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.
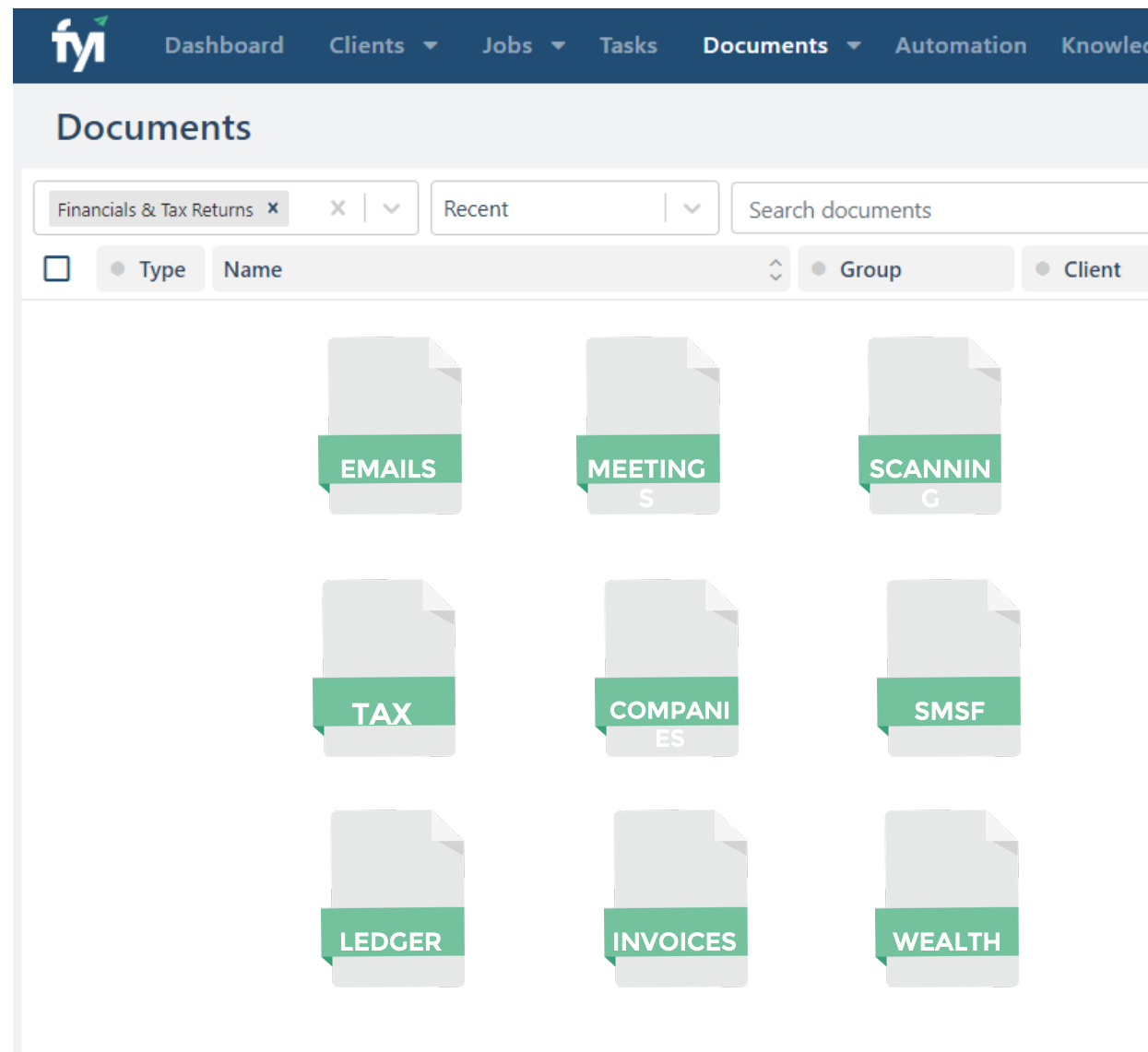
IN THIS **MASTERCLASS**

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**

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.

