

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.



[Follow Jack](#)



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.



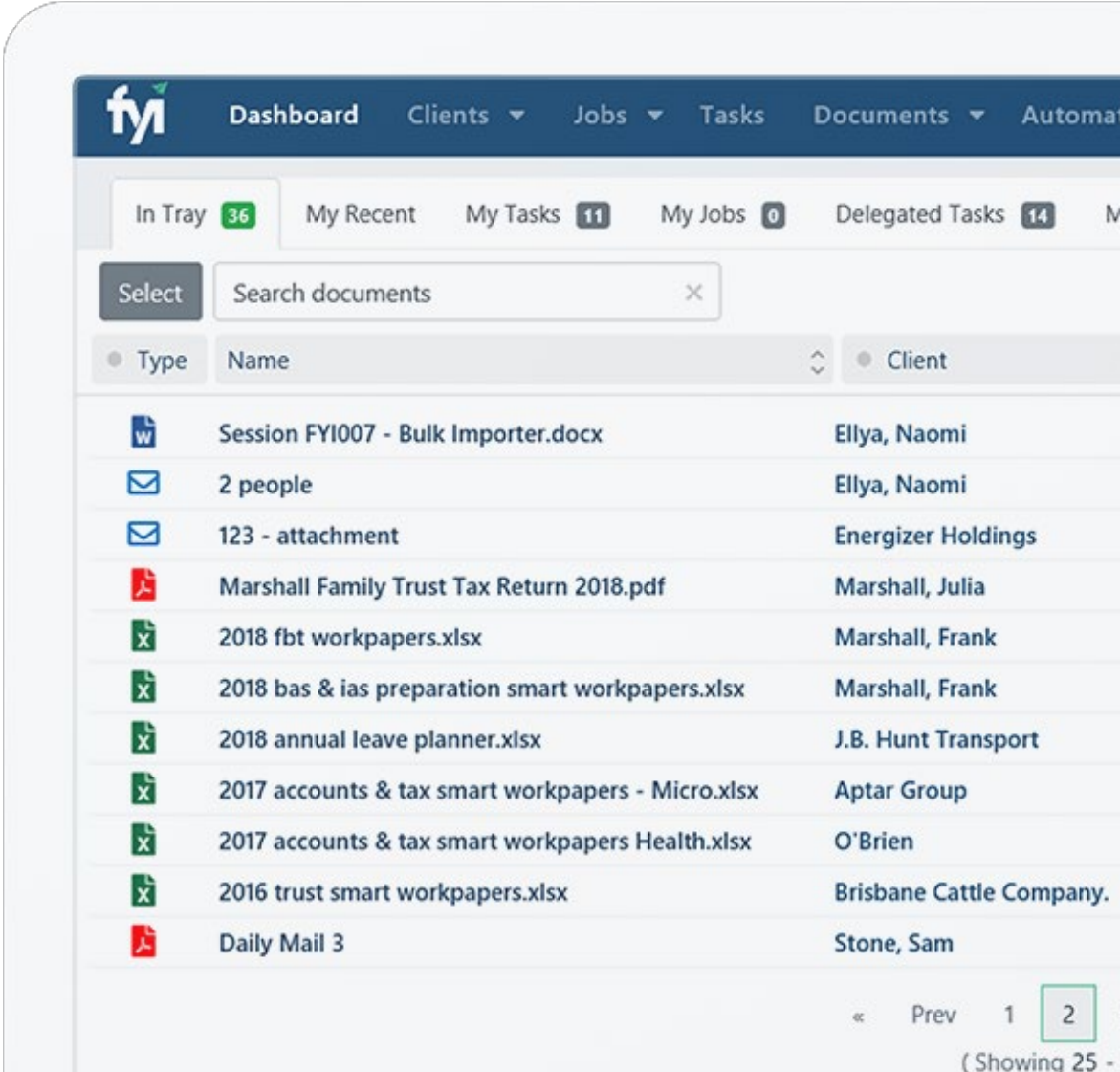
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In This Session

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

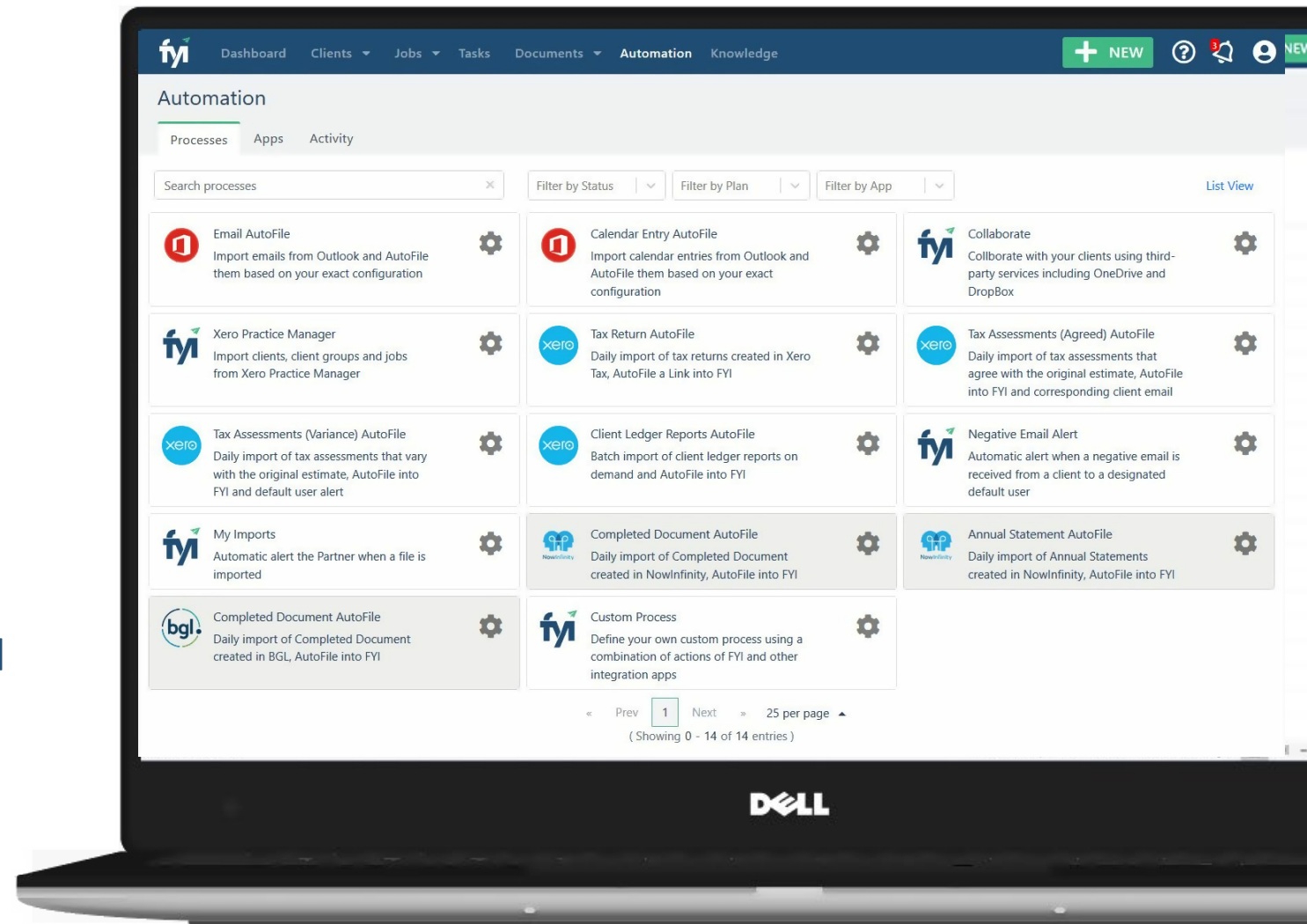
What is it? How will it help me?





