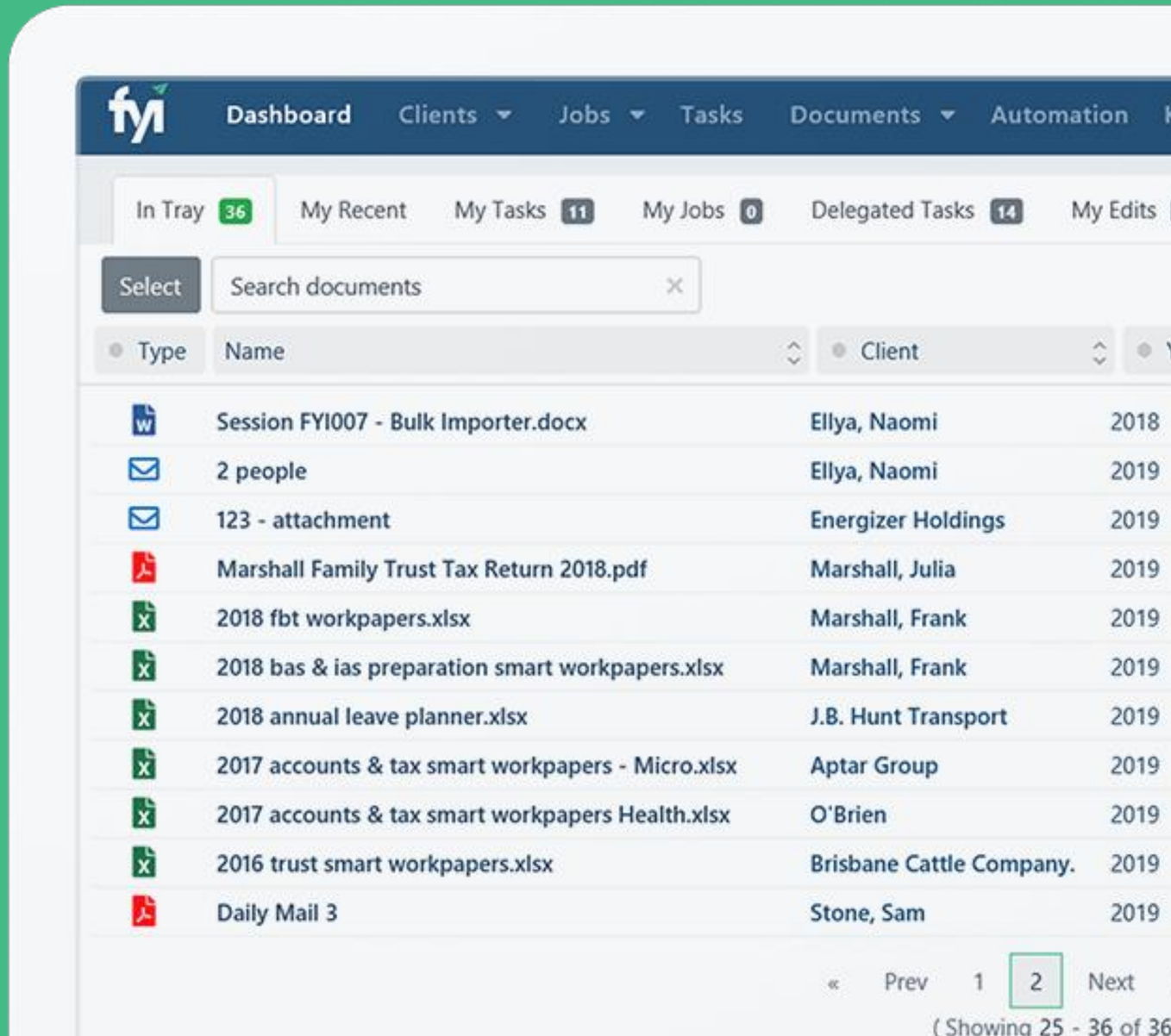
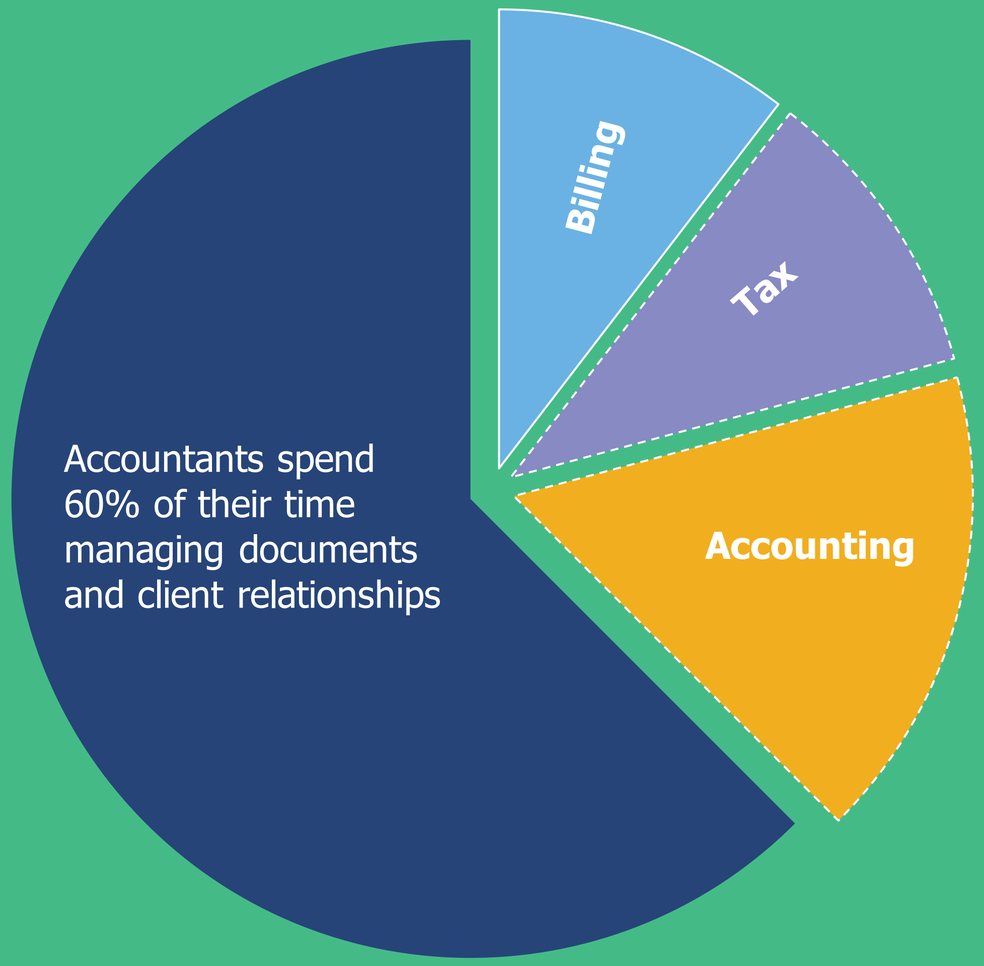
THE WORLD'S
MOST AUTOMATED
DOCUMENT MANAGEMENT
PLATFORM

