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.

Follow Shaun

In This Session
We Will Cover:

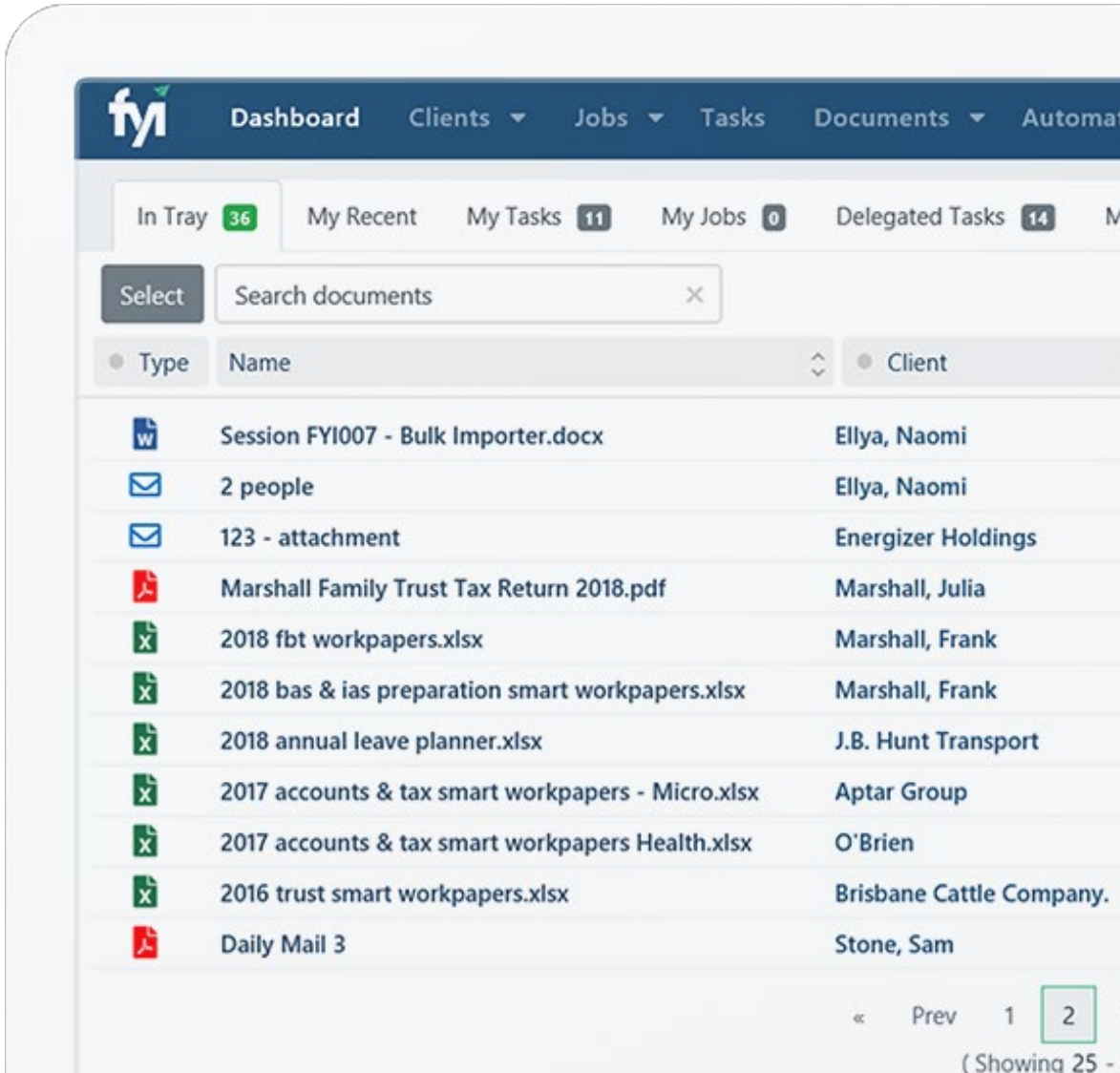
1. **A brief introduction to FYI**
   What is FYI? How will it help?

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

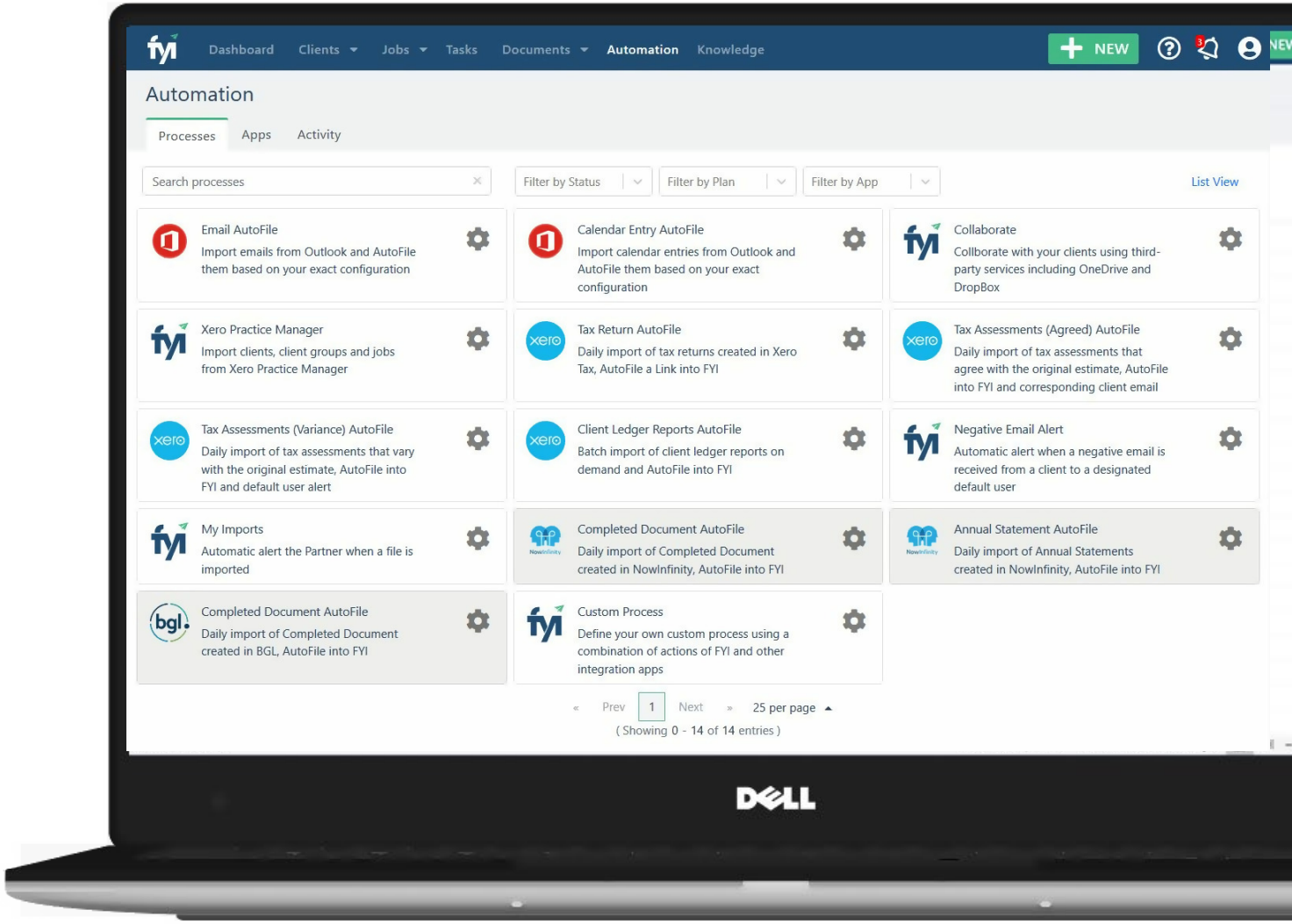


A BRIEF INTRO TO FYI

What is it? How will it help me?

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

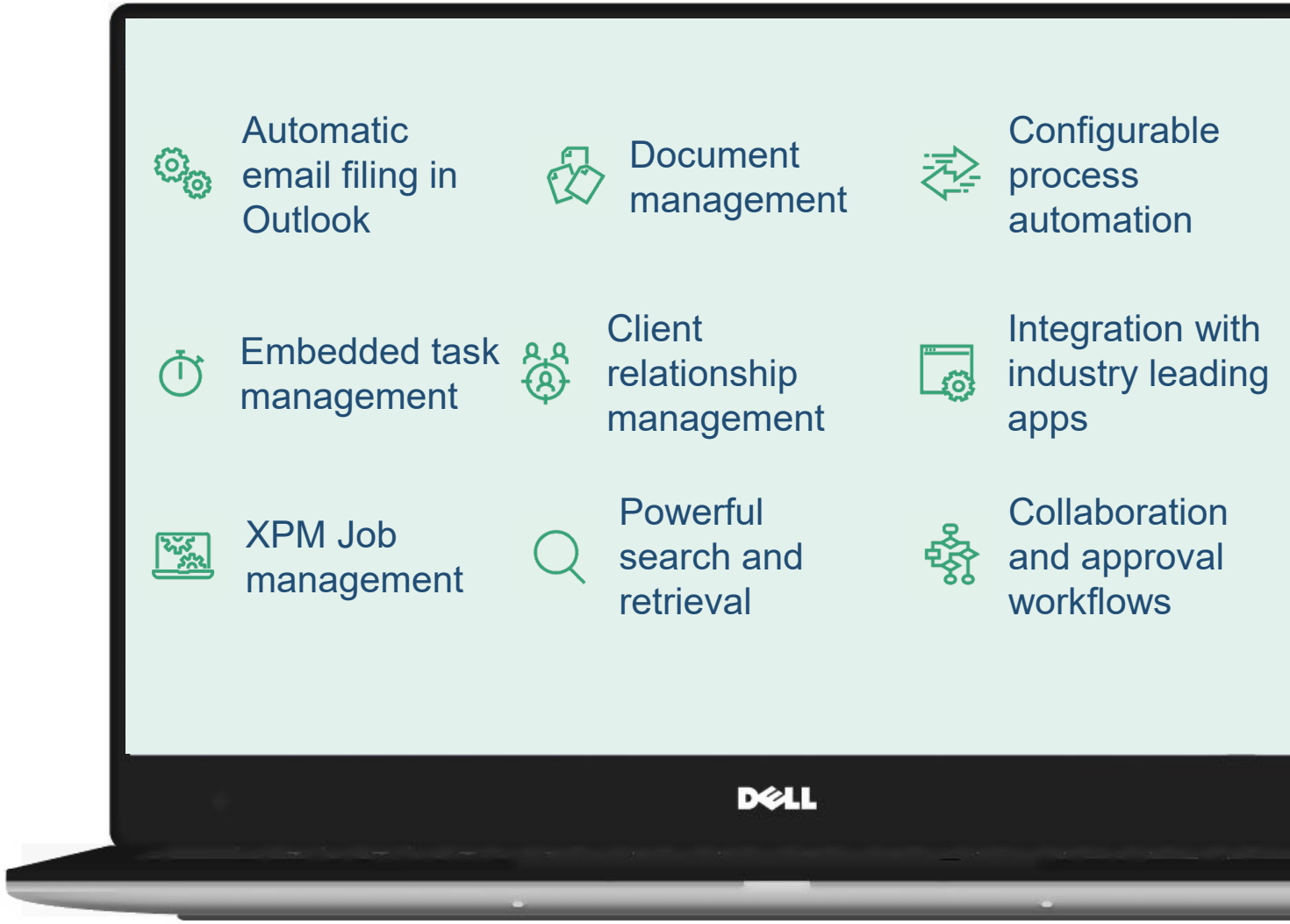
We’re on a mission to halve the time spent on compliance and admin by delivering a step-change in document automation and efficiency.



