TRAINING

KEY CONCEPTS
FOR NEW USERS

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

www.fyidocs.com

Meet your hosts

Jack Thiel

Client Success Manager

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

Shaun Darvill

Client Success Manager

- A Chartered Accountant with more than 5 years working in the profession as well as previously working with Xero as a Senior Account Manager.
- Shaun leads our Client Support Team to ensure FYI clients have access to useful content, allowing for efficient problem resolution.
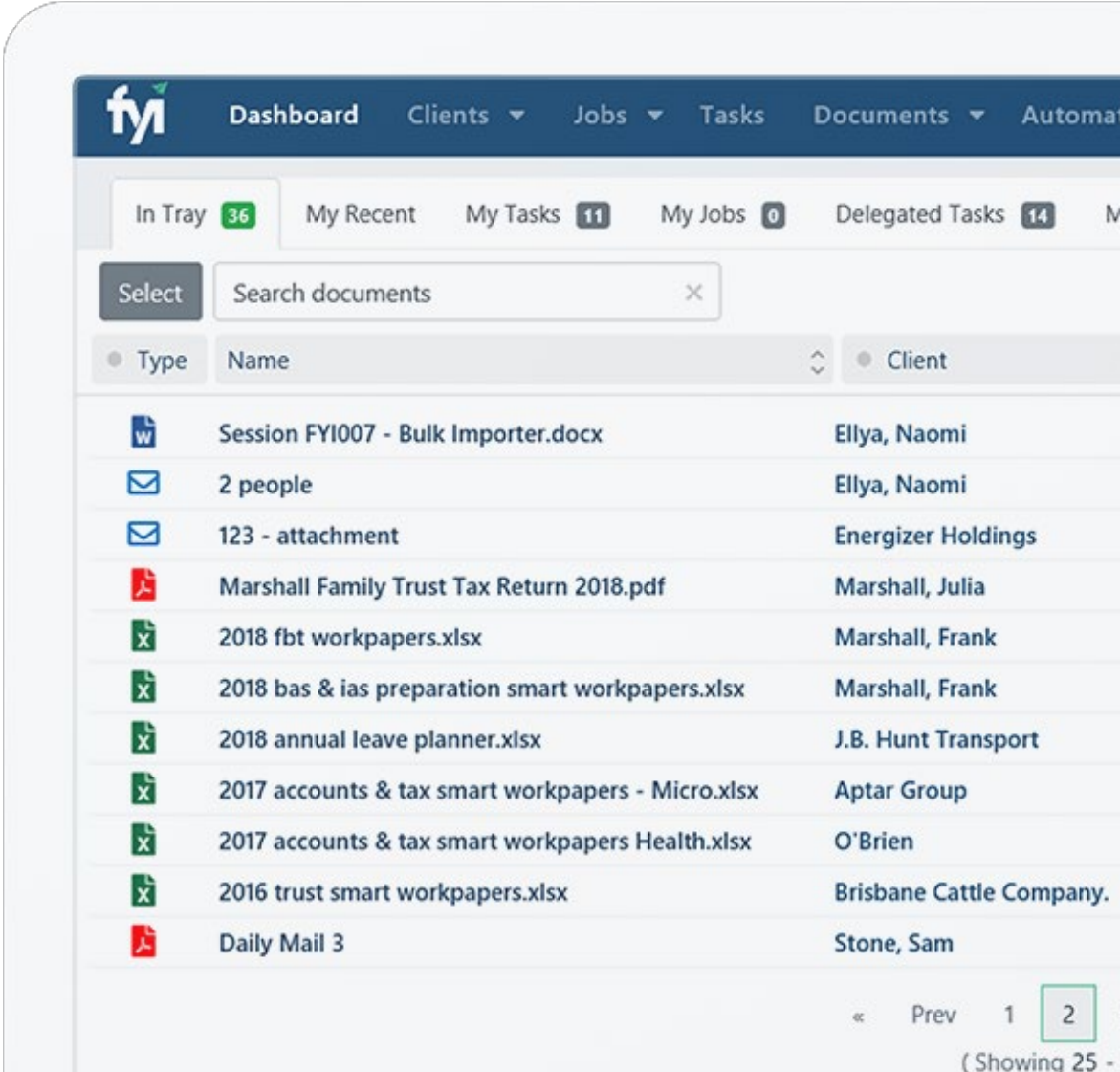
In This Session
We Will Cover:

1. **A brief introduction to FYI**
   What is FYI? How will it help?

