



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

The screenshot displays the 'Automation' section of the FYI software interface. At the top, a navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this, the 'Automation' header is followed by tabs for Processes, Apps, and Activity. A search bar labeled 'Search processes' and two filter buttons, 'Filter by Status' and 'Filter by', are positioned above a grid of process cards. Each card features a logo, a title, a description, and a settings gear icon. The processes listed include:

- Email AutoFile**: Import emails from Outlook and AutoFile them based on your exact configuration.
- Calendar Entry AutoFile**: Import calendar entries from AutoFile them based on your configuration.
- Xero Practice Manager**: Import clients, client groups and jobs from Xero Practice Manager.
- Tax Return AutoFile**: Daily import of tax returns from AutoFile a Link into FYI.
- Tax Assessments (Variance) AutoFile**: Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert.
- Client Ledger Reports AutoFile**: Batch import of client ledger demand and AutoFile into FYI.
- My Imports**: Automatic alert the Partner when a file is imported.
- Completed Document AutoFile**: Daily import of Completed Document created in BGL, AutoFile into FYI.
- Completed Document AutoFile**: Daily import of Completed Document created in NowInfinite, AutoFile into FYI.
- Custom Process**: Define your own custom process combination of actions of...



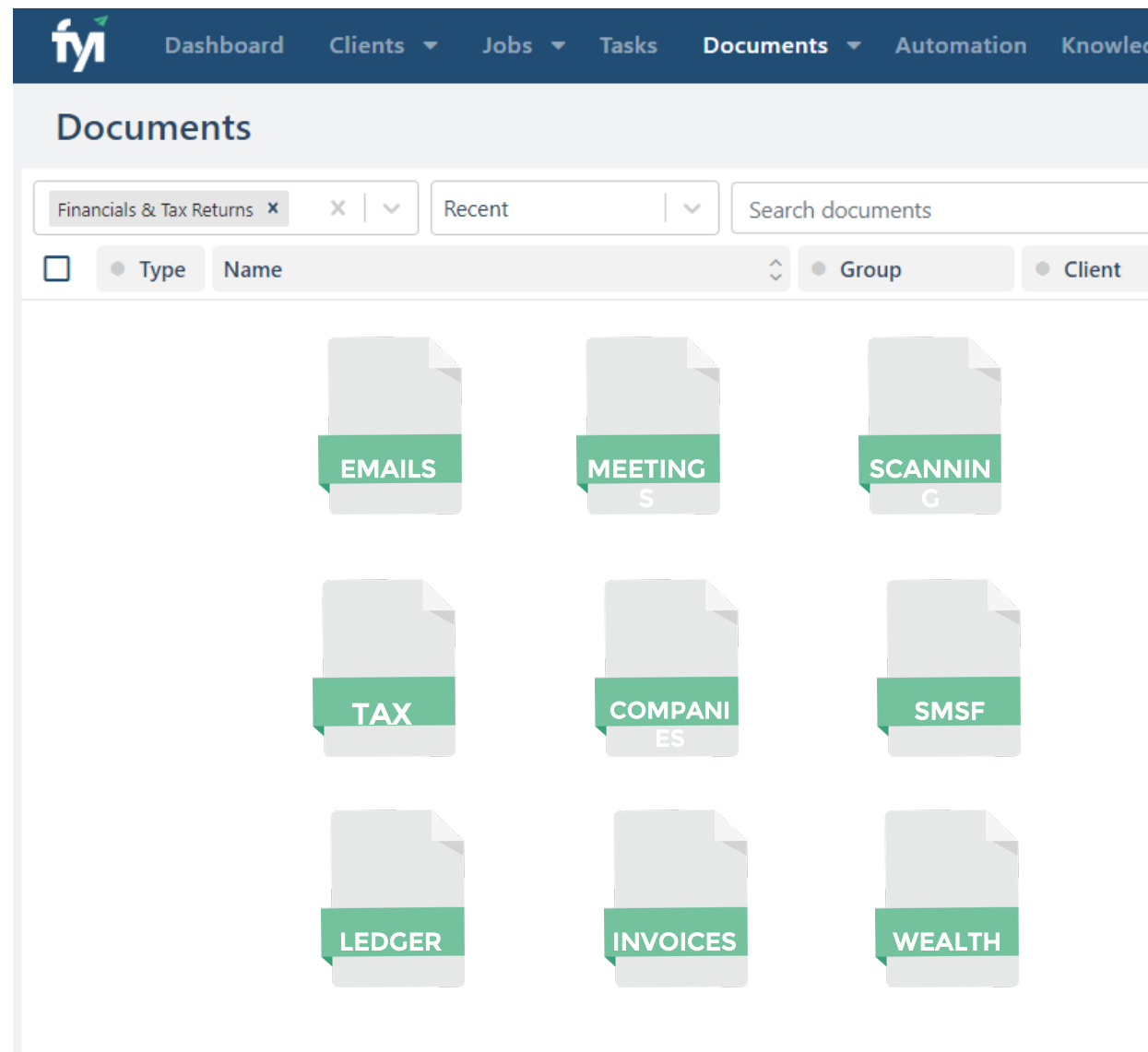
## IN THIS MASTERCLASS

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

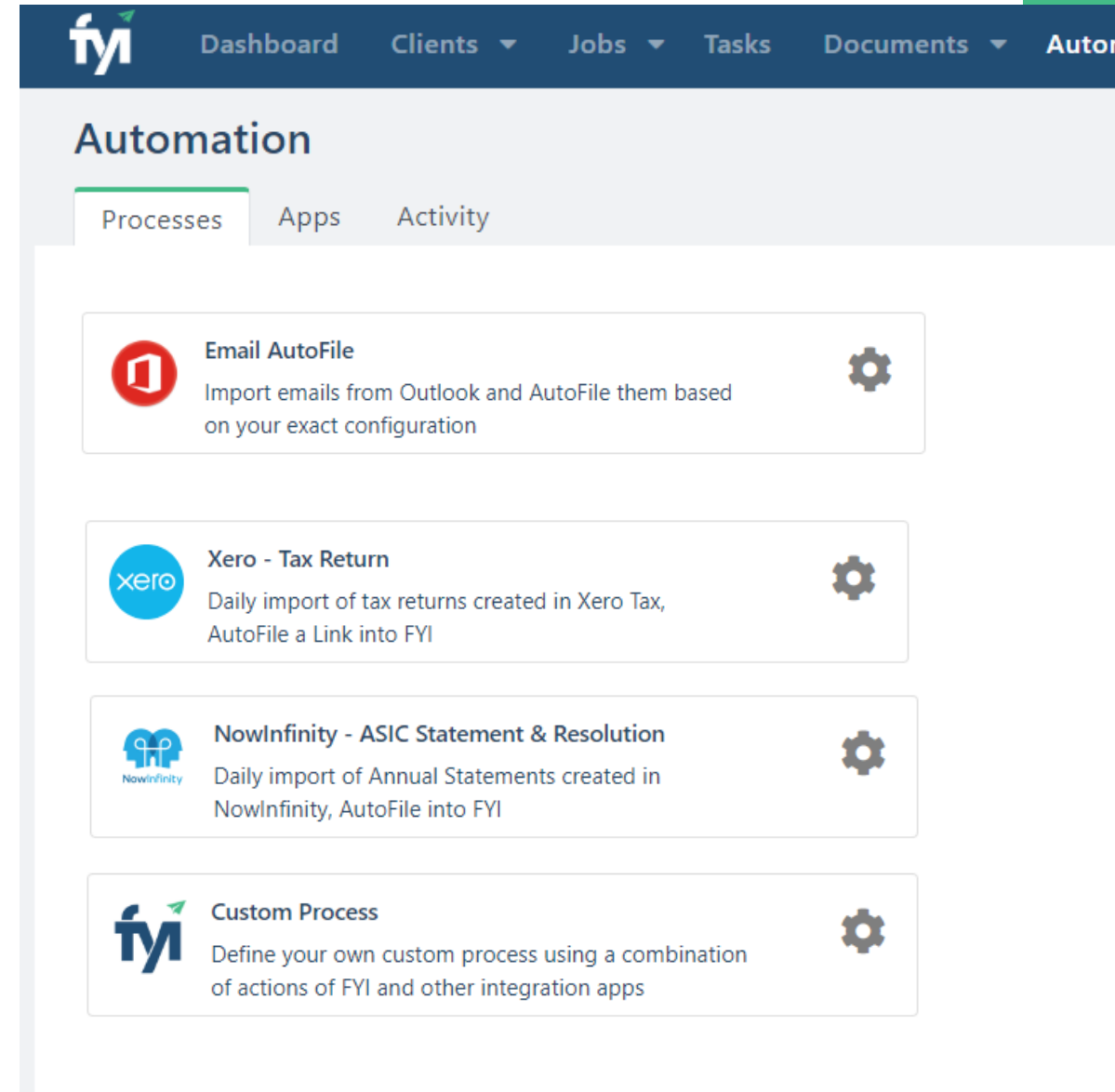
- **Background Services**

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:

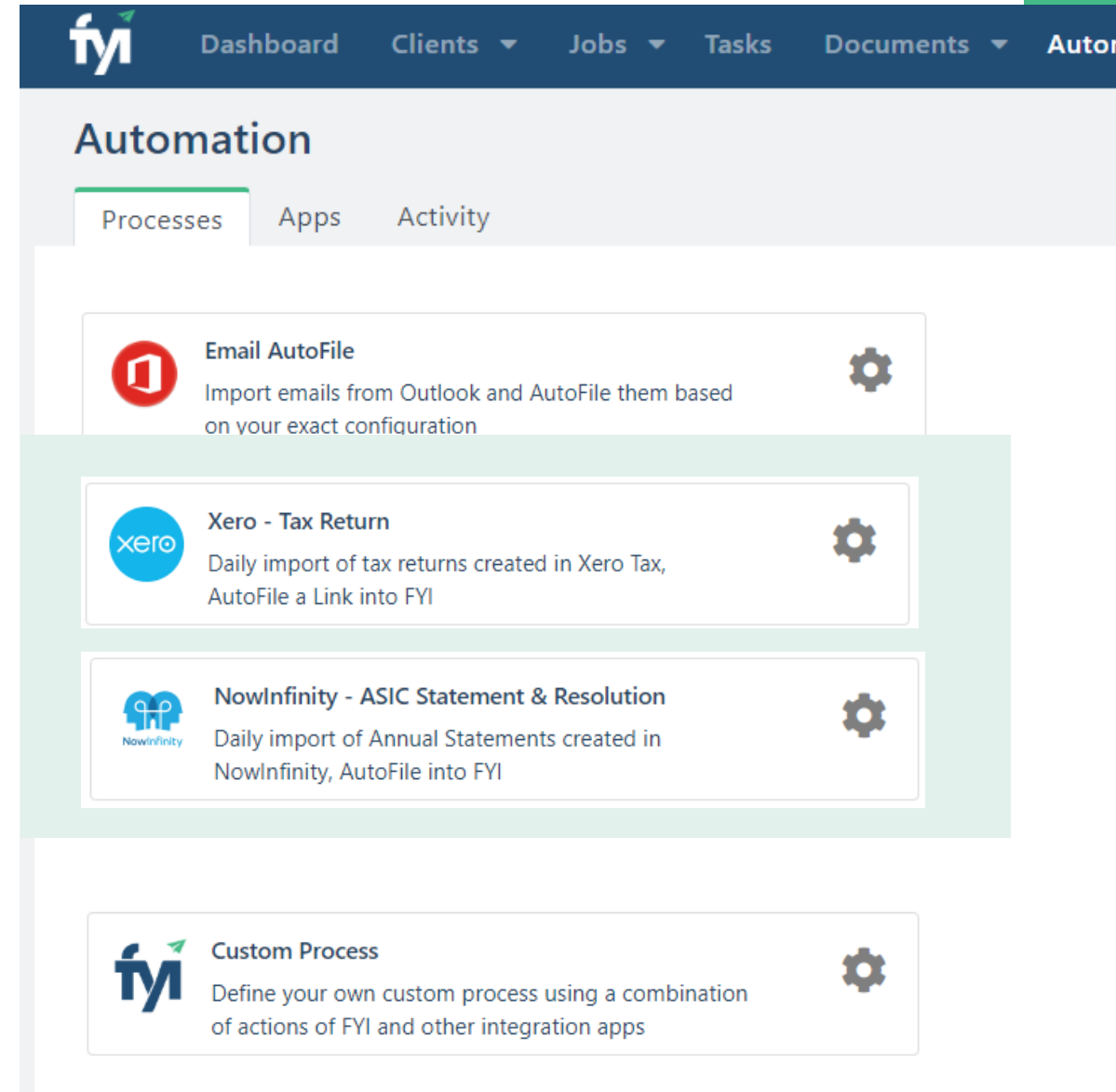
- **Default**

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.

**Automation**

Processes Apps Activity

-  **ASIC Statement & Resolution – Import & AutoFile**  
Daily import of Completed Document created in BGL, AutoFile into FYI
-  **NowInfinity - ASIC Statement & Resolution**  
Daily import of Annual Statements created in NowInfinity, AutoFile into FYI
-  **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**

The screenshot displays the FYI Automation interface. The top navigation bar includes 'Dashboard', 'Clients', 'Jobs', 'Tasks', 'Documents', and 'Automation'. The 'Automation' section is active, showing 'Processes', 'Apps', and 'Activity' tabs. Below these, there's a search bar with 'Corporate Affairs' selected, a 'Recent' filter, and a search for 'ASIC'. A table lists the results, with one entry highlighted: 'ASIC\_invoice' for 'Innecity Electrical Pty Ltd' in 'Corporate Affairs' for the year '2019'.