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



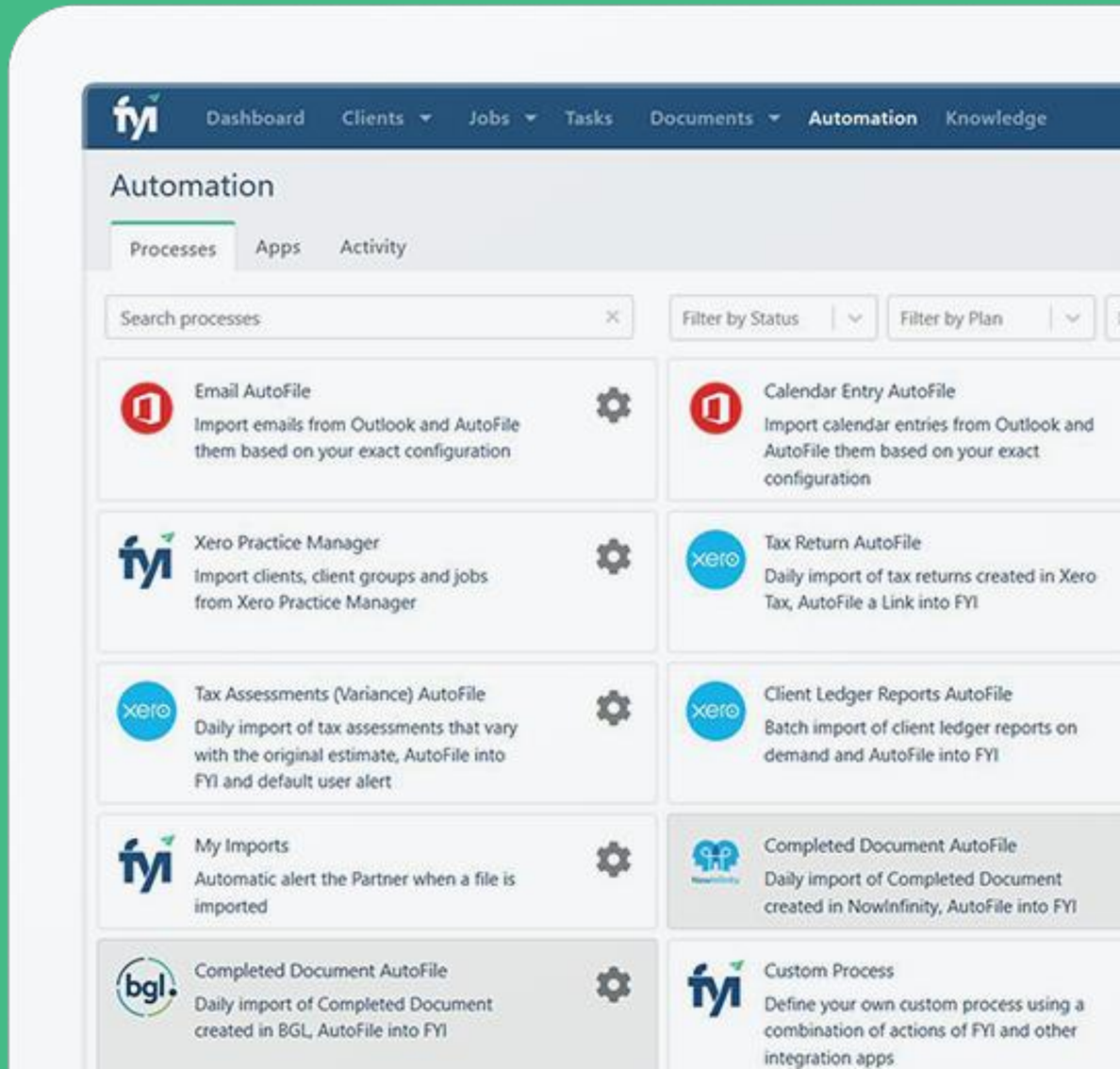
We’re on a mission
to halve the time spent on
compliance and administration
through automation.



**Source: FYI Compliance
Time and Motion Study 2018**

A NEW BREED OF AUTOMATED DOCUMENT MANAGEMENT

- Automatic filing of client emails
- Embedded task management
- Document management
- XPM Job management
- Powerful search and retrieval
- Configurable process automation
- Client relationship management
- Collaboration and approval workflows



Very excited re NZ launch

- Support hours
- Recruiting for country head
- Integrations

BUILT FOR ACCOUNTANTS
AND DEEPLY INTEGRATED TO
YOUR PRACTICE SUITE

BEST OF BREED
INTEGRATIONS

Office 365

Edit Word, Excel, PowerPoint and PDF documents using the richness of Microsoft Office

Automatically capture and file client emails in Outlook

BEST OF BREED
INTEGRATIONS

Xero Practice Manager

Synch clients, client groups and jobs from XPM

Add something about deep xero integration

BEST OF BREED
INTEGRATIONS

With a growing number of partners across the practice ecosystem

SECURITY AND TRUST

PROVEN RETURN ON INVESTMENT

EASY ONBOARDING

PROTECT YOUR DOCUMENTS

WITH THE HIGHEST SECURITY

SECURITY AND TRUST

PROTECT YOUR DOCUMENTS IN THE CLOUD

- Highest levels of data encryption
- Microsoft Windows authentification
- ISO27001:2019 Certified
- oWASP Security Level
- AWS Well-Architected Framework
- 24/7 data protection
- Tier 1 Hosting - Australia
- Regular load and penetration testing

PROVEN

RETURN ON INVESTMENT

WHERE DOES **THE TIME GO?**

6% **Planning and workflow**
Job scoping, capacity planning, reviewing milestone progress

23% **Gathering, filing and sharing data**
From emails, attachments, client storage, scanners, integration apps and more

27% **Preparing workpapers**
Searching and retrieving documents multiple times a day from numerous sources, comparing and cross-linking to substantiate amounts