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.

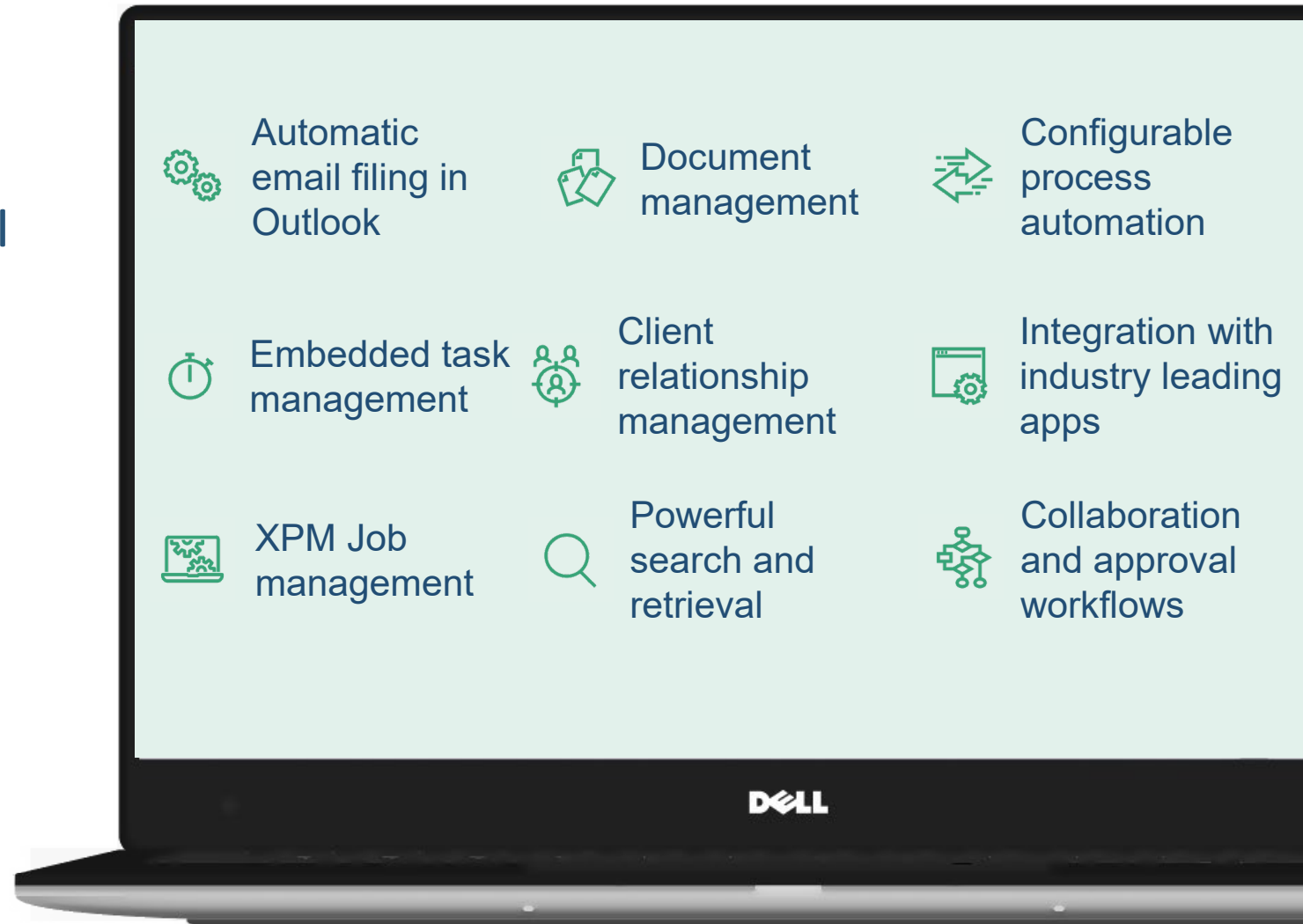




As a fully featured built-for-purpose document management platform, FYI provides:

- practice-wide accessibility and visibility
- efficiency
- automation

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





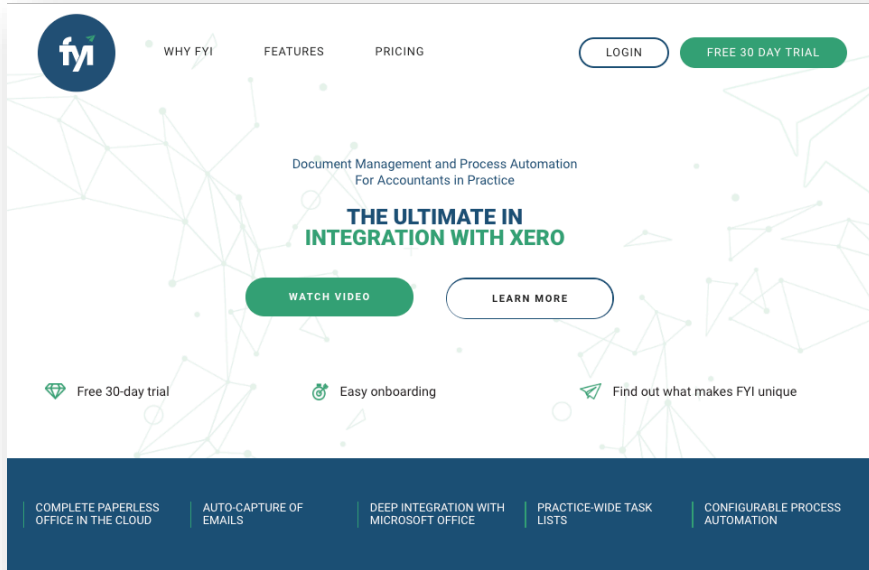
NAVIGATING FYI FOR THE FIRST TIME

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

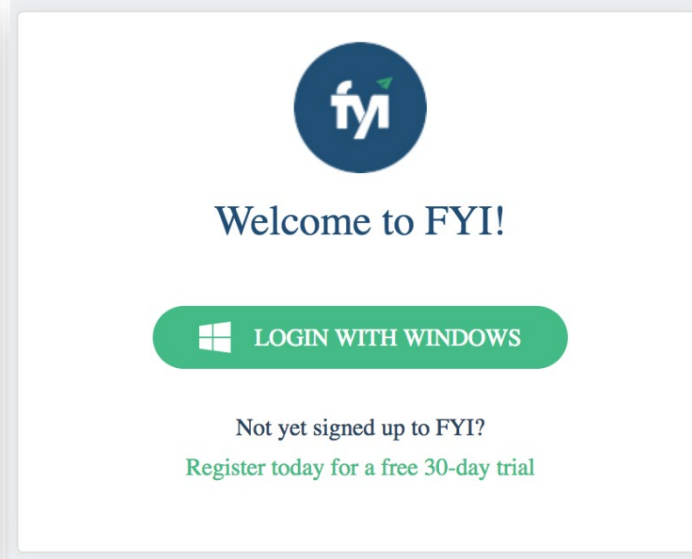




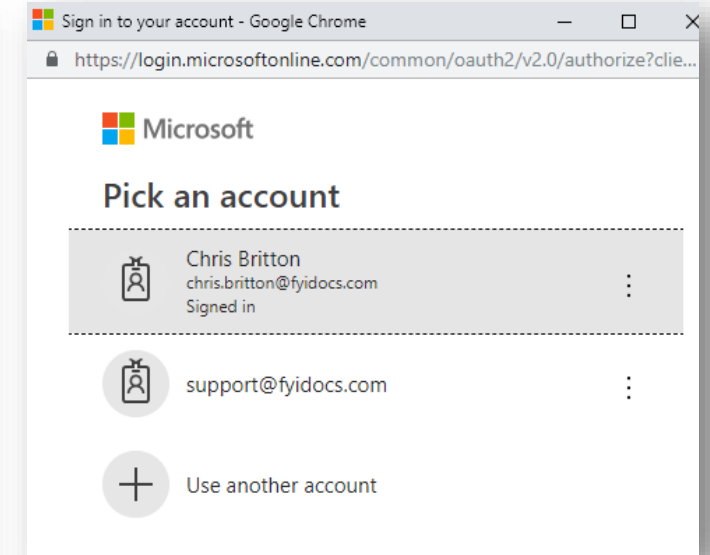
Log-in at
www.fyidocs.com



- 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

The image shows two overlapping screenshots of the FYI web application's 'Documents' section. The top screenshot shows the 'Cabinets' tab selected, with a search bar and a list of cabinets: 'Client Files', 'Directors Files', and 'Financial Planning'. The bottom screenshot shows the 'Categories' tab selected, with a search bar and a list of categories: 'Year', 'Work Type', and 'Special Files'. To the right of the bottom screenshot, a dropdown menu for 'Work Type' is open, showing options: 'Administration', 'Advisory', 'Business', and 'Corporate Affairs'.

Documents

Cabinets Categories

Search by name

Name ▾

Client Files

Directors Files

Financial Planning

Documents

Cabinets Categories Templates Stationery Views Job States Imp

Search by name

Name ▾

Year

Work Type

Special Files

Name

Work Type

Available in Templates

Options

≡ Administration

≡ Advisory

≡ Business

≡ Corporate Affairs



Visit [FYI Help > Getting Started](#)
for an introduction to [Filing to Cabinets and Categories](#)



BASIC FILING CONCEPTS

WATCH VIDEO



Visit [FYI Help > Getting Started](#)
for an introduction to [Filing to Cabinets and Categories](#)



Hot Tips!

#FYIFiling

- Make important fields **Required** within the cabinet
- Save client defaults to save time
- Adjust your AutoFile preferences in My Settings
- Leverage **Tags** to attach additional info

My settings

Profile Documents Share Security Devices

Roger Taylor's Details

Email Notifications: ☐ OFF

Autofile Email Attachments: ☒ ON

Weekly Stats: ☒ ON

Preview Office via OneDrive: ☒ ON

Open Outlook using: Online | v

Open Office using: Desktop | v

AutoFile mode: Practice Default | v

Name

Workpapers

Enable Jobs ☒ ON

Enable Accounts ☐ OFF

Enable Keywords ☐ OFF

Enable Tags ☒ ON

FYI for Outlook

Email

End Checklist - Individual

Created by Roger Taylor on 2/2/2019

Reference RT-008663

Marshall, Frank
client.frank.mars...

Financials & Tax R...

2019 Compl...

Show Closed Jobs ☐ OFF

Year 2019

Keywords Keywords

Owner Roger Taylor

Save as Client Default



Visit [FYI Help > Getting Started](#)
for an introduction to [Filing to Cabinets and Categories](#)



Displaying the FYI Drawer

fyi Dashboard Clients Jobs Tasks Documents Automation Knowledge

Reed, Hank View client group data

Summary Detail Jobs Tasks Documents Tax Corporate Affairs Apps Processes Activity

Edit Copy Delete Doc Link Send Mark Sent Export Bulk Update Cancel

Type	Name	Client	Year	Work Type	Modified by	Modified on
	DocuSign: Fiona_Reed-Tax-return[10]	Reed, Hank	2019	Tax - Income	Roger Taylor	14/08/2019 23:04
	Fiona_Reed-Tax-return[9]	Reed, Hank	2019	Tax - Income	Liz Hurst	13/08/2019 08:28
	Fiona_Reed-Tax-return[11]	Reed, Hank	2019	Tax - Income	Roger Taylor	12/08/2019 15:50
	DocuSign: Hank_Reed-Tax-return 2018	Reed, Hank	2019	Correspondence	Roger Taylor	22/07/2019 13:41
	Year end financials	Reed, Hank	2018	Correspondence	Roger Taylor	17/04/2019 19:52
	Reed-Construction-Tax-return-2018	Reed, Hank	2018	Tax - Income	Roger Taylor	17/04/2019 19:50
	Hank_Reed-Tax-return-2018	Reed, Hank	2018	Tax - Income	Roger Taylor	17/04/2019 19:50
	Reed-SMSF-Tax-return-2018	Reed, Hank	2018	Tax - Income	Roger Taylor	17/04/2019 19:50
	Fiona_Reed-Tax-return-2018	Reed, Hank	2018	Tax - Income	Roger Taylor	17/04/2019 19:50
	Engagement_Letter	Reed, Hank	2018	Administration	Liz Hurst	06/03/2019 10:30
	Engagement Letter Attached	Reed, Hank	2019	Tax - Income	Troy Steele	05/03/2019 18:13
	Engagement Letter Attached	Reed, Hank	2019	Advisory	Troy Steele	05/03/2019 18:09
	Engagement_Letter	Reed, Hank	2018	Advisory	Troy Steele	05/03/2019 18:08
	Xero Con	Reed, Hank	2019	Advisory	Liz Hurst	05/03/2019 16:48
	RE: I want apps for my business	Reed, Hank	2019	Advisory	Liz Hurst	05/03/2019 15:28
	Invoicing Requirements	Reed, Hank	2019	Advisory	Liz Hurst	05/03/2019 15:28
	Called re superfund	Reed, Hank	2019	Correspondence	Liz Hurst	05/03/2019 14:53