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

- practice-wide accessibility and visibility
- efficiency
- automation

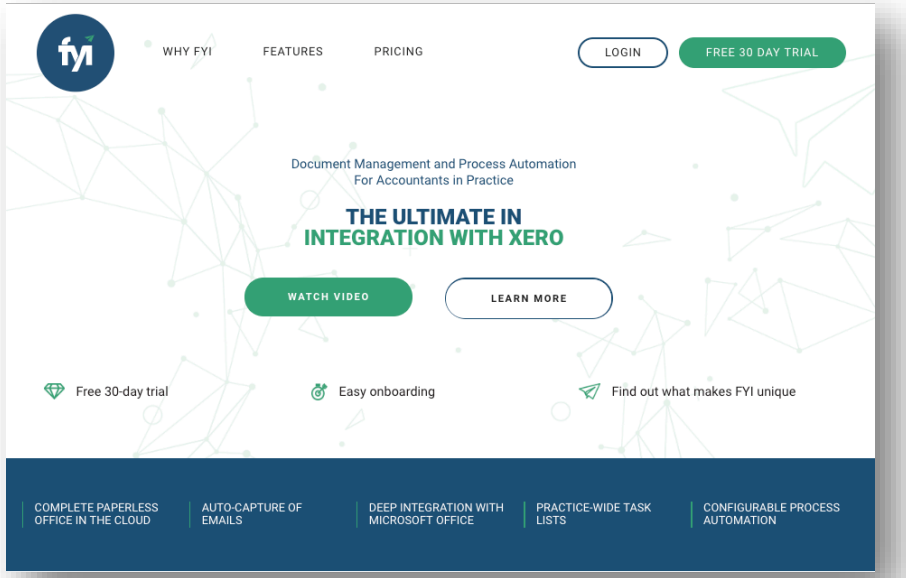
Your emails, documents, CRM, jobs and tasks…all in one place!

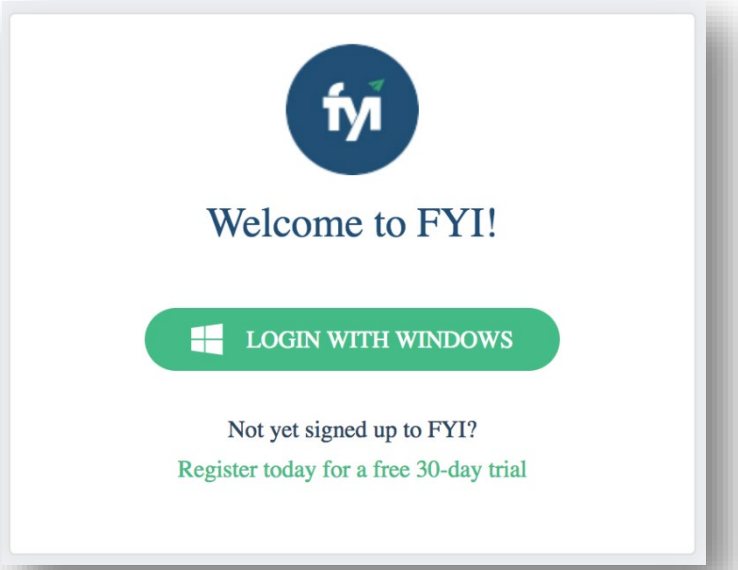


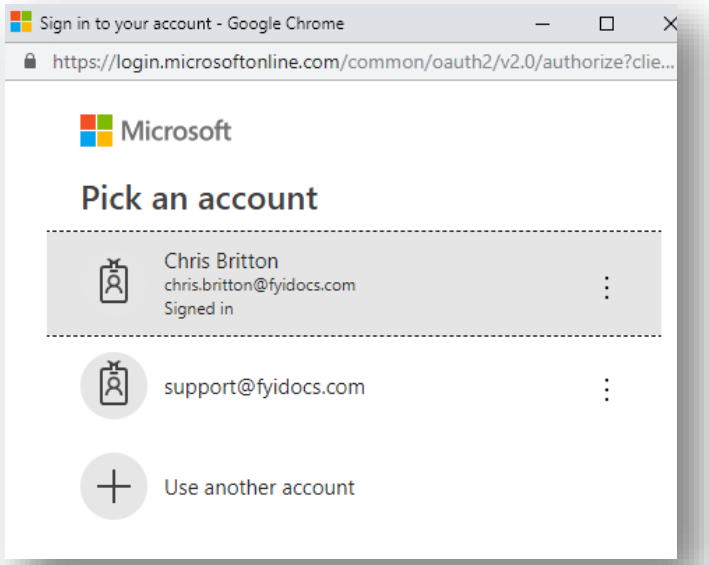
NAVIGATING FYI FOR THE FIRST TIME

- 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.