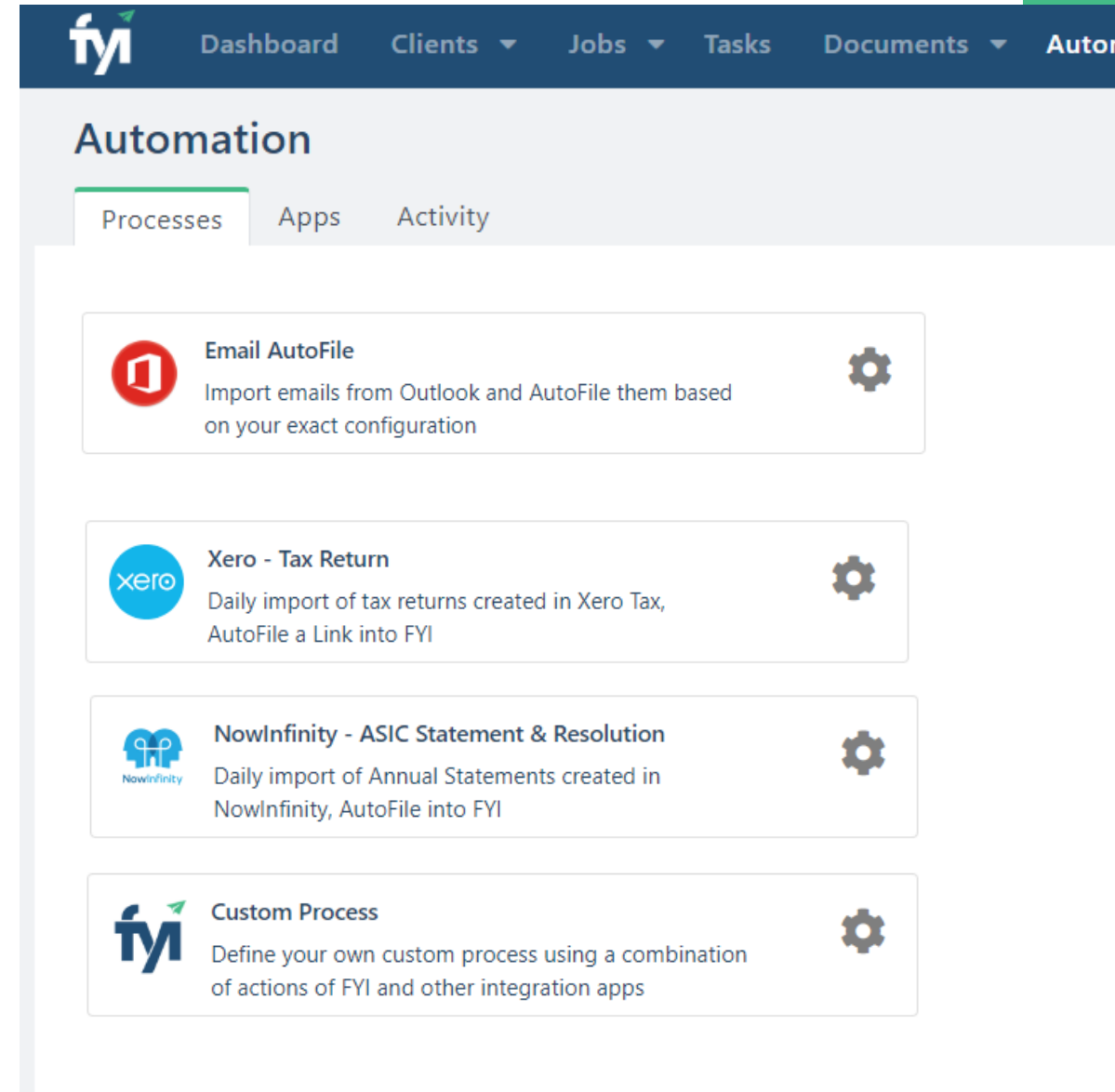# TYPES OF
AUTOMATIONS

- **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

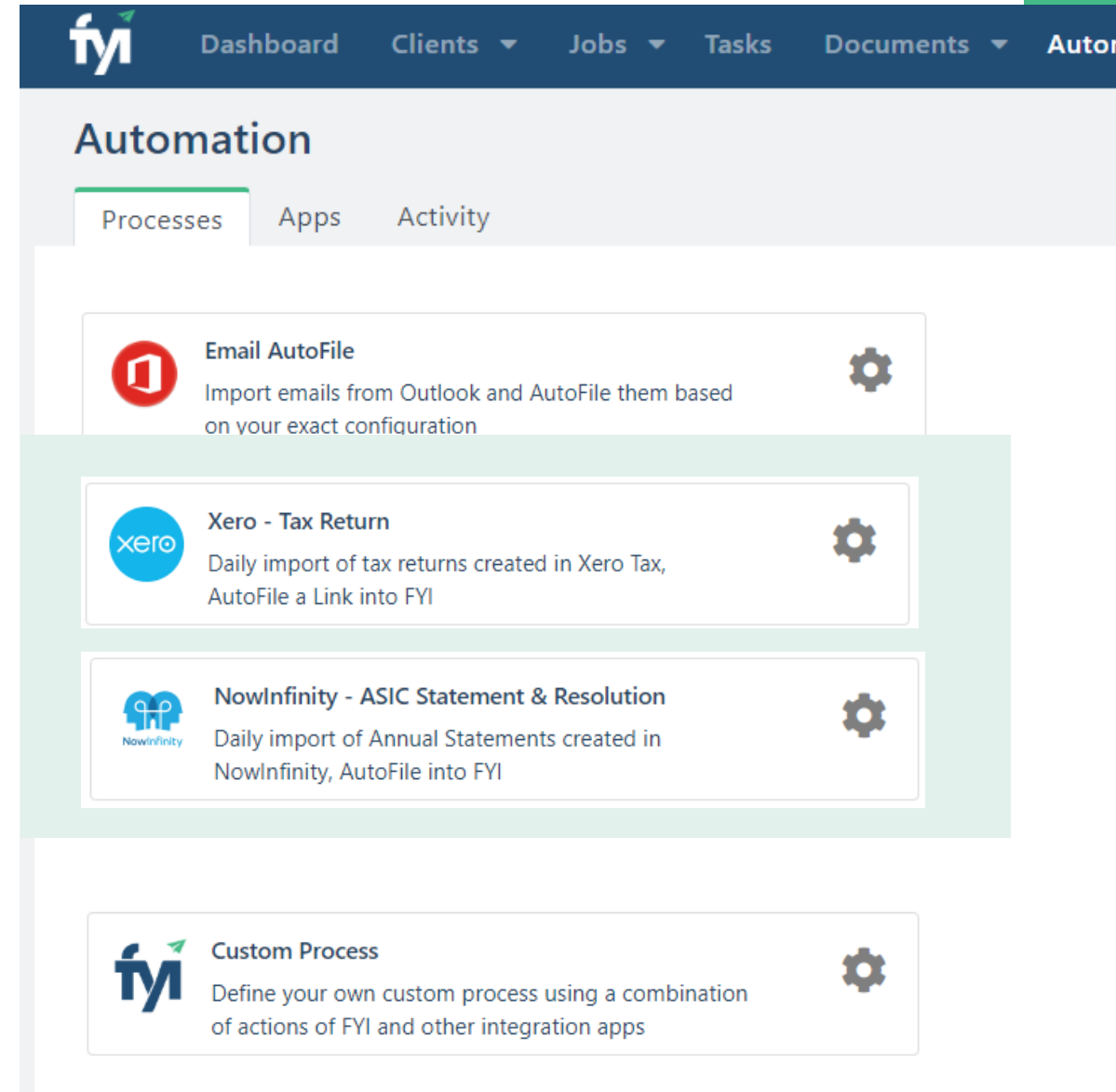Within Process Automations there are two types:

- **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**.

Dashboard | Clients ▼ | Jobs ▼ | Tasks | Documents ▼ | Autor

Automation

Processes | Apps | Activity

Email AutoFile
Import emails from Outlook and AutoFile them based on your exact configuration ⚙

xero - Tax Return
Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI ⚙

NowInfinity - ASIC Statement & Resolution
Daily import of Annual Statements created in NowInfinity, AutoFile into FYI ⚙

Custom Process
Define your own custom process using a combination of actions of FYI and other integration apps ⚙

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.

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fyi   Dashboard   Clients ▾   Jobs ▾   Tasks   Documents ▾   **Automation**

Automation

Processes   Apps   Activity

bgl.   **ASIC Statement & Resolution – Import & AutoFile**
Daily import of Completed Document created in BGL, AutoFile into FYI ⚙

NowInfinity   **NowInfinity - ASIC Statement & Resolution**
Daily import of Annual Statements created in NowInfinity, AutoFile into FYI ⚙

NowInfinity   **NowInfinity - Corporate Documents**
Daily import of Completed Document created in NowInfinity, AutoFile into FYI ⚙

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

Step 1 ✕

Import NowInfinity Statement
NowInfinity

Filing 📄   ⌃

Name	«OrginalFileName» ···
AutoFile	DISABLED
Cabinet	Corporate Affairs ✕ | ⌄
Job	No client selected
	Show Closed Jobs OFF
Year	Merge Field ReportYear ⌄
Filing	Filed | ⌄

Workflow   ⌄

Task   ⌄

Comment 💬   ⌄

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

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fyi   Dashboard   Clients ▾   Jobs ▾   Tasks   Documents ▾   **Automation**   Kn