2. **Navigating FYI for the first time**
   Filing concepts, the FYI Drawer and Workspaces

3. **Tutorial for beginners**
   Creating a sample letter, adding a task, filing your first email in FYI

4. **Trouble-shooting**
   Setting up for success

5. **Help when you need it**
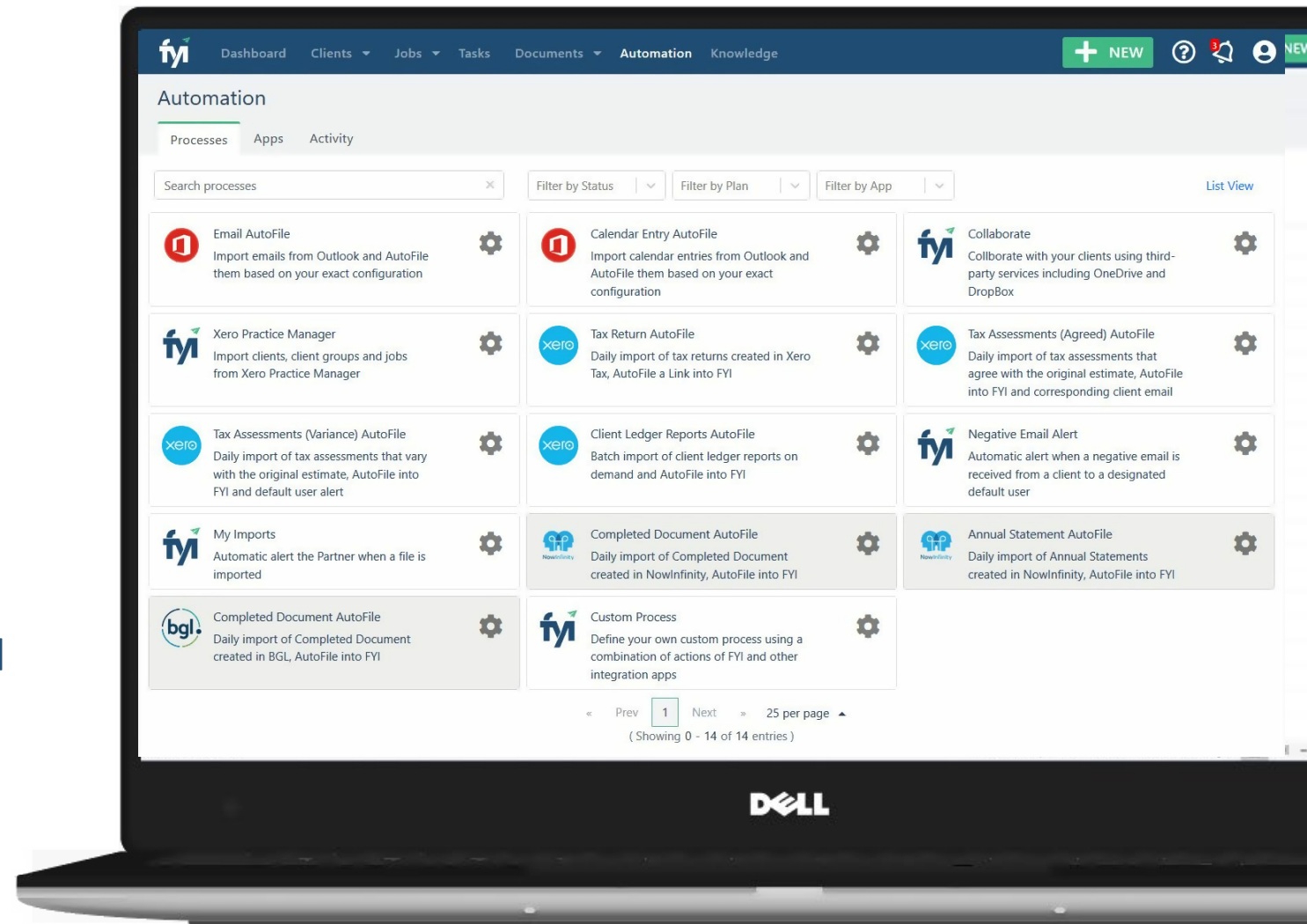   The FYI Help Centre and email support

A BRIEF INTRO TO FYI

What is it? How will it help me?

