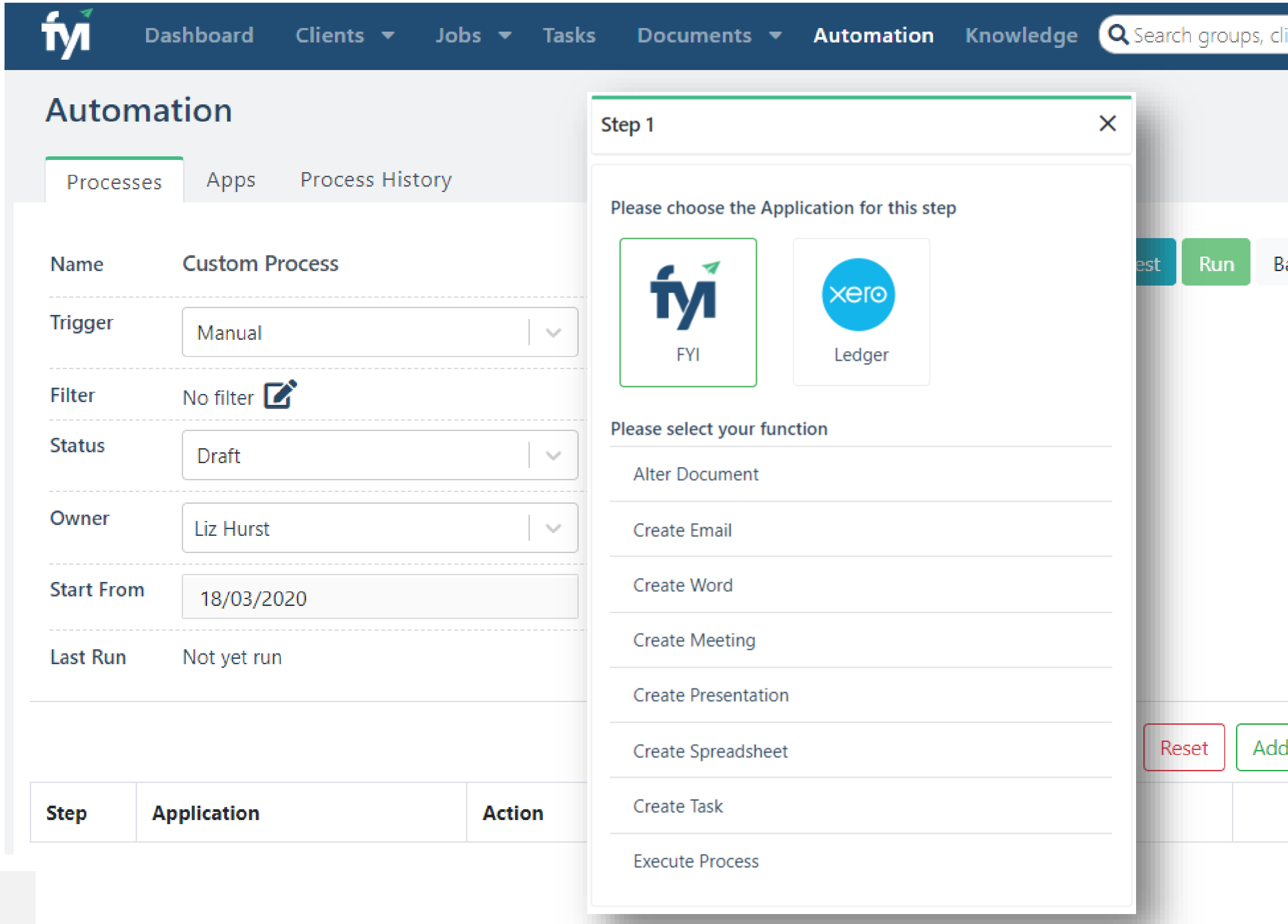
CREATING A CUSTOM PROCESS

- **Step 1:**
  Add Custom Process
- **Step 2:**
  Select **trigger** on demand or scheduled
- **Step 3:**
  Add **filter** based on client segment
- **Step 4:**
  Set the **owner**
- **Step 5:**
  Set **start from** date



CREATING A
CUSTOM PROCESS

- **Step 6:**
  Add Steps!