Automation

| Processes | Apps | Activity |

Xero - Tax Return
xero
Daily import of tax returns created in Xero Tax, AutoFile a Link into 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
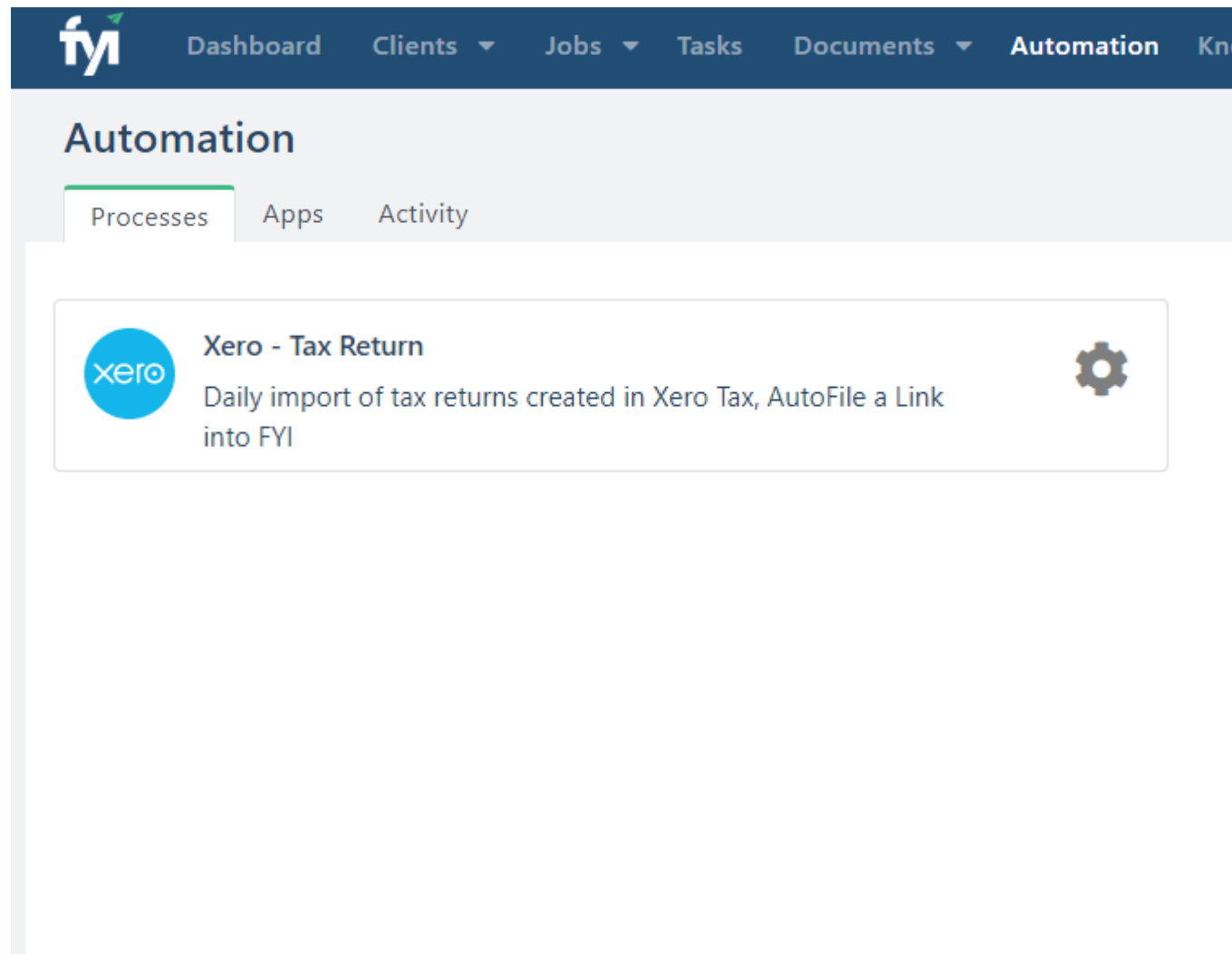
STEP 2:
SETTING UP THE AUTOMATION

This automation comes pre-packaged with FYI.

Turning it on is simple:

- Go to Automation > Processes

- Select the ⚙ icon
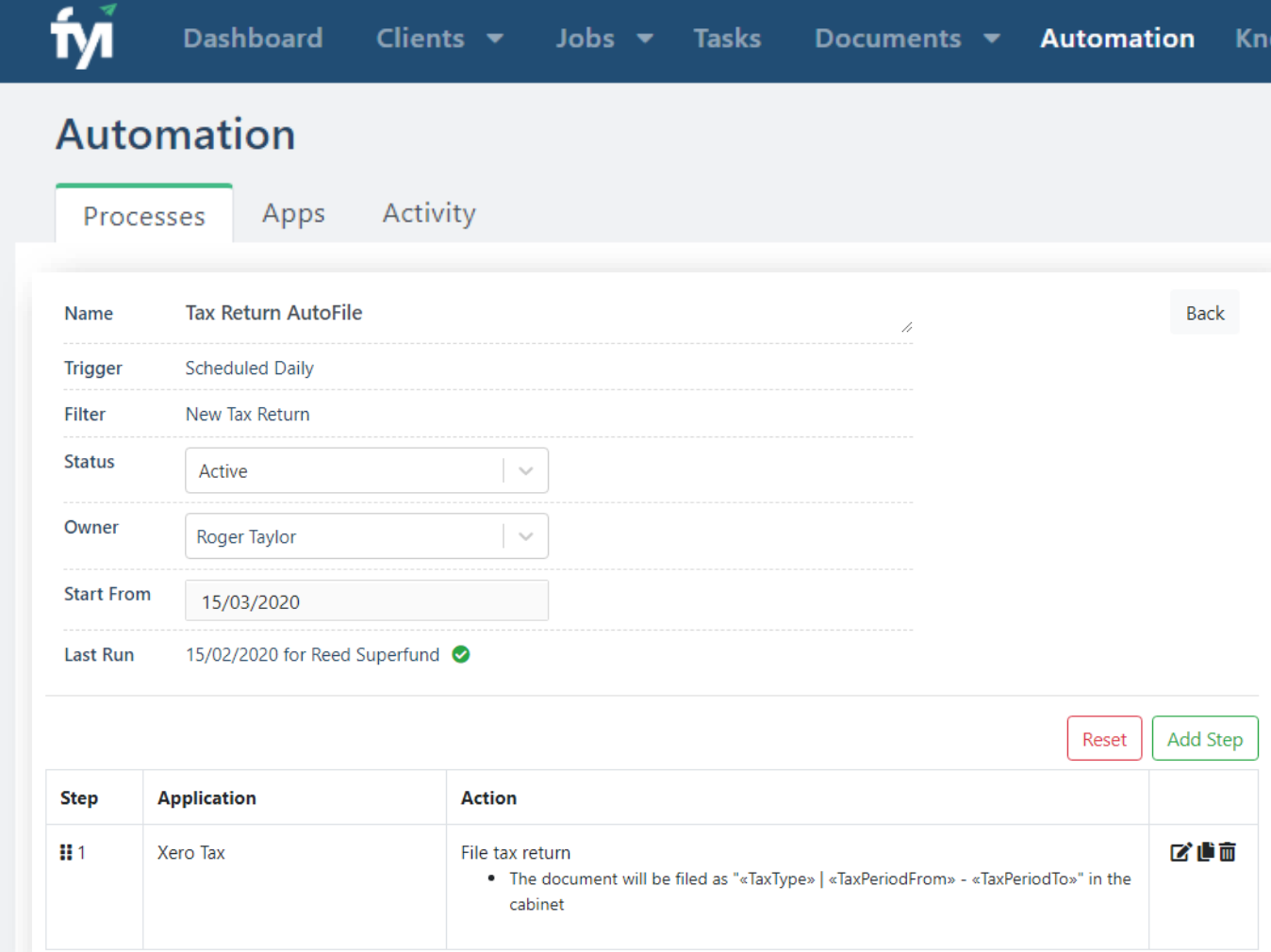
Click here for more information on
Tax Return AutoFile

| fyi | Dashboard | Clients ▾ | Jobs ▾ | Tasks | Documents ▾ | **Automation** | Kn |