FYI is an online document management and automation engine, purpose built for accountants.

We're on a mission to halve the time spent on compliance and admin by delivering a step-change in document automation and efficiency.
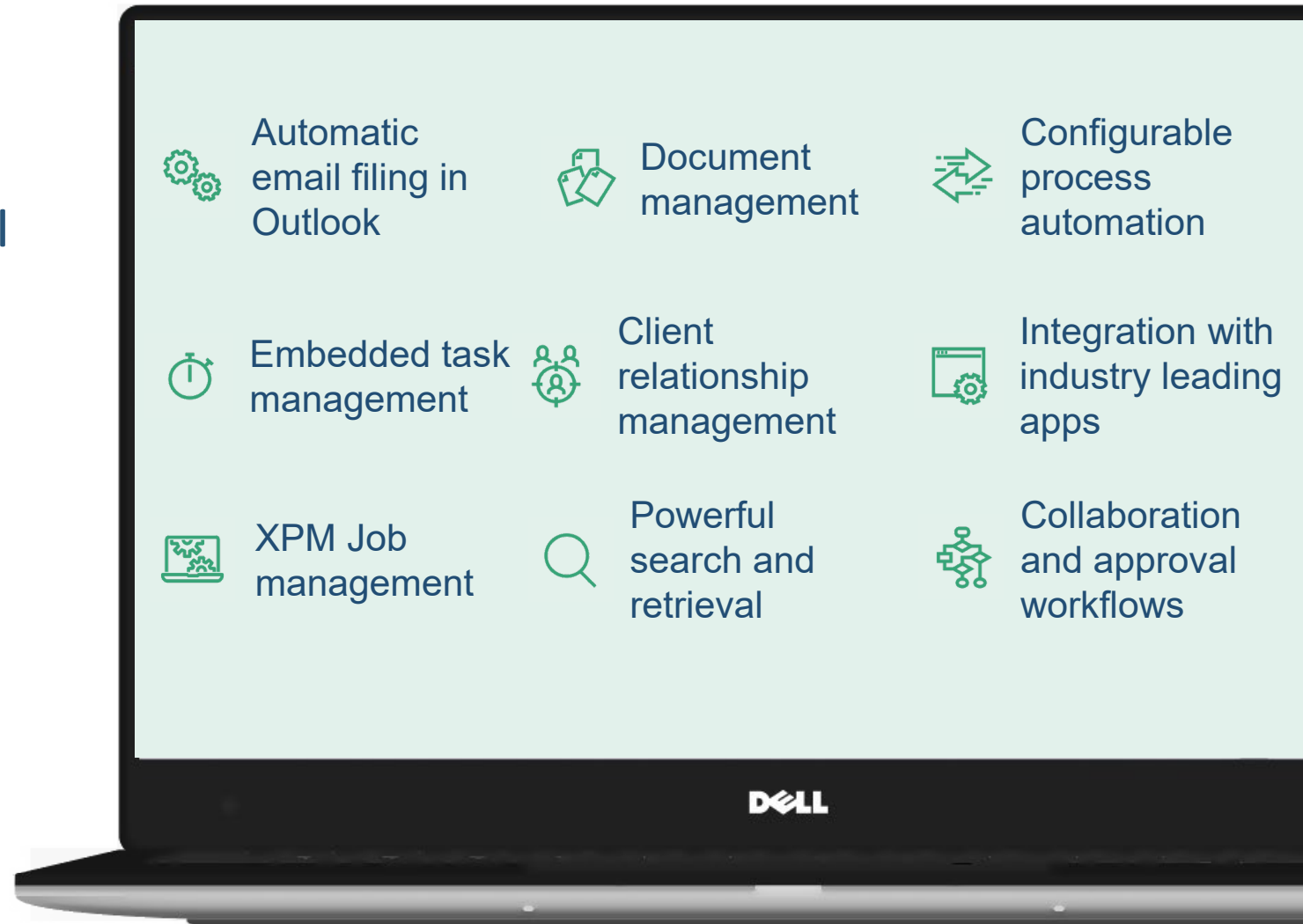
As a fully featured built-for-purpose document management platform, FYI provides:

- practice-wide accessibility and visibility
- efficiency
- automation

Your emails, documents, CRM, jobs and tasks...all in one place!