The second screenshot shows the 'Corporate Affairs' section for the 'Marshall Group'. It includes a search bar and a table with columns: 'Client', 'Name', 'Year', 'Status', and 'Owing'. The table lists four entries:

Client	Name	Year	Status	Owing
Innecity Electrical Pty Ltd	Annual Statement for Innecity Electrical Pty Ltd	2020	Signed	0
Marshall Family Trust	Annual Statement for Marshall Family Trust	2020	Not Received	0
Marshall Superfund	Annual Statement for Marshall Superfund	2020	Not Received	0
Marshall, Leslie	Annual Statement for Marshall, Leslie	2021	Not Received	0



# 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**

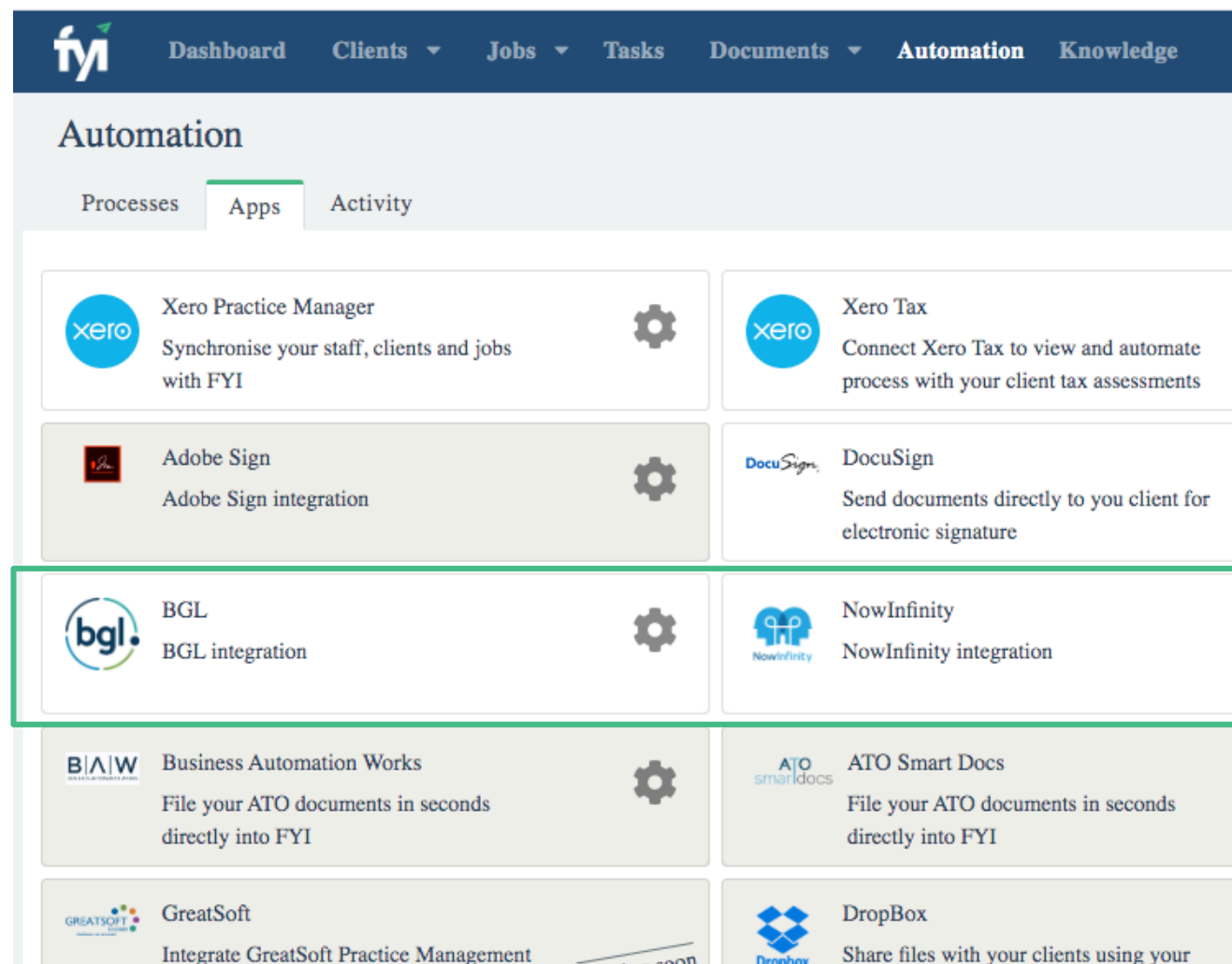
The screenshot displays the FYI Automation dashboard. At the top is a dark blue navigation bar with the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this is a light blue header for the 'Automation' section, with tabs for Processes, Apps, and Activity. The main area contains a grid of integration cards, each with an app logo, name, description, and a settings gear icon. A green border highlights the 'BGL' integration card. Other visible integrations include Xero Practice Manager, Xero Tax, Adobe Sign, DocuSign, NowInfinity, Business Automation Works, ATO Smart Docs, GreatSoft, and DropBox.

App	Description
Xero Practice Manager	Synchronise your staff, clients and jobs with FYI
Xero Tax	Connect Xero Tax to view and automate process with your client tax assessments
Adobe Sign	Adobe Sign integration
DocuSign	Send documents directly to you client for electronic signature
<b>BGL</b>	<b>BGL integration</b>
NowInfinity	NowInfinity integration
Business Automation Works	File your ATO documents in seconds directly into FYI
ATO Smart Docs	File your ATO documents in seconds directly into FYI
GreatSoft	Integrate GreatSoft Practice Management
DropBox	Share files with your clients using your



## STEP 1: CONNECTING EACH APP

- Go to Automation > Apps
- Select the  icon




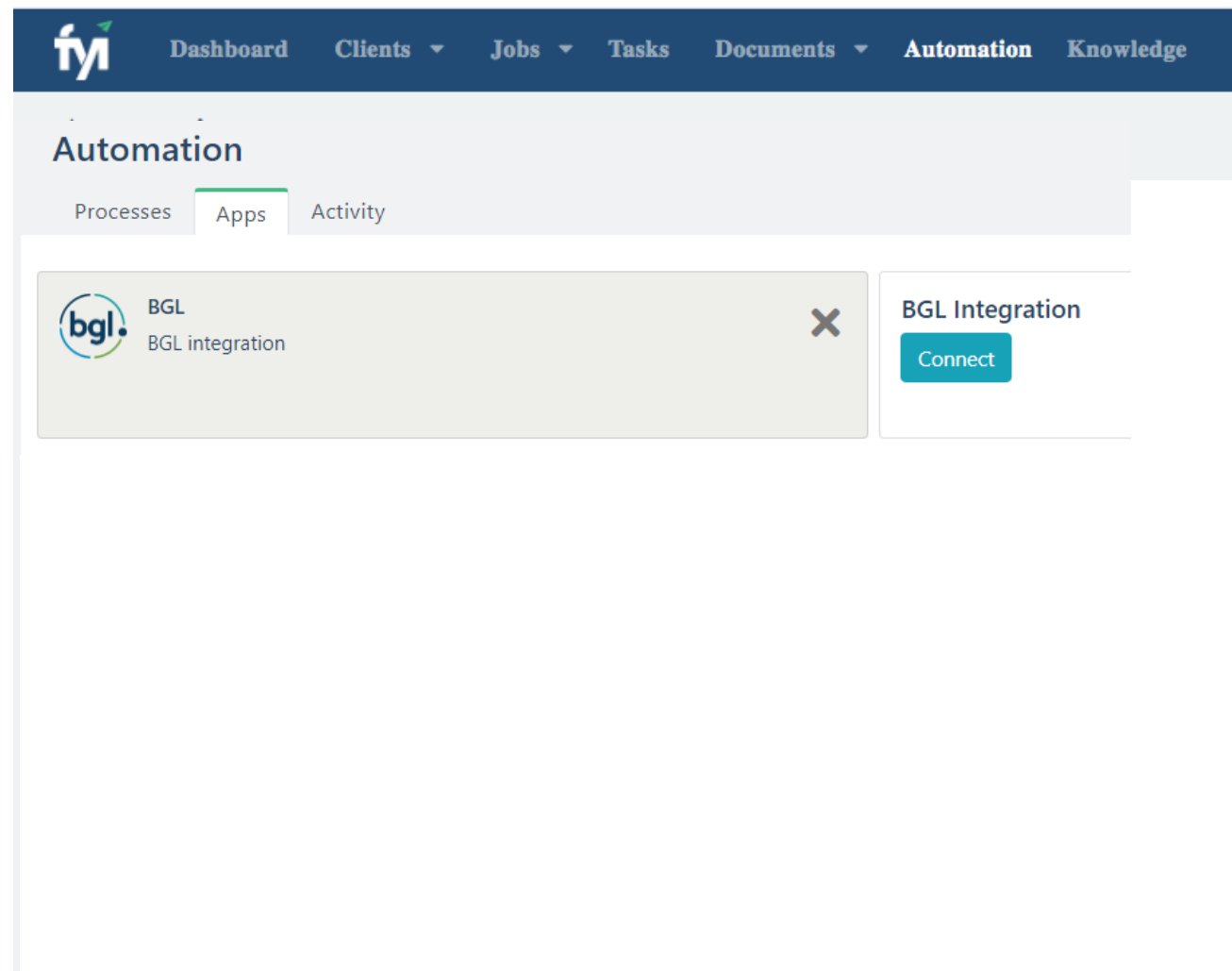
The screenshot displays the FYI Automation interface. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation (selected), and Knowledge. Below the navigation bar, the 'Automation' section is active, with tabs for Processes, Apps (selected), and Activity. The 'Apps' tab shows a grid of app integration cards. The 'BGL' card is highlighted with a green border. Each card contains the app's logo, name, description, and a gear icon for settings.

App	Description	Settings Icon
Xero Practice Manager	Synchronise your staff, clients and jobs with FYI	⚙️
Xero Tax	Connect Xero Tax to view and automate process with your client tax assessments	⚙️
Adobe Sign	Adobe Sign integration	⚙️
DocuSign	DocuSign Send documents directly to you client for electronic signature	⚙️
BGL	BGL integration	⚙️
NowInfinity	NowInfinity integration	⚙️
Business Automation Works (BAW)	File your ATO documents in seconds directly into FYI	⚙️
ATO Smart Docs	File your ATO documents in seconds directly into FYI	⚙️
GreatSoft	Integrate GreatSoft Practice Management	⚙️
DropBox	Share files with your clients using your	⚙️




## STEP 1: CONNECTING EACH APP

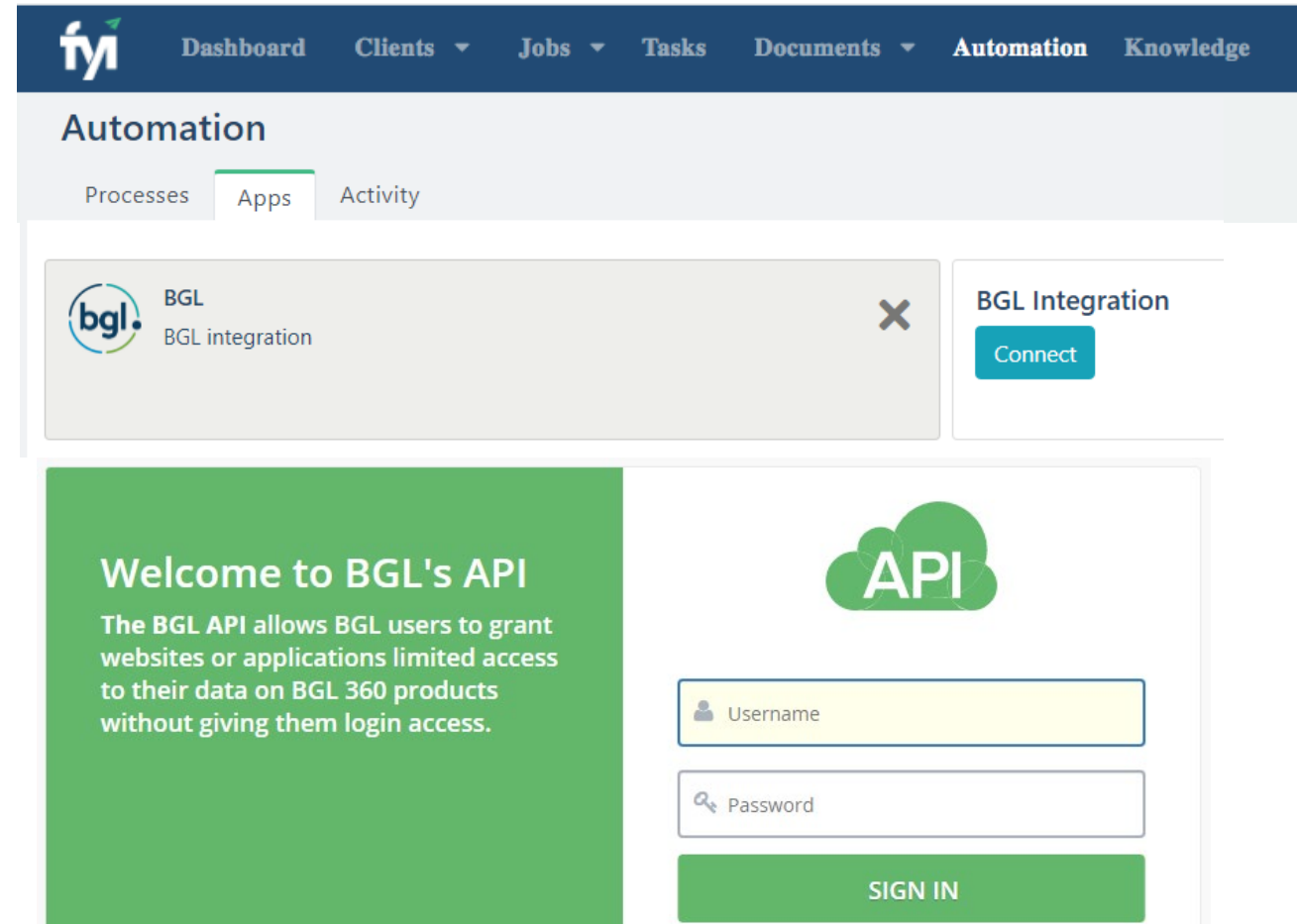
- Go to Automation > Apps
- Select the  icon
- Select **Connect**





## STEP 1: CONNECTING EACH APP

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





The screenshot shows the fyi web application interface. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. The 'Automation' section is active, with sub-tabs for Processes, Apps, and Activity. Under the 'Apps' tab, there is a card for 'BGL BGL integration' with a gear icon and a close button. To the right of this card is a 'BGL Integration' panel with a 'Connect' button. Below these elements is a large green box with the text 'Welcome to BGL's API' and a description of the API. To the right of the green box is a login form with fields for 'Username' and 'Password', and a 'SIGN IN' button.