9% **Review and Supervision**
Liaising with your team throughout the job with ongoing delegation and tracking of tasks

18% **Client collaboration**
Corresponding with clients, chasing information via emails, meetings and phone calls

9% **Completion and lodgement**
Compiling final reports, sending to client for signing, lodging returns and processing assessments

8% **Administration**
General client admin and job maintenance, updating client records, time recording, billing and debt collection

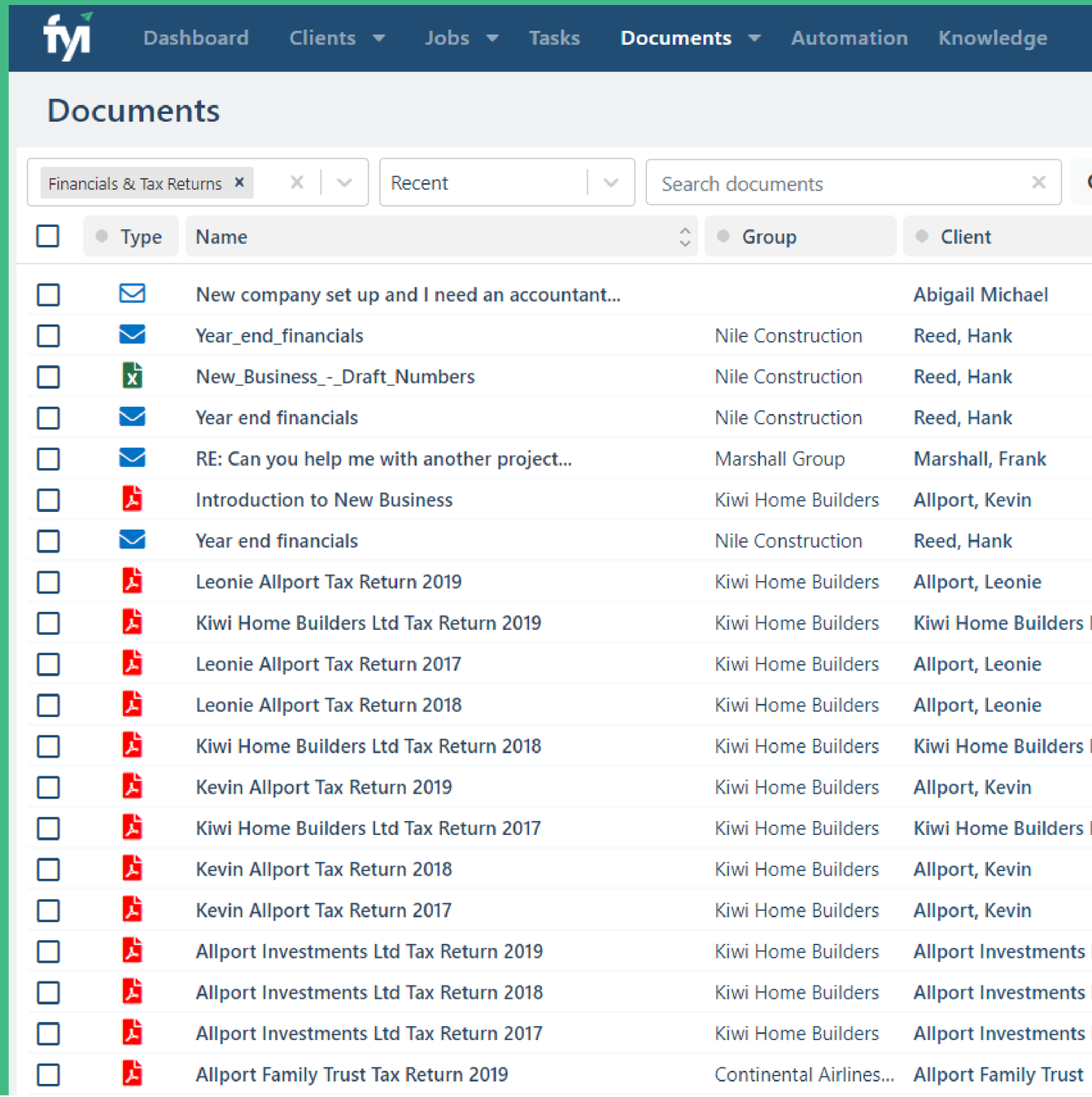
Source: FYI Compliance
Time and Motion Study 2018

Gathering, filing and sharing data

From emails, attachments, client storage, scanners, integration apps and more

COMPLETE PAPERLESS OFFICE **IN THE CLOUD**

› FYI blends email, documents and client interactions in a single client-centric database