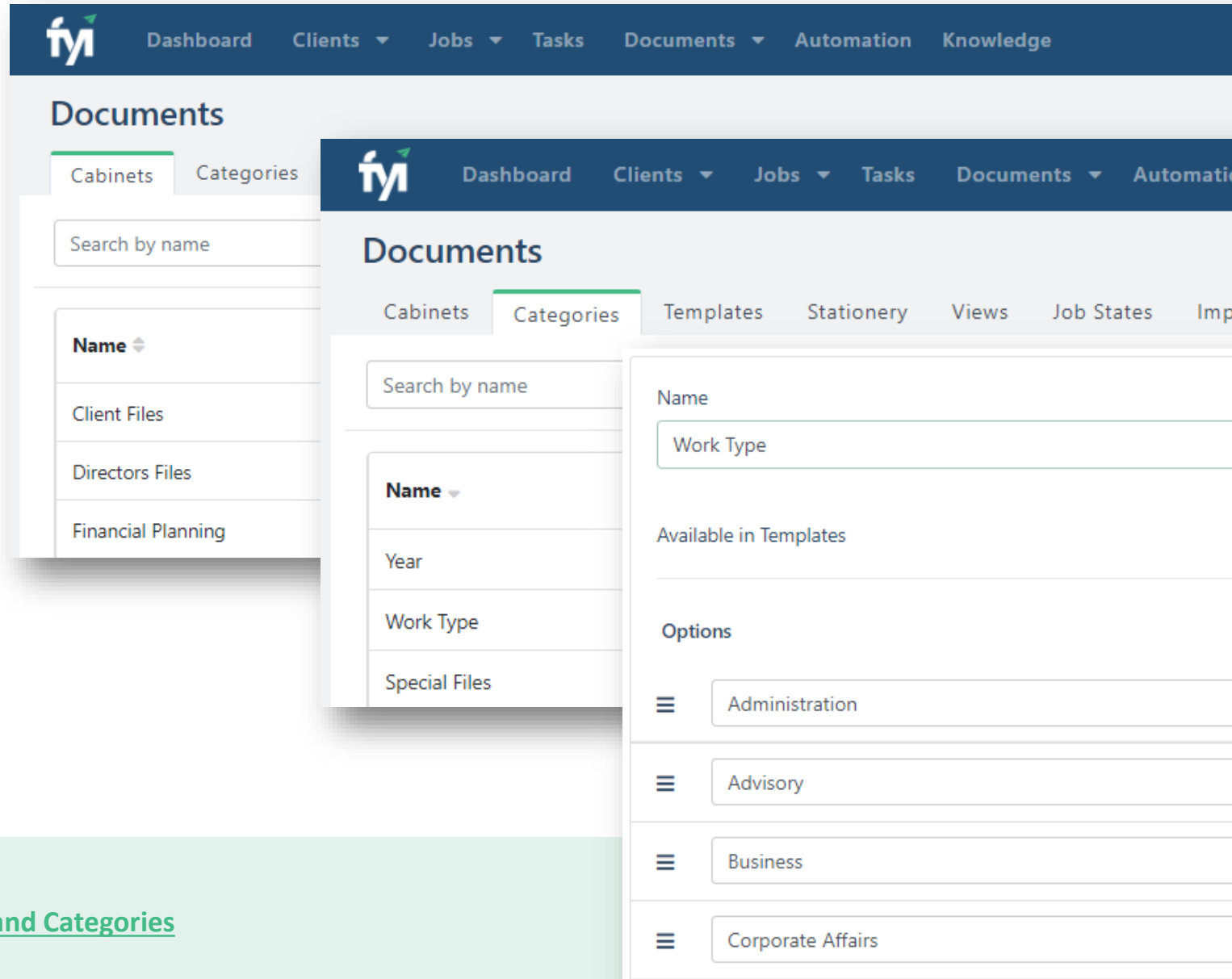
2. Click **LOGIN WITH WINDOWS**

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

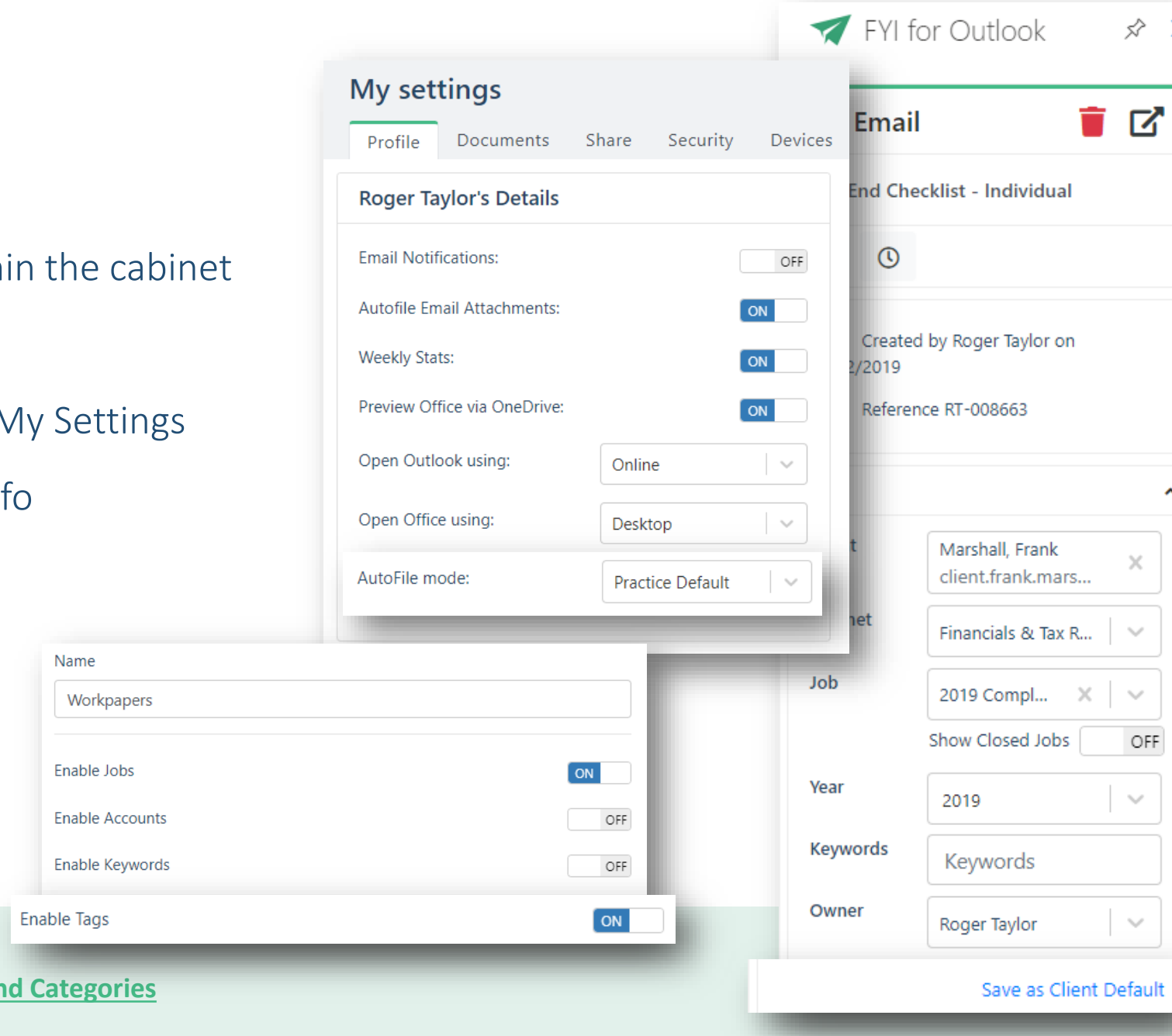


Visit FYI Help > Getting Started
for an introduction to **Filing to Cabinets and Categories**

Visit FYI Help > Getting Started
for an introduction to **Filing to Cabinets and Categories**

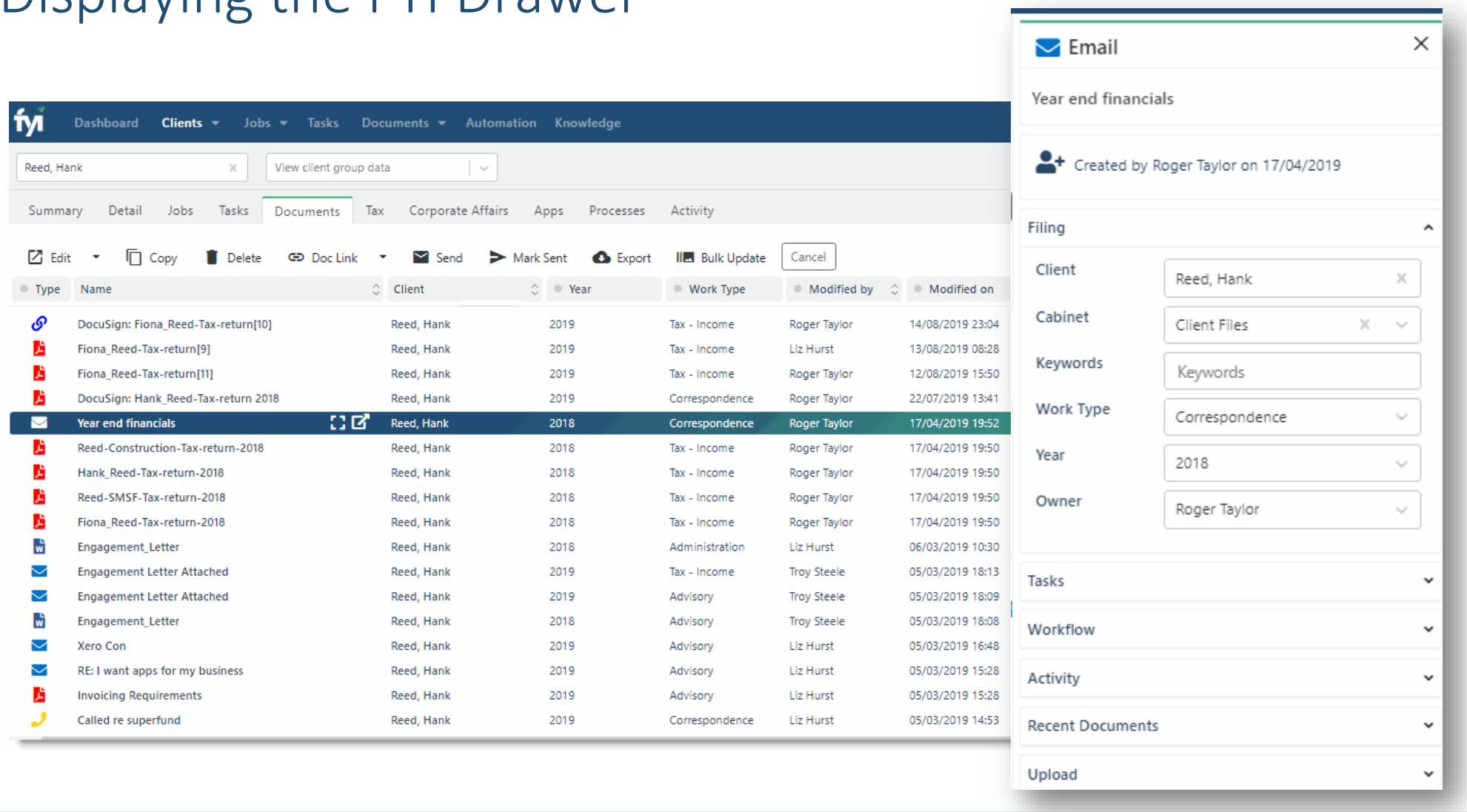
Hot Tips!
#FYIFiling

- 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



Visit FYI Help > Getting Started
for an introduction to **Filing to Cabinets and Categories**

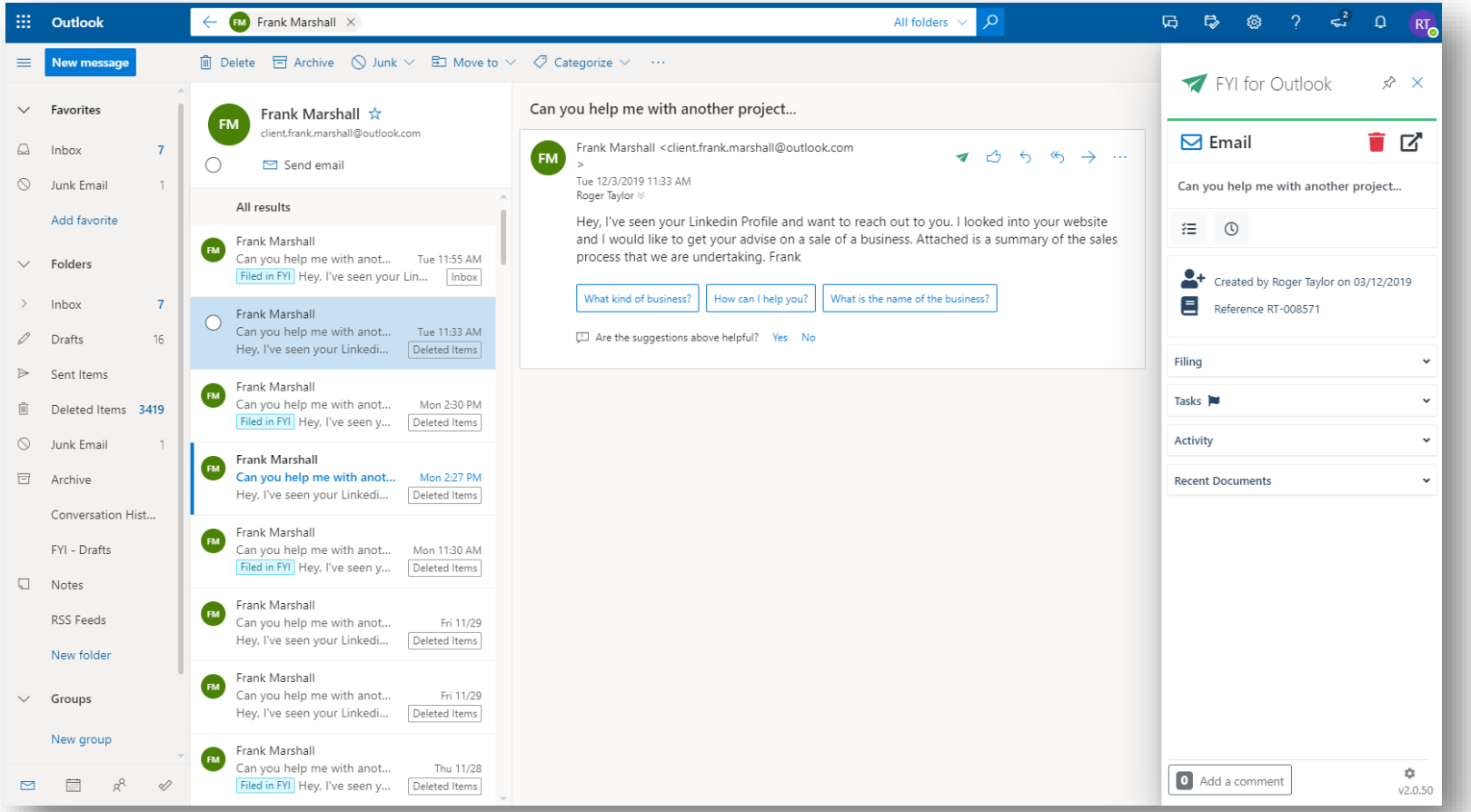
Displaying the FYI Drawer



Visit FYI Help > Getting Started
for an introduction to **Displaying the Drawer in FYI, Outlook and Office**