Automatic email filing in Outlook

Document management

Configurable process automation

Embedded task management

Client relationship management

Integration with industry leading apps

XPM Job management

Powerful search and retrieval

Collaboration and approval workflows

NAVIGATING FYI
FOR THE FIRST TIME

- How to Login
- Basic Filing Concepts
- The FYI Drawer
- FYI Workspaces

Log-in at
www.fyidocs.com

(1) Visit the FYI website at www.fyidocs.com. Click on the **LOGIN** button to get started.

(2) Click **LOGIN WITH WINDOWS**

(3) Authenticate using your Microsoft Office 365 email and password

Visit FYI Help > Getting Started
for instructions on **How to Login**

Basic Filing Concepts

- Cabinets

- Categories

- Options

- Filing to a client or job

Displaying the FYI Drawer

Displaying the FYI Drawer in Outlook

- Browser

- Desktop

Displaying the FYI Drawer in Office

- Word

- Excel

- PowerPoint

Using the FYI Drawer

- Filing
- Preview
- Comments
- Tasks
- Workflow
- Activity
- Recent Documents
- And more.....

Email

Re: Help with new business...

Created by Roger Taylor on 21/10/2019
Email has attachments
Attachments have been AutoFiled
Reference RT-006909

Filing
Thread
Tasks
Workflow
Activity
Recent Documents
Attachments
People
Upload
Stapled

PREVIEW
COMMENTS 0

Filing

Client	Marshall, Frank client.frank.marshall@outlook.com
Cabinet	Client Files
Job	2019 Compliance
	Show Closed Jobs OFF
Work Type	Advisory
Year	2019
Keywords	Keywords
Owner	Roger Taylor

Tasks 🚩

Outstanding

Please turn this into a template - Not Started, due in a day
Roger Taylor assigned this to Troy Steele

Please review - In Progress, due in a day
Roger Taylor assigned this to Liz Hurst

Add Task

Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating the FYI Drawer**

Hot Tips!
#FYIDrawer

- Leverage the drawer on jobs during daily huddle

- Write comments to notify the team

- Jump to email threads and attachments

Your Workspaces

- Dashboard
- Clients
- Jobs
- Tasks
- Documents
- Automation
- Knowledge

Visit FYI Help > Getting Started
to watch a recorded introduction to **The FYI Dashboard**

Hot Tips!
#FYIDashboard

- Rearrange tabs to build a personalised dashboard

- Jump into **My Recent** at the end of the day to get up to speed on what you worked on today, making timesheets a breeze

NAVIGATING CLIENTS

WATCH VIDEO

Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating Clients**

Hot Tips!
#FYIClients

- Jump between **Groups**, **Clients** and **Jobs** using the purpose-built navigation

- Record interactions (phone calls, file notes and meeting minutes) from the **Client** Summary screen

Hot Tips!
#FYIJobs

- Make your daily huddle easy by adding comments and tasks from the **Job** drawer

- Give life to your **Job** board by assigning job states unique colours!

Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating Tasks**

Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating the Automation Dashboard**

Hot Tips!
#FYIAutomations

- Set email AutoFile exclusions for magazines and other subscription services to avoid clutter

- Utilise custom fields in XPM to better segregate your customer base for use with Custom Processes!

Autofile Email

Settings | Exclusion

Search by name ✕   Add Exclusion

Email/Domain ⇕	
spammagazine.com.au	remove
nogood.com.au	remove
spam@fakeemail.com	remove

Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating Knowledge**

Hot Tips!
#FYIKnowledge

- Quickly preview templates from **Knowledge** to check

  which is best for your situation

- Add other cabinets to knowledge via **Practice**

  Settings

TUTORIAL FOR BEGINNERS

- Creating a document
- Filing a document
- Adding a task
- Filing an email

GETTING STARTED
TUTORIAL FOR
BEGINNERS

WATCH VIDEO

Visit FYI Help > Getting Started
to access the **Tutorial for Beginners**

Hot Tips!
#FYITutorial

- Create any kind of document or client interaction from the FYI **+New** button

- Documents can be refiled if you make a mistake!