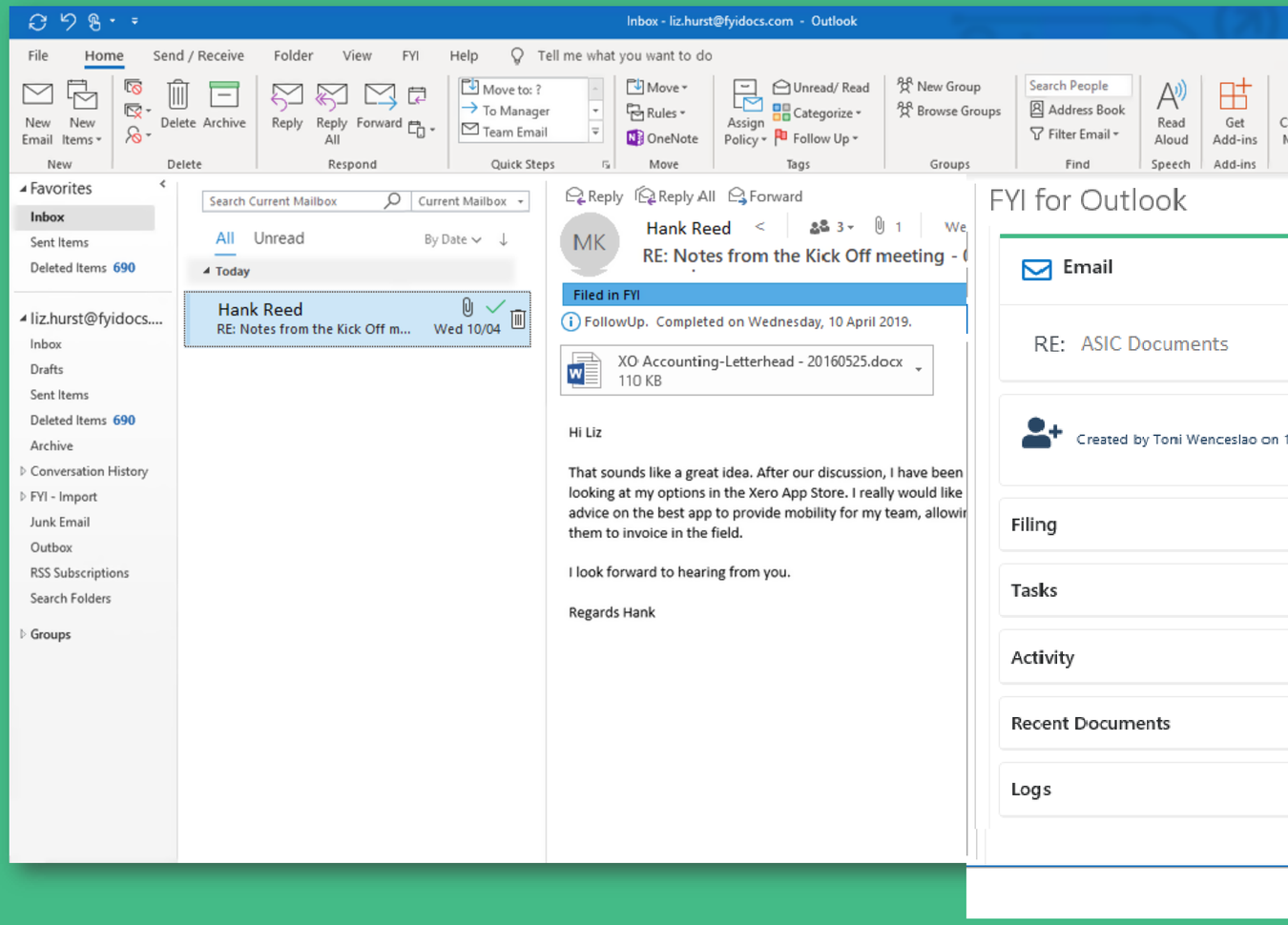


Gathering, filing and sharing data

From emails, attachments, client storage, scanners, integration apps and more

AUTOMATED **EMAIL FILING**

- Automatically capture and file client emails in Outlook
- Access email templates, file emails, assign tasks and more without leaving the email you're working

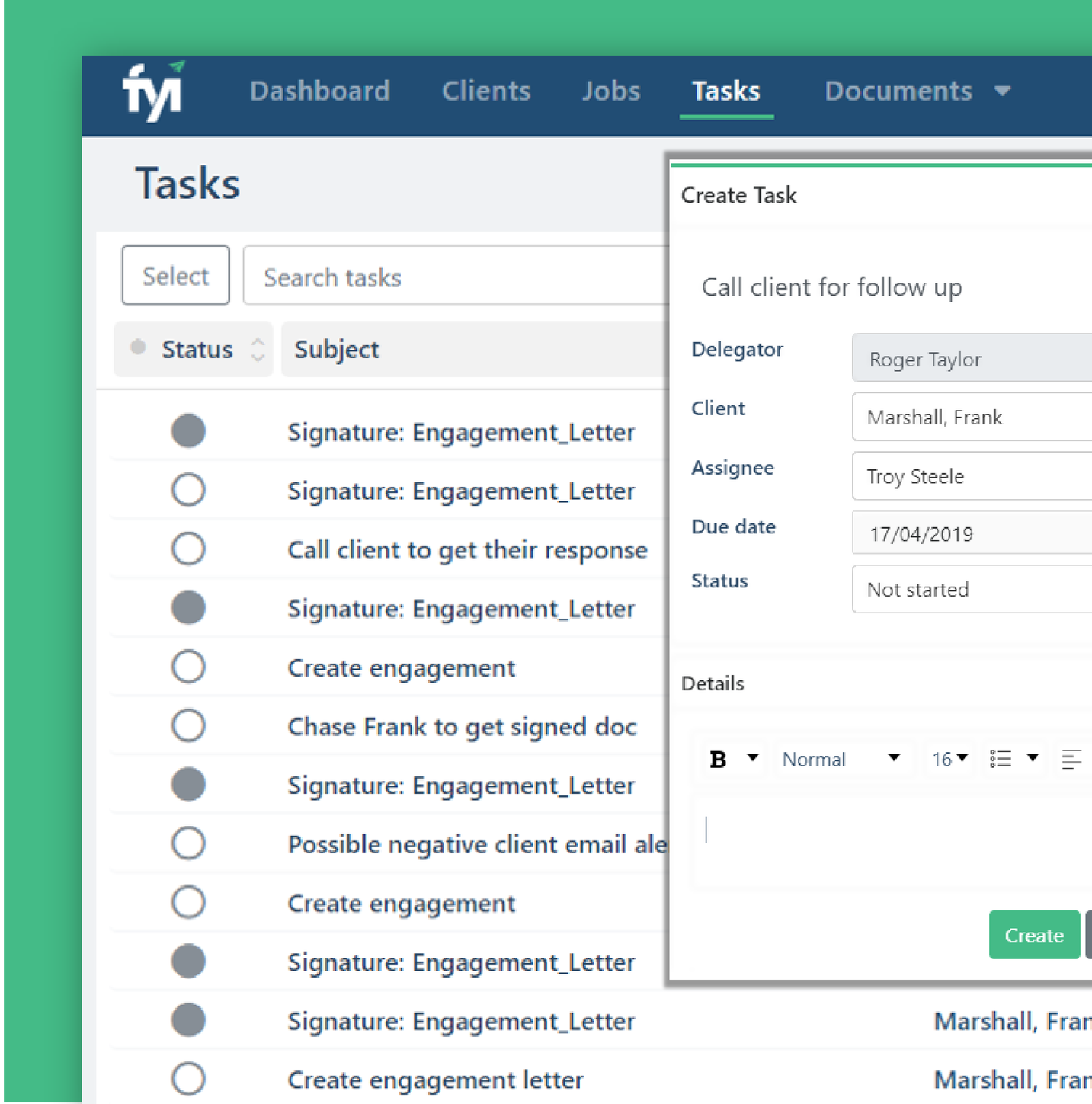


Review and Supervision

Liaising with your team throughout the job with ongoing delegation and tracking of tasks

PRACTICAL **TASK MANAGEMENT**

- Add tasks to an email, document, phone call or meeting
- Assign tasks to a team member and monitor progress