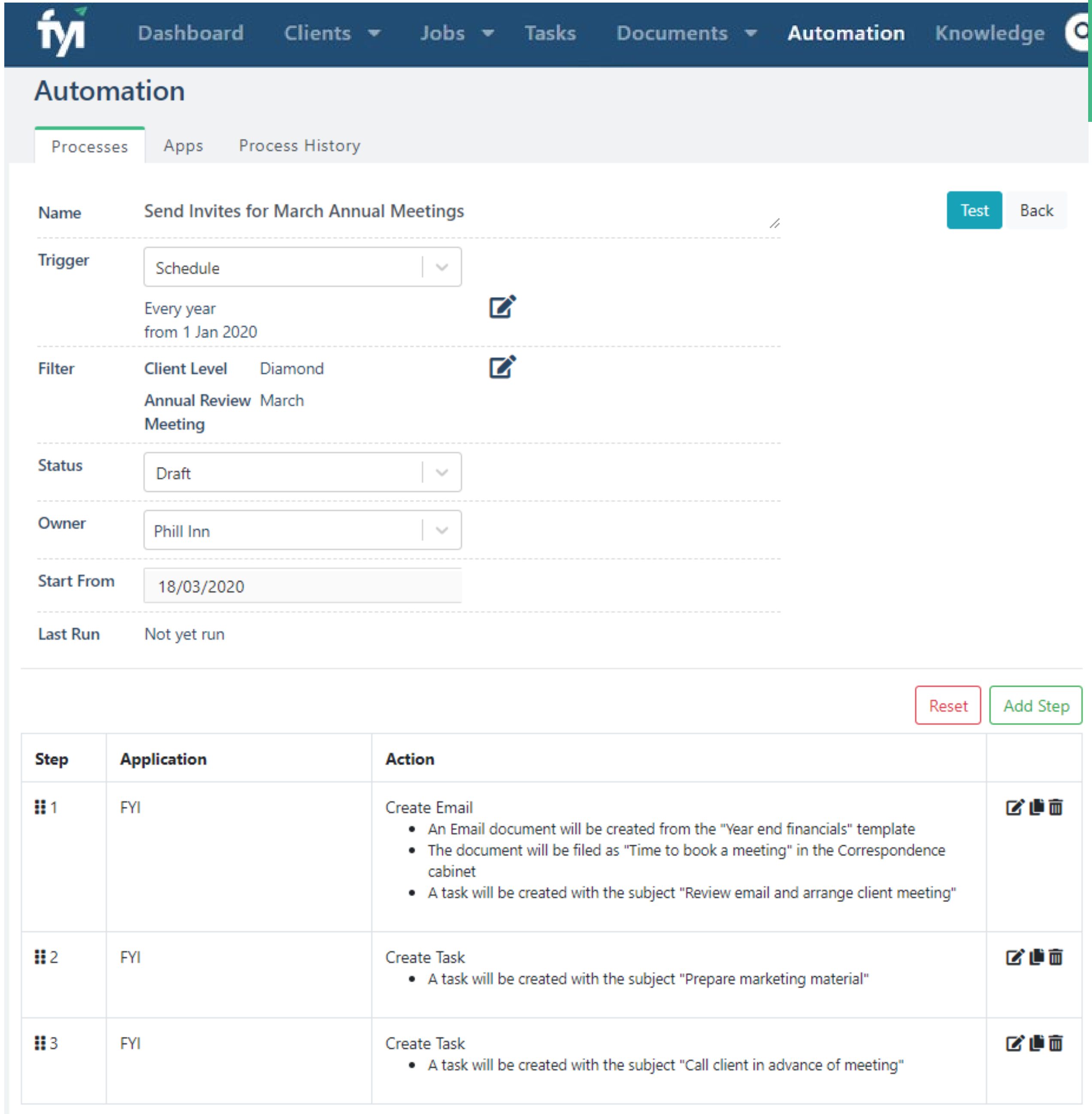


Click here for information on **Automation Process Steps**

CREATING A