Automation

| Processes | Apps | Activity |

Xero - Tax Return
xero
Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI ⚙

**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

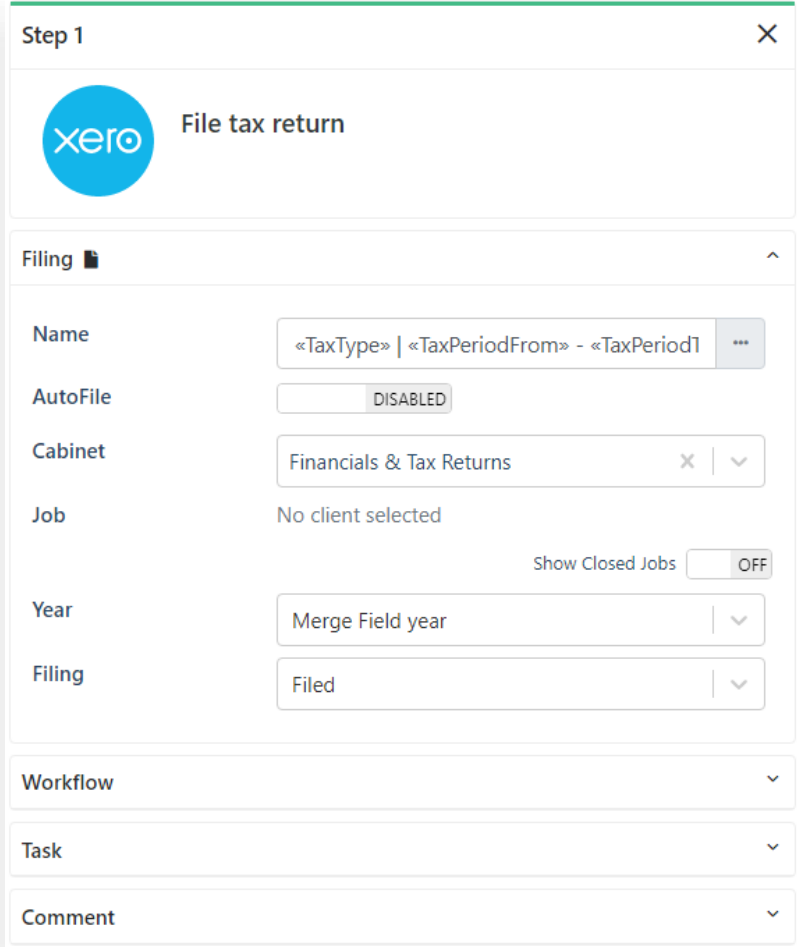[Click here](#) for more information on **Automation Processes**

Dashboard | **Clients** ▼ | **Jobs** ▼ | **Tasks** | **Documents** ▼ | **Automation** | Kn

Automation

| Processes | Apps | Activity |

Name	Tax Return AutoFile	Back
Trigger	Scheduled Daily	
Filter	New Tax Return	
Status	Active	
Owner	Roger Taylor	
Start From	15/03/2020	
Last Run	15/02/2020 for Reed Superfund ✔	

Reset   Add Step

Step	Application	Action	
⠿ 1	Xero Tax	File tax return • The document will be filed as "«TaxType» | «TaxPeriodFrom» - «TaxPeriodTo»" in the cabinet	✎ 📋 🗑

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

TAX AND CORPORATE AFFAIRS

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

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)
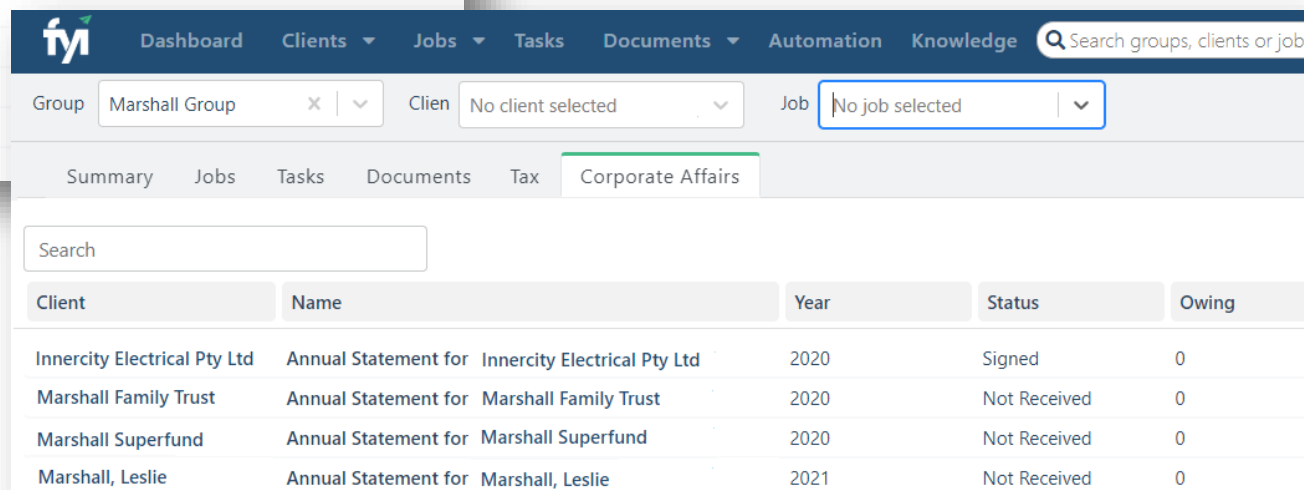
- View tax return and ASIC statement status from the tax and corporate affairs tabs

- 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.

| Dashboard | Clients ▾ | Jobs ▾ | Tasks | Documents ▾ | **Automation** | Knowl |

Automation

| Processes | Apps | Activity |

Name	Tax Assessments (Agreed) AutoFile
Trigger	Scheduled Daily
Filter	Assessment varies from estimate
Status	Active

Step	Application	Action
1	Xero Tax	Import & file assessment • Document will be custom filed
2	FYI	Create Email • Document will be custom filed • A task will be created with a subject **Notice of assessment r**

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

13 March 2020

Stone, Sam

123 Franklin Street
Adelaide SA 5000

Notice of assessn

Income Tax Assessment

Description

Initial estimate

Your estimated taxable income was:

Your estimated tax (payable)/refund.

Actual tax outcome

Your actual taxable income was:

Your actual tax (payable)/refundable

Hi Abigail,

Your Notice of Assessment of Income Tax have been issued for the year ended 2018:

Name	Refund/Payable	Amount
Smith, Abigail	0	$1200

The assessment has been checked and is in accordance with the estimate previously advised to you. There is an amount of $1200 payable which has been transferred to your Income Tax Account – Statement of Account.

You can download our summary of the assessment using this secure link:

- Notice_of_Assessment_01072017_-_30062018.pdf

Please note:

- the link will only work for the original recipient of this email through the sending of a unique code
- this document is only a replica, if the original is required please contact our office or download from MyGov

Please contact us if you have any questions.