- Once filed in Outlook, Office or the FYI app there is no need to file it again

✉	Email	E
▢	File Note	F
🗓	Meeting	M
📄	Pdf	D
📞	Phone	C
P	Presentation	P
X	Spreadsheet	S
☑	Task	T
🕐	Time Sheet	I
⬆	Upload	U
🔗	Web Link	
W	Word	

Filing

Client	Samarat, Nat savitabrocf1@eliteemail.com ✕
Cabinet	Workpapers ⌄
Year	2020 ⌄
Owner	Roger Taylor ⌄

TROUBLE-SHOOTING FOR NEW USERS

Practice Set-Up
Preparing your OneDrive

- It may be necessary to delete files from your Office Document Cache and ensure this process is completed automatically in the future.

> ✈ Open the Microsoft Office Upload Center windows application to check your settings

Microsoft Office Upload Center Settings

Display Options

☑ Display icon in notification area

Cache Settings

Days to keep files in the Office Document Cache: 14

☑ Delete files from the Office Document Cache when they are closed

Delete files in the cache that have been saved for faster viewing. This will not delete items pending upload to the server, nor items with upload errors.

Delete cached files

OK   Cancel

Visit FYI Help > Administration > Practice Set-Up
for an instructions on **Preparing Your OneDrive for FYI**

Practice Set-Up
Preparing your Browser to Allow Pop-ups

- In order to select documents in FYI and edit them in your browser, you need to set your browser to allow pop-ups from the FYI app.

PRACTICE SET UP
Preparing your Browser to Allow Pop-ups

WATCH VIDEO

Visit FYI Help > Administration > Practice Set-up
for an introduction to **Preparing your Browser for FYI**

HELP WHEN YOU NEED IT

Help Centre

- Comprehensive knowledge base

- Self-guided learning library

- Detailed help articles

- Downloadable PDF guides

- Video tutorials

Help Centre

The **Getting Started Guides** are a great place to start:

- Welcome to FYI
- Key Concepts for New Users
- Mastering the Essentials
- Getting Started with Email Management
- Getting Started with Tasks
- Getting Started with Document Management

fyi

Submit a request   Sign in

FYI > Getting Started > Getting Started Guides   Search

Getting Started Guides   Follow

Welcome to FYI

How to Login

Key Concepts for New Users

Tutorial for Beginners

Mastering the Essentials

Getting Started with Email Management

Getting Started with Tasks

Getting Started with Document Management

Getting Started with Automations

FYI Email Support

Our support team is available during business hours to answer any of your queries.
Simply email **support@fyidocs.com** and we will be happy to help.

Hi team,
Today is our first day getting to know the FYI system (loving it so far) and we have a few questions for you.....

Sarah,
Client Services Coordinator

Hi Sarah,
Welcome to FYI. If you are interested in learning more, visit our Help Centre at https://fyidocs.zendesk.com/hc/en-us or you can email us anytime. We're here to help you in any way we can.

Regards,
FYI Support

Q. Is there an example of how an accounting firm should set up their filing system?
A. Cabinets can be configured according to the requirements of your own practice. You can change the name of the default Cabinets, add new or remove existing ones. To learn more, refer to Managing Cabinets.

Q. How do we file our existing documents in FYI?
A. For existing documents, FYI's Bulk Import feature allows administrators to easily import historical documents via a specified OneDrive account and file them in a consistent folder hierarchy. Please click here to learn how.

Q. How do I ensure that each email I send to a client is recorded in FYI?
A. FYI monitors both your inbox and Sent items in Outlook. Any of the client interactions that you receive or send subsequent to the deployment of FYI will be automatically imported and filed in FYI. For more information on FYI's AutoFile feature, click here.

CALL TO ACTION

1. Perform the **beginner's tutorial**

    - Creating and filing your first document

2. Familiarise yourself with the **FYI workspaces**

    - Record your next client interaction!

3. Check out the **FYI Help Centre**

    - See if you can find the Getting Started videos!

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WEB APP
app.fyidocs.com

HELP CENTRE
support.fyidocs.com

EMAIL SUPPORT
support@fyidocs.com

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