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

### Automation


Processes Apps Activity

 **BGL**  
BGL integration 

**BGL Integration**  
[Connect](#)


### Welcome to BGL's API

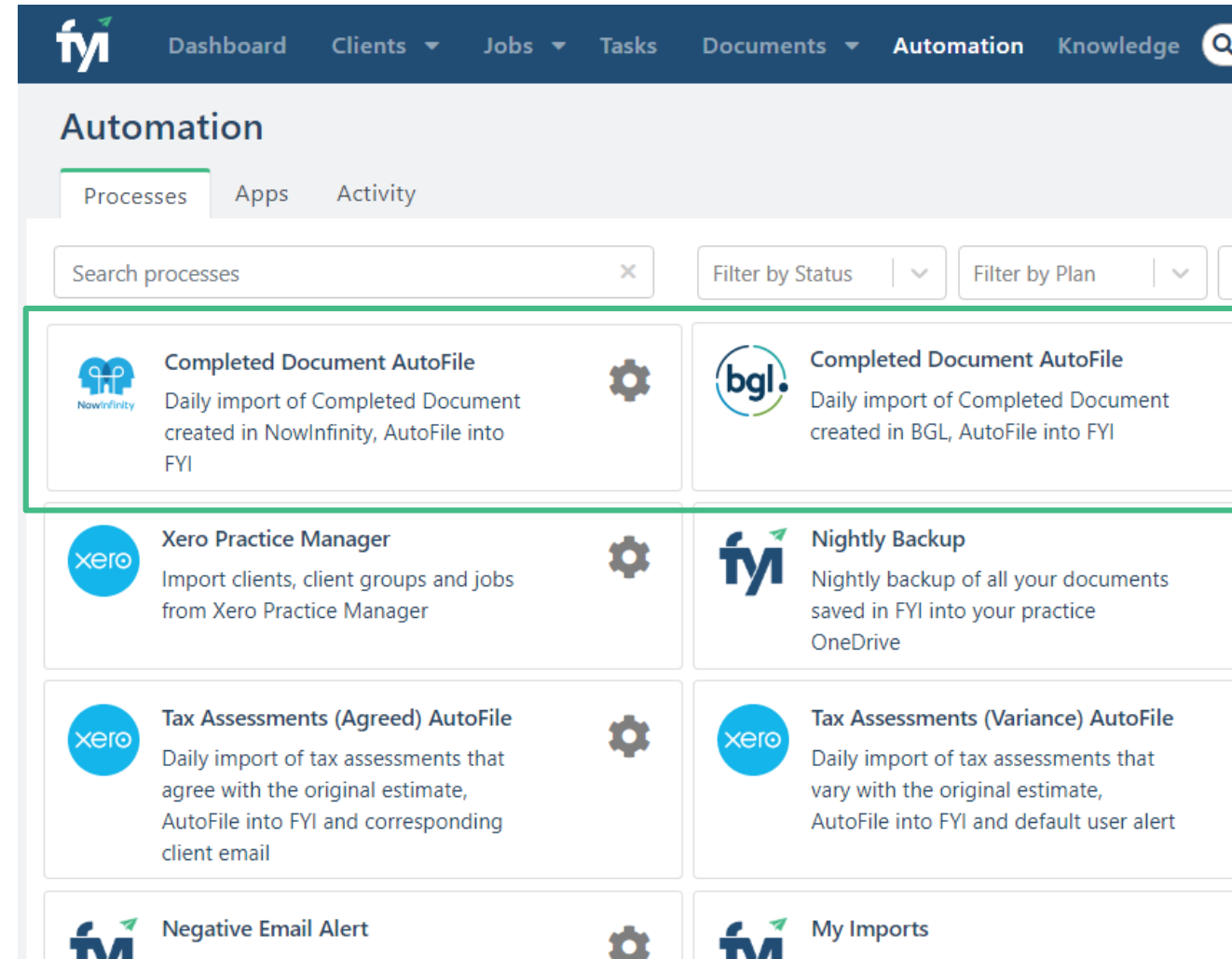
The BGL API allows BGL users to grant websites or applications limited access to their data on BGL 360 products without giving them login access.

  
  
  
[SIGN IN](#)



## STEP 2: SETTING UP THE AUTOMATION

- Go to Automation > Processes
- Select the  icon



The screenshot displays the FYI Automation interface. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. The 'Automation' section is active, showing tabs for Processes, Apps, and Activity. A search bar and filters for Status and Plan are present. The main content area lists several automation processes:

Icon	Process Name	Description	Settings Icon
NowInfinity	Completed Document AutoFile	Daily import of Completed Document created in NowInfinity, AutoFile into FYI	
BGL	Completed Document AutoFile	Daily import of Completed Document created in BGL, AutoFile into FYI	
Xero	Xero Practice Manager	Import clients, client groups and jobs from Xero Practice Manager	
FYI	Nightly Backup	Nightly backup of all your documents saved in FYI into your practice OneDrive	
Xero	Tax Assessments (Agreed) AutoFile	Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email	
Xero	Tax Assessments (Variance) AutoFile	Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert	
FYI	Negative Email Alert		
FYI	My Imports		



## STEP 2: SETTING UP THE AUTOMATION

These come pre-packaged with FYI



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

Dashboard

Clients ▾

Jobs ▾

Tasks

Documents ▾

Automation

Knowledge

Search

Automation

ProcessesAppsActivity

NameCompleted Document AutoFile

TriggerDocument created ▾

FilterDocument Source is "BGL Document"







StatusActive ▾

OwnerNo owner selected ▾

Last RunNot yet run

Reset

Add Step

Step	Application	Action	
1	BGL	Import BGL Document <ul style="list-style-type: none"><li>The document will be filed as "" in the cabinet</li></ul>	  
2	FYI	Alter Document <ul style="list-style-type: none"><li>The document will be filed as "«OriginalFileName»" in the cabinet</li><li>A comment will be created</li></ul>	  





## 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

**Automation**

Processes Apps Activity

Name Annual Statement AutoFile Test Run

Trigger On Demand

Filter Document Source is "Now Infinity Statement"

Status Active

Owner Roger Taylor

Start From 15/03/2020

Last Run Not yet run

Reset Ad

Step	Application	Action
1	NowInfinity	Import NowInfinity Statement <ul style="list-style-type: none"><li>The document will be filed as "«OriginalFileName»" in the cabinet</li><li>A comment will be created</li></ul>



## 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



fyi

DashboardClientsJobsTasksDocumentsAutomationKnowledge

Search groups, clients or j

Automation

ProcessesAppsActivity

NameAnnual Statement AutoFile

TriggerOn Demand

FilterDocument Source is "Now Infinity Statement"

StatusActive

OwnerRoger Taylor

Start From15/03/2020

Last RunNot yet run

TestRunBack


ResetAdd Step

Step	Application	Action	
1	NowInfinity	Import NowInfinity Statement <ul style="list-style-type: none"><li>The document will be filed as "«OriginalFileName»" in the cabinet</li><li>A comment will be created</li></ul>	



## 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 1

 Import NowInfinity Statement

Filing

Name

«OriginalFileName»

AutoFile

DISABLED

Cabinet

Corporate Affairs

Job

No client selected

Year

Merge Field ReportYear

Filing

Filed

Show Closed Jobs

OFF

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

Step 1

 Import NowInfinity Statement

Filing

Name

«OriginalFileName»

AutoFile

DISABLED

Cabinet

Corporate Affairs

Job

No client selected

Show Closed Jobs

OFF

Year

Merge Field ReportYear

Filing

Filed

Workflow

Task

Comment



# AUTOMATIC TAX RETURN FILING

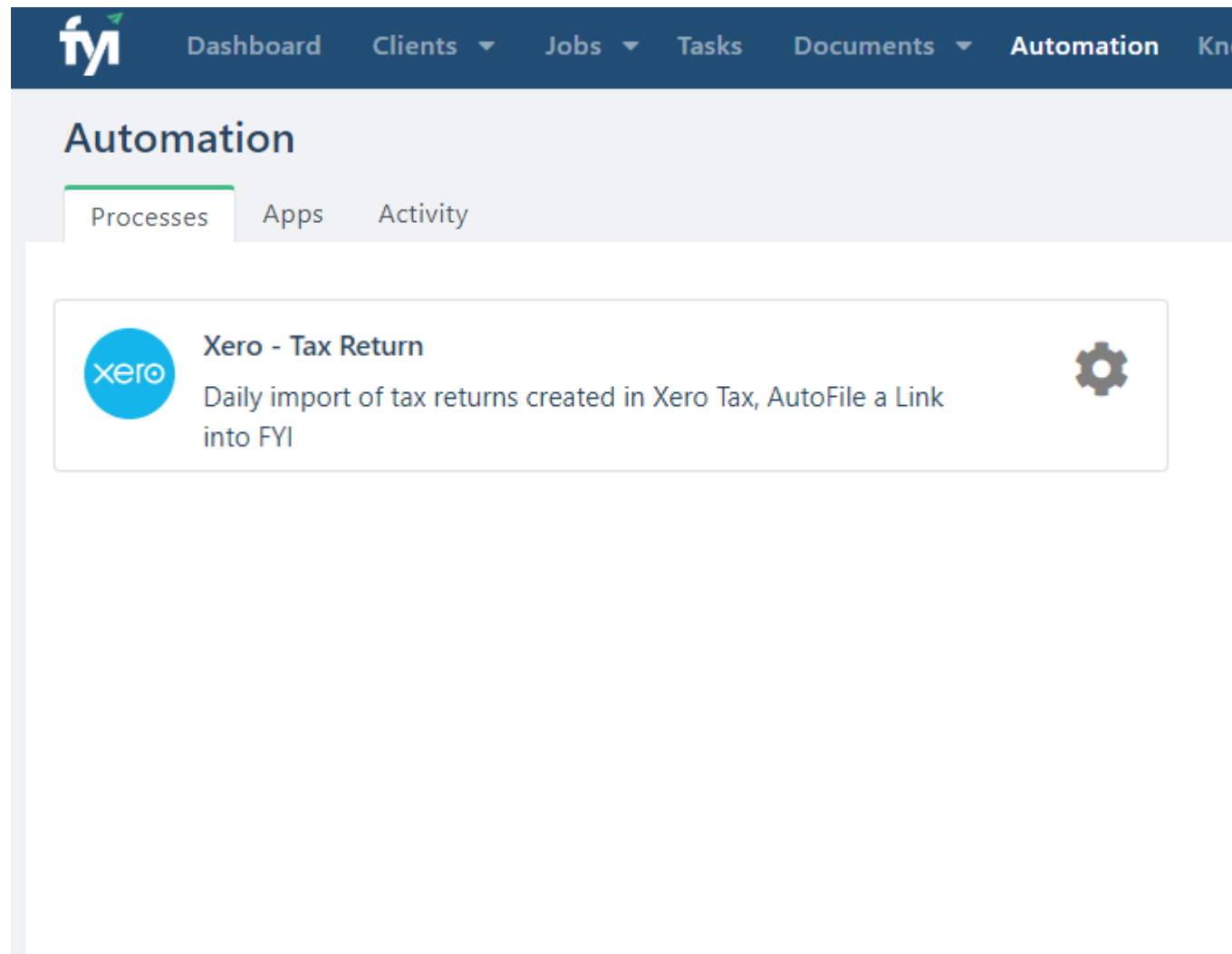
- Xero Tax





## 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**

The screenshot displays the FYI Automation interface. At the top, a dark blue navigation bar includes the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this, the 'Automation' section is active, with tabs for Processes, Apps, and Activity. A card for 'Xero - Tax Return' is shown, featuring the Xero logo and the description: 'Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI'. A gear icon for settings is in the top right of the card.

Below the card, a green-bordered box highlights a search and filter section. It includes a 'Search taxes' input field and three filter buttons: 'Return Type', 'Year', and 'Status'. Below these filters is a table of tax returns:

Return Type	Year	Status	
Income Tax Return	2019	Draft	
Trust Return	2019	Filed	 <b>Open Tax</b>

Below the table, another green-bordered box highlights a list of tax returns. It includes a table with columns for Type, Name, Modified by, and Modified on. The first row shows a 'Company Return' for the period '01/07/2018 - 30/06/2019'. A link icon and a button labeled 'Open Company Return | 01/07/2018 - 30/06/2019' are next to the entry.



## STEP 1: CONNECTING XERO TAX

- Enable Xero Tax integration within Apps

The screenshot displays the FYI software interface, specifically the 'Automation' section under the 'Apps' tab. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. The 'Automation' section is divided into three tabs: Processes, Apps, and Activity. The 'Apps' tab is active, showing a grid of integration options. The 'Xero Tax' option is highlighted with a green border. It features the Xero logo and the text: 'Xero Tax', 'Connect Xero Tax to view and automate process with your client tax assessments', and a gear icon for settings. Other visible options include Xero Practice Manager, Adobe Sign, BGL, Business Automation Works, GreatSoft, DocuSign, NowInfinity, ATO Smart Docs, and DropBox.

App Icon	App Name	Description	Settings Icon
	Xero Practice Manager	Synchronise your staff, clients and jobs with FYI	⚙️
	Xero Tax	Connect Xero Tax to view and automate process with your client tax assessments	⚙️
	Adobe Sign	Adobe Sign integration	⚙️
	DocuSign	Send documents directly to you client for electronic signature	⚙️
	BGL	BGL integration	⚙️
	NowInfinity	NowInfinity integration	⚙️
	Business Automation Works	File your ATO documents in seconds directly into FYI	⚙️
	ATO Smart Docs	File your ATO documents in seconds directly into FYI	⚙️
	GreatSoft	Integrate GreatSoft Practice Management software, synchronizing clients, task and groups	⚙️
	DropBox	Share files with your clients using your practice Dropbox account	⚙️






## STEP 2: SETTING UP THE AUTOMATION

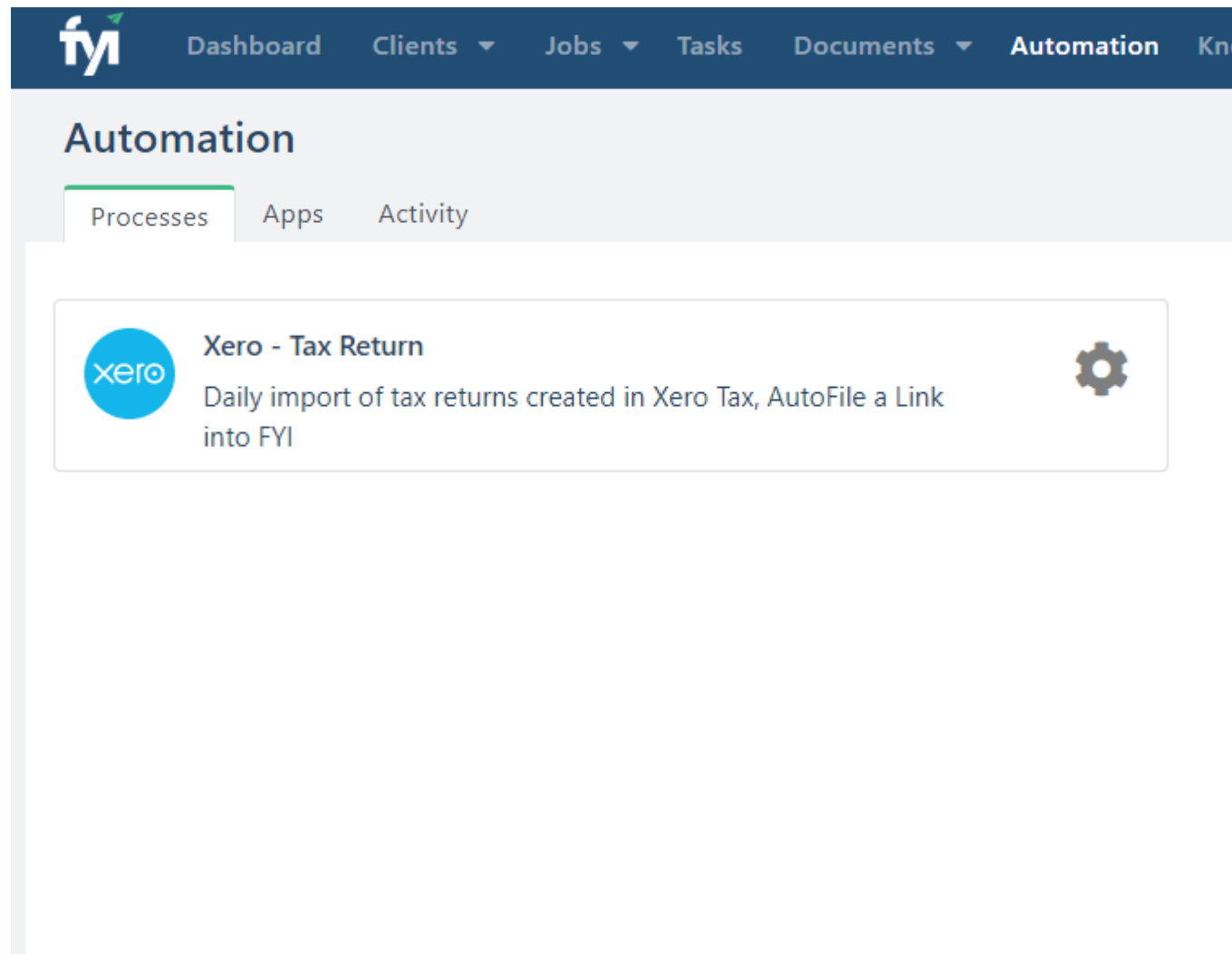
This automation comes pre-packaged with FYI.