Email

Year end financials

Created by Roger Taylor on 17/04/2019

Filing

Client: Reed, Hank

Cabinet: Client Files

Keywords: Keywords

Work Type: Correspondence

Year: 2018

Owner: Roger Taylor

Tasks

Workflow

Activity

Recent Documents

Upload

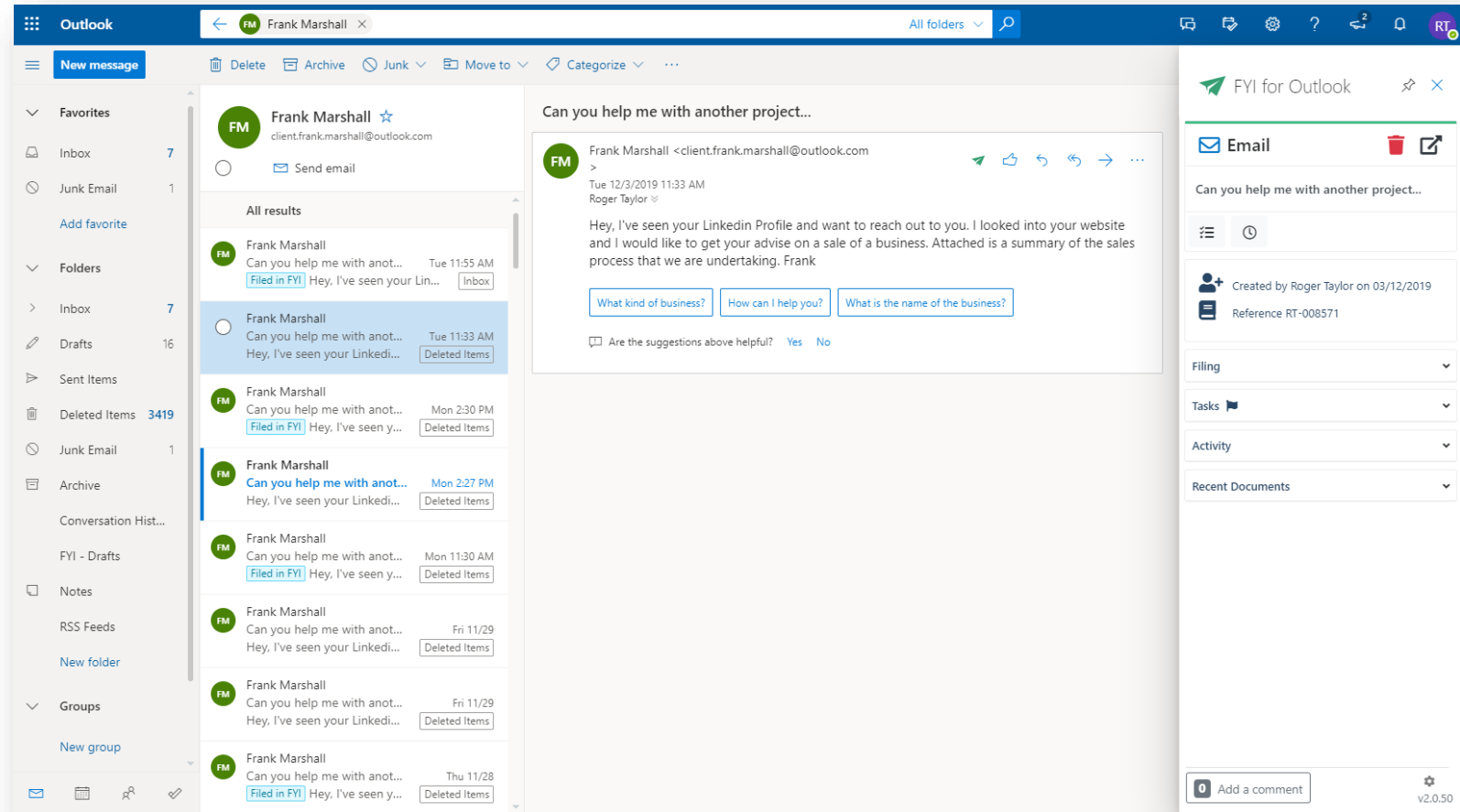


Visit [FYI Help > Getting Started](#)
for an introduction to [Displaying the Drawer in FYI, Outlook and Office](#)



Displaying the FYI Drawer in Outlook

- Browser
- Desktop



Visit [FYI Help > Getting Started](#)
for an introduction to [Displaying the Drawer in FYI, Outlook and Office](#)



Displaying the FYI Drawer in Office

- Word
- Excel
- PowerPoint

	INCOME	Y/N	Information Provided
1	Salary or Wage (PAYG Payment Summary)		
2	Allowances, Earnings, Tips, Director's fees, etc		
3	Employer Lump Sum Payments See PAYG Payment Summary for Details at Label A and B		
4	Eligible Termination Payments (ETP's) Obtain and attach any ETP payment summaries and employer termination statements		
5	Australian Government Allowances and Payments Youth Allowance, Newstart, Sickness, Special Benefit, Educational, Training Allowances		
6	Australian Government Pensions and other Allowances		
7	Other Australian Pensions or Annuities – including superannuation pensions		
8	Australian Superannuation Lump Sum Payments		
10	Gross Interest From bank accounts or other sources		
11A	Dividends Includes dividend reinvestment (DRP) or any other information (eg: buybacks, consolidations, return of capital)		
11B	Share Purchases Did you purchase any shares throughout the year (eg: purchase documents, sales contracts)		
12	Employee Share Schemes		
	Partnerships and Trusts		
13	Provide tax statements for any managed funds or copy of partnership's or trust's		



Visit [FYI Help > Getting Started](#)
for an introduction to [Displaying the Drawer in FYI, Outlook and Office](#)



Using the FYI Drawer

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

The screenshot displays the FYI Drawer interface. At the top, an 'Email' window shows the subject 'Re: Help with new business...'. Below this, a list of metadata items is shown: 'Created by Roger Taylor on 21/10/2019', 'Email has attachments', 'Attachments have been AutoFiled', and 'Reference RT-006909'. A vertical sidebar on the left contains tabs for 'Filing', 'Thread', 'Tasks', 'Workflow', 'Activity', 'Recent Documents', 'Attachments', 'People', 'Upload', and 'Stapled'. The 'Filing' tab is active, and a 'Filing' overlay is shown on the right, containing fields for 'Client' (Marshall, Frank), 'Cabinet' (Client Files), 'Job' (2019 Compliance), 'Work Type' (Advisory), 'Year' (2019), 'Keywords' (Keywords), and 'Owner' (Roger Taylor). A 'Show Closed Jobs' toggle is set to 'OFF'. Below the 'Filing' overlay, a 'Tasks' overlay is visible, showing a list of tasks under the heading 'Outstanding'. The tasks are: 'Please turn this into a template - Not Started, due in a day' (assigned to Troy Steele) and 'Please review - In Progress, due in a day' (assigned to Liz Hurst). An 'Add Task' button is located at the bottom right of the 'Tasks' overlay.