CUSTOM PROCESS

- **Step 6:**
  Add Steps

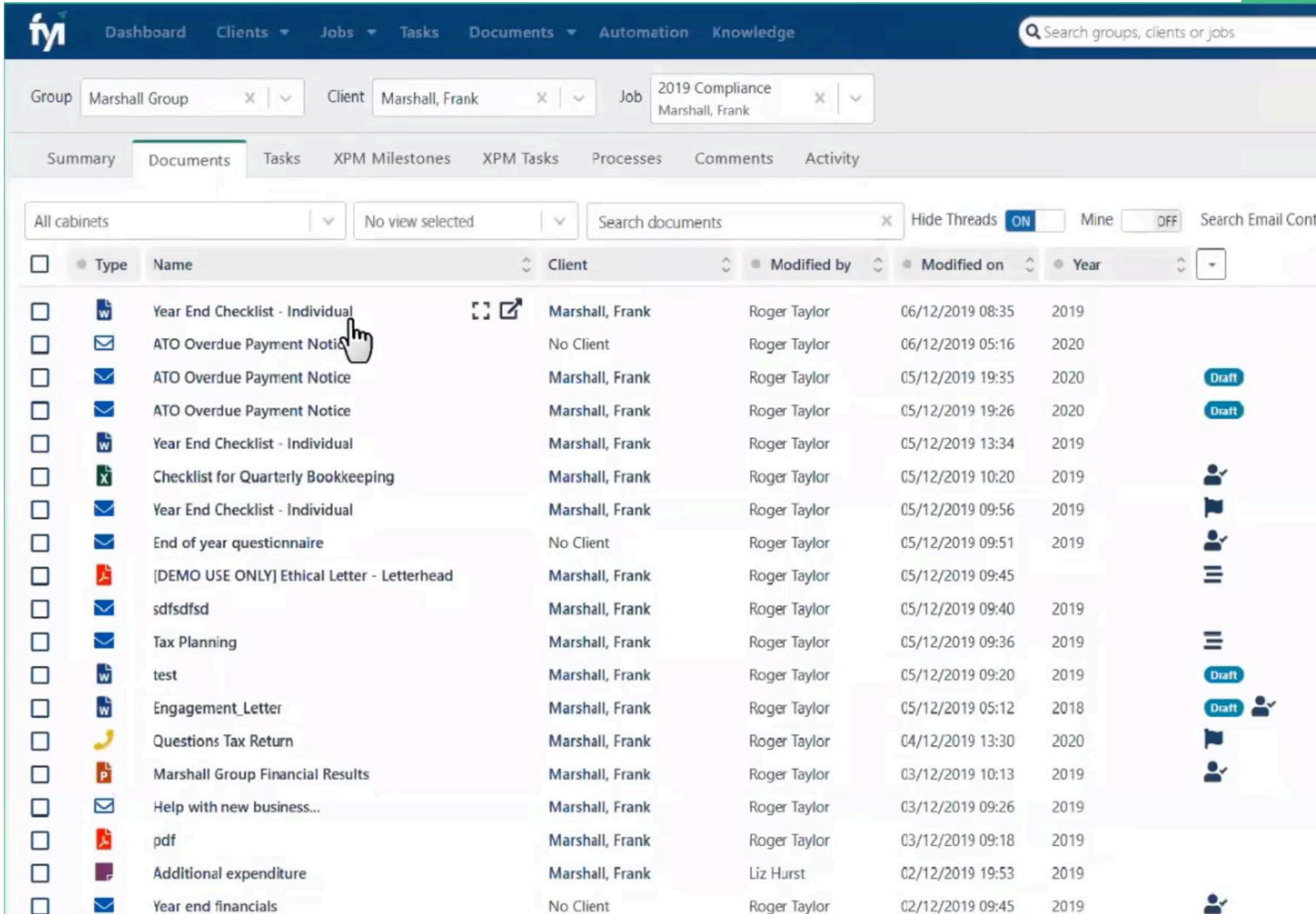
- **Step 7:**
  Build your processes!