Turning it on is simple:

- Go to Automation > Processes
- Select the  icon




[Click here](#) for more information on  
**Tax Return AutoFile**



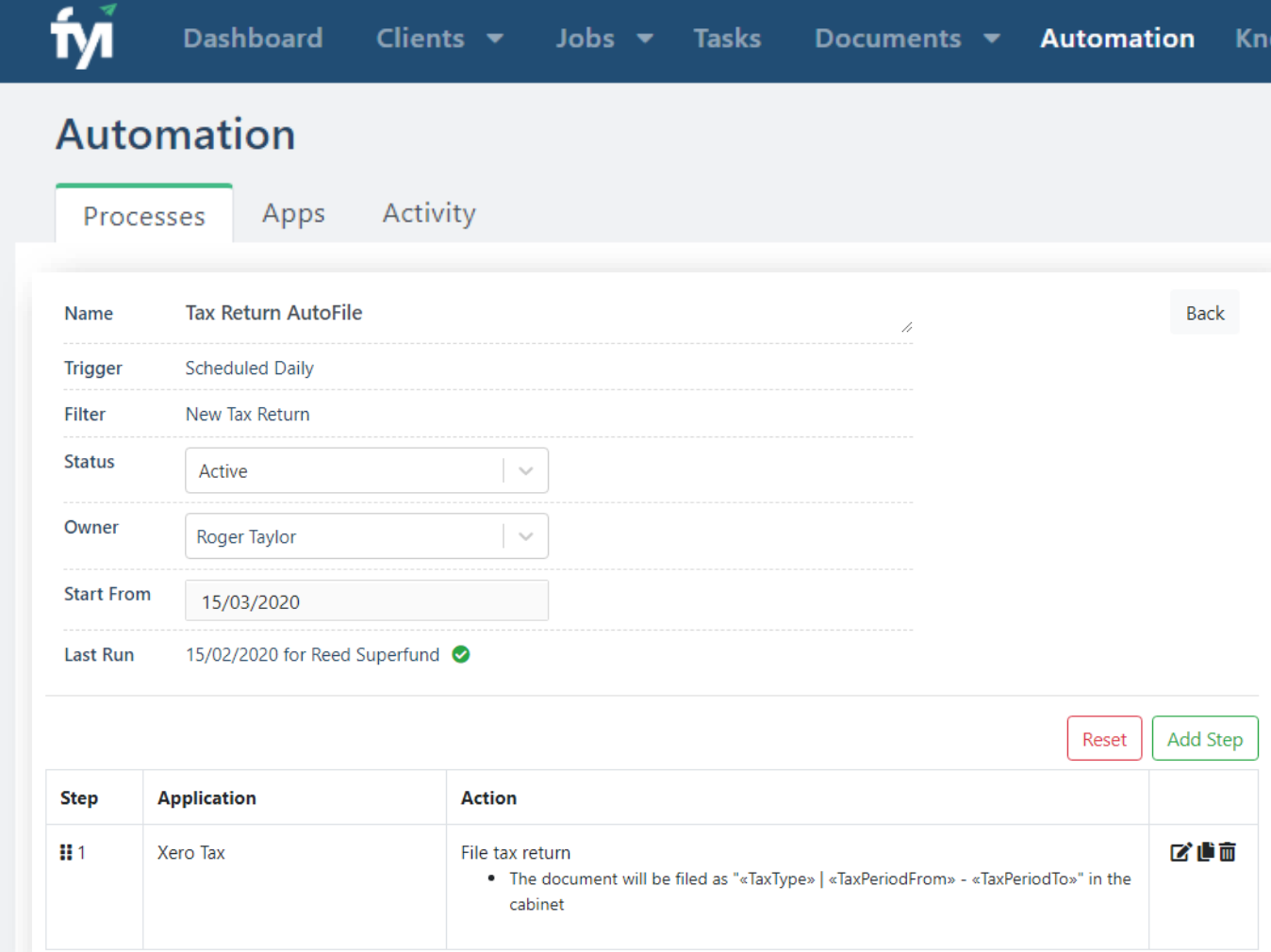


## STEP 2: SETTING UP THE AUTOMATION




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**




The screenshot shows the 'Automation' section of the fyi system. The top navigation bar includes 'Dashboard', 'Clients', 'Jobs', 'Tasks', 'Documents', and 'Automation'. The 'Automation' page has three tabs: 'Processes', 'Apps', and 'Activity'. The 'Processes' tab is active, showing a form for 'Tax Return AutoFile'. The form fields are: Name (Tax Return AutoFile), Trigger (Scheduled Daily), Filter (New Tax Return), Status (Active), Owner (Roger Taylor), Start From (15/03/2020), and Last Run (15/02/2020 for Reed Superfund). A 'Back' button is in the top right. At the bottom right of the form are 'Reset' and 'Add Step' buttons. Below the form is a table with one step:

Step	Application	Action	
1	Xero Tax	File tax return <ul style="list-style-type: none"><li>The document will be filed as "«TaxType»   «TaxPeriodFrom» - «TaxPeriodTo»" in the cabinet</li></ul>	  

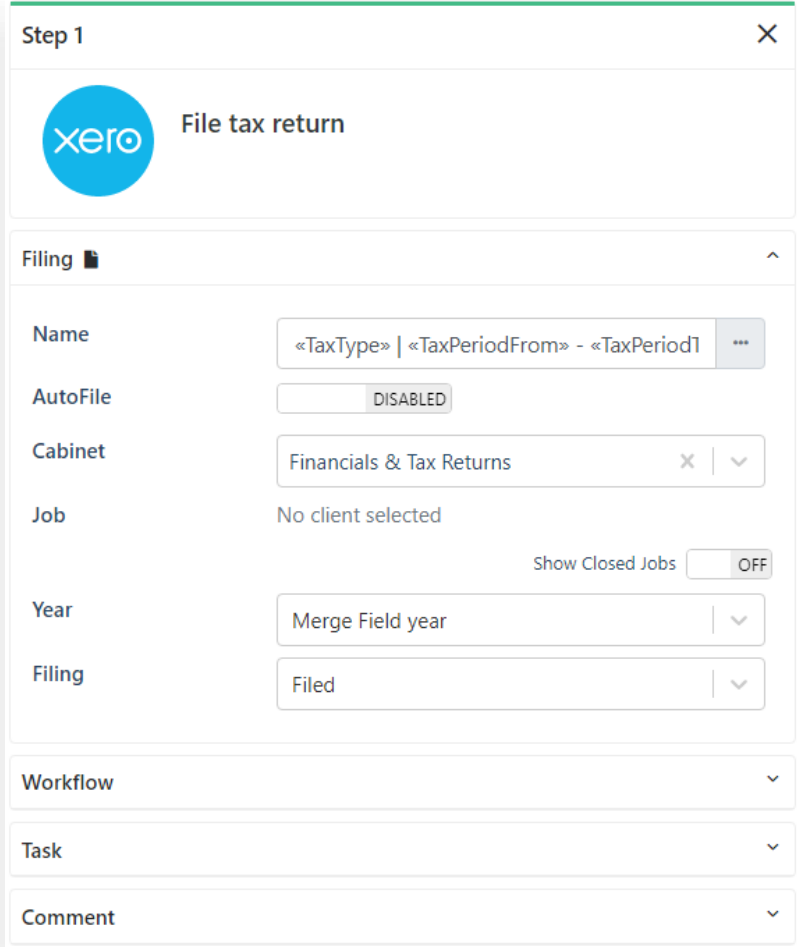


## STEP 2: SETTING UP THE AUTOMATION

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**



Step 1

xero File tax return

Filing

Name «TaxType» | «TaxPeriodFrom» - «TaxPeriodTo»

AutoFile DISABLED

Cabinet Financials & Tax Returns

Job No client selected

Show Closed Jobs OFF

Year Merge Field year

Filing Filed

Workflow

Task

Comment



## LIVE DEMO

- Automatic corporate affairs filing
- Automatic tax return filing

fyi Dashboard Clients Jobs Tasks Documents Automation Knowledge

Search groups, clients or jobs

Group Marshall Group Client Marshall, Frank Job 2019 Compliance Marshall, Frank

Summary Documents Tasks XPM Milestones XPM Tasks Processes Comments Activity

All cabinets No view selected Search documents Hide Threads ON Mine OFF Search Email Cont

Type	Name	Client	Modified by	Modified on	Year
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	06/12/2019 08:35	2019
<input type="checkbox"/>	ATO Overdue Payment Notice	No Client	Roger Taylor	06/12/2019 05:16	2020
<input type="checkbox"/>	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:35	2020
<input type="checkbox"/>	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:26	2020
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 13:34	2019
<input type="checkbox"/>	Checklist for Quarterly Bookkeeping	Marshall, Frank	Roger Taylor	05/12/2019 10:20	2019
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 09:56	2019
<input type="checkbox"/>	End of year questionnaire	No Client	Roger Taylor	05/12/2019 09:51	2019
<input type="checkbox"/>	[DEMO USE ONLY] Ethical Letter - Letterhead	Marshall, Frank	Roger Taylor	05/12/2019 09:45	
<input type="checkbox"/>	sdfsd	Marshall, Frank	Roger Taylor	05/12/2019 09:40	2019
<input type="checkbox"/>	Tax Planning	Marshall, Frank	Roger Taylor	05/12/2019 09:36	2019
<input type="checkbox"/>	test	Marshall, Frank	Roger Taylor	05/12/2019 09:20	2019
<input type="checkbox"/>	Engagement Letter	Marshall, Frank	Roger Taylor	05/12/2019 05:12	2018
<input type="checkbox"/>	Questions Tax Return	Marshall, Frank	Roger Taylor	04/12/2019 13:30	2020
<input type="checkbox"/>	Marshall Group Financial Results	Marshall, Frank	Roger Taylor	03/12/2019 10:13	2019
<input type="checkbox"/>	Help with new business...	Marshall, Frank	Roger Taylor	03/12/2019 09:26	2019
<input type="checkbox"/>	pdf	Marshall, Frank	Roger Taylor	03/12/2019 09:18	2019
<input type="checkbox"/>	Additional expenditure	Marshall, Frank	Liz Hurst	02/12/2019 19:53	2019
<input type="checkbox"/>	Year end financials	No Client	Roger Taylor	02/12/2019 09:45	2019

Draft Draft Draft Draft Draft Draft Draft Draft Draft Draft



## EXISTING SETUPS

Want to start over?  
Made a mistake?

Reset

### Reset Process

Are you sure you want to reset this process back to its initial configuration?

Yes

No



Dashboard

Clients ▾

Jobs ▾

Tasks

Documents ▾

Automation

Knowledge

Search groups, clients or j

### Automation

Processes

Apps

Activity

Name Annual Statement AutoFile

Test

Run

Back

Trigger On Demand

Filter Document Source is "Now Infinity Statement"

Status Active




Owner Roger Taylor

Start From 15/03/2020

Last Run Not yet run

Reset

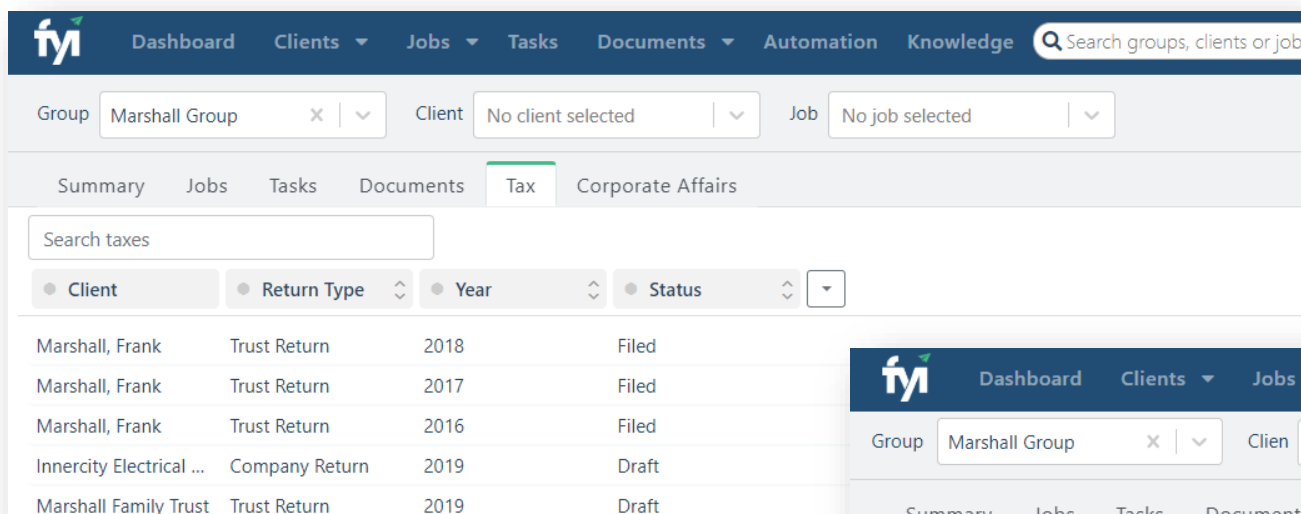
Add Step

Step	Application	Action	
1	NowInfinity	Import NowInfinity Statement <ul style="list-style-type: none"><li>The document will be filed as "«OriginalFileName»" in the cabinet</li><li>A comment will be created</li></ul>	  