Visit [FYI Help > Document Management](#) for an introduction to [Using the Drawer](#)



NAVIGATING THE FYI DRAWER

WATCH VIDEO



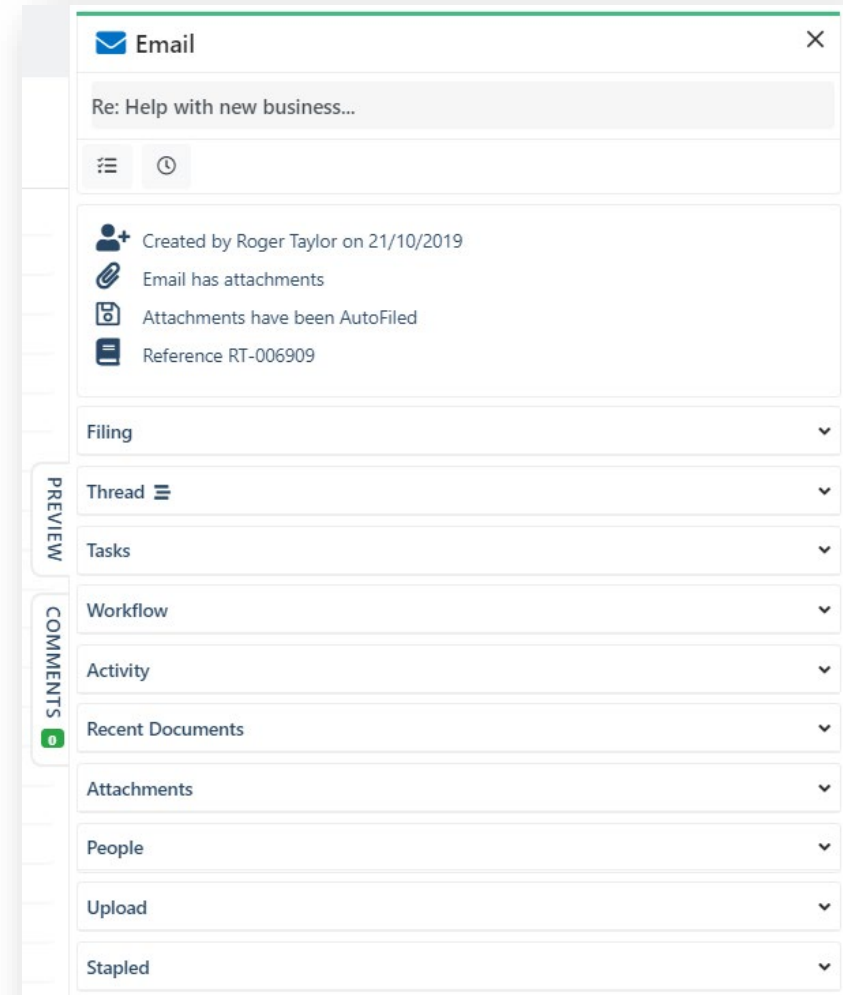
Visit [FYI Help > Getting Started](#)
to watch a recorded introduction to [Navigating the FYI Drawer](#)



Hot Tips!

#FYIDrawer

- Leverage the drawer on jobs during daily huddle
- Write comments to notify the team
- Jump to email threads and attachments



Visit [FYI Help > Document Management](#)
for an introduction to [Using the Drawer](#)



Your Workspaces

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

The image displays three overlapping screenshots of the FYI software interface, illustrating the 'Your Workspaces' concept.

Top Screenshot (Dashboard): Shows the main navigation bar with 'Dashboard', 'Clients', 'Jobs', 'Tasks', 'Documents', 'Automation', and 'Knowledge'. A green '+ NEW' button is on the right. Below the navigation bar, there are several status boxes: 'My Tasks 28', 'My Recent', 'In Tray 33', 'Delegated Tasks 75', 'My Jobs 5', 'My Edits 3', 'My Time 0', and 'Notifications 4'.

Middle Screenshot (Client Details): Shows the 'Clients' workspace. A search bar contains 'Marshall, Frank'. Below it, there are tabs for 'Summary', 'Documents', 'Detail', 'Jobs', 'Tasks', 'Tax', 'Corporate Affairs', 'Apps', 'Processes', and 'Activity'. The 'Summary' tab is active, displaying 'Contact Details' for 'Marshall, Frank', including contact information like 'Mr F. Marshall', 'client.frank.marsh', and '(08) 9867-5548'.

Bottom Screenshot (Jobs): Shows the 'Jobs' workspace. A dropdown menu is open, listing 'Client group(s)' with options: 'NVG Universal', 'Entergy Corporation', 'Marshall Group', and 'AMM Chiropractic Gro'. The 'Jobs' section shows a 'Select' button, a dropdown menu with 'Daily Standup Meeting', and a status 'No partner selected'.

Bottom Screenshot (Documents): Shows the 'Documents' workspace. It features a search bar with 'Client Files' and 'Recent Documents'. Below, there is a table with columns 'Type', 'Name', and 'Client'. The table lists three documents: 'Growth_Partners_-_Sample_Spreadsheet' (Type: xlsx), 'End of year questionnaire' (Type: pdf), and 'Engagement_Letter' (Type: pdf), all associated with 'Marshall, Frank'.



Visit [FYI Help > Getting Started](#)
for an introduction to [Your Workspaces](#)



NAVIGATING THE FYI DASHBOARD

WATCH VIDEO



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

The screenshot displays the FYI dashboard interface. At the top, there is a 'Word' document tab titled 'Year End Checklist - Individual'. Below this, a 'Create Time Sheet' modal form is open. The form contains the following fields:

Field	Value
Date	05/12/2019
User	Roger Taylor
Client	Marshall, Frank client.frank.marshall@outlook.com
Job	2019 Compliance
XPM Task	2. Prepare Return
Time	01:15
Notes	Letter: Year End Checklist - Individual
Billable	ON

At the bottom right of the modal, there are two buttons: 'Create' (green) and 'Cancel' (grey).





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

The screenshot shows the top navigation bar of the FYI system with links: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below the bar, there are three filter boxes: 'Group' with 'Marshall Group', 'Client' with 'Marshall, Frank', and 'Job' with '2019 Compliance Marshall, Frank'. Each box has an 'x' to clear the filter and a dropdown arrow.

The screenshot shows the 'Phone call' form within the Client Summary screen. At the top, there are three tabs: 'Phone call' (selected), 'File note', and 'Meeting'. The form includes a 'Subject' field with the placeholder 'Enter the subject'. Below this is a rich text editor with a toolbar containing icons for bold, italic, underline, font size (15), font face (Segoe UI), background color (yellow), bulleted list, numbered list, indent, table, link, image, unlink, and source code. The text area contains the placeholder 'Please enter description ...'. At the bottom, there are three fields: 'Phone' with '(08) 9867-5548', 'Date' with '05/12/2019', and 'Time' with '16:13:49'. To the right of the time field is a close icon. At the bottom right are two buttons: 'Create' (green) and 'Clear' (white).