LIVE DEMO

Custom process creation and run:

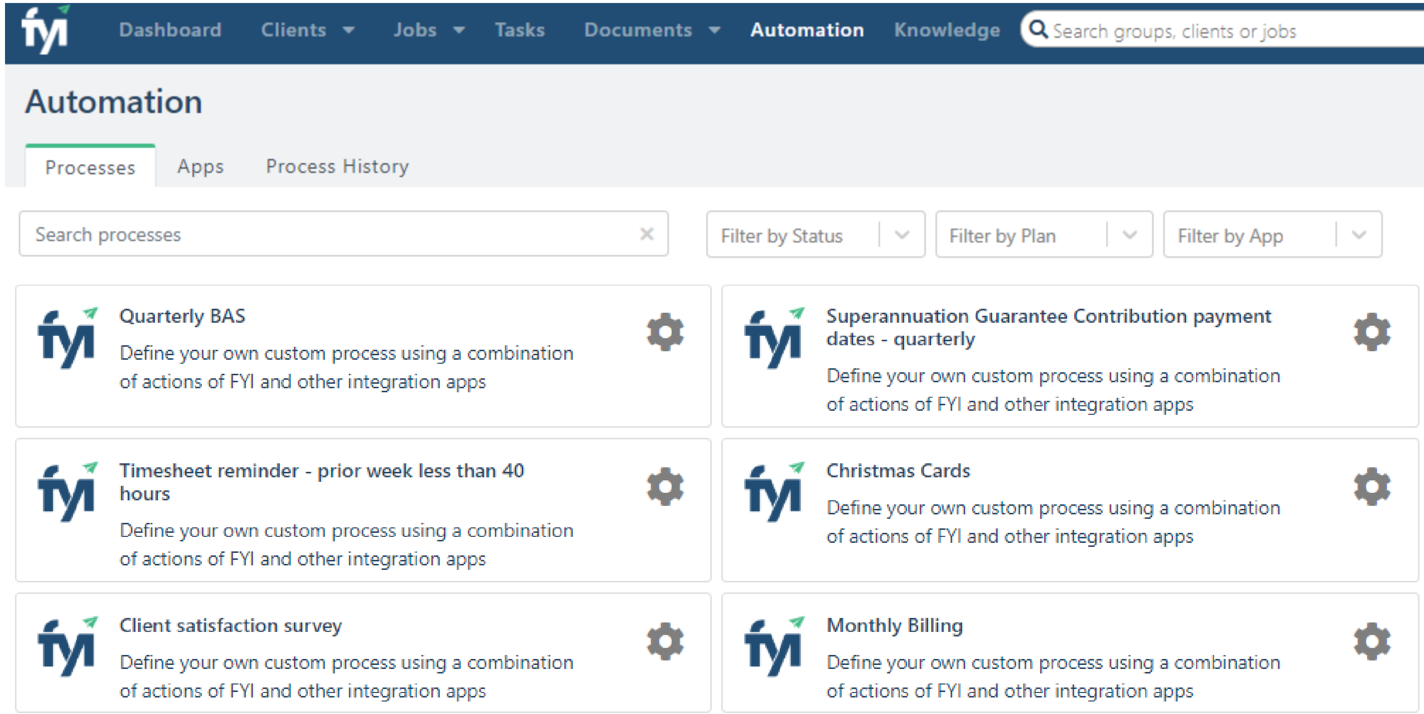
- Bulk email send
- Batch documents with tasks



CUSTOM PROCESS
EXAMPLES

Some example processes to set up:

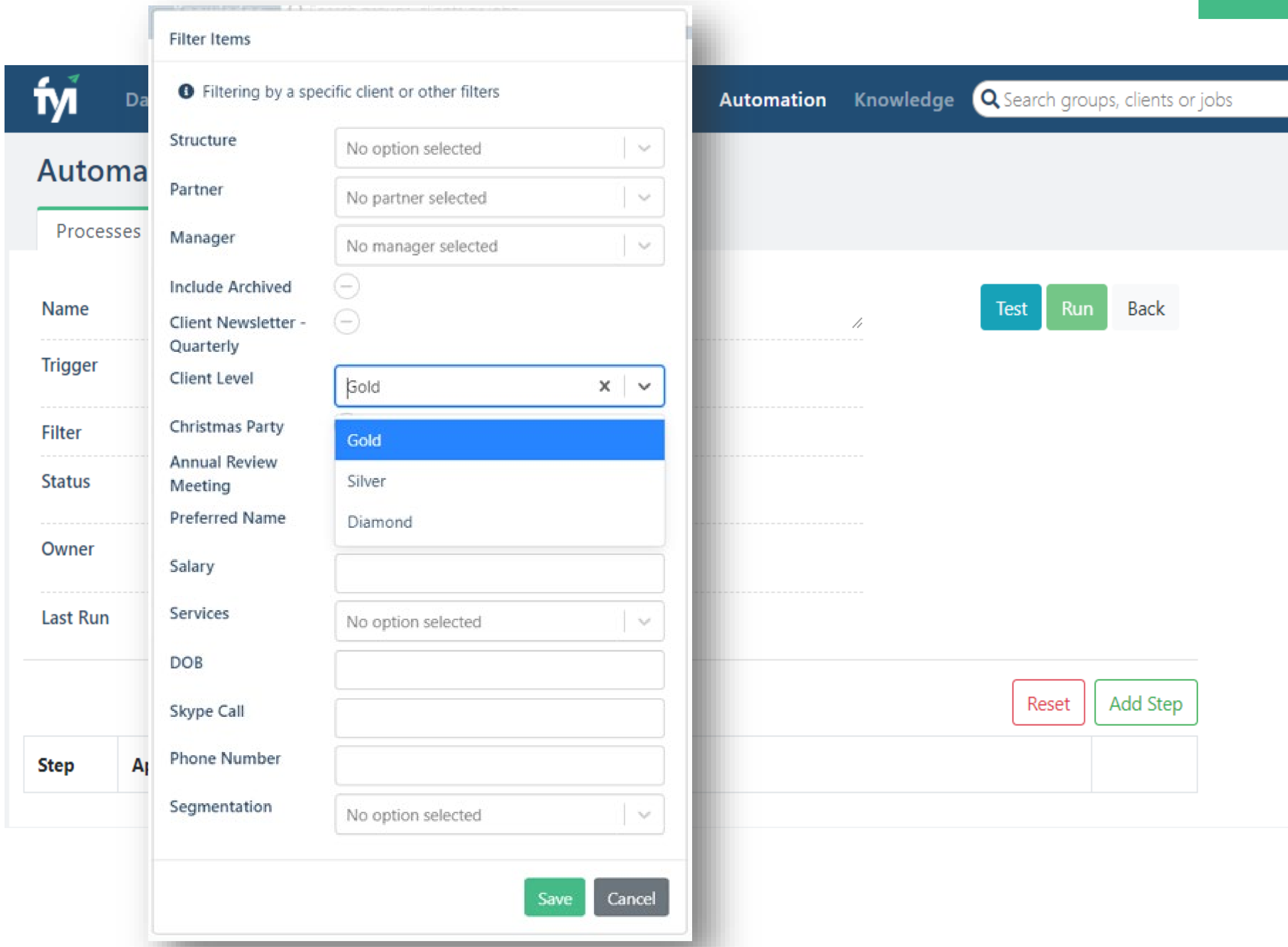
- **Marketing:** Bulk email sending
- **Admin:** Monthly billing process
- **Sales:** New customer onboarding
- **IT:** New client onboarding



SEGMENTING YOUR CLIENT BASE

For more targeted communications, utilise **custom fields** in **XPM** to segment your database:

- Think about what you want to achieve (client, internal, marketing etc)
- Then segment your client base for best results