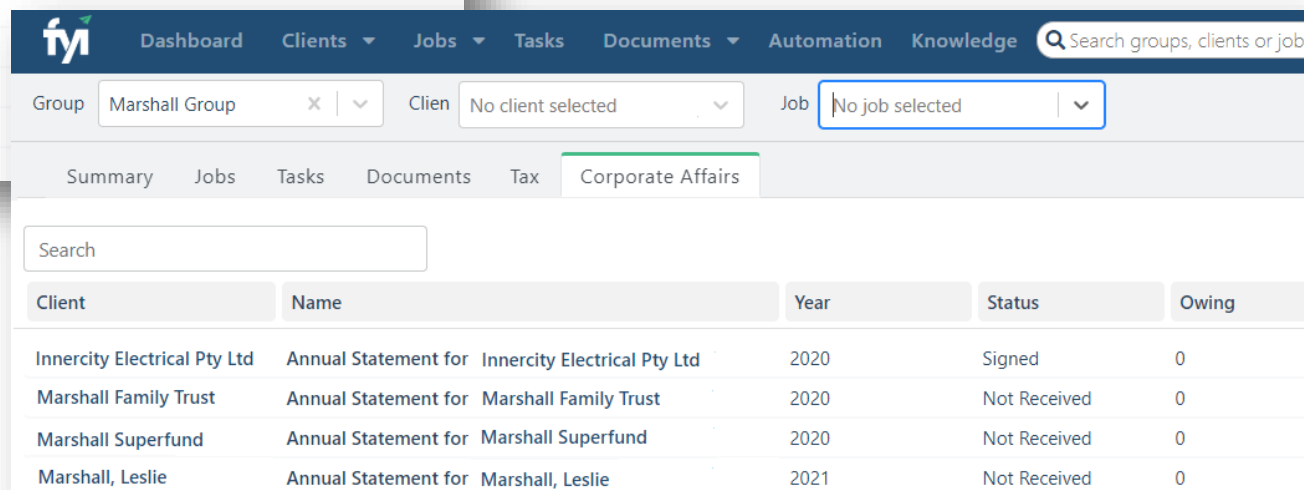
# TAX AND CORPORATE AFFAIRS

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



The screenshot shows the FYI web application interface with the 'Tax' tab selected. The top navigation bar includes 'Dashboard', 'Clients', 'Jobs', 'Tasks', 'Documents', 'Automation', and 'Knowledge', along with a search bar. Below the navigation bar, there are filters for 'Group' (Marshall Group), 'Client' (No client selected), and 'Job' (No job selected). The 'Tax' tab is active, showing a 'Search taxes' input field and filter buttons for 'Client', 'Return Type', 'Year', and 'Status'. A table displays the following data:

Client	Return Type	Year	Status
Marshall, Frank	Trust Return	2018	Filed
Marshall, Frank	Trust Return	2017	Filed
Marshall, Frank	Trust Return	2016	Filed
Innercity Electrical ...	Company Return	2019	Draft
Marshall Family Trust	Trust Return	2019	Draft



The screenshot shows the FYI web application interface with the 'Corporate Affairs' tab selected. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there are filters for 'Group' (Marshall Group), 'Client' (No client selected), and 'Job' (No job selected). The 'Corporate Affairs' tab is active, showing a 'Search' input field and a table with the following data:

Client	Name	Year	Status	Owing
Innercity Electrical Pty Ltd	Annual Statement for Innercity Electrical Pty Ltd	2020	Signed	0
Marshall Family Trust	Annual Statement for Marshall Family Trust	2020	Not Received	0
Marshall Superfund	Annual Statement for Marshall Superfund	2020	Not Received	0
Marshall, Leslie	Annual Statement for Marshall, Leslie	2021	Not Received	0



## 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.

DashboardClients ▾Jobs ▾TasksDocuments ▾AutomationKnowl

Automation

ProcessesAppsActivity

NameTax Assessments (Agreed) AutoFile

TriggerScheduled Daily

FilterAssessment varies from estimate

Status

Active

Step	Application	Action
1	Xero Tax	Import & file assessment <ul style="list-style-type: none"><li>• Document will be custom filed</li></ul>
2	FYI	Create Email <ul style="list-style-type: none"><li>• Document will be custom filed</li><li>• A task will be created with a subject <b>Notice of assessment r</b></li></ul>



# 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 assessment**  
Income Tax Assessment

Description
<b>Initial estimate</b>
Your estimated taxable income was:
Your estimated tax (payable)/refund
<b>Actual tax outcome</b>
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

The screenshot shows the FYI software interface. At the top is a dark blue navigation bar with the FYI logo and links for Dashboard, Clients, Jobs, Tasks, and Documents. Below this is a filter bar with 'Group' set to 'Marshall Group' and 'Client' set to 'Marshall, Frank'. A tabbed interface shows 'Summary', 'Detail' (selected), 'Tax', 'Jobs', 'Tasks', and 'Documents'. The 'Settings' section is visible, containing several configuration options:

Cabinet	Correspondence	x   v
Job	2019 Compliance	x   v
	Show Closed Jobs	OFF
Year	2019	v
Send attachments	Postal Service	x   v



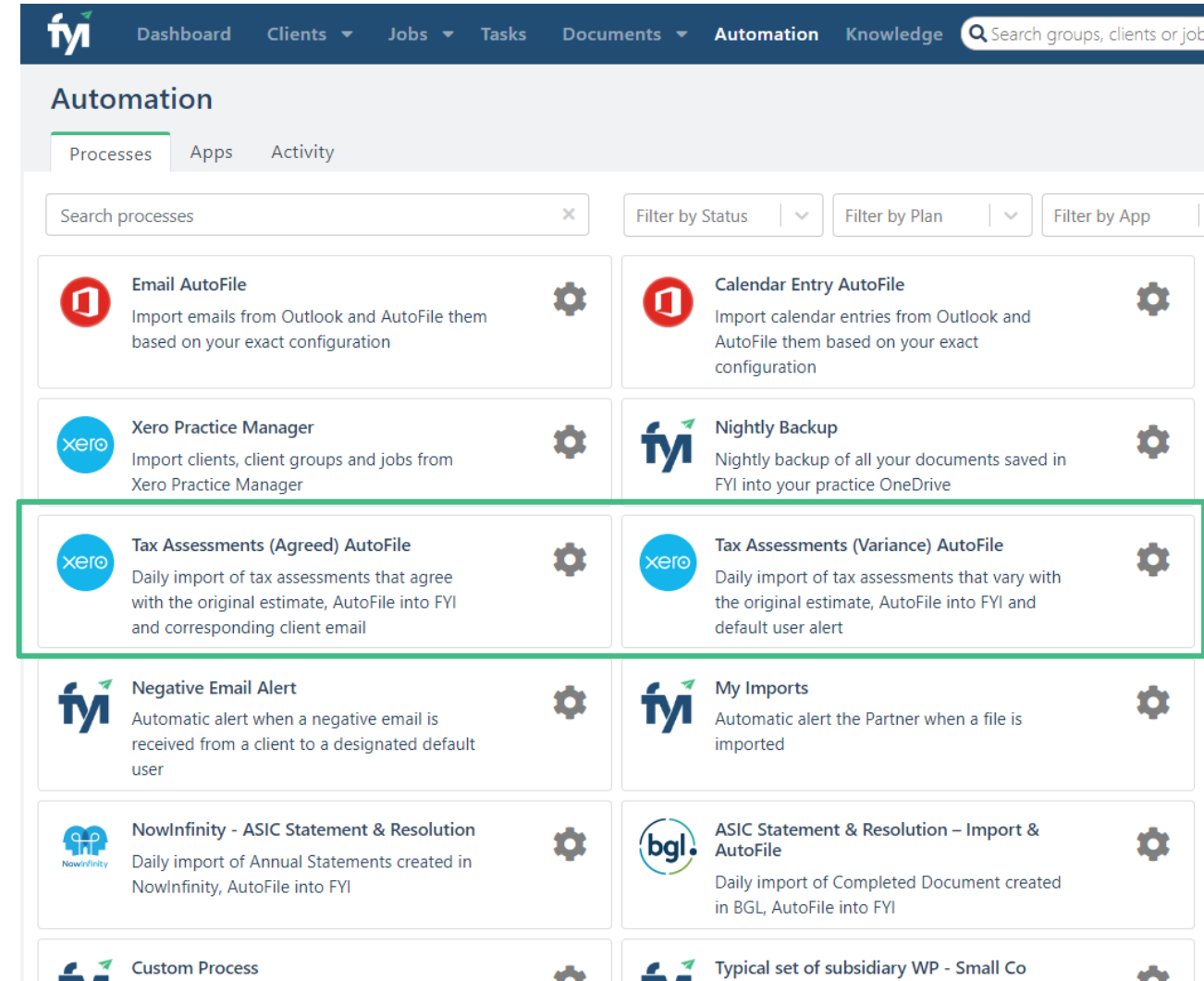
# GETTING STARTED

## 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**




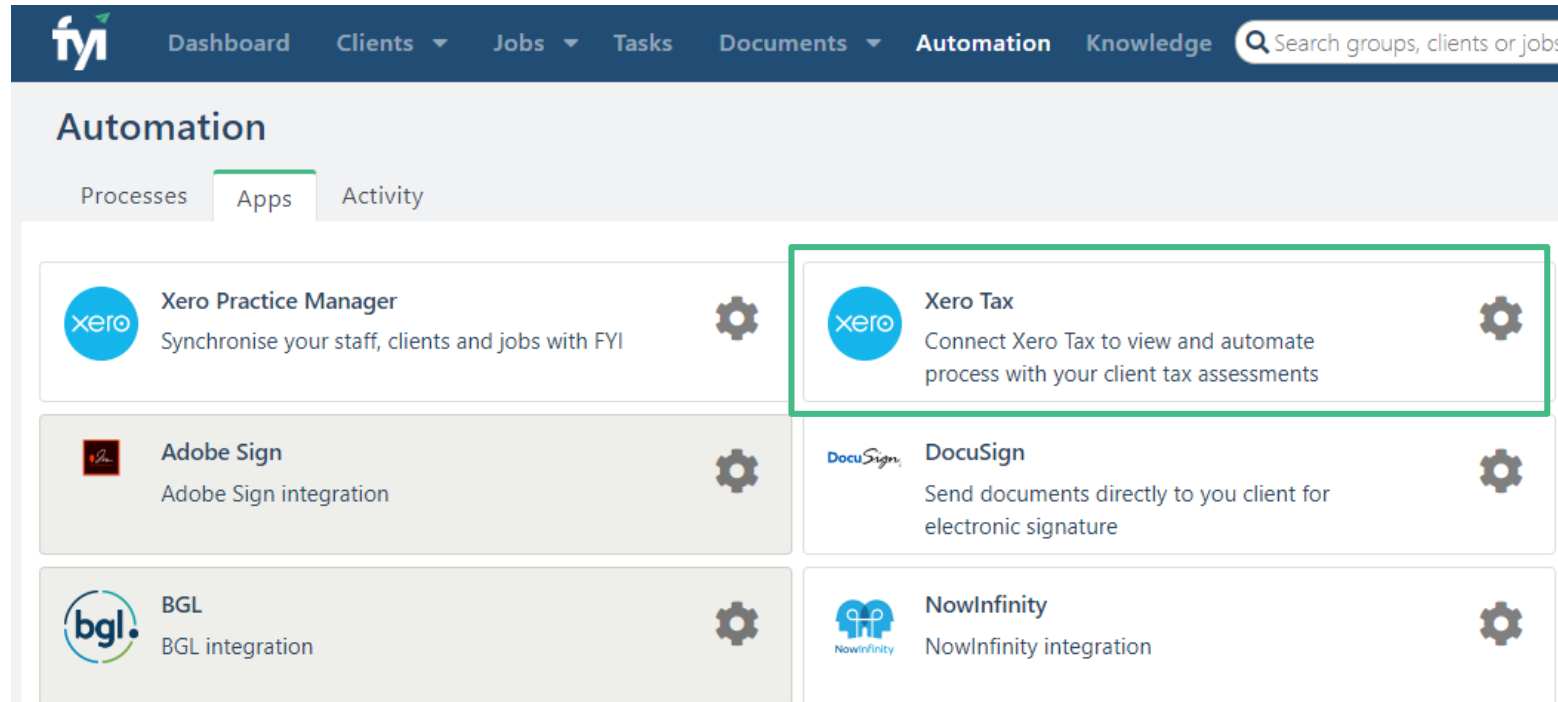
The screenshot shows the FYI Automation dashboard. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge, along with a search bar. The 'Automation' section is active, showing a list of processes. The 'Processes' tab is selected, displaying a grid of automation tasks. Two tasks, 'Tax Assessments (Agreed) AutoFile' and 'Tax Assessments (Variance) AutoFile', are highlighted with a green border. Each task card includes an icon, a title, a description, and a settings gear icon.

Search processes	Filter by Status	Filter by Plan	Filter by App
<b>Email AutoFile</b> Import emails from Outlook and AutoFile them based on your exact configuration			
<b>Calendar Entry AutoFile</b> Import calendar entries from Outlook and AutoFile them based on your exact configuration			
<b>Xero Practice Manager</b> Import clients, client groups and jobs from Xero Practice Manager			
<b>Nightly Backup</b> Nightly backup of all your documents saved in FYI into your practice OneDrive			
<b>Tax Assessments (Agreed) AutoFile</b> Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email			
<b>Tax Assessments (Variance) AutoFile</b> Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert			
<b>Negative Email Alert</b> Automatic alert when a negative email is received from a client to a designated default user			
<b>My Imports</b> Automatic alert the Partner when a file is imported			
<b>NowInfinity - ASIC Statement &amp; Resolution</b> Daily import of Annual Statements created in NowInfinity, AutoFile into FYI			
<b>ASIC Statement &amp; Resolution – Import &amp; AutoFile</b> Daily import of Completed Document created in BGL, AutoFile into FYI			
<b>Custom Process</b>			
<b>Typical set of subsidiary WP - Small Co</b>			









## STEP 1: CONNECTING EACH APP

- Go to Automation > Apps
- Select the  icon




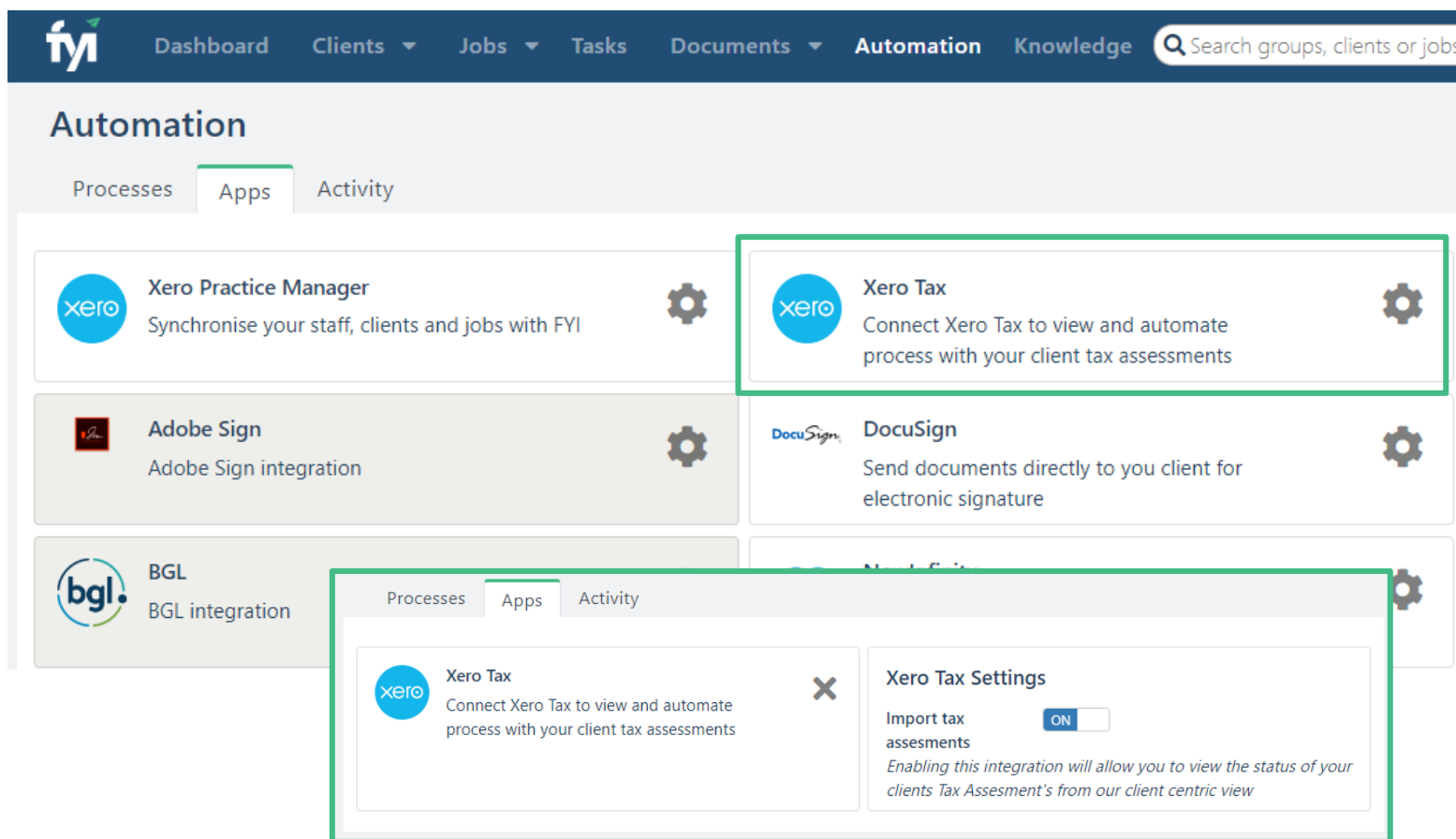
The screenshot shows the FYI web application interface. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge, along with a search bar. The 'Automation' section is active, and the 'Apps' tab is selected. A list of integrated applications is displayed, each with a logo, name, description, and a gear icon for configuration.