NAVIGATING JOBS

WATCH VIDEO

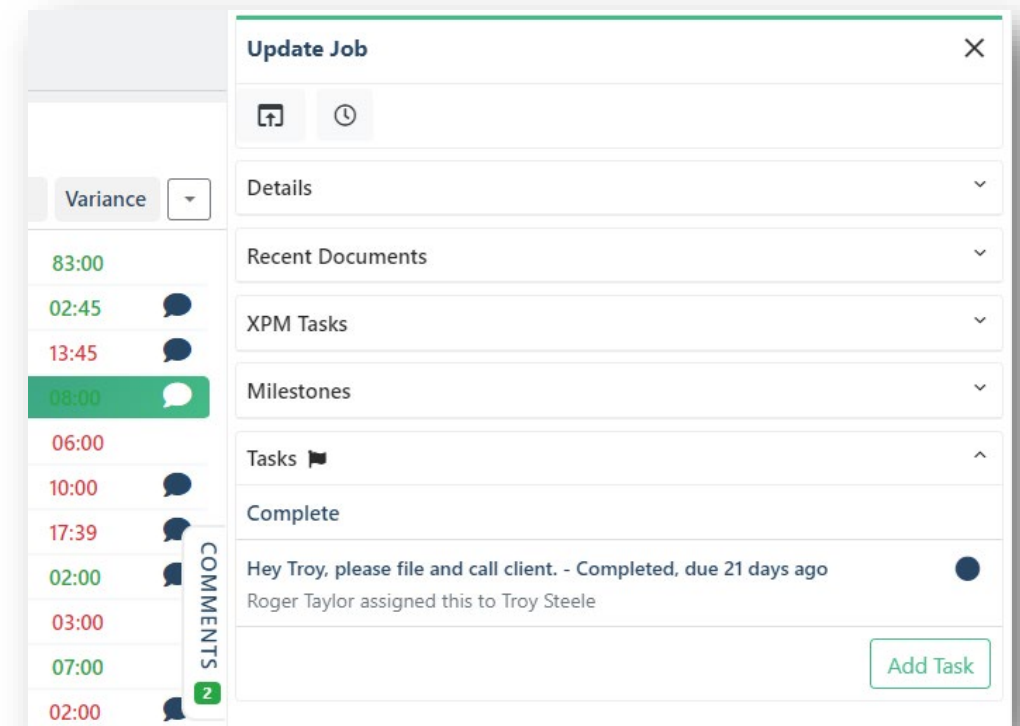


Visit [FYI Help > Getting Started](#)
to watch a recorded introduction to [Navigating Jobs](#)



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 > Document Management](#)
for an introduction to [Using the Drawer](#)



NAVIGATING TASKS

WATCH VIDEO



Visit [FYI Help > Getting Started](#)
to watch a recorded introduction to [Navigating Tasks](#)



Hot Tips! #FYITasks

- Keep track of your to-do list by assigning yourself ad-hoc tasks
- Add comments to tasks to update the delegator when the due date won't be met

Comment

✕

1 Comment

Roger Taylor

in a few seconds

Edit

Delete

Liz Hurst

this will be done by next week.

Update Task

Sign-off tax letter

Assignee	Me
Delegator	Liz Hurst
Client	NVG Universal
Job	2018 Compliance
Category	Compliance
Due date	05/12/2019
Status	In Progress



Visit [FYI Help > Document Management](#)
for an introduction to [Using the Drawer](#)



NAVIGATING AUTOMATIONS

WATCH VIDEO



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 > Document Management](#)
for an introduction to [Using the Drawer](#)



NAVIGATING KNOWLEDGE

WATCH VIDEO



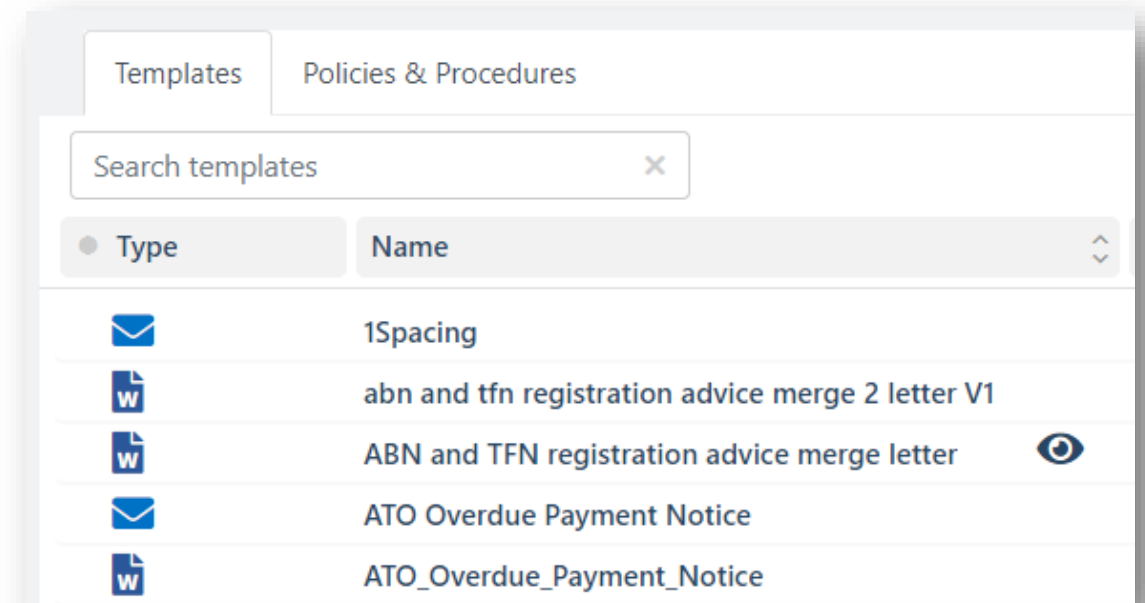
Visit [FYI Help > Getting Started](#)
to watch a recorded introduction to [Navigating Knowledge](#)



Hot Tips!