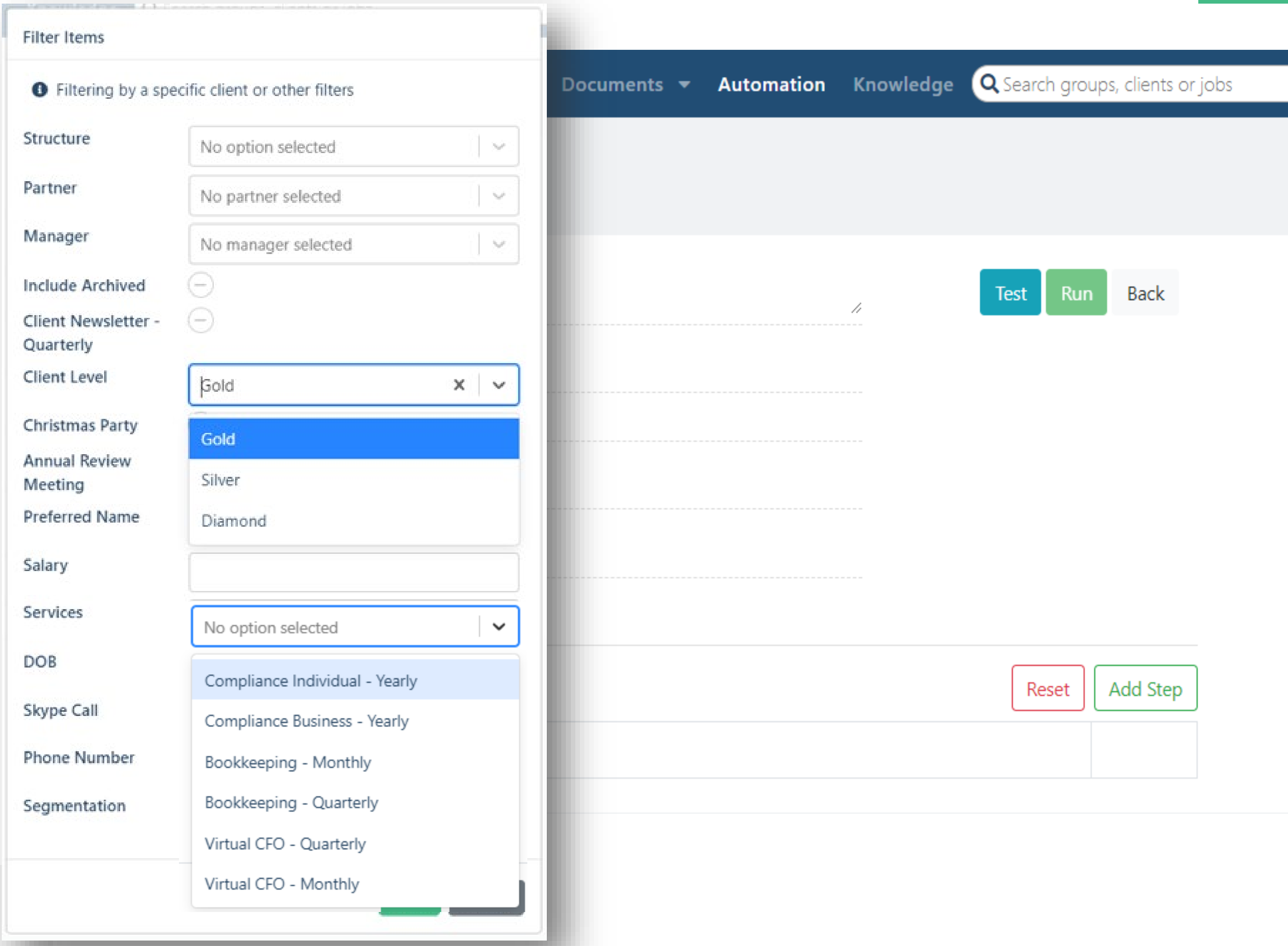


SEGMENTING YOUR CLIENT BASE

Some example fields to consider:

- Client type: Gold, Silver, Bronze
- Month in which work is completed
- Services engaged
- Marketing opt-in

Tip: Focus on the most effective method of segmentation (i.e. Yes vs No).



FORMATTING
EMAIL TEMPLATES

- Copy and paste content using Ctrl, Shift, v (removes hidden styles)
- Remove line breaks (translation to Outlook, spacing is added automatically)
- Add merge fields where required (minor bug on first merge field)
- Complete any additional formatting for bold, bullets etc
- Select all and apply correct font and size

SUMMARY

Custom Processes

- Set processes to run on a repeating schedule
- Set a filter to segment the clients whom the process will run for
- Add blocking tasks to prevent the next step from running
- Use custom fields in XPM to provide greater segmentation