App	Description	Settings Icon
Xero Practice Manager	Synchronise your staff, clients and jobs with FYI	
Xero Tax	Connect Xero Tax to view and automate process with your client tax assessments	
Adobe Sign	Adobe Sign integration	
BGL	BGL integration	
DocuSign	Send documents directly to you client for electronic signature	
NowInfinity	NowInfinity integration	



## STEP 1: CONNECTING EACH APP

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



The screenshot displays the FYI web application interface. The top navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge, along with a search bar. The 'Automation' section is active, showing a list of integrated applications under the 'Apps' tab. The applications listed are Xero Practice Manager, Xero Tax, Adobe Sign, DocuSign, and BGL. Each application card includes a description and a gear icon for settings. The 'Xero Tax' card is highlighted with a green border. A modal window is open for the 'Xero Tax' settings, showing a toggle switch for 'Import tax assessments' which is currently turned 'ON'. The modal also includes a description of the integration's functionality.

**Automation**

Processes Apps Activity

- Xero Practice Manager**  
Synchronise your staff, clients and jobs with FYI
- Xero Tax**  
Connect Xero Tax to view and automate process with your client tax assessments
- Adobe Sign**  
Adobe Sign integration
- DocuSign**  
Send documents directly to you client for electronic signature
- BGL**  
BGL integration


**Xero Tax Settings**

Import tax assessments ☒

Enabling this integration will allow you to view the status of your clients Tax Assessment's from our client centric view

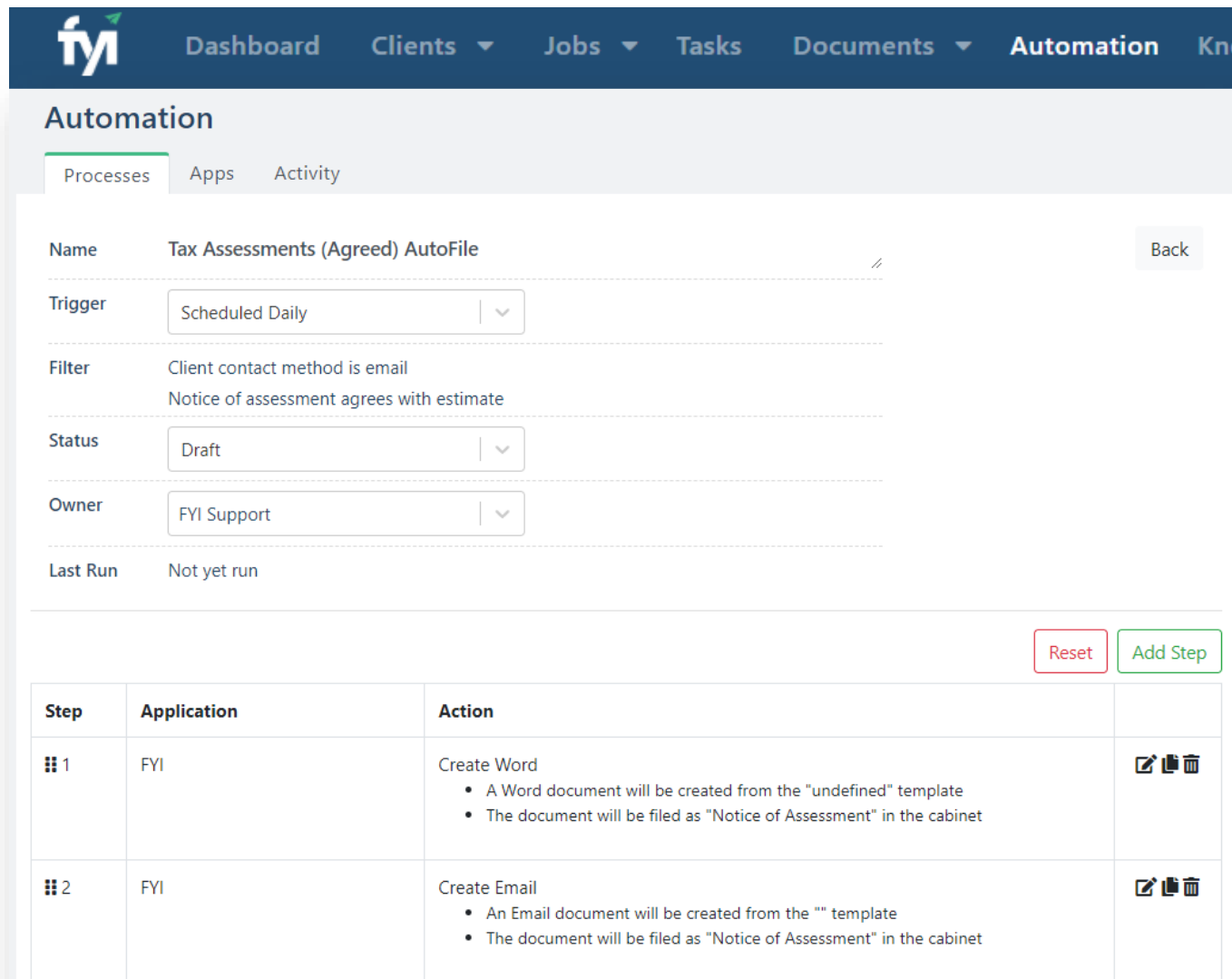


## STEP 2: SETTING UP THE AUTOMATION







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**



The screenshot shows the FYI Automation interface. At the top is a dark blue navigation bar with the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, and Automation. Below this is a light grey header for the 'Automation' section, with tabs for Processes, Apps, and Activity. The 'Processes' tab is active, showing a form for a process named 'Tax Assessments (Agreed) AutoFile'. The form includes fields for Trigger (Scheduled Daily), Filter (Client contact method is email, Notice of assessment agrees with estimate), Status (Draft), Owner (FYI Support), and Last Run (Not yet run). To the right of the form is a 'Back' button. Below the form are 'Reset' and 'Add Step' buttons. At the bottom is a table with two steps.

Step	Application	Action	
1	FYI	Create Word <ul style="list-style-type: none"><li>A Word document will be created from the "undefined" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  
2	FYI	Create Email <ul style="list-style-type: none"><li>An Email document will be created from the "" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  



## STEP 2: SETTING UP THE AUTOMATION

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

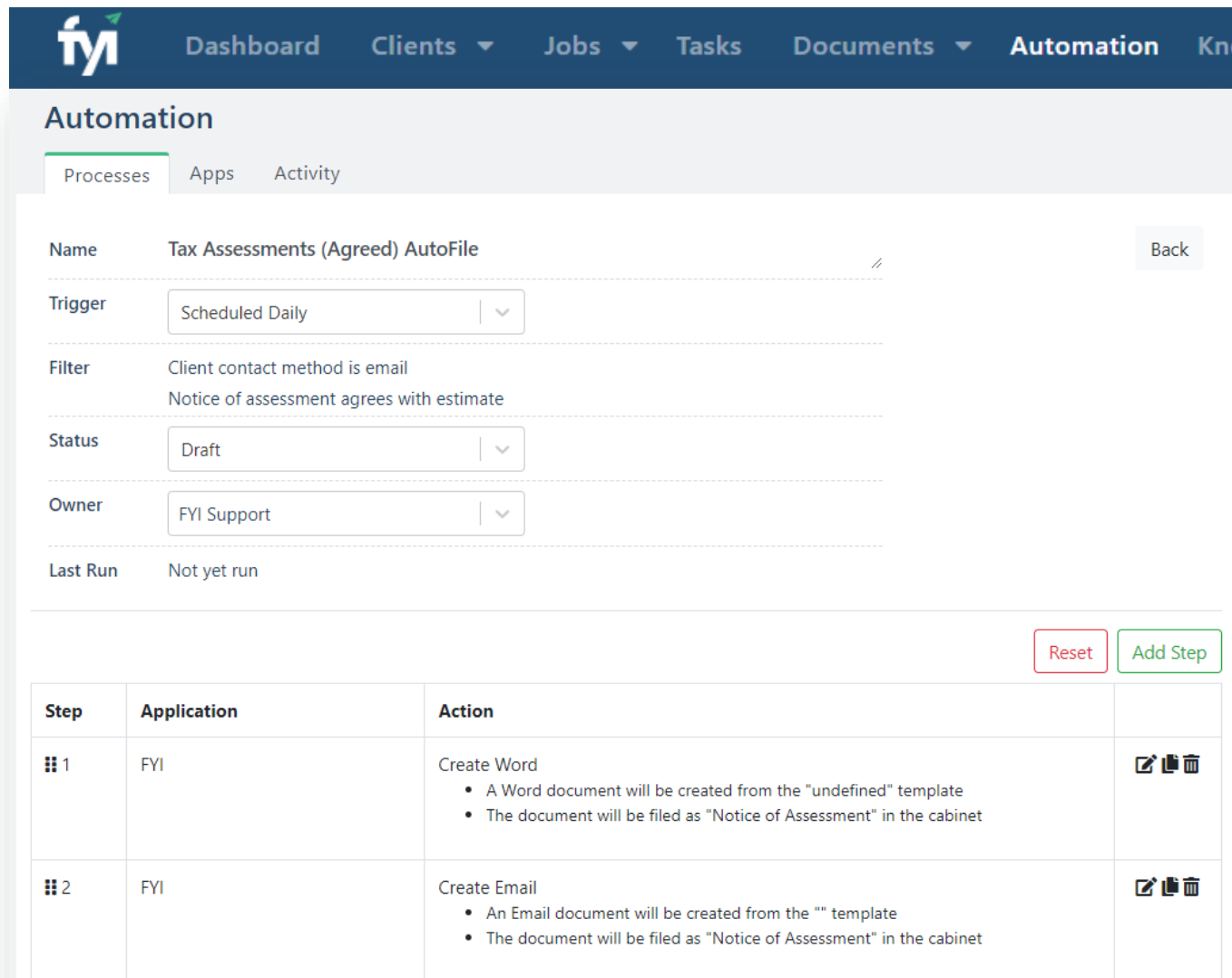
Then add them as follows:

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







a) Select the edit icon 



[Click here](#) for more information on **Templates**  
[Click here](#) for information on **Email Templates**



The screenshot shows the FYI Automation setup interface. At the top is a dark blue navigation bar with the FYI logo and links to Dashboard, Clients, Jobs, Tasks, Documents, and Automation. Below this is a light gray header for the 'Automation' section, with tabs for Processes, Apps, and Activity. The 'Processes' tab is active, showing a form for a process named 'Tax Assessments (Agreed) AutoFile'. The form includes fields for Trigger (Scheduled Daily), Filter (Client contact method is email, Notice of assessment agrees with estimate), Status (Draft), Owner (FYI Support), and Last Run (Not yet run). To the right of the form is a 'Back' button. Below the form is a table with two steps. Step 1 is 'Create Word' and Step 2 is 'Create Email'. Both steps are for the 'FYI' application. Each step has a list of actions and a set of icons (edit, duplicate, delete) in the rightmost column. At the top right of the table are 'Reset' and 'Add Step' buttons.

Step	Application	Action	
1	FYI	Create Word <ul style="list-style-type: none"><li>A Word document will be created from the "undefined" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  
2	FYI	Create Email <ul style="list-style-type: none"><li>An Email document will be created from the "" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  






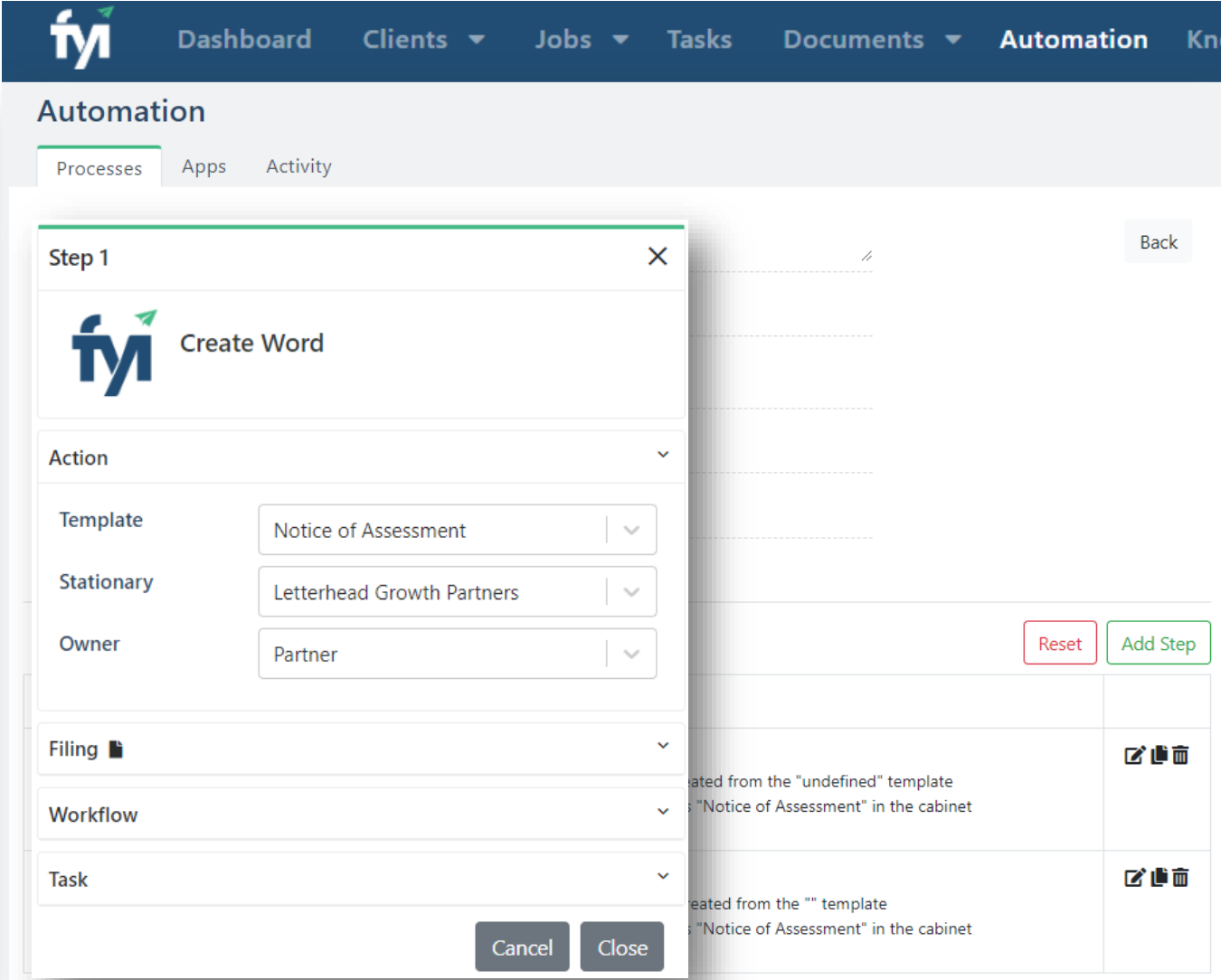
## STEP 2: SETTING UP THE AUTOMATION

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



The screenshot shows the 'Automation' section of the fyi system. The 'Processes' tab is active, displaying a table of automation steps. A modal window titled 'Step 1' is open, showing the 'Create Word' action configuration. The modal includes dropdown menus for 'Template' (Notice of Assessment), 'Stationery' (Letterhead Growth Partners), and 'Owner' (Partner). Below these are sections for 'Filing', 'Workflow', and 'Task', each with a dropdown arrow. At the bottom of the modal are 'Cancel' and 'Close' buttons. In the background, a table lists automation processes, with a 'Back' button in the top right corner.