#FYIKnowledge

- Quickly preview templates from **Knowledge** to check which is best for your situation
- Add other cabinets to knowledge via **Practice Settings**



Visit [FYI Help > Document Management](#)
for an introduction to [Using the Drawer](#)



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
📄	Presentation	P
📄	Spreadsheet	S
☰	Task	T
🕒	Time Sheet	I
📁	Upload	U
🔗	Web Link	
📄	Word	

Filing

Client

Samarat, Nat
savitabroc1@eliteemail.com

×

Cabinet

Workpapers

▾

Year

2020

▾

Owner

Roger Taylor

▾





TROUBLE-SHOOTING FOR NEW USERS





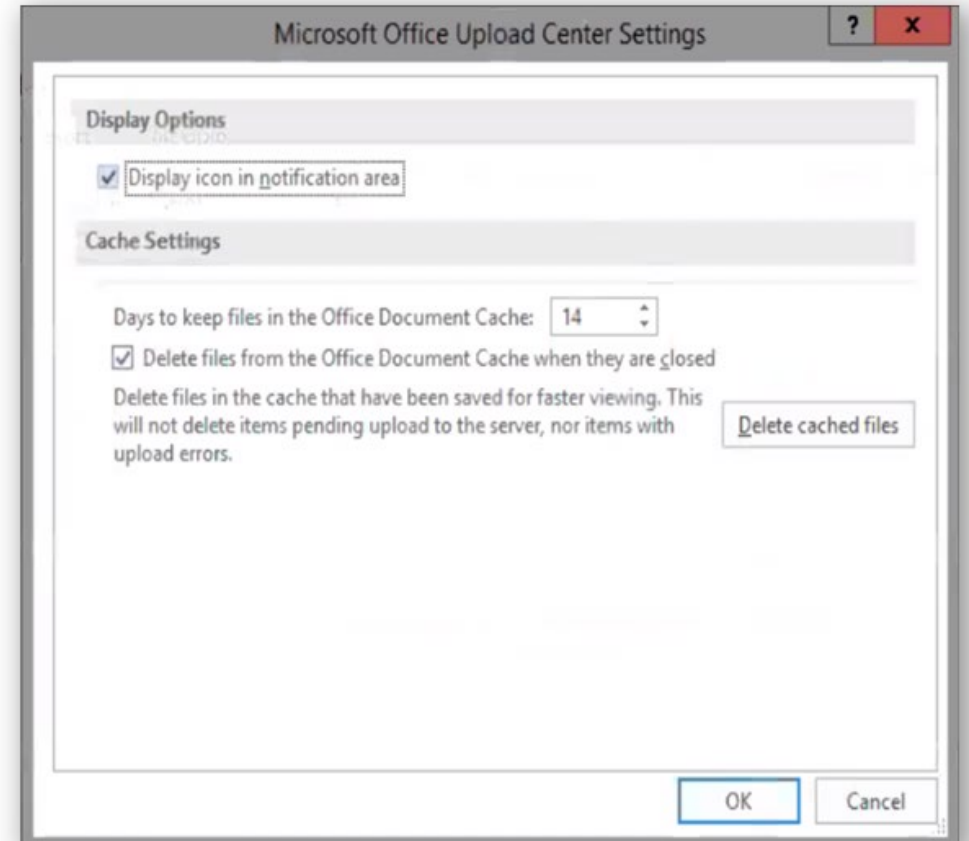
Practice Set-Up

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



Visit [FYI Help > Administration > Practice Set-Up](#) for an instructions on [Preparing Your OneDrive for FYI](#)



PRACTICE SET UP PREPARING YOUR ONEDRIVE

WATCH VIDEO



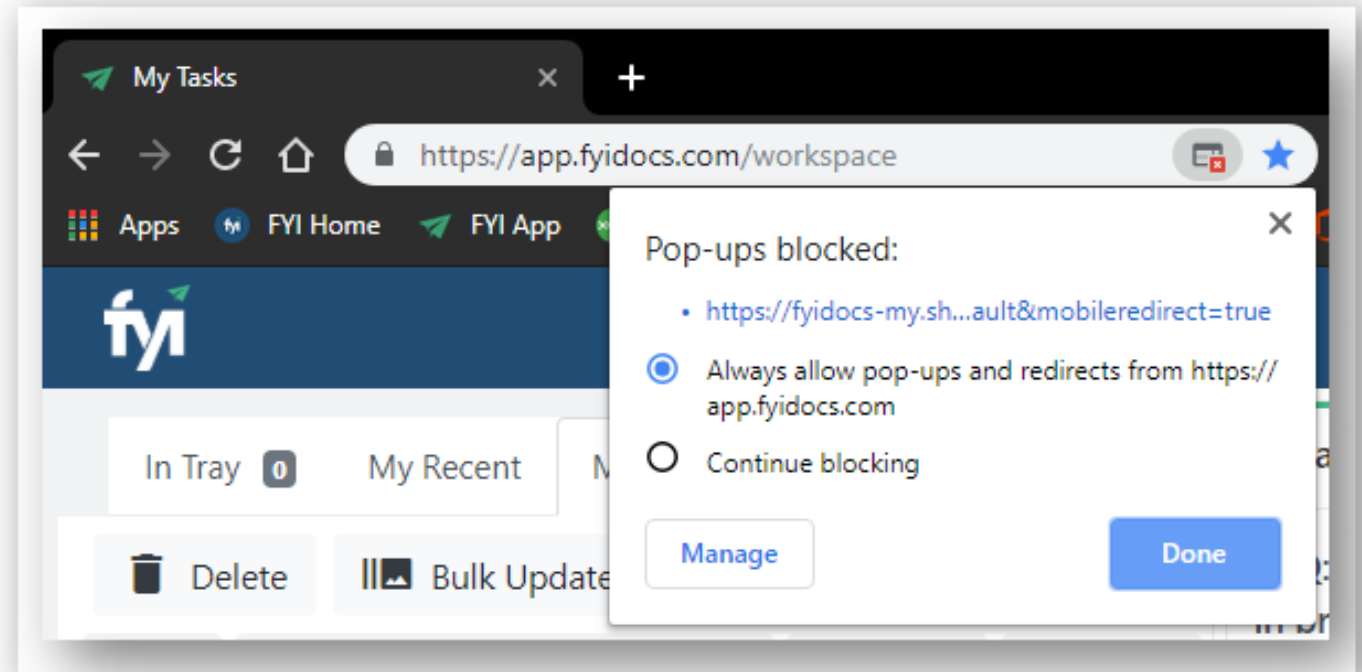
Visit [FYI Help > Administration > Practice Set-Up](#)
for an instructions on [Preparing Your OneDrive for FYI](#)



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](#)