PLATFORM UPDATE

NEW FEATURES
AND ENHANCEMENTS

Recent Releases

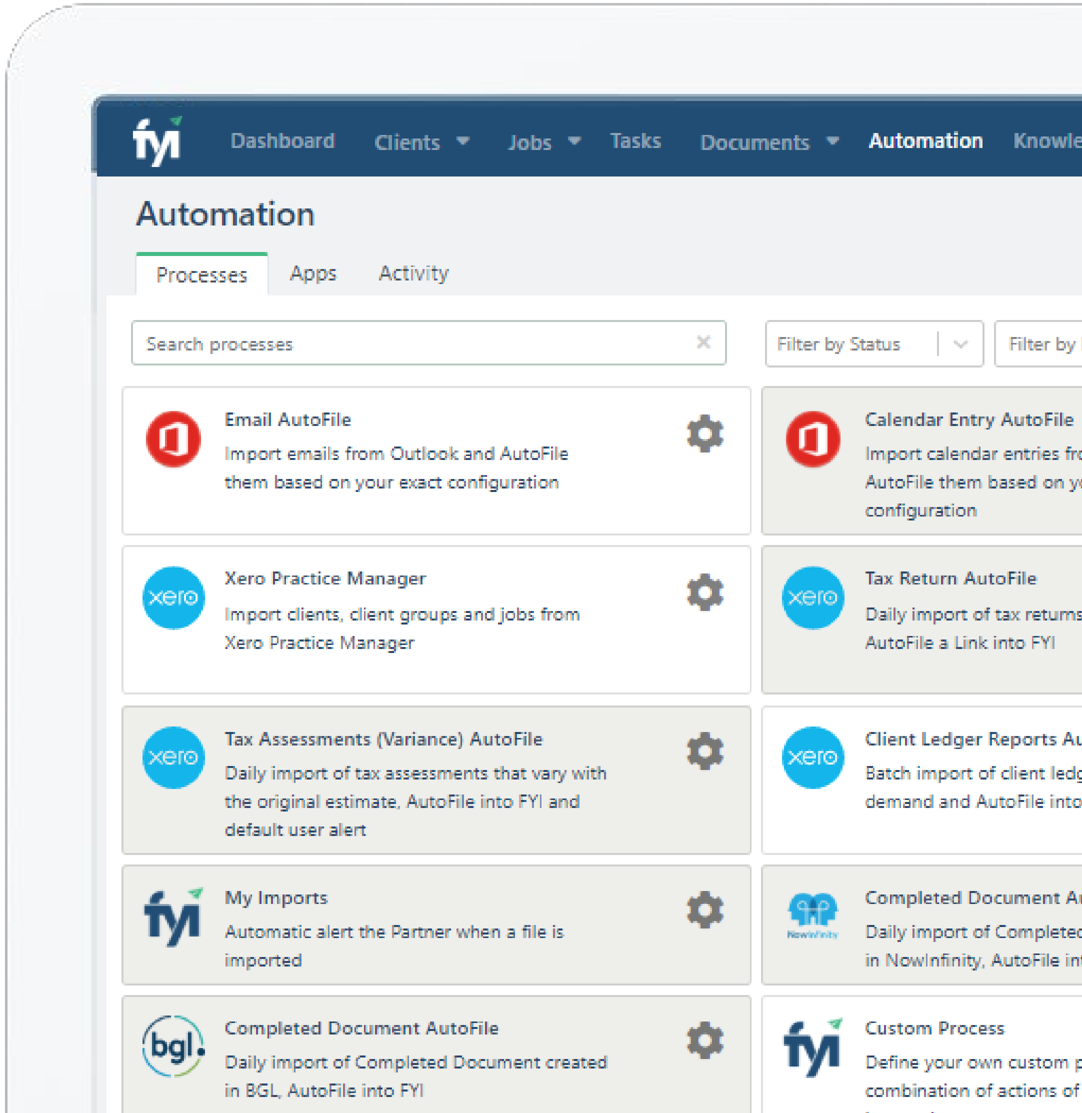
- Export to CSV
- Client Custom Fields
- Notifications on Workflow
- Enhancements to BGL & NowInfinity Integrations
- Tax Assessments AutoFile
- Custom Processes

Coming Soon!

- GreatSoft Integration
- Xero Logins
- Secure Tasks

SERVICE UPDATES

ONEDRIVE ISSUES



HOW DO YOU
WANT TO LEARN?