Roger Taylor

Manager CA

| Reception | (03) 5134 5000 | 235-237 The Parade |
| Direct | 03 9862 9855 | Kensington VIC 3000 |

Growth Partners

FEATURE
OVERVIEW

Tax Assessments AutoFile (Agreed & Not Postal)
Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email

Tax Assessments AutoFile (Agreed & Postal)
Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email

Tax Assessments AutoFile (Variance)
Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert

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

Dashboard   Clients ▼   Jobs ▼   Tasks   Docu

Group Marshall Group   ✕ | ⌄   Client Marshall, Frank

Summary   Detail   Tax   Jobs   Tasks   Documents

Settings

Cabinet   Correspondence   ✕ | ⌄

Job   2019 Compliance   ✕ | ⌄

                          Show Closed Jobs   OFF

Year   2019   ⌄

Send attachments Postal Service   ✕ | ⌄

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:
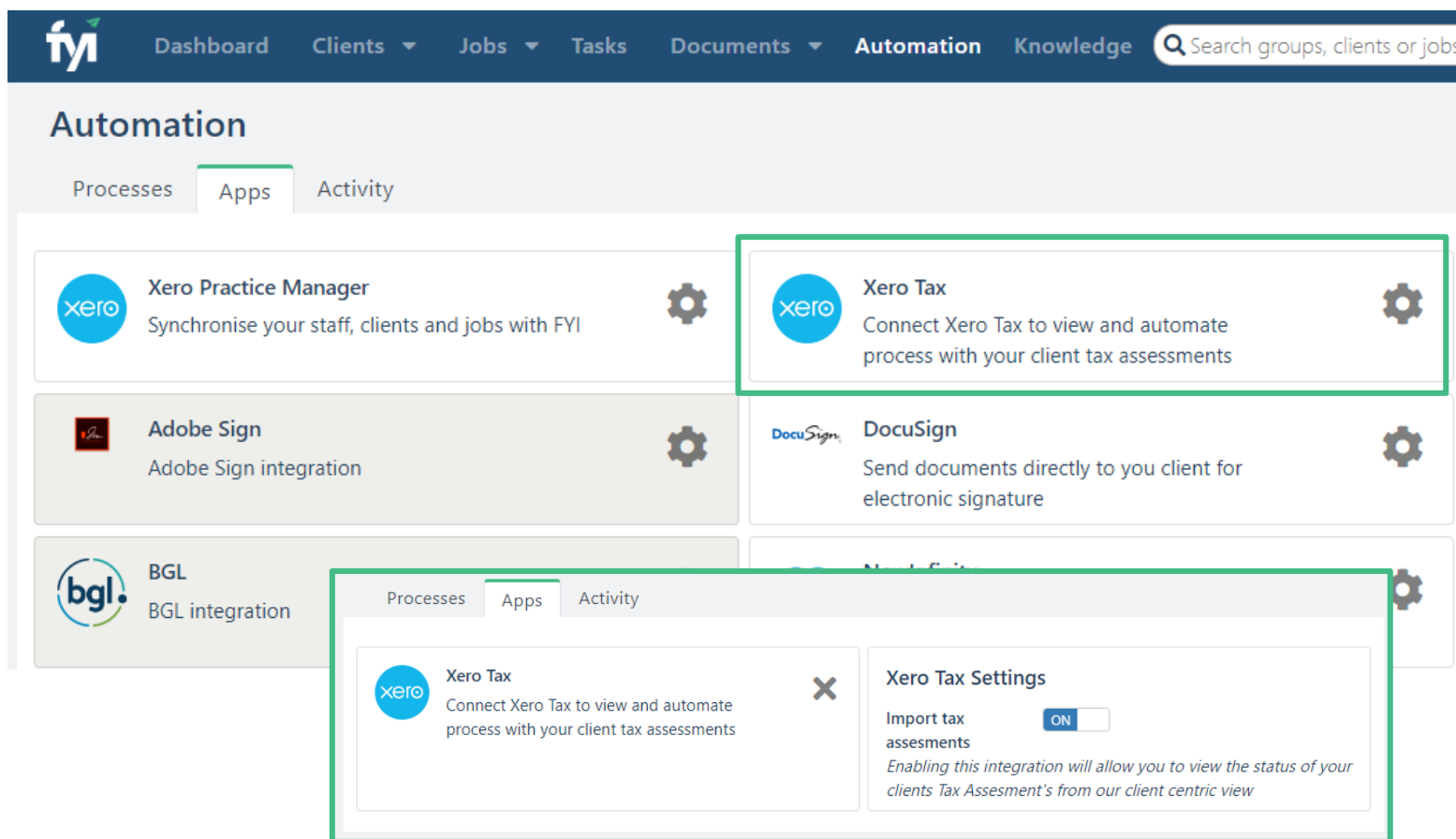## CONNECTING EACH APP
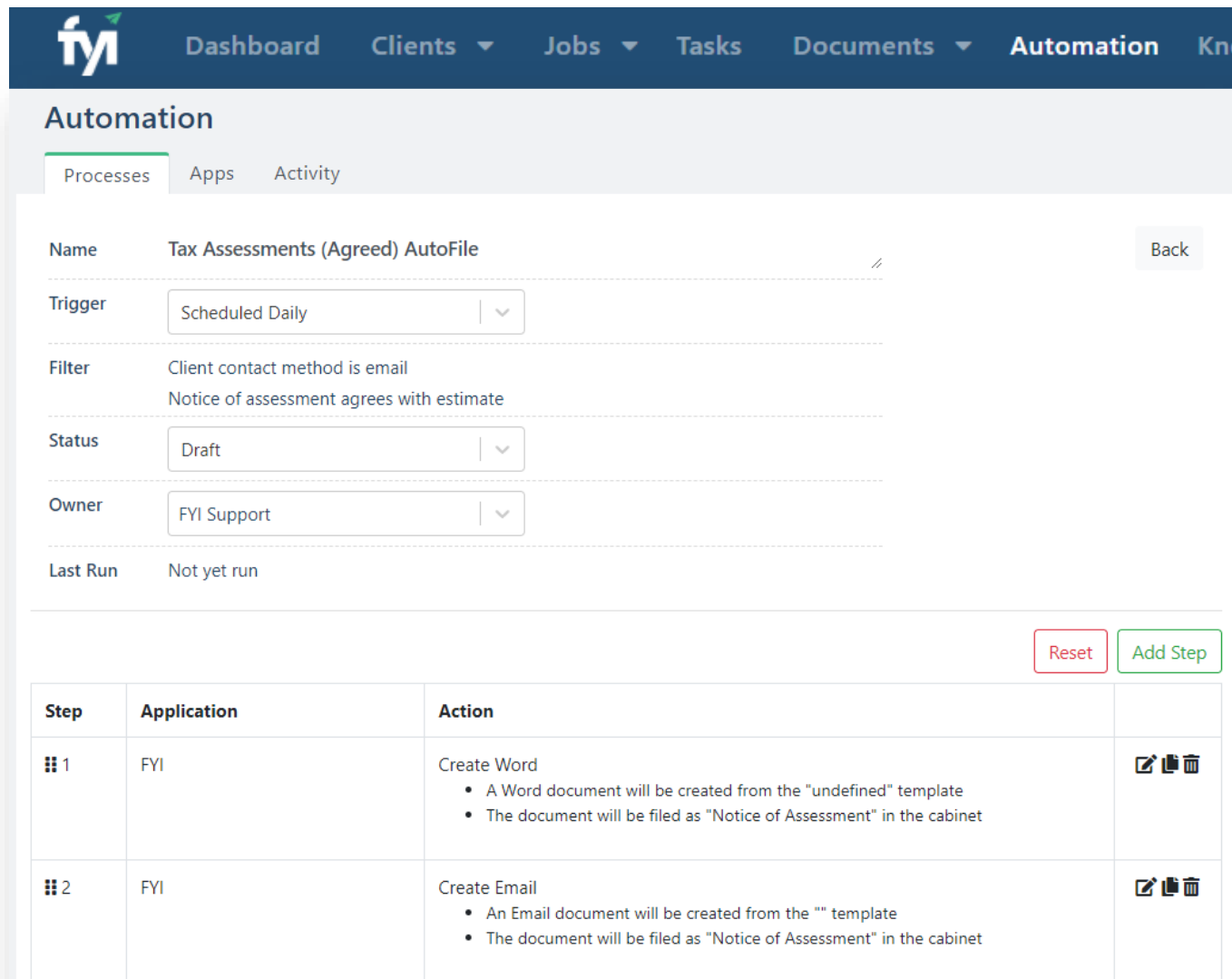
- Go to Automation > Apps