Displaying the FYI Drawer in Outlook

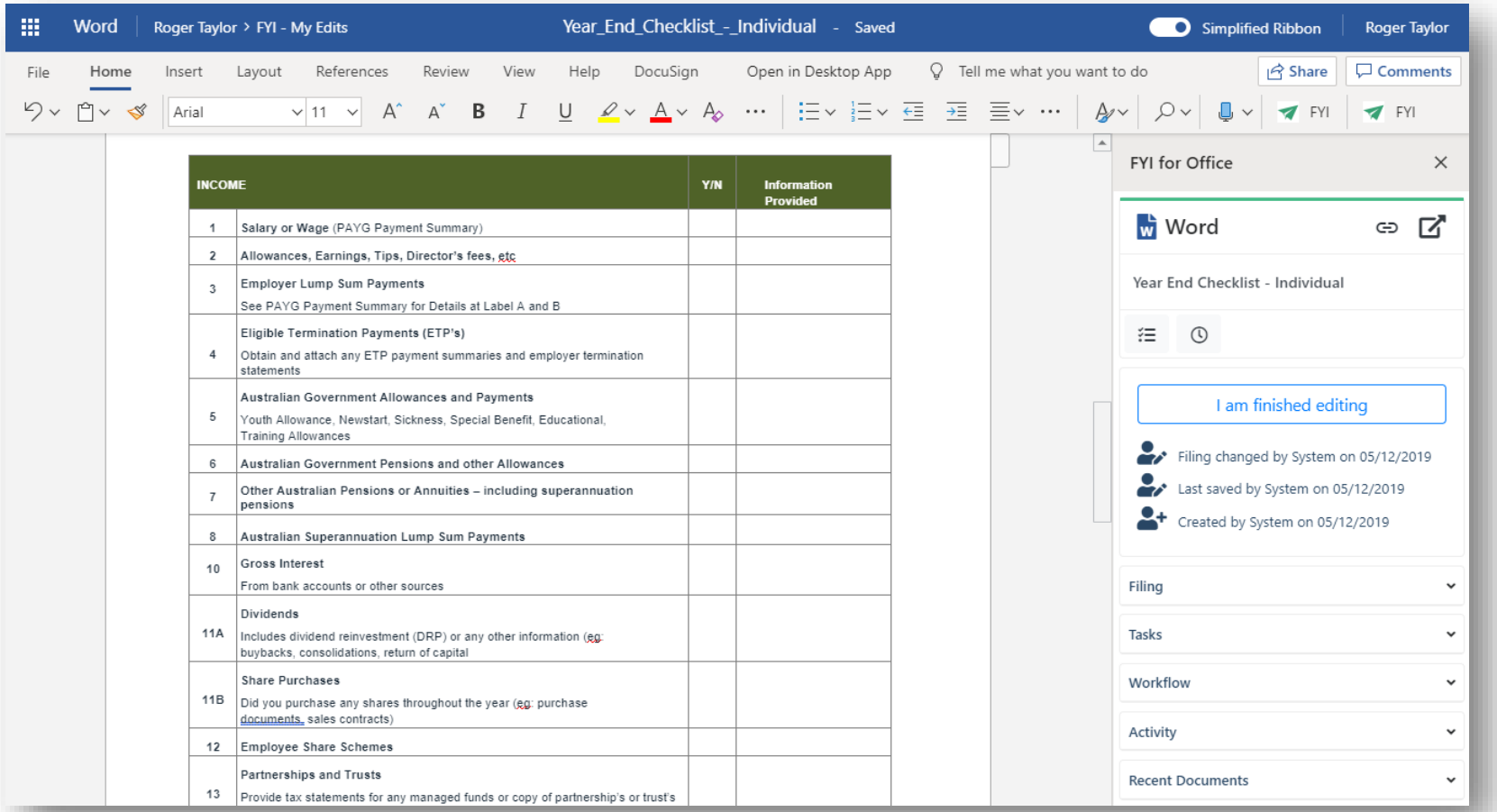
- Browser
- Desktop



Visit FYI Help > Getting Started
for an introduction to **Displaying the Drawer in FYI, Outlook and Office**

Displaying the FYI Drawer in Office

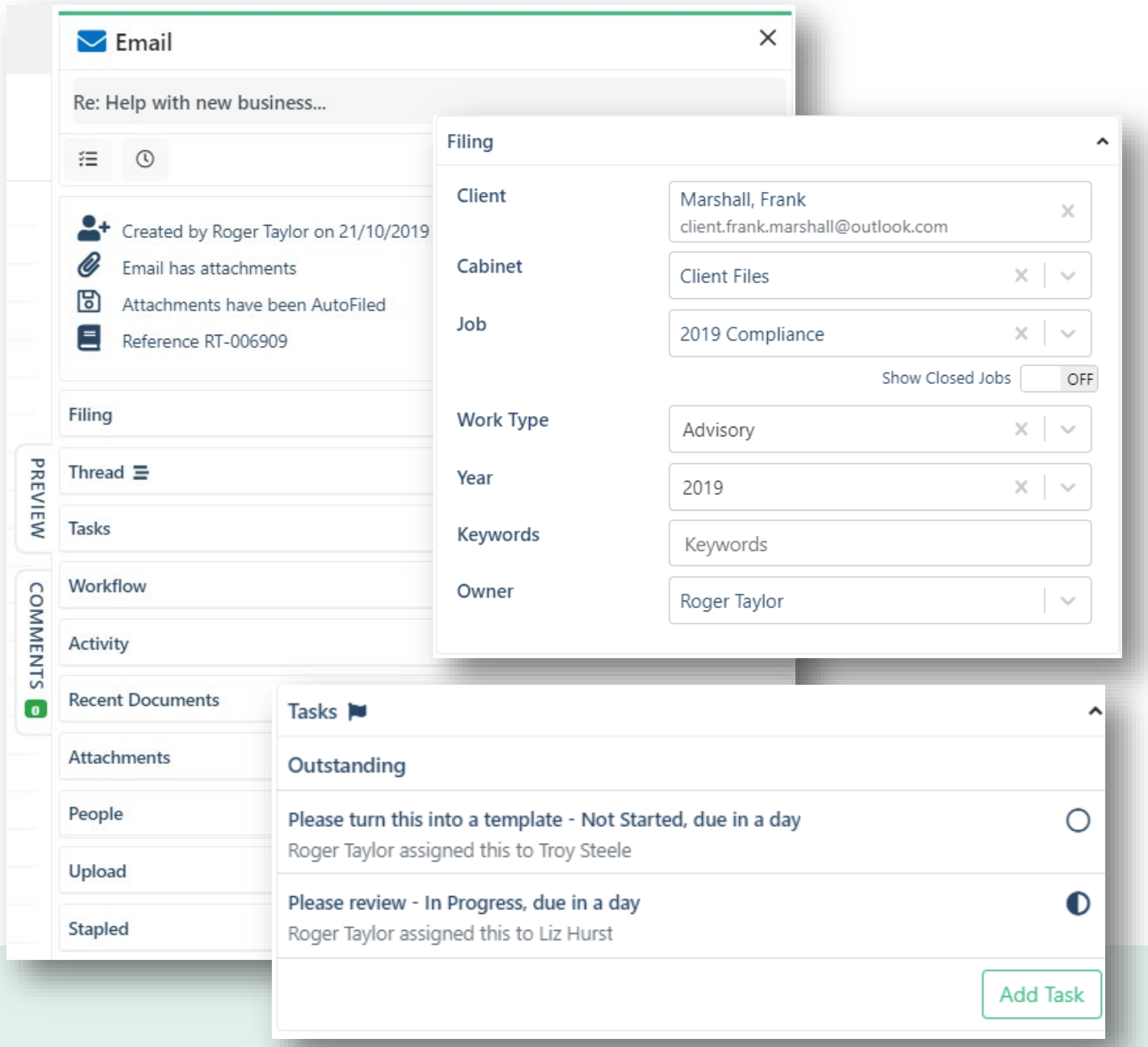
- Word
- Excel
- PowerPoint



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.....