- **Webinar-style training workshops**
  Repeating periodic training sessions (30-60 minutes) focussed on basic and intermediate needs

- **Bite-sized video content in our help centre**
  Increased video content, in academy-style format, for you to watch in your own time

- **In-product videos and walkthroughs**
  Pop-ups and walkthroughs for new or underutilised features

SOME NEXT STEPS

WHAT TO TAKE AWAY
FROM THIS SESSION

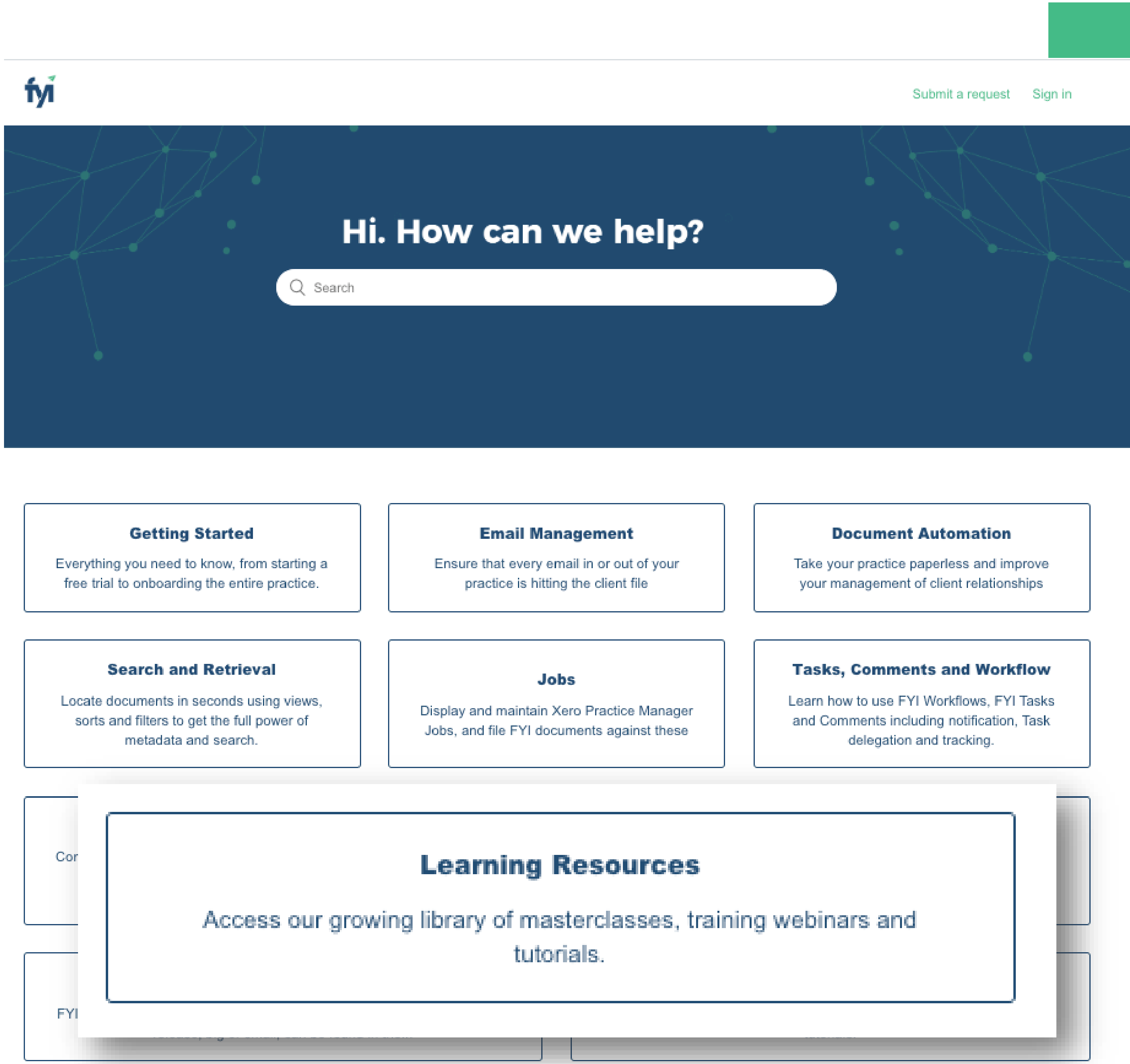
Invest some time in FYI's Automations workspace:

- Connect your applicable apps
- Complete required fields and activate **corporate affairs AutoFile** processes
- Complete required fields and activate **tax return AutoFile** process
- Turn on **tax assessments AutoFile** and see what happens
- Set up your first **custom process**

AVAILABLE RESOURCES

- Webinar recording
- Presentation slides

Our next Masterclass is planned for **mid April**. Keep an eye on your email for a registration link!



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