- 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**

Dashboard | **Clients** ▾ | **Jobs** ▾ | **Tasks** | **Documents** ▾ | **Automation** | Kn

Automation

| Processes | Apps | Activity |

		Back
Name	Tax Assessments (Agreed) AutoFile	
Trigger	Scheduled Daily ▾	
Filter	Client contact method is email	
	Notice of assessment agrees with estimate	
Status	Draft ▾	
Owner	FYI Support ▾	
Last Run	Not yet run	

Reset | Add Step

Step	Application	Action	
⠿ 1	FYI	Create Word • A Word document will be created from the "undefined" template • The document will be filed as "Notice of Assessment" in the cabinet	
⠿ 2	FYI	Create Email • An Email document will be created from the "" template • The document will be filed as "Notice of Assessment" in the cabinet	

STEP 2:
SETTING UP THE AUTOMATION

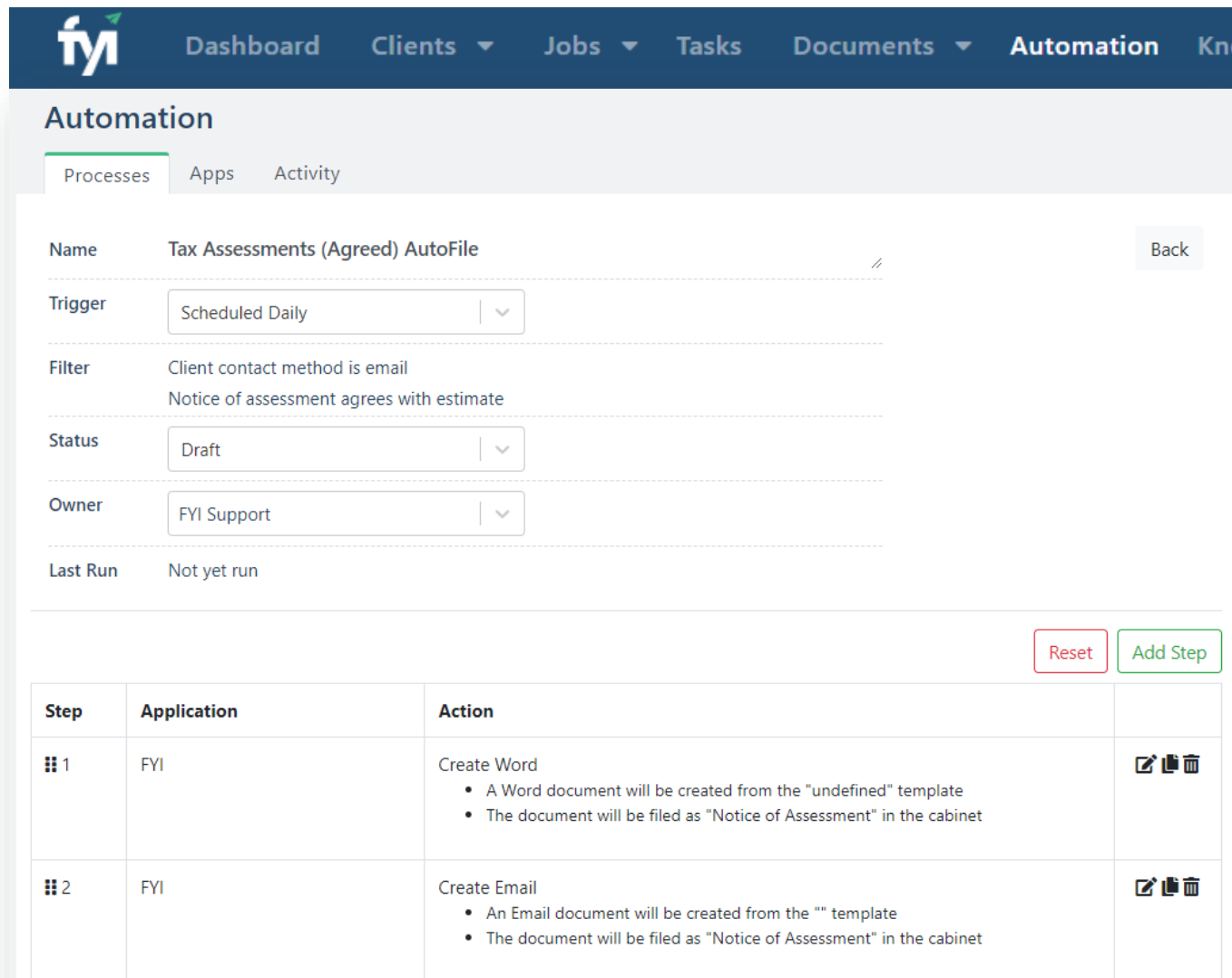Set up separate email and letter templates for the "Agreed" and "Variance" processes to use.

Then add them as follows:

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

  a) Select the edit icon

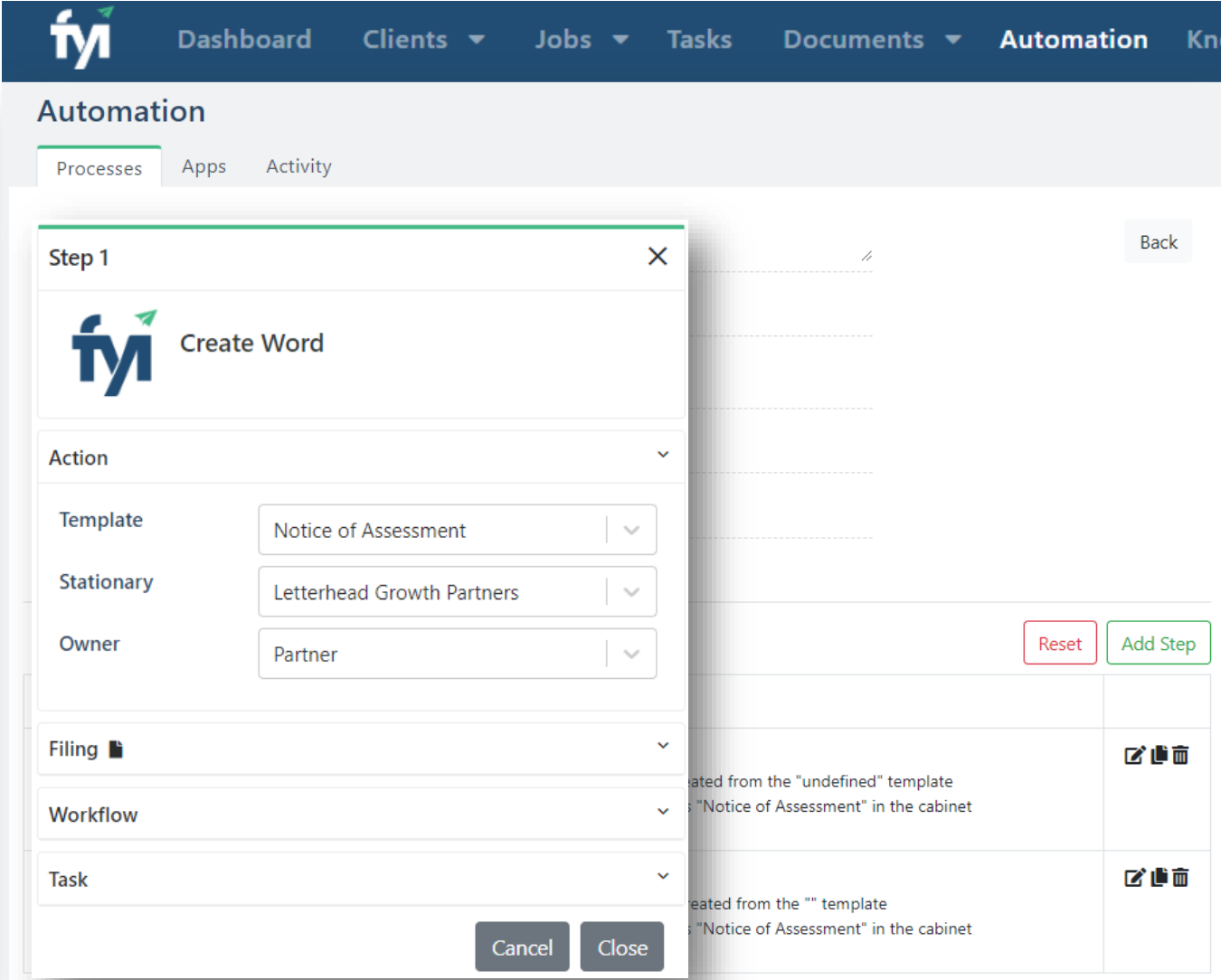---

Automation

| Dashboard | Clients ▾ | Jobs ▾ | Tasks | Documents ▾ | Automation | Kn |

Automation

Processes | Apps | Activity

Name	Tax Assessments (Agreed) AutoFile	Back
Trigger	Scheduled Daily ▾	
Filter	Client contact method is email	
	Notice of assessment agrees with estimate	
Status	Draft ▾	
Owner	FYI Support ▾	
Last Run	Not yet run	

Reset   Add Step

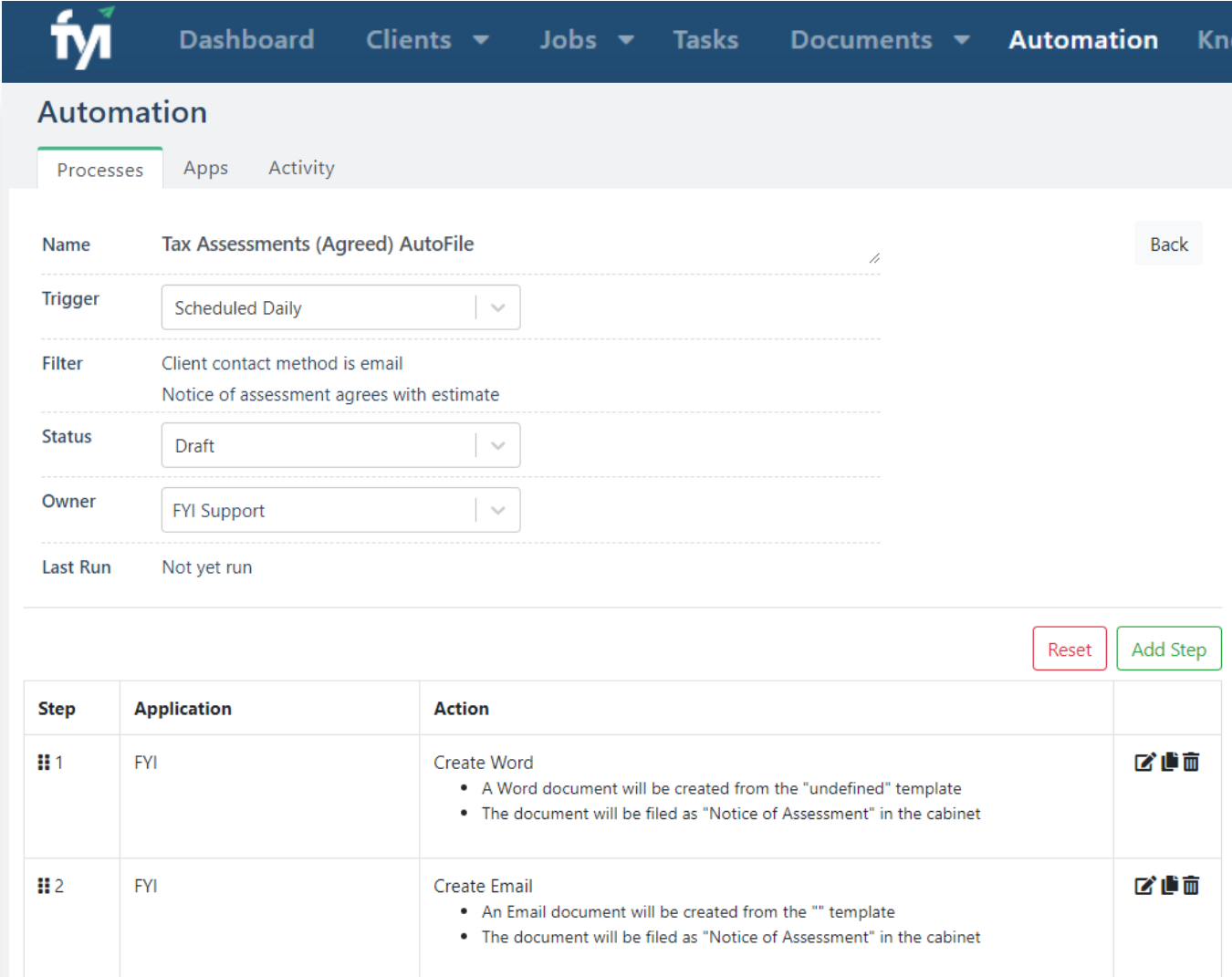| Step	Application	Action	
⠿ 1	FYI	Create Word • A Word document will be created from the "undefined" template • The document will be filed as "Notice of Assessment" in the cabinet	✎ ⧉ 🗑
⠿ 2	FYI	Create Email • An Email document will be created from the "" template • The document will be filed as "Notice of Assessment" in the cabinet	✎ ⧉ 🗑

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.