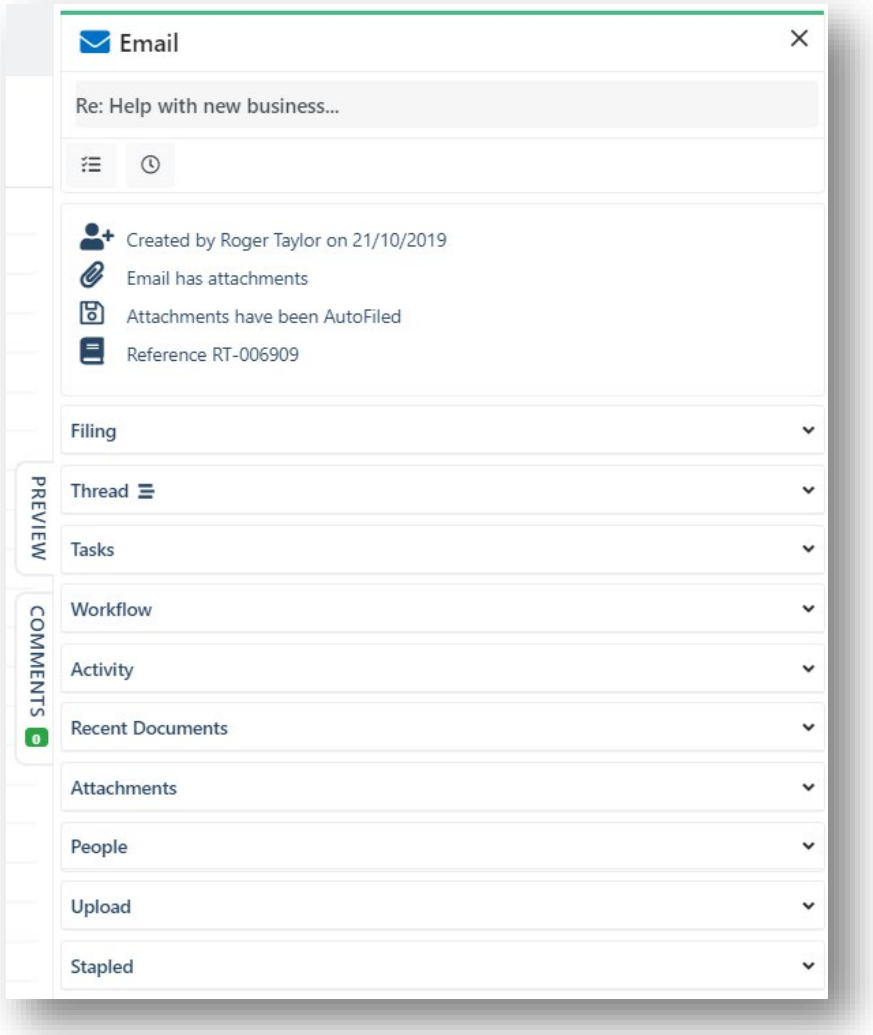


Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

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

Hot Tips!
#FYIDrawer

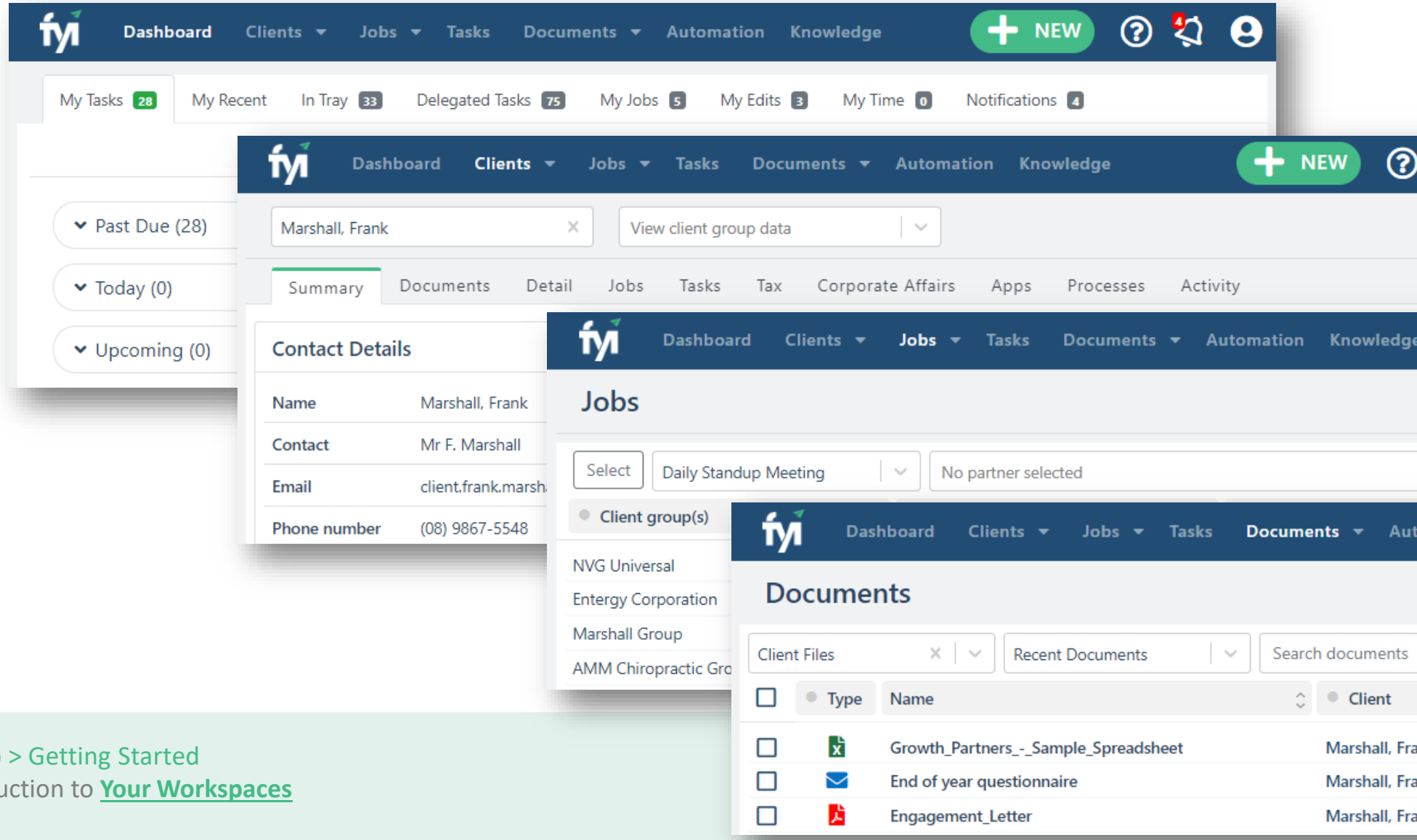
- Leverage the drawer on jobs during daily huddle
- Write comments to notify the team
- Jump to email threads and attachments



Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

Your Workspaces

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

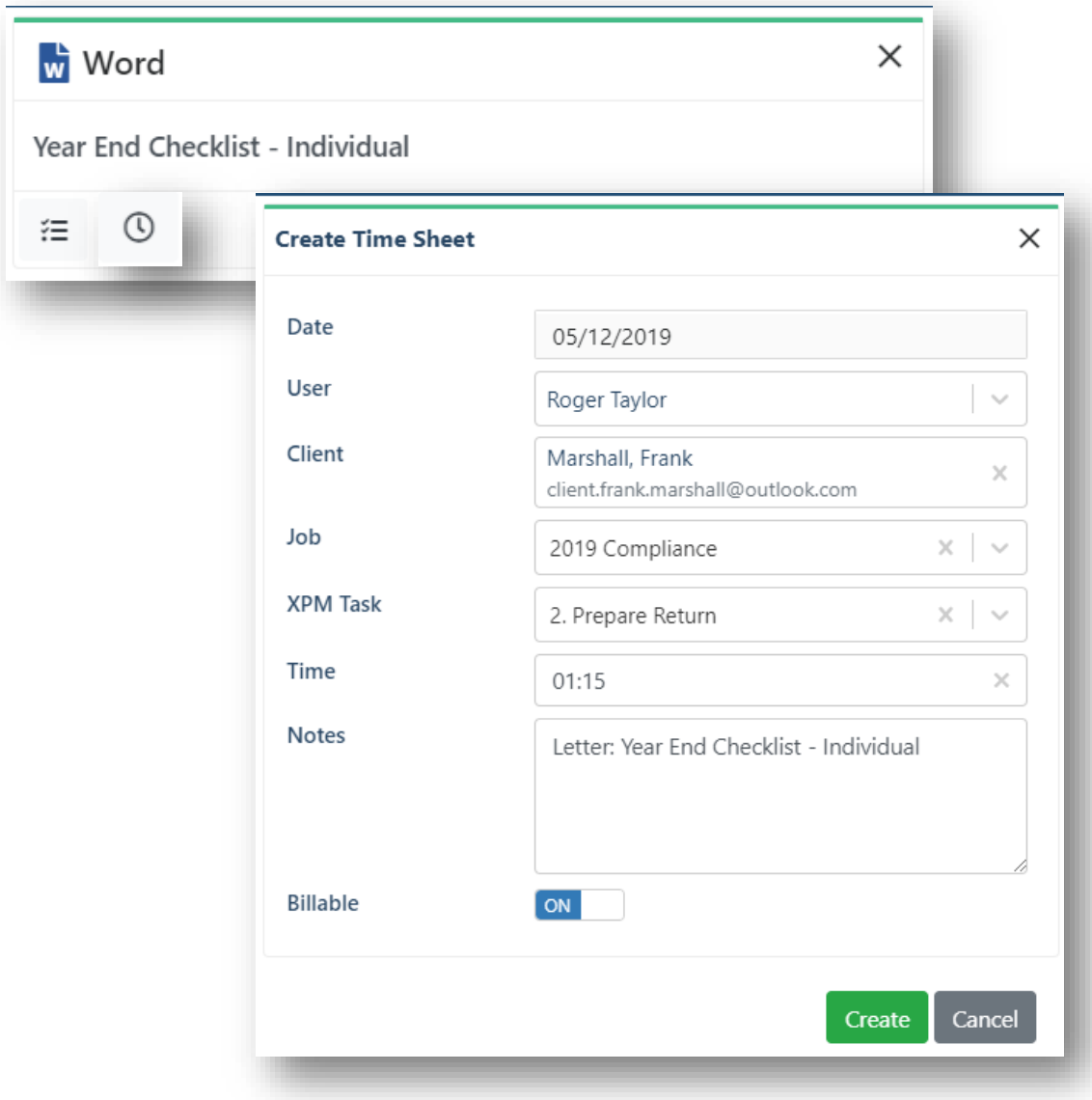


Visit FYI Help > Getting Started
for an introduction to **Your Workspaces**

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

Hot Tips!
#FYIDashboard

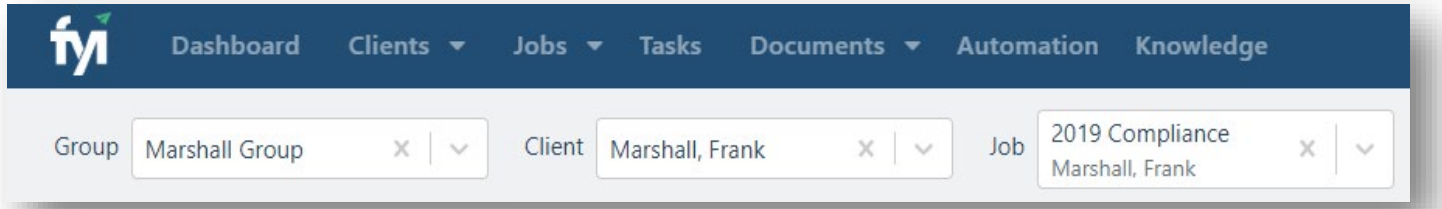
- Rearrange tabs to build a personalised dashboard
- Jump into **My Recent** at the end of the day to get up to speed on what you worked on today, making timesheets a breeze

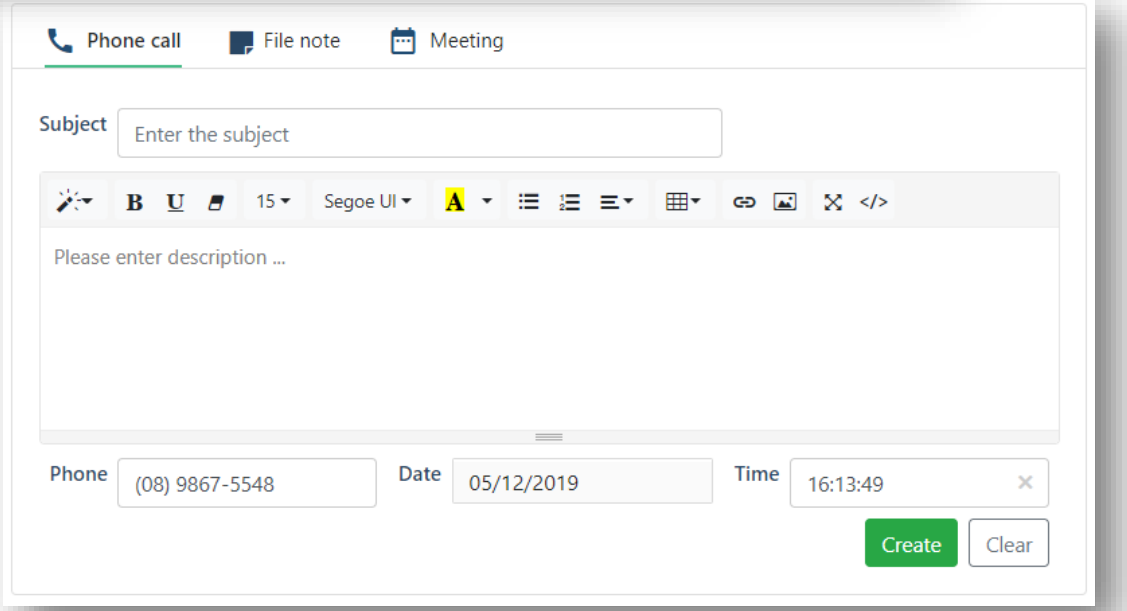


Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

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

Hot Tips!
#FYIClients





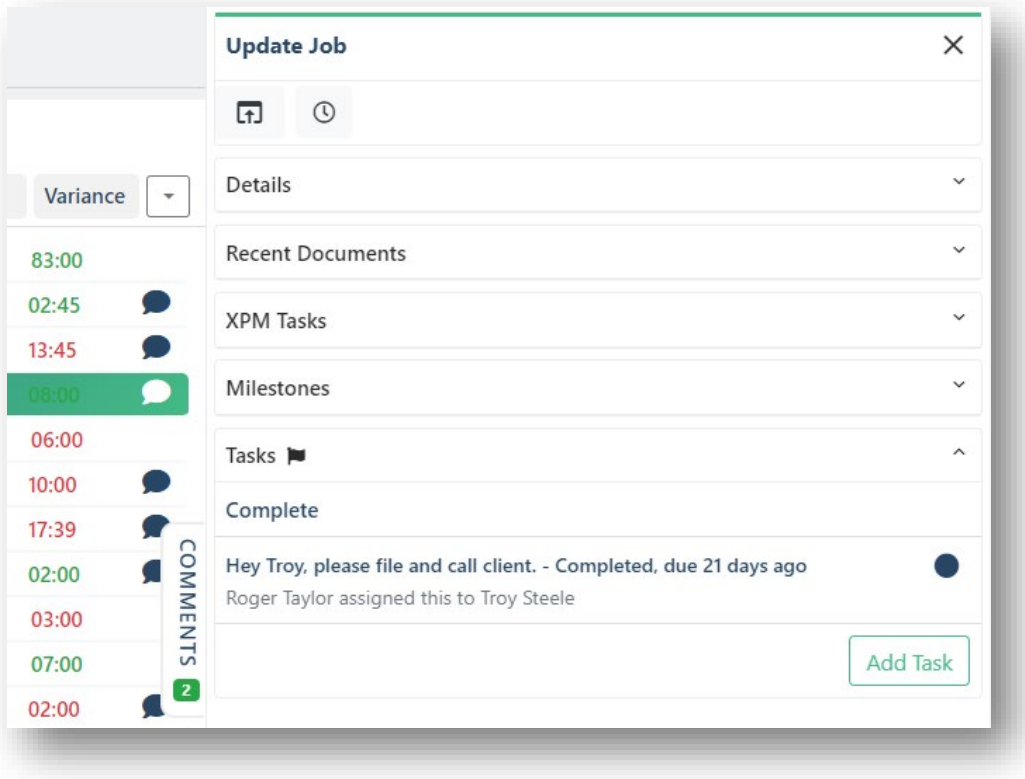
- Jump between **Groups**, **Clients** and **Jobs** using the purpose-built navigation
- Record interactions (phone calls, file notes and meeting minutes) from the **Client** Summary screen

Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

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!