Process	App	Activity
Step 1	Create Word	
Step 2		
Step 3		
Step 4		
Step 5		
Step 6		
Step 7		
Step 8		
Step 9		
Step 10		
Step 11		
Step 12		
Step 13		
Step 14		
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Step 99		
Step 100		



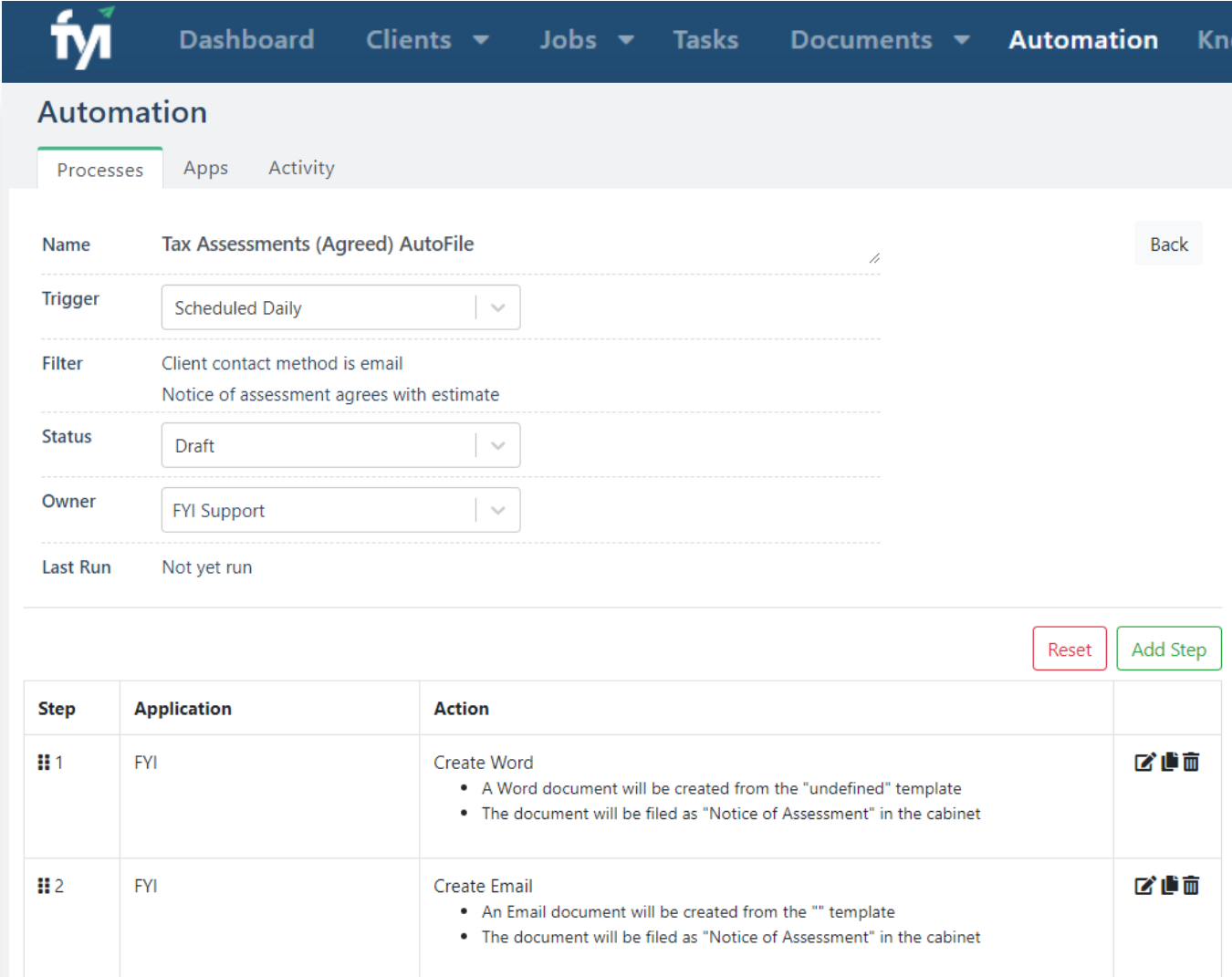
## STEP 2: SETTING UP THE AUTOMATION

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 



The screenshot shows the FYI Automation setup interface. At the top is a dark blue navigation bar with the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, and Automation. Below the navigation bar is a light gray header for the 'Automation' section, with tabs for Processes, Apps, and Activity. The 'Processes' tab is selected. The main area displays the configuration for a process named 'Tax Assessments (Agreed) AutoFile'. The configuration includes fields for Name, Trigger (Scheduled Daily), Filter (Client contact method is email, Notice of assessment agrees with estimate), Status (Draft), Owner (FYI Support), and Last Run (Not yet run). A 'Back' button is in the top right. Below the configuration fields are 'Reset' and 'Add Step' buttons. At the bottom is a table with two steps.

Step	Application	Action	
1	FYI	Create Word <ul style="list-style-type: none"><li>A Word document will be created from the "undefined" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  
2	FYI	Create Email <ul style="list-style-type: none"><li>An Email document will be created from the "" template</li><li>The document will be filed as "Notice of Assessment" in the cabinet</li></ul>	  




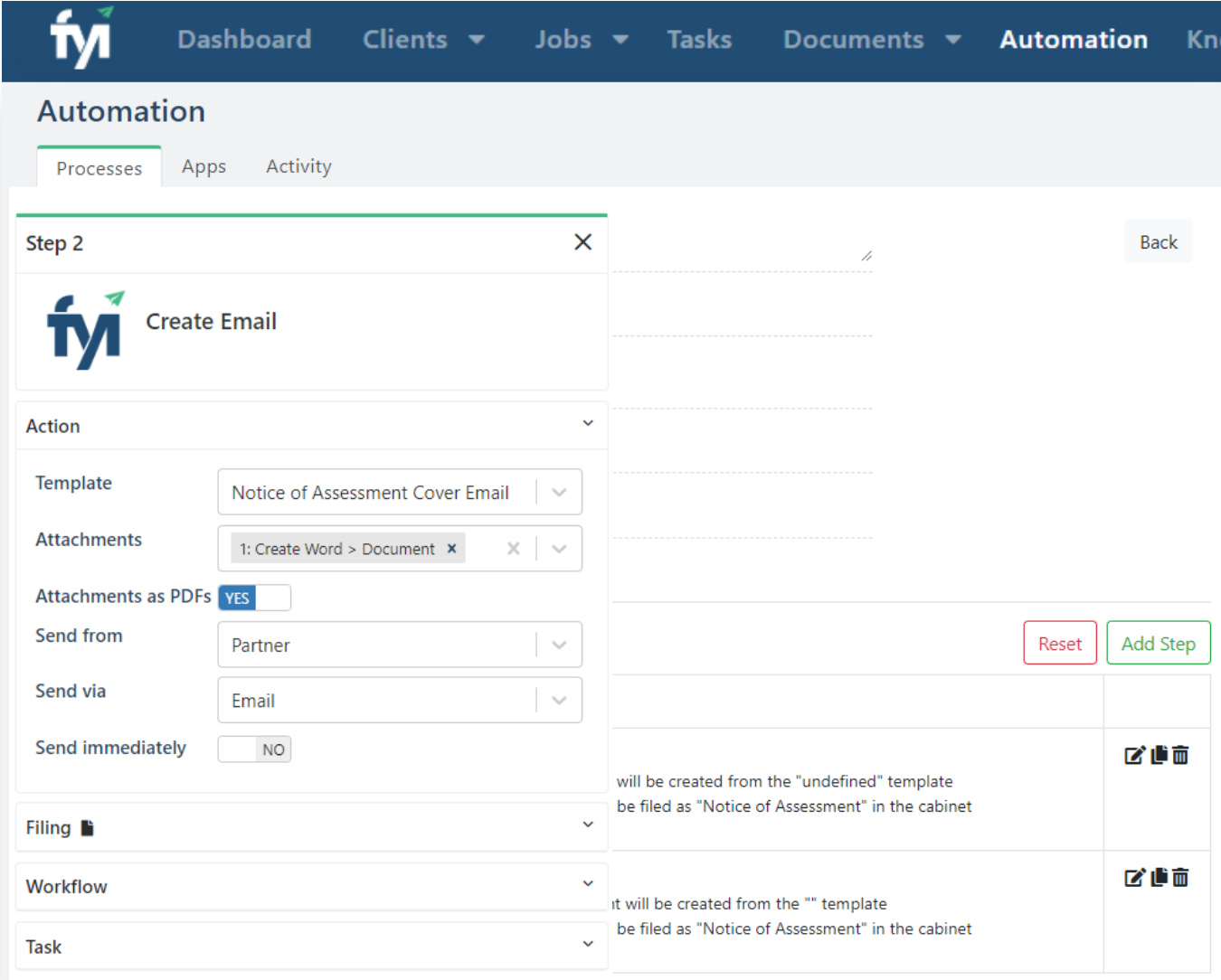
## STEP 2: SETTING UP THE AUTOMATION

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**

- Select the edit icon 
- Update the template
- Attach the Word document
- Set your preferences



The screenshot shows the fyi Automation interface. The top navigation bar includes Dashboard, Clients, Jobs, Tasks, Documents, and Automation. The Automation section is active, showing a list of steps. Step 2, titled "Create Email", is selected and expanded. The configuration for Step 2 is as follows:

- Action:** Create Email
- Template:** Notice of Assessment Cover Email
- Attachments:** 1: Create Word > Document
- Attachments as PDFs:** YES
- Send from:** Partner
- Send via:** Email
- Send immediately:** NO

Below the configuration, there are sections for Filing, Workflow, and Task, each with a dropdown arrow. The Filing section shows a description: "will be created from the 'undefined' template be filed as 'Notice of Assessment' in the cabinet". The Workflow and Task sections also show similar descriptions.



## LIVE DEMO

- Tax assessments  
AutoFile

The screenshot displays the FYI software interface. At the top, there is a navigation bar with tabs: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. A search bar on the right allows searching for groups, clients, or jobs. Below the navigation bar, filters are set for Group: Marshall Group, Client: Marshall, Frank, and Job: 2019 Compliance Marshall, Frank. The 'Documents' tab is selected, showing a list of documents. The list includes columns for checkboxes, Type, Name, Client, Modified by, Modified on, and Year. A hand cursor points to the 'Year End Checklist - Individual' document. On the right side of the document list, there are icons for draft status and user avatars.

	Type	Name	Client	Modified by	Modified on	Year	
<input type="checkbox"/>	Word	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	06/12/2019 08:35	2019	
<input type="checkbox"/>	Envelope	ATO Overdue Payment Notice	No Client	Roger Taylor	06/12/2019 05:16	2020	
<input type="checkbox"/>	Envelope	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:35	2020	Draft
<input type="checkbox"/>	Envelope	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:26	2020	Draft
<input type="checkbox"/>	Word	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 13:34	2019	
<input type="checkbox"/>	Excel	Checklist for Quarterly Bookkeeping	Marshall, Frank	Roger Taylor	05/12/2019 10:20	2019	
<input type="checkbox"/>	Envelope	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 09:56	2019	
<input type="checkbox"/>	Envelope	End of year questionnaire	No Client	Roger Taylor	05/12/2019 09:51	2019	
<input type="checkbox"/>	PDF	[DEMO USE ONLY] Ethical Letter - Letterhead	Marshall, Frank	Roger Taylor	05/12/2019 09:45		
<input type="checkbox"/>	Envelope	sdfsdfs	Marshall, Frank	Roger Taylor	05/12/2019 09:40	2019	
<input type="checkbox"/>	Envelope	Tax Planning	Marshall, Frank	Roger Taylor	05/12/2019 09:36	2019	
<input type="checkbox"/>	Word	test	Marshall, Frank	Roger Taylor	05/12/2019 09:20	2019	Draft
<input type="checkbox"/>	Word	Engagement Letter	Marshall, Frank	Roger Taylor	05/12/2019 05:12	2018	Draft
<input type="checkbox"/>	Phone	Questions Tax Return	Marshall, Frank	Roger Taylor	04/12/2019 13:30	2020	
<input type="checkbox"/>	PDF	Marshall Group Financial Results	Marshall, Frank	Roger Taylor	03/12/2019 10:13	2019	
<input type="checkbox"/>	Envelope	Help with new business...	Marshall, Frank	Roger Taylor	03/12/2019 09:26	2019	
<input type="checkbox"/>	PDF	pdf	Marshall, Frank	Roger Taylor	03/12/2019 09:10	2019	



## 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

fyi

Dashboard

Clients ▾

Jobs ▾

Tasks

Documents ▾

Automation

Knowledge

Automation

ProcessesAppsActivity

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

Test

Run

Back

Reset

Add Step

Step	Application	Action	
1	FYI	<div>Create Word</div> <ul style="list-style-type: none"><li>• A Word document will be created from the "Year End Checklist - Individual" template</li><li>• The document will be filed as "Year End Checklist - Individual" in the Workpapers cabinet</li></ul>	
2	FYI	<div>Create Email</div> <ul style="list-style-type: none"><li>• An Email document will be created from the "Year End Checklist - Individual" template, and <b>immediately</b> sent</li><li>• The document will be filed as "Year End Checklist - Individual" in the</li></ul>	



# 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

fyi

Dashboard

Clients ▾

Jobs ▾

Tasks

Documents ▾

Automation

Knowledge

Automation

Processes

Apps

Activity

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

Test

Run

Back

Reset

Add Step

Step	Application	Action	
1	FYI	<div>Create Word<ul style="list-style-type: none"><li>A Word document will be created from the "Year End Checklist - Individual" template</li><li>The document will be filed as "Year End Checklist - Individual" in the Workpapers cabinet</li></ul></div>	
2	FYI	<div>Create Email<ul style="list-style-type: none"><li>An Email document will be created from the "Year End Checklist - Individual" template, and <b>immediately</b> sent</li><li>The document will be filed as "Year End Checklist - Individual" in the</li></ul></div>	





# CUSTOM PROCESSES

- **Step 1:**  
Add Custom Process

The screenshot displays the FYI Automation interface. At the top, a navigation bar includes links for Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge, along with a search bar and a '+ NEW' button. The 'Automation' section is active, showing tabs for Processes, Apps, and Process History. A search bar and filter options (Status, Plan, App) are present. A grid of 12 custom processes is listed, each with an icon, title, description, and a settings gear icon. A green callout box with the text 'Add Custom Process' is overlaid on the right side of the grid.