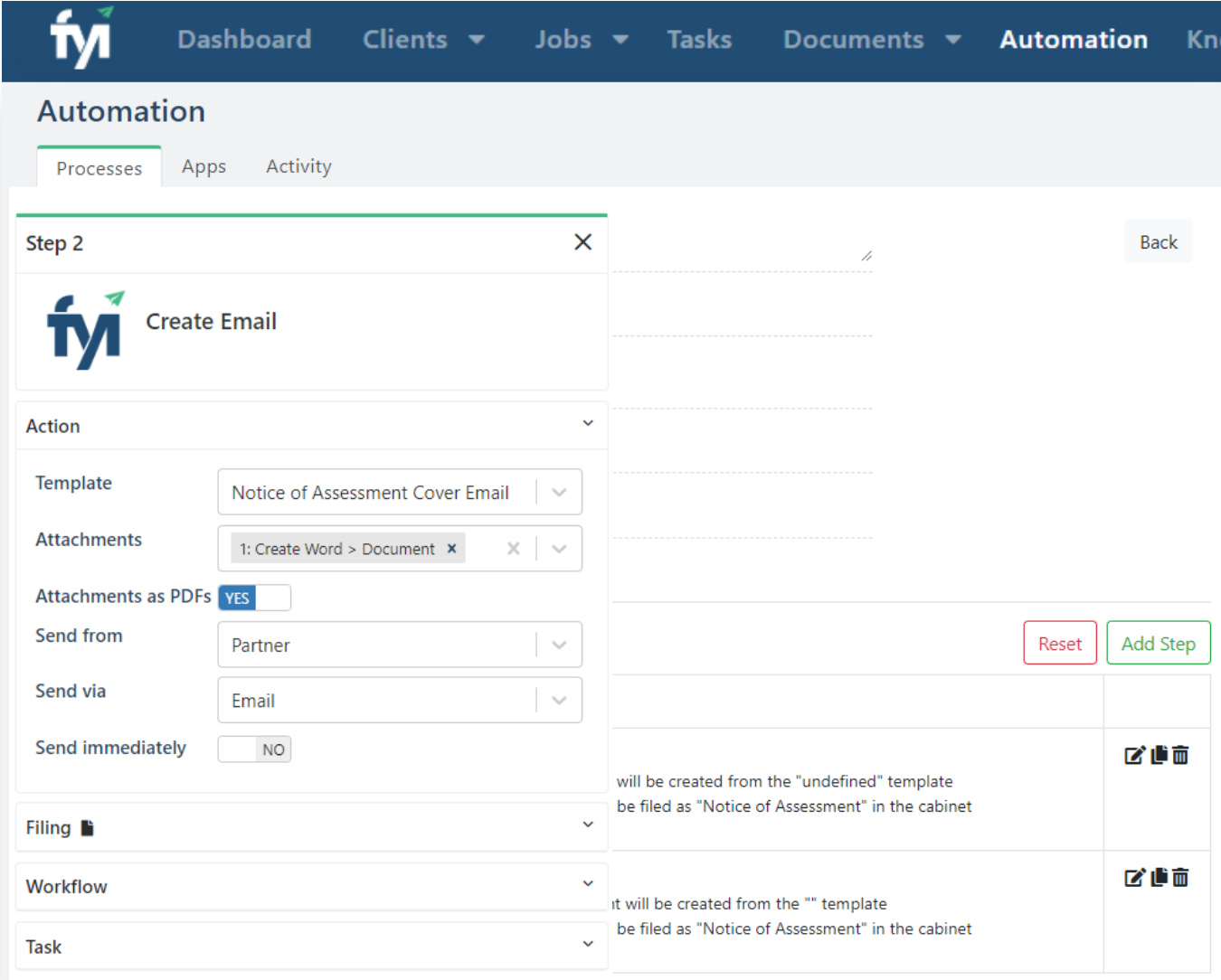Then add them as follows:

- **On Step #2: Create Email**

  a) Select the edit icon

Dashboard | **Clients** ▾ | **Jobs** ▾ | **Tasks** | **Documents** ▾ | **Automation** | Kn

Automation

| Processes | Apps | Activity |

Back

Name	Tax Assessments (Agreed) AutoFile
Trigger	Scheduled Daily ▾
Filter	Client contact method is email
	Notice of assessment agrees with estimate
Status	Draft ▾
Owner	FYI Support ▾
Last Run	Not yet run

Reset | Add Step

Step	Application	Action	
⠿ 1	FYI	Create Word	✎ ▤ 🗑
		• A Word document will be created from the "undefined" template	
		• The document will be filed as "Notice of Assessment" in the cabinet	
⠿ 2	FYI	Create Email	✎ ▤ 🗑
		• An Email document will be created from the "" template	
		• The document will be filed as "Notice of Assessment" in the cabinet	

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

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

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Dashboard   Clients ▾   Jobs ▾   Tasks   Documents ▾   **Automation**   Knowledge

Automation

| Processes | Apps | Activity |

Test   Run   Back

Name	Year end checklist - Individuals
Trigger	Manual ▾
Filter	Structure Individual ✎
Status	Active ▾
Owner	Roger Taylor ▾
Last Run	Last Friday at 09:24 for Michael, Abigail

Reset   Add Step

Step	Application	Action	
⠿1	FYI	**Create Word** • A Word document will be created from the "Year End Checklist - Individual" template • The document will be filed as "Year End Checklist - Individual" in the Workpapers cabinet	✎ ⧉ 🗑
⠿2	FYI	**Create Email** • An Email document will be created from the "Year End Checklist - Individual" template, and **immediately** sent • The document will be filed as "Year End Checklist - Individual" in the	✎ ⧉ 🗑

CUSTOM
PROCESSES

- **Step 1:**
  Add Custom Process

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!

CREATING A
CUSTOM PROCESS

- **Step 6:**
  Add Steps

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

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fyi | Dashboard | Clients ⌄ | Jobs ⌄ | Tasks | Documents ⌄ | Automation | Knowledge

Automation

| Processes | Apps | Process History |

Name	Send Invites for March Annual Meetings	Test Back
Trigger	Schedule ⌄	
	Every year from 1 Jan 2020	✎
Filter	Client Level Diamond	✎
	Annual Review March Meeting	
Status	Draft ⌄	
Owner	Phill Inn ⌄	
Start From	18/03/2020	
Last Run	Not yet run	

Reset Add Step

Step	Application	Action	
⠿1	FYI	**Create Email** • An Email document will be created from the "Year end financials" template • The document will be filed as "Time to book a meeting" in the Correspondence cabinet • A task will be created with the subject "Review email and arrange client meeting"	✎ ▤ 🗑
⠿2	FYI	**Create Task** • A task will be created with the subject "Prepare marketing material"	✎ ▤ 🗑
⠿3	FYI	**Create Task** • A task will be created with the subject "Call client in advance of meeting"	✎ ▤ 🗑

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

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!

VISIT THE HELP CENTRE
FOR MORE INFORMATION

support.fyidocs.com

THE WORLD'S MOST AUTOMATED
DOCUMENT MANAGEMENT PLATFORM