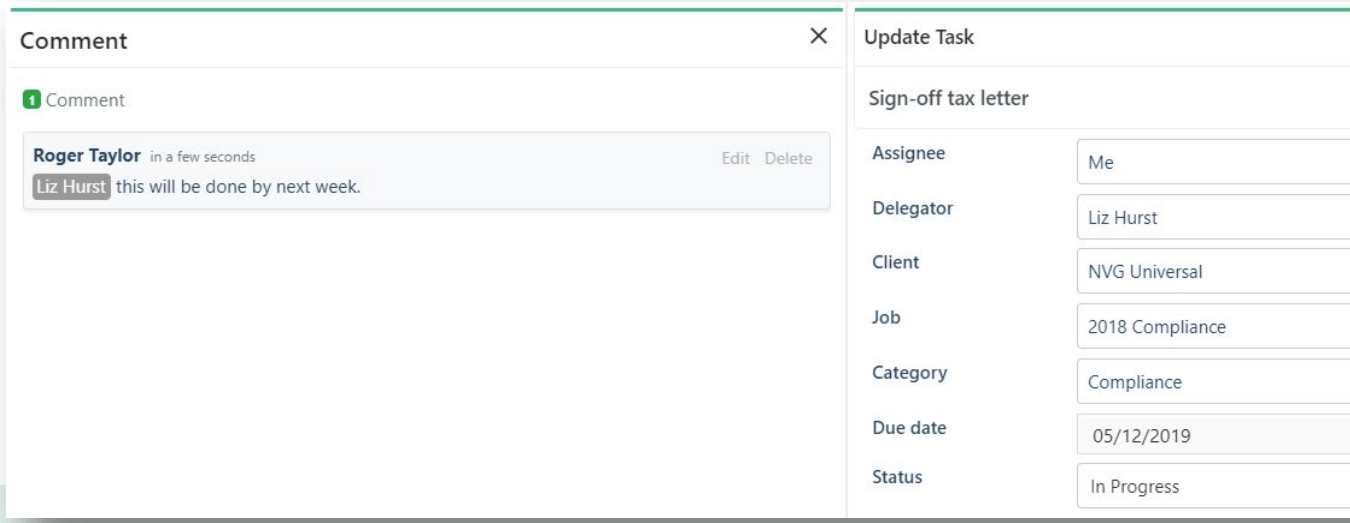


Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

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



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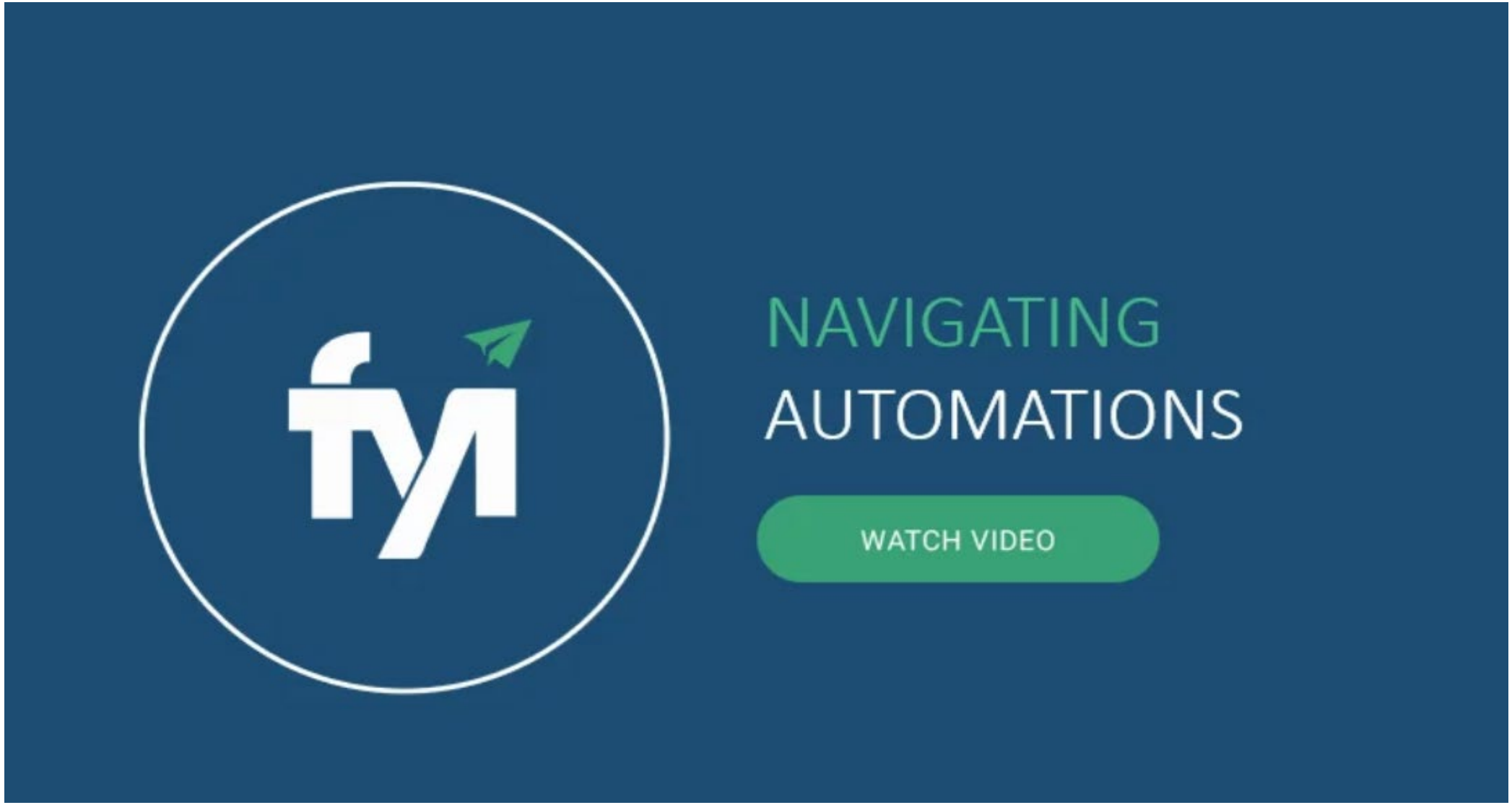
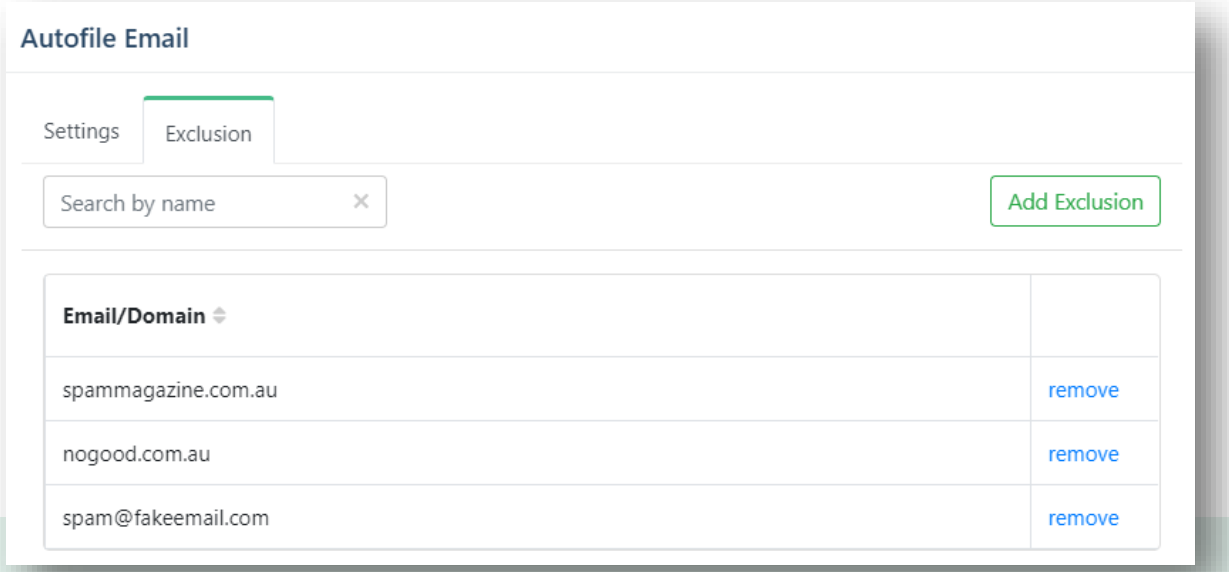


Visit FYI Help > Getting Started
to watch a recorded introduction to **Navigating the Automation Dashboard**

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!