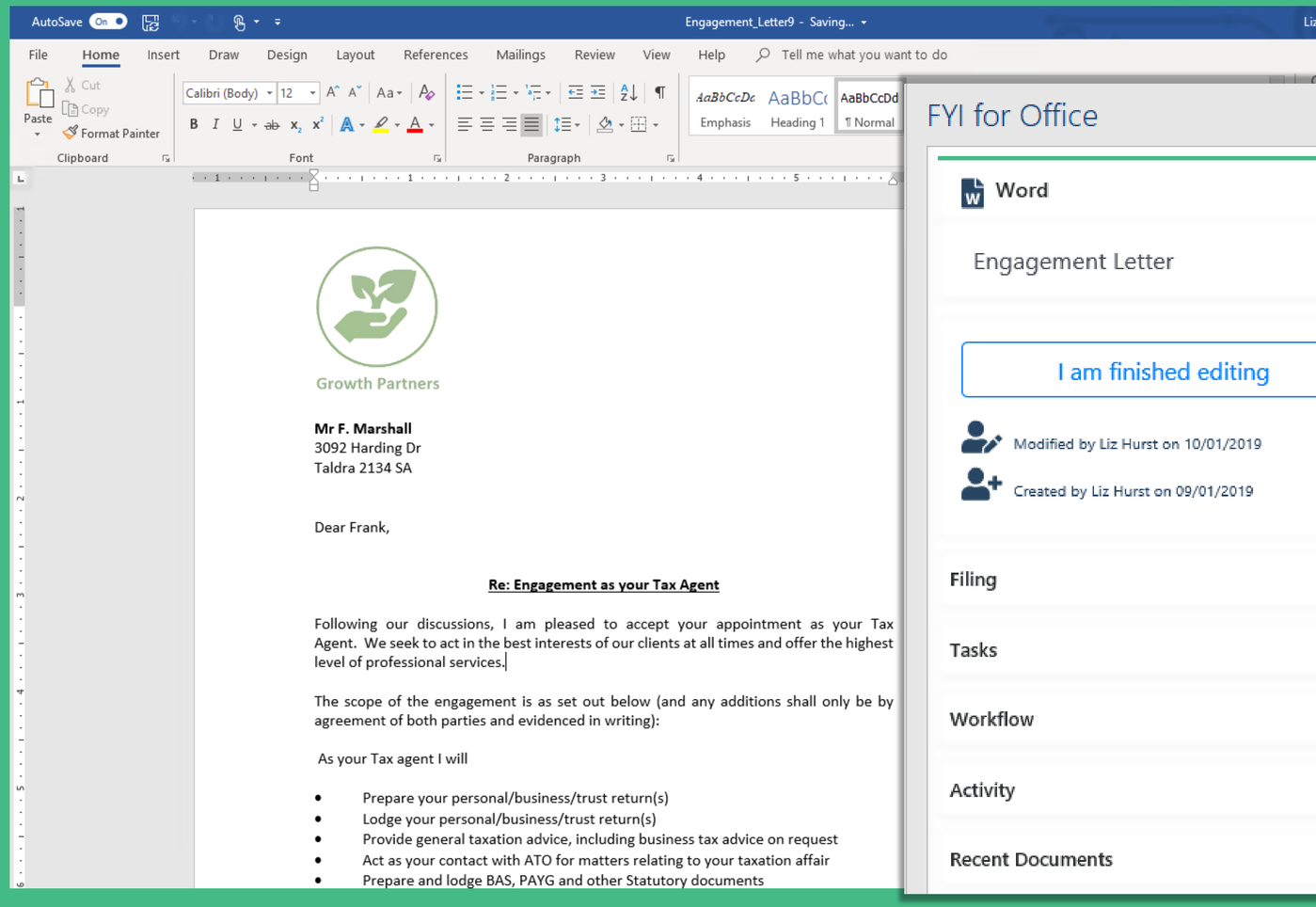


Preparing workpapers

Searching and retrieving documents multiple times a day from numerous sources, comparing and cross-linking to substantiate amounts

DOCUMENT AUTOMATION

- Create and edit documents natively using the richness of Microsoft's desktop apps
- Access templates, file documents, assign tasks and more without leaving the document you're working in Word, Excel or Powerpoint



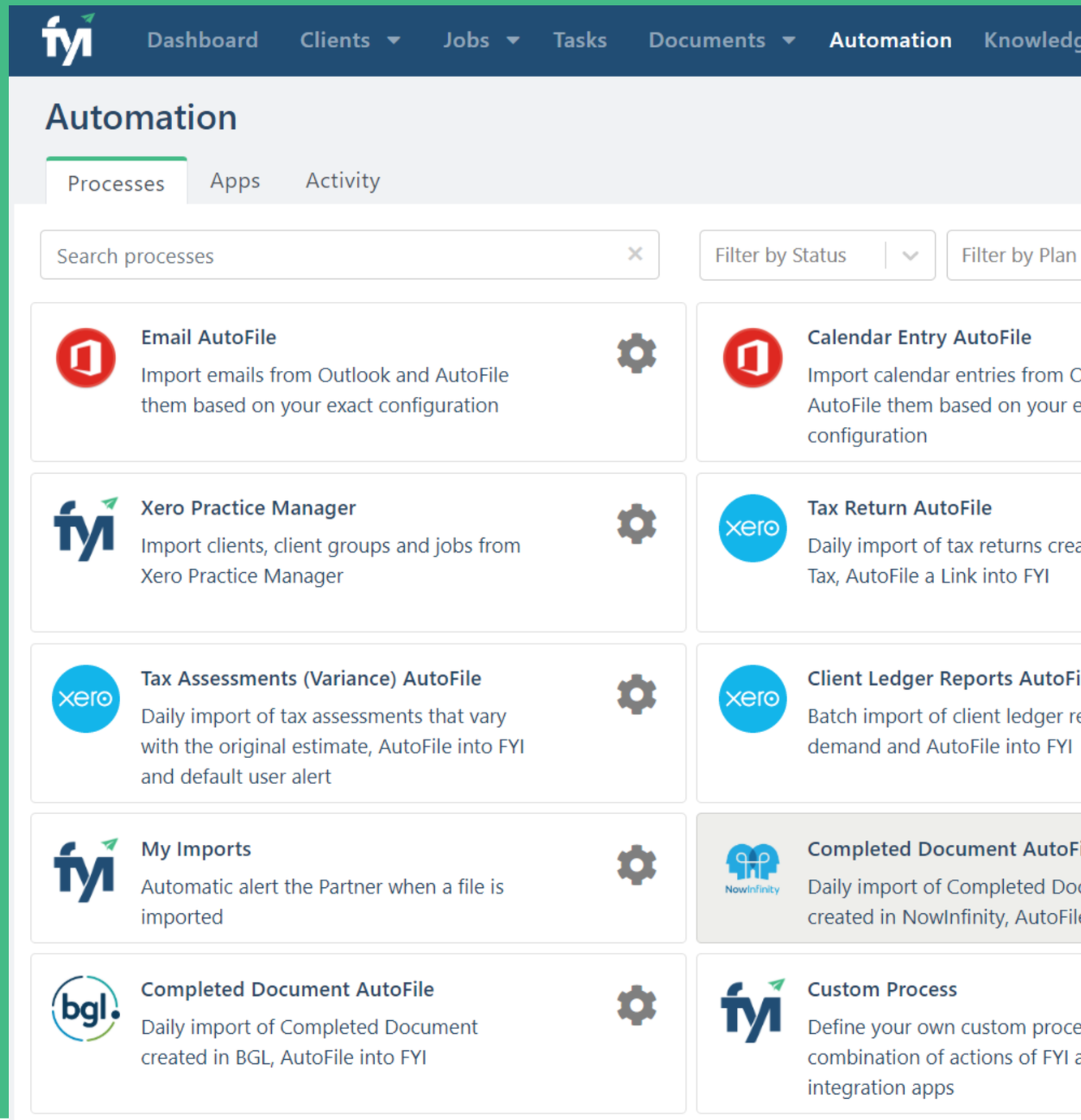
- Auto-create documents and emails from practice templates with merge fields.
- Consistent naming and filing.
- Cross links.
- Powerful search and retrieval.