Icon	Process Name	Description
	Email AutoFile	Import emails from Outlook and AutoFile them based on your exact configuration
	Calendar Entry AutoFile	Import calendar entries from Outlook and AutoFile them based on your exact configuration
	Collaborate	Collaborate with your clients using third-party services including OneDrive and DropBox
	Xero Practice Manager	Import clients, client groups and jobs from Xero Practice Manager
	Nightly Backup	Nightly backup of all your documents saved in FYI into your practice OneDrive
	Xero - Tax Return	Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI
	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
	Client Ledger Reports AutoFile	Batch import of client ledger reports on demand and AutoFile into FYI
	Negative Email Alert	Automatic alert when a negative email is received from a client to a designated default user
	My Imports	Automatic alert the Partner when a file is imported



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



# CREATING A CUSTOM PROCESS

- **Step 1:**  
Add Custom Process
- **Step 2:**  
Select **trigger** on demand or  
scheduled

The screenshot shows the 'Automation' section of a software interface. The 'Processes' tab is active, displaying a form for a 'Custom Process'. The form includes fields for Name, Trigger, Filter, Status, Owner, and Last Run. The 'Trigger' dropdown is set to 'Manual'. A 'Select Date Range' modal is open, showing options for 'On the' and 'Every' triggers. The 'On the' option is selected, with '1st' of each 'Month' chosen. The 'Every' option is also visible, with 'Number' and 'Interval' fields. The modal has 'Ok' and 'Cancel' buttons.

Step	Application	Action
------	-------------	--------



# 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

The screenshot displays the 'Filter Items' dialog box, which is used for filtering data based on specific criteria. The dialog is titled 'Filter Items' and includes a sub-header 'Filtering by a specific client or other filters'. The filters are organized into sections: 'Structure', 'Partner', 'Manager', 'Include Archived', 'Client Newsletter - Quarterly', 'Client Level', 'Christmas Party', 'Annual Review Meeting', 'Preferred Name', 'Salary', 'Services', 'DOB', 'Skype Call', 'Phone Number', and 'Segmentation'. The 'Client Level' filter is currently selected, showing a dropdown menu with 'Gold' as the chosen option. The background shows the 'Automation' section of the application, with a search bar and buttons for 'Test', 'Run', 'Back', 'Reset', and 'Add Step'.

Filter	Value
Structure	No option selected
Partner	No partner selected
Manager	No manager selected
Include Archived	<input type="checkbox"/>
Client Newsletter - Quarterly	<input type="checkbox"/>
Client Level	Gold
Christmas Party	Gold
Annual Review Meeting	Silver
Preferred Name	Diamond
Salary	
Services	No option selected
DOB	
Skype Call	
Phone Number	
Segmentation	No option selected



# 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**

The screenshot shows the 'Automation' section of a software interface. The 'Processes' tab is active, displaying a form for a 'Custom Process'. The form includes fields for Name, Trigger, Filter, Status, Owner, and Last Run. The 'Owner' dropdown menu is open, showing a list of users with 'Liz Hurst' selected. The 'Filter' field is set to 'Client Level' with a value of 'Gold'. The 'Status' is 'Draft'. The 'Trigger' is 'Manual'. The 'Last Run' field is empty. The 'Add Step' button is visible at the bottom right.

Name	Custom Process	Test	Run	Back
Trigger	Manual			
Filter	Client Level Gold			
Status	Draft			
Owner	No owner selected			
Last Run				

Owner dropdown list:

- Growth Partners
- Jann DiPaolo
- Kim Doyle
- Liz Hurst
- Mark Jackson
- Patrick Smith
- Phill Inn
- Reception

Buttons: Reset, Add Step



# 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

The screenshot shows the 'Automation' section of a software interface. The 'Processes' tab is active, displaying a form for a 'Custom Process'. The form fields are as follows:

- Name:** Custom Process
- Trigger:** Manual
- Filter:** No filter
- Status:** Draft
- Owner:** Liz Hurst
- Start From:** 18/03/2020
- Last Run:** Not yet run

Buttons for 'Test' and 'Run' are visible on the right. A date picker is open, showing the month of March 2020, with the 18th selected. The date picker table is as follows:

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Below the form is a table with the following headers:

Step	Application	Action
------	-------------	--------



# CREATING A CUSTOM PROCESS

- **Step 6:**  
Add Steps!

**fyi** Dashboard Clients ▾ Jobs ▾ Tasks Documents ▾ Automation Knowledge 🔍 Search groups, cli

## Automation

Processes Apps Process History

Name Custom Process

Trigger  ▾

Filter No filter

Status  ▾

Owner  ▾

Start From

Last Run Not yet run

Step	Application	Action
------	-------------	--------

Step 1 ✕

Please choose the Application for this step

FYI

Ledger

Please select your function

Alter Document

Create Email

Create Word

Create Meeting

Create Presentation

Create Spreadsheet

Create Task

Execute Process



[Click here](#) for information on **Automation Process Steps**



# CREATING A CUSTOM PROCESS

- **Step 6:**  
Add Steps
- **Step 7:**  
Build your processes!

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 <ul style="list-style-type: none"><li>An Email document will be created from the "Year end financials" template</li><li>The document will be filed as "Time to book a meeting" in the Correspondence cabinet</li><li>A task will be created with the subject "Review email and arrange client meeting"</li></ul>	
2	FYI	Create Task <ul style="list-style-type: none"><li>A task will be created with the subject "Prepare marketing material"</li></ul>	
3	FYI	Create Task <ul style="list-style-type: none"><li>A task will be created with the subject "Call client in advance of meeting"</li></ul>	



## LIVE DEMO

Custom process creation and run:

- Bulk email send
- Batch documents with tasks

fyi Dashboard Clients Jobs Tasks Documents Automation Knowledge

Search groups, clients or jobs

Group Marshall Group Client Marshall, Frank Job 2019 Compliance Marshall, Frank

Summary Documents Tasks XPM Milestones XPM Tasks Processes Comments Activity

All cabinets No view selected Search documents Hide Threads ON Mine OFF Search Email Cont

Type	Name	Client	Modified by	Modified on	Year
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	06/12/2019 08:35	2019
<input type="checkbox"/>	ATO Overdue Payment Notice	No Client	Roger Taylor	06/12/2019 05:16	2020
<input type="checkbox"/>	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:35	2020
<input type="checkbox"/>	ATO Overdue Payment Notice	Marshall, Frank	Roger Taylor	05/12/2019 19:26	2020
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 13:34	2019
<input type="checkbox"/>	Checklist for Quarterly Bookkeeping	Marshall, Frank	Roger Taylor	05/12/2019 10:20	2019
<input type="checkbox"/>	Year End Checklist - Individual	Marshall, Frank	Roger Taylor	05/12/2019 09:56	2019
<input type="checkbox"/>	End of year questionnaire	No Client	Roger Taylor	05/12/2019 09:51	2019
<input type="checkbox"/>	[DEMO USE ONLY] Ethical Letter - Letterhead	Marshall, Frank	Roger Taylor	05/12/2019 09:45	
<input type="checkbox"/>	sdfsd	Marshall, Frank	Roger Taylor	05/12/2019 09:40	2019
<input type="checkbox"/>	Tax Planning	Marshall, Frank	Roger Taylor	05/12/2019 09:36	2019
<input type="checkbox"/>	test	Marshall, Frank	Roger Taylor	05/12/2019 09:20	2019
<input type="checkbox"/>	Engagement Letter	Marshall, Frank	Roger Taylor	05/12/2019 05:12	2018
<input type="checkbox"/>	Questions Tax Return	Marshall, Frank	Roger Taylor	04/12/2019 13:30	2020
<input type="checkbox"/>	Marshall Group Financial Results	Marshall, Frank	Roger Taylor	03/12/2019 10:13	2019
<input type="checkbox"/>	Help with new business...	Marshall, Frank	Roger Taylor	03/12/2019 09:26	2019
<input type="checkbox"/>	pdf	Marshall, Frank	Roger Taylor	03/12/2019 09:18	2019
<input type="checkbox"/>	Additional expenditure	Marshall, Frank	Liz Hurst	02/12/2019 19:53	2019
<input type="checkbox"/>	Year end financials	No Client	Roger Taylor	02/12/2019 09:45	2019

Draft Draft Draft Draft Draft Draft Draft Draft Draft





# 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

The screenshot displays the 'Automation' section of the FYI software interface. At the top, a dark blue navigation bar contains the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation (highlighted), and Knowledge. A search bar on the right of the navigation bar is labeled 'Search groups, clients or jobs'. Below the navigation bar, the 'Automation' section has three tabs: 'Processes' (selected), 'Apps', and 'Process History'. Under the 'Processes' tab, there is a search input field labeled 'Search processes' and three filter buttons: 'Filter by Status', 'Filter by Plan', and 'Filter by App'. The main content area displays a grid of six process cards, each with the FYI logo, a title, a description, and a gear icon for configuration. The processes listed are: 'Quarterly BAS', 'Superannuation Guarantee Contribution payment dates - quarterly', 'Timesheet reminder - prior week less than 40 hours', 'Christmas Cards', 'Client satisfaction survey', and 'Monthly Billing'. Each card's description states: 'Define your own custom process using a combination of actions of FYI and other integration apps'.

**Automation**

Processes Apps Process History

Search processes

Filter by Status Filter by Plan Filter by App

- Quarterly BAS**  
Define your own custom process using a combination of actions of FYI and other integration apps
- Superannuation Guarantee Contribution payment dates - quarterly**  
Define your own custom process using a combination of actions of FYI and other integration apps
- Timesheet reminder - prior week less than 40 hours**  
Define your own custom process using a combination of actions of FYI and other integration apps
- Christmas Cards**  
Define your own custom process using a combination of actions of FYI and other integration apps
- Client satisfaction survey**  
Define your own custom process using a combination of actions of FYI and other integration apps
- Monthly Billing**  
Define your own custom process using a combination of actions of FYI and other integration apps



# 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

The screenshot displays the 'Filter Items' dialog box in the XPM interface. The dialog is titled 'Filter Items' and contains a list of filterable fields. The 'Client Level' field is currently selected, and its dropdown menu is open, showing three options: 'Gold', 'Silver', and 'Diamond'. The 'Gold' option is highlighted. The background shows the 'Automation' section of the interface, which includes a search bar with the text 'Search groups, clients or jobs' and buttons for 'Test', 'Run', 'Back', 'Reset', and 'Add Step'.

Field	Value
Structure	No option selected
Partner	No partner selected
Manager	No manager selected
Include Archived	<input type="checkbox"/>
Client Newsletter - Quarterly	<input type="checkbox"/>
Client Level	Gold
Christmas Party	Gold
Annual Review Meeting	Silver
Preferred Name	Diamond
Salary	
Services	No option selected
DOB	
Skype Call	
Phone Number	
Segmentation	No option selected



# 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).

Filter Items

Filtering by a specific client or other filters

Structure: No option selected

Partner: No partner selected

Manager: No manager selected

Include Archived: ☐

Client Newsletter - Quarterly: ☐

Client Level: Gold

Christmas Party: Gold

Annual Review Meeting: Silver

Preferred Name: Diamond

Salary:

Services: No option selected

DOB: Compliance Individual - Yearly

Skype Call: Compliance Business - Yearly

Phone Number: Bookkeeping - Monthly

Segmentation: Bookkeeping - Quarterly

Virtual CFO - Quarterly

Virtual CFO - Monthly

Documents Automation Knowledge Search groups, clients or jobs

Test Run Back

Reset Add Step



# 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

The screenshot displays the FYI Automation dashboard. At the top, a navigation bar includes the FYI logo and links to Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. The main heading is "Automation", with sub-tabs for Processes, Apps, and Activity. Below the heading is a search bar labeled "Search processes" and two filter buttons: "Filter by Status" and "Filter by". The dashboard features a grid of automation process cards, each with a logo, a title, a description, and a settings gear icon.

Logo	Process Name	Description
Red square with white 'f'	Email AutoFile	Import emails from Outlook and AutoFile them based on your exact configuration
Red square with white 'f'	Calendar Entry AutoFile	Import calendar entries from Outlook and AutoFile them based on your exact configuration
Xero logo	Xero Practice Manager	Import clients, client groups and jobs from Xero Practice Manager
Xero logo	Tax Return AutoFile	Daily import of tax returns from Xero and AutoFile a Link into FYI
Xero logo	Tax Assessments (Variance) AutoFile	Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert
Xero logo	Client Ledger Reports AutoFile	Batch import of client ledger reports from Xero and AutoFile into FYI
FYI logo	My Imports	Automatic alert the Partner when a file is imported
NowInfinite logo	Completed Document AutoFile	Daily import of Completed Documents from NowInfinite, AutoFile into FYI
bgl. logo	Completed Document AutoFile	Daily import of Completed Document created in BGL, AutoFile into FYI
FYI logo	Custom Process	Define your own custom process by combining actions of other processes





## 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!

**fyi** [Submit a request](#) [Sign in](#)

## Hi. How can we help?

- Getting Started**  
Everything you need to know, from starting a free trial to onboarding the entire practice.
- Email Management**  
Ensure that every email in or out of your practice is hitting the client file
- Document Automation**  
Take your practice paperless and improve your management of client relationships
- Search and Retrieval**  
Locate documents in seconds using views, sorts and filters to get the full power of metadata and search.
- Jobs**  
Display and maintain Xero Practice Manager Jobs, and file FYI documents against these
- Tasks, Comments and Workflow**  
Learn how to use FYI Workflows, FYI Tasks and Comments including notification, Task delegation and tracking.

### Learning Resources

Access our growing library of masterclasses, training webinars and tutorials.

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