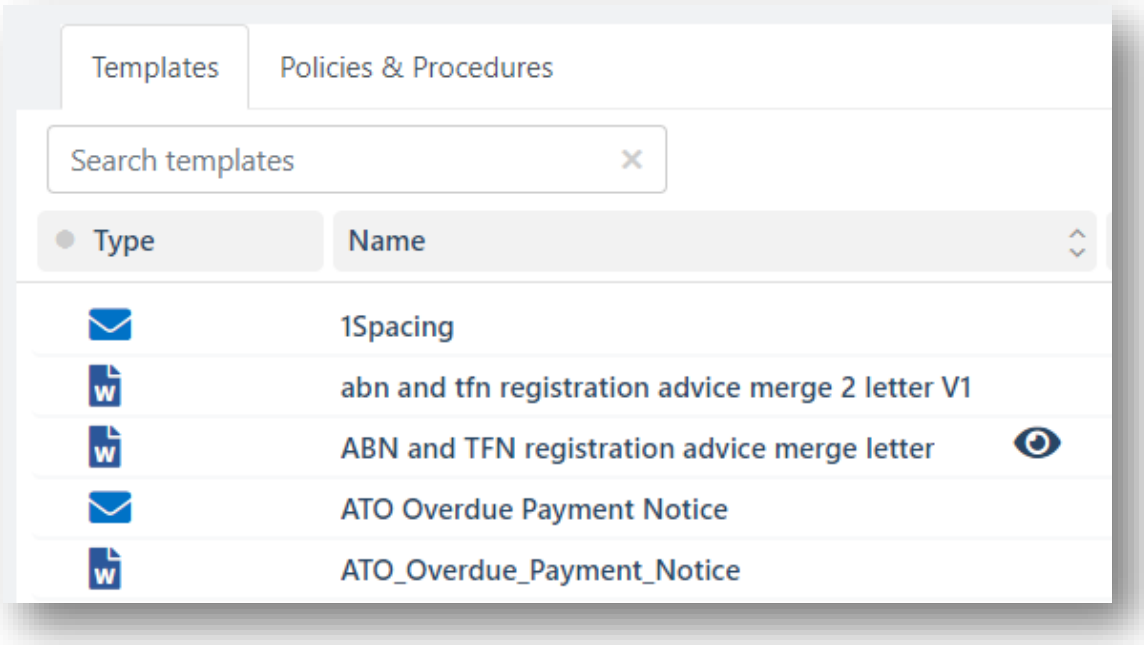


Visit FYI Help > Document Management
for an introduction to **Using the Drawer**

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**

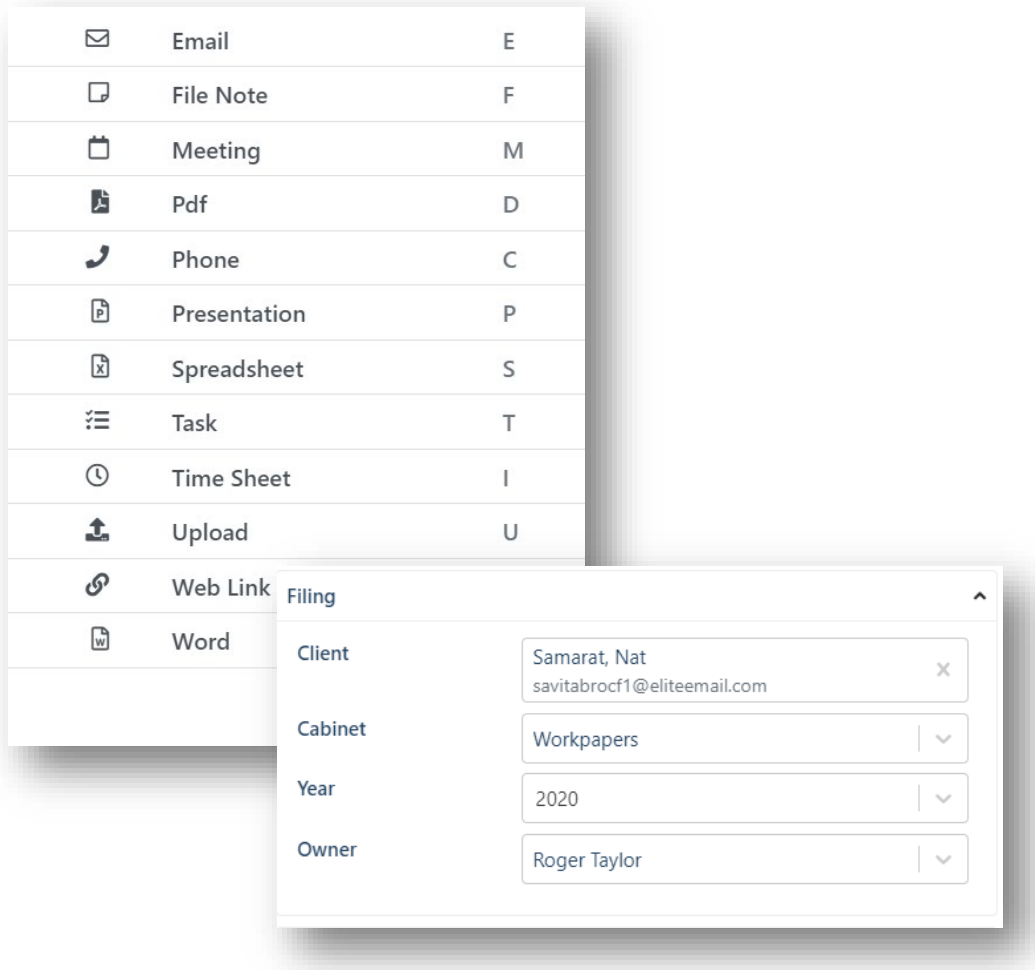
TUTORIAL FOR BEGINNERS

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

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



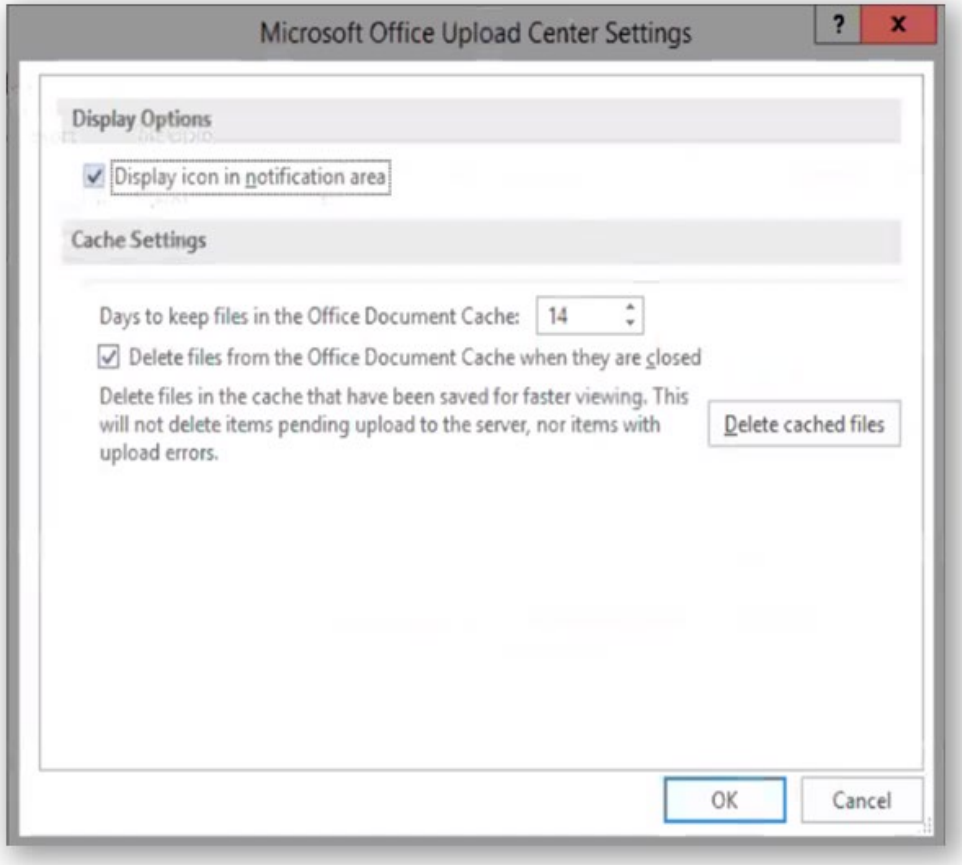
Visit FYI Help > Getting Started
for an introduction to **Your Workspaces**

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

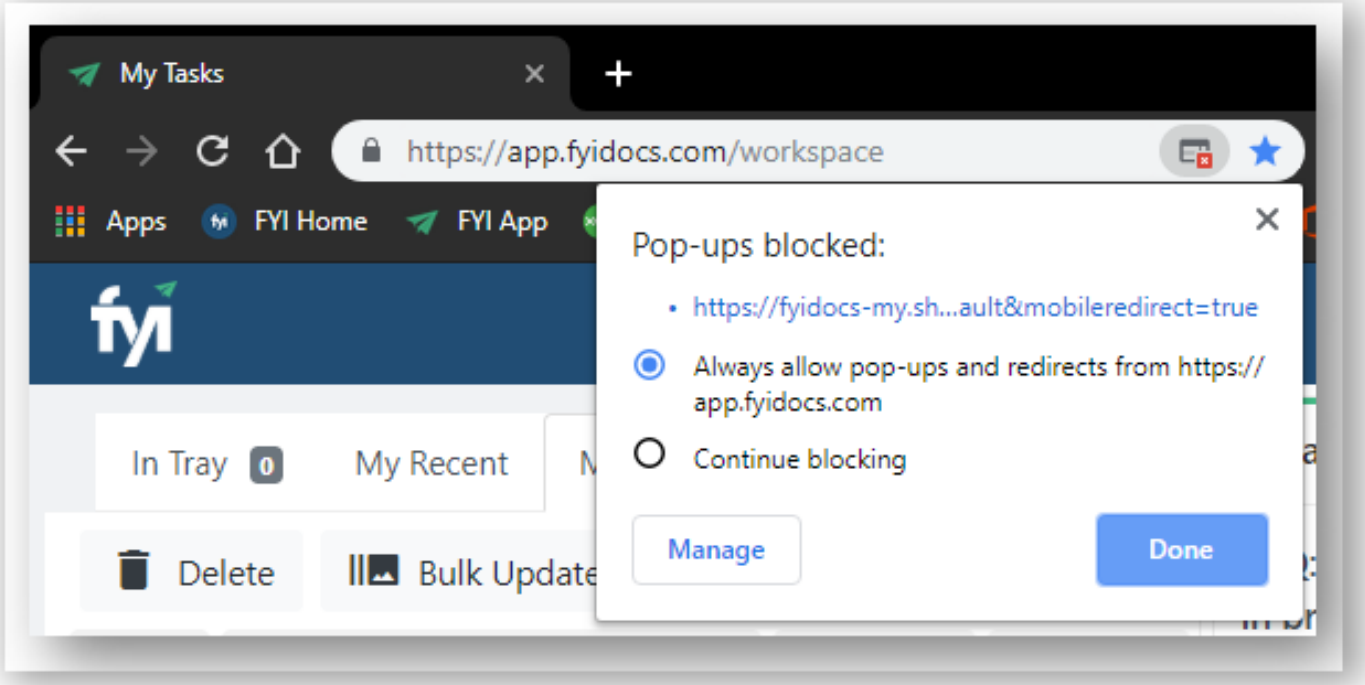


Visit FYI Help > Administration > Practice Set-Up
for an instructions on **Preparing Your OneDrive for FYI**

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.