Review and Supervision

Liaising with your team throughout the job with ongoing delegation and tracking of tasks

DOCUMENT **WORKFLOWS**

- Individual approval authorisations
- Document workflow status
- Document approvals
- Scanned signatures

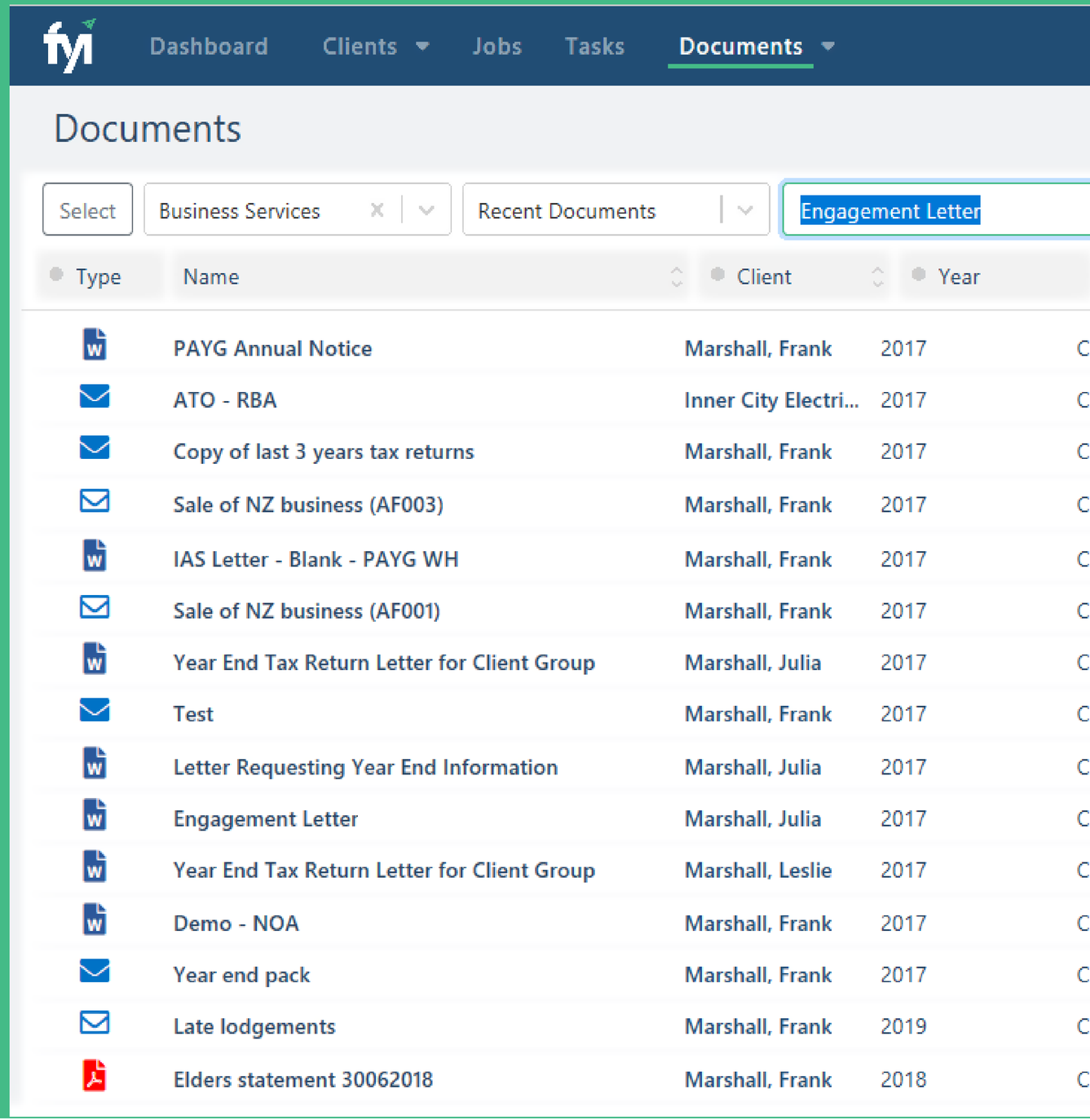


Preparing workpapers

Searching and retrieving documents multiple times a day from numerous sources, comparing and cross-linking to substantiate amounts

POWERFUL SEARCH **AND RETRIEVAL**

› Access information in seconds using metadata, text searching and tags rather than folders