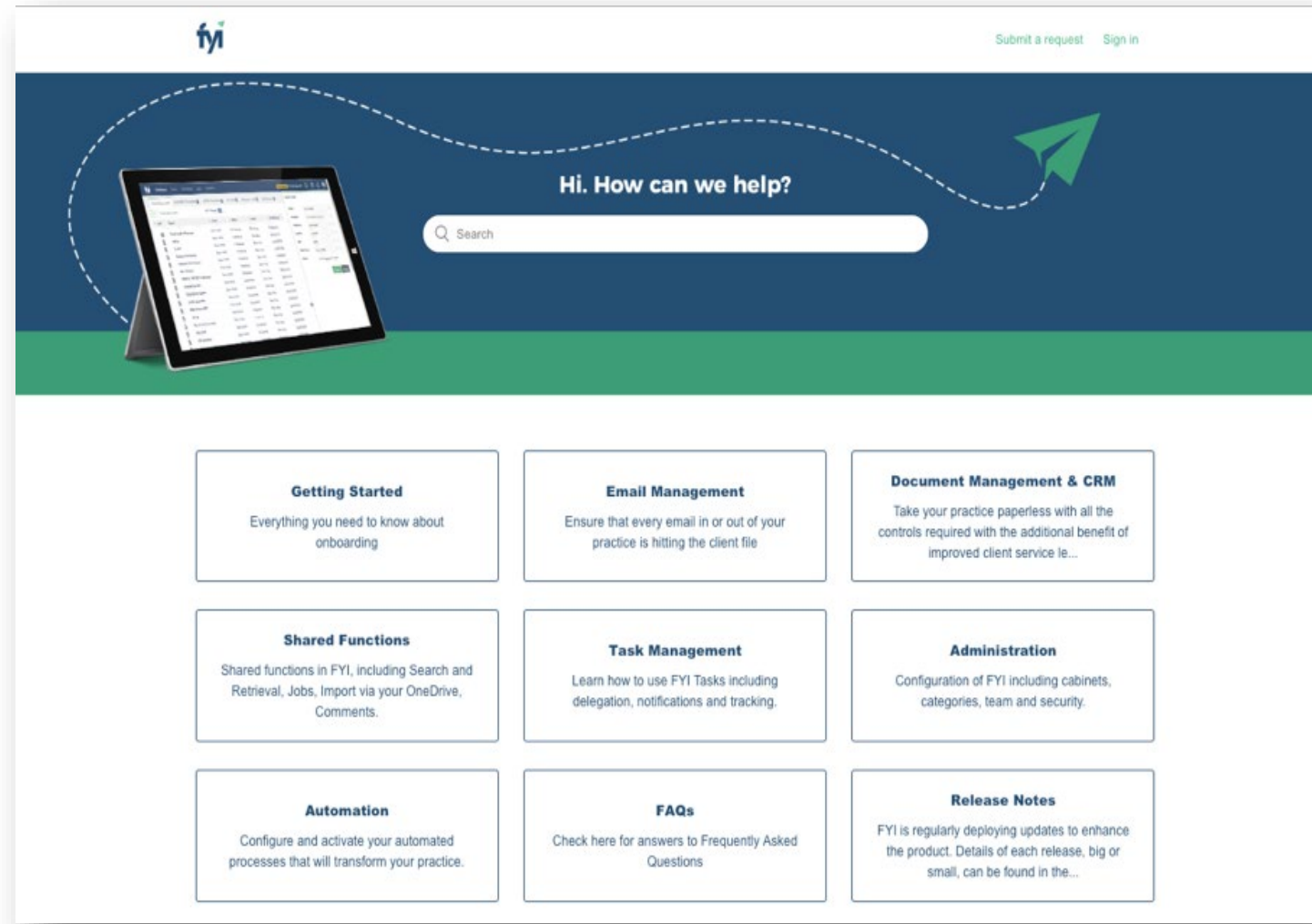
**HELP WHEN YOU
NEED IT**





Help Centre

- Comprehensive knowledge base
- Self-guided learning library
- Detailed help articles
- Downloadable PDF guides
- Video tutorials



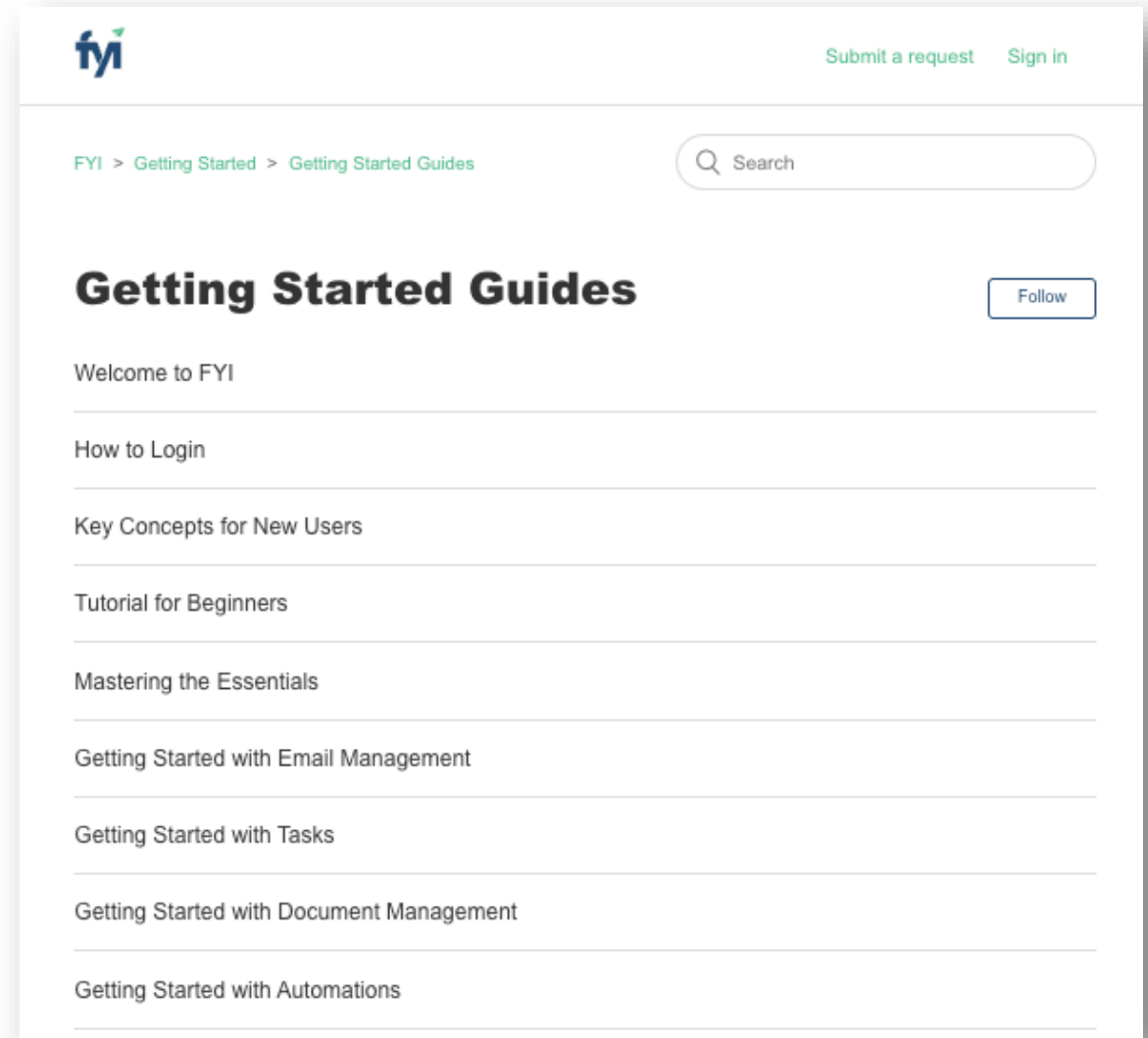
Visit www.support.fyidocs.com



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



Visit [FYI Help > Getting Started](#)
to download the [Getting Started Guides](#)



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!



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

WEB APP

app.fyidocs.com

HELP CENTRE

support.fyidocs.com

EMAIL SUPPORT

support@fyidocs.com



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