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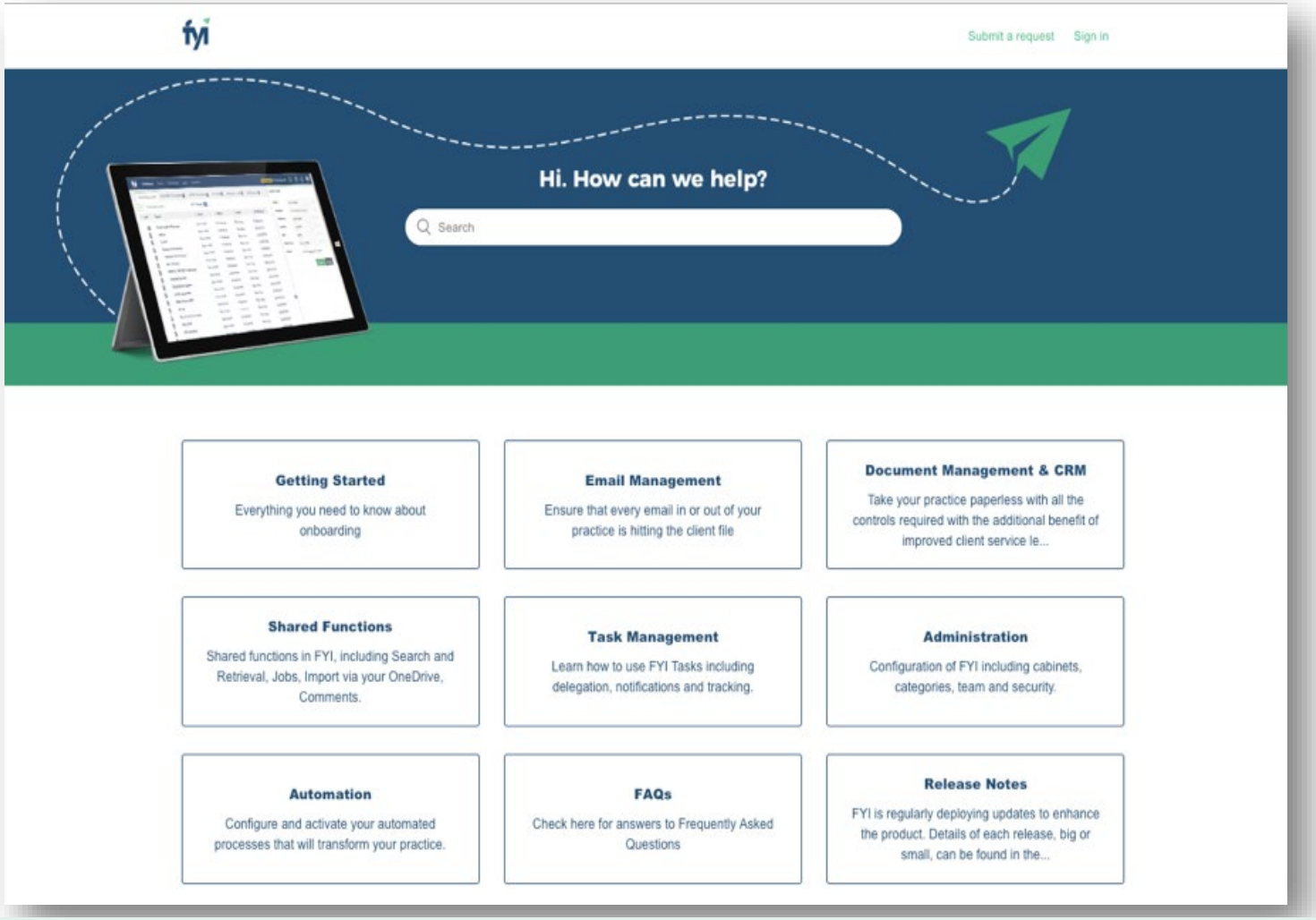
HELP WHEN YOU NEED IT

Help Centre

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

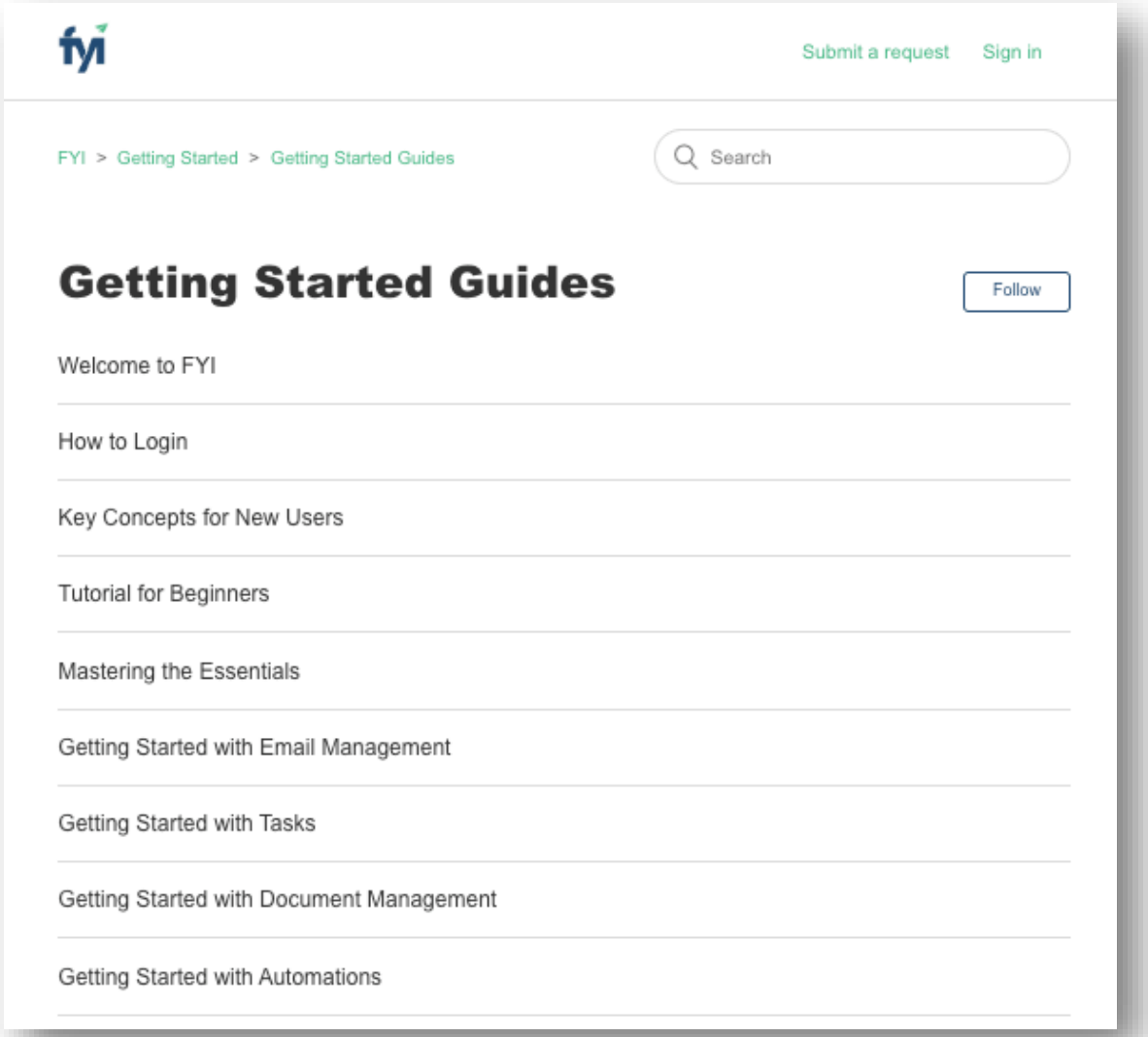


Visit www.support.fyidocs.com

Help Centre

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

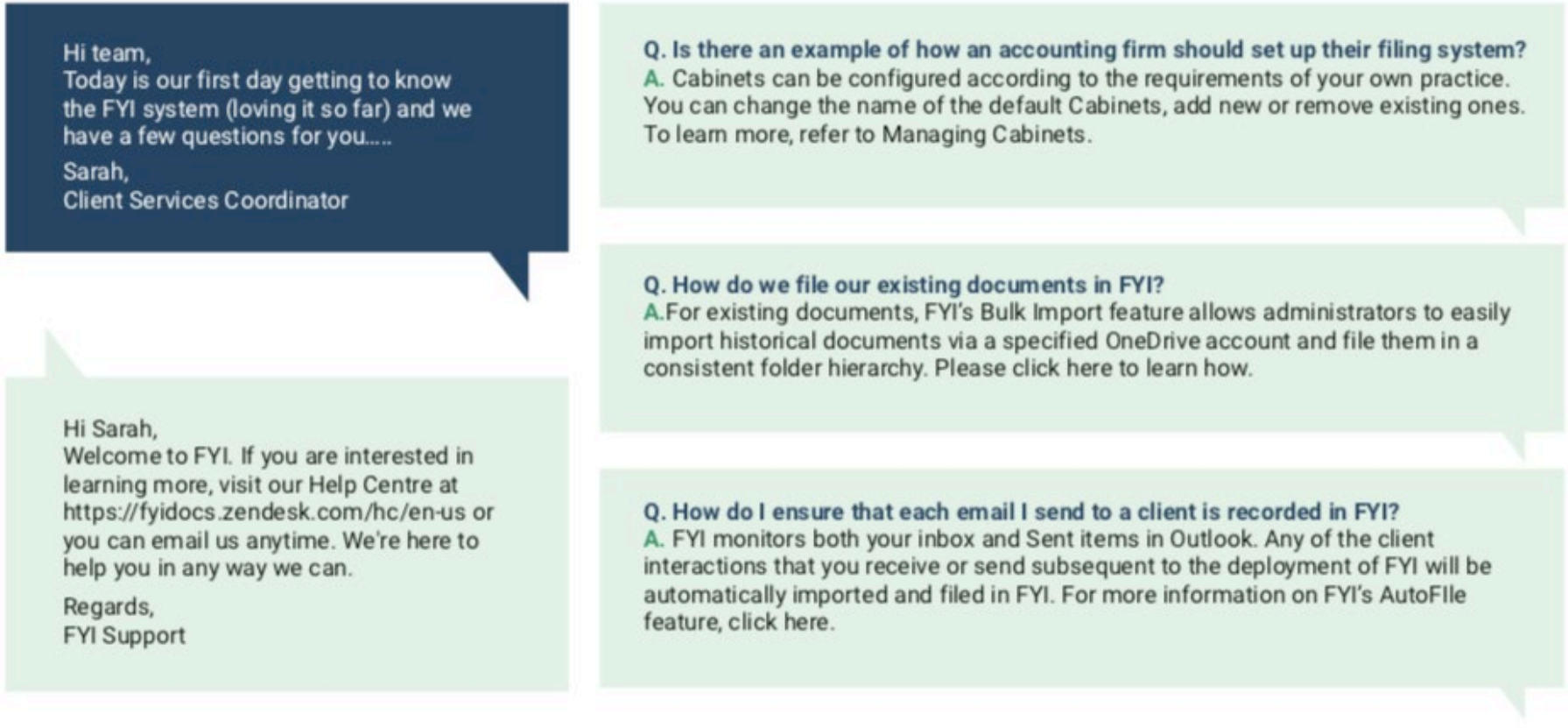
- Welcome to FYI
- Key Concepts for New Users
- Mastering the Essentials
- Getting Started with Email Management
- Getting Started with Tasks
- Getting Started with Document Management



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.



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
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