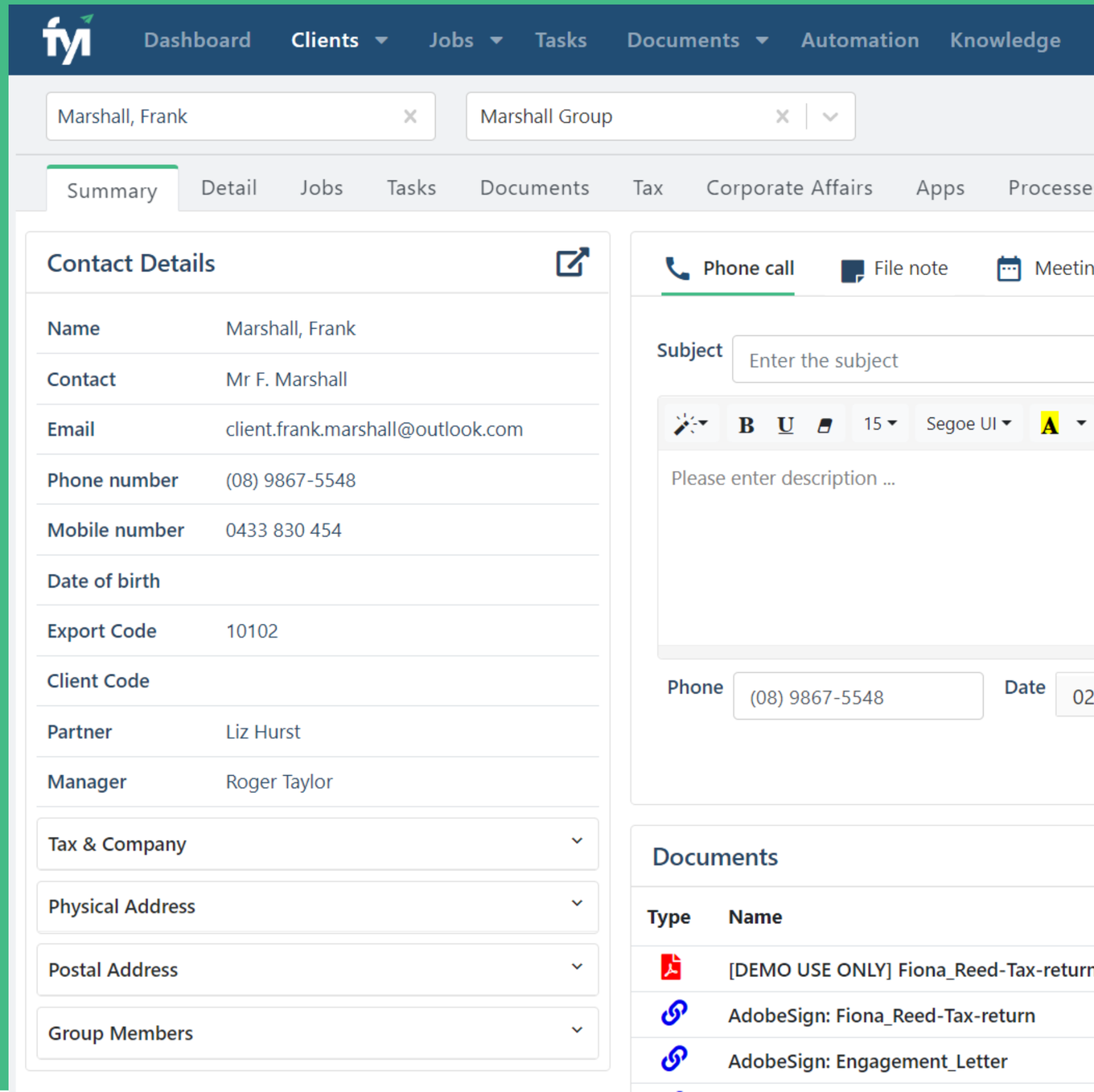


Client collaboration

Corresponding with clients, chasing information via emails, meetings and phone calls

CLIENT RELATIONSHIP **MANAGEMENT**

- Know your clients better with a complete record of all emails, documents and interactions on file
- Phone calls, file notes, meetings



Marshall, Frank | Marshall Group

Summary | Detail | Jobs | Tasks | Documents | Tax | Corporate Affairs | Apps | Processes | Activity

Contact Details

Name	Marshall, Frank
Contact	Mr F. Marshall
Email	client.frank.marshall@outlook.com
Phone number	(08) 9867-5548
Mobile number	0433 830 454
Date of birth	
Export Code	10102
Client Code	
Partner	Liz Hurst
Manager	Roger Taylor

Tax & Company

Physical Address

Postal Address

Group Members

Phone call | File note | Meeting

Subject: Enter the subject

15 | Segoe UI

Please enter description ...

Phone: (08) 9867-5548 | Date: 02/09/2019 | Time: 11:15:44

Create | Clear

Documents

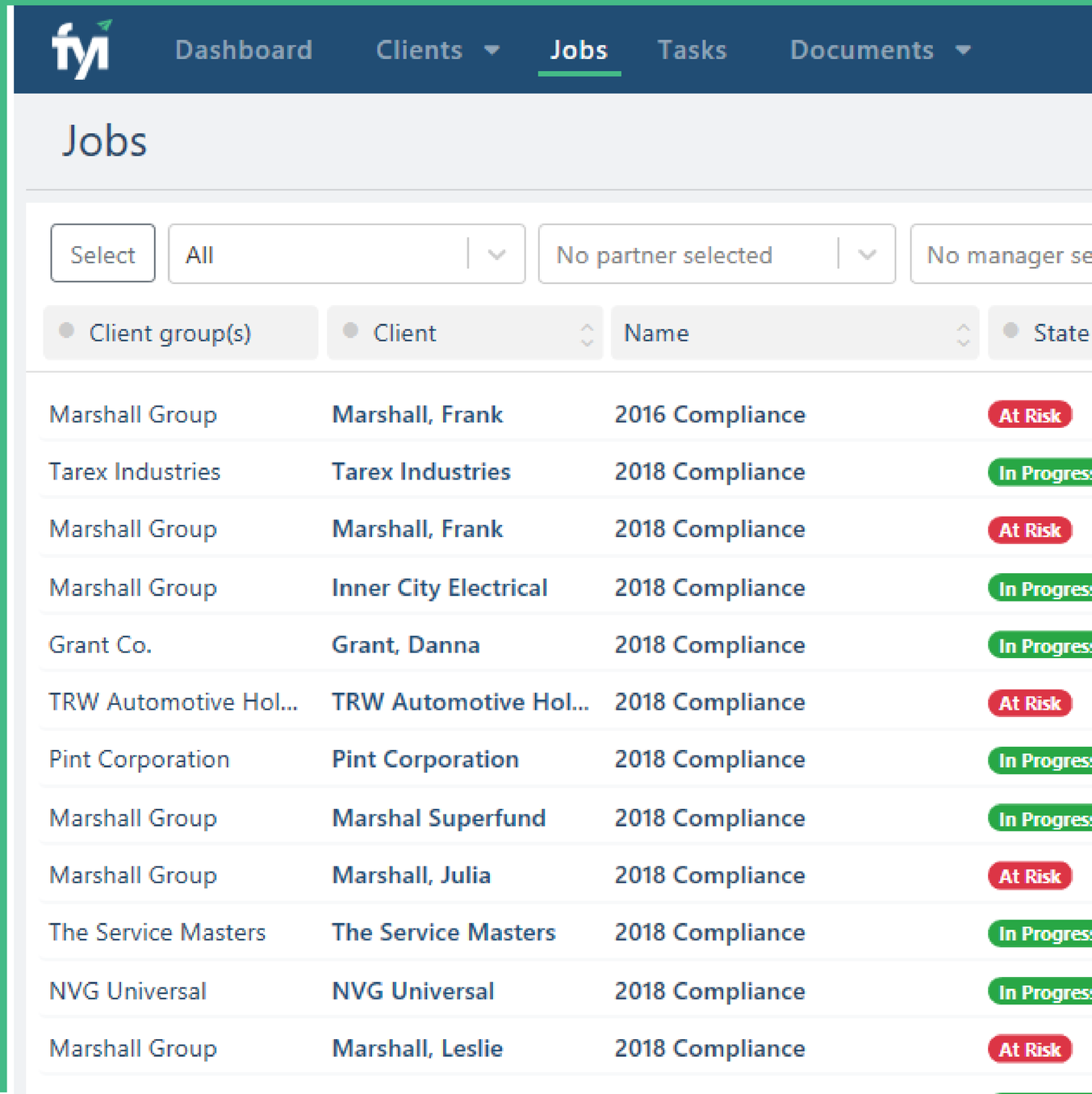
Type	Name	Modified By	Modified On
	[DEMO USE ONLY] Fiona_Reed-Tax-return	System	02/09/2019
	AdobeSign: Fiona_Reed-Tax-return	Roger Taylor	02/09/2019
	AdobeSign: Engagement_Letter	Roger Taylor	02/09/2019

Planning and workflow

Job scoping, capacity planning, reviewing milestone progress

JOB MANAGEMENT

- Display and maintain XPM jobs from within FYI
- Add commentary to share with the team
- File emails and documents, and add tasks at a job level



Client collaboration

Corresponding with clients, chasing information via emails, meetings and phone calls

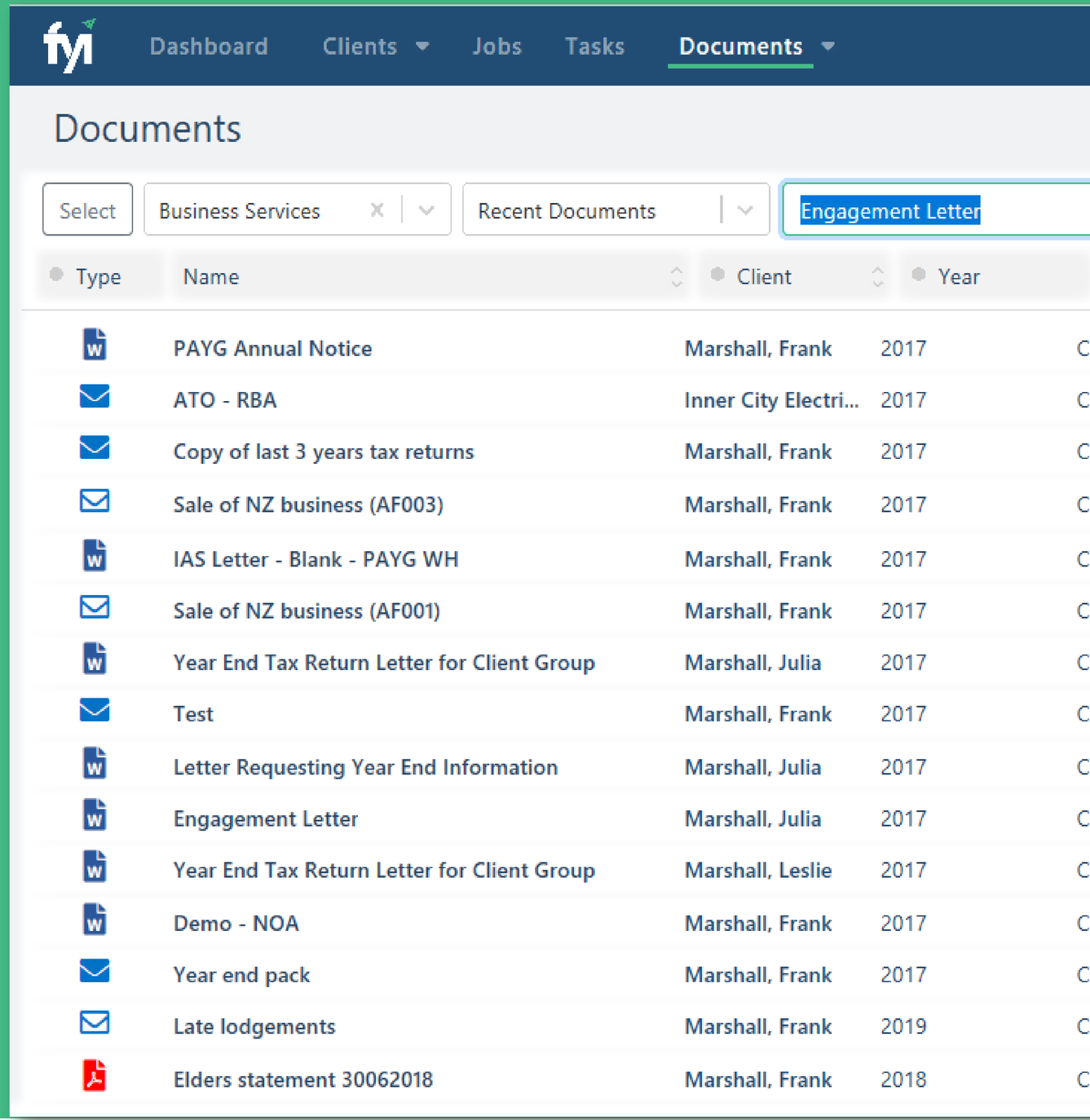
COLLABORATE WITH YOUR **CLIENTS**

OneDrive

COMING SOON

Google Drive

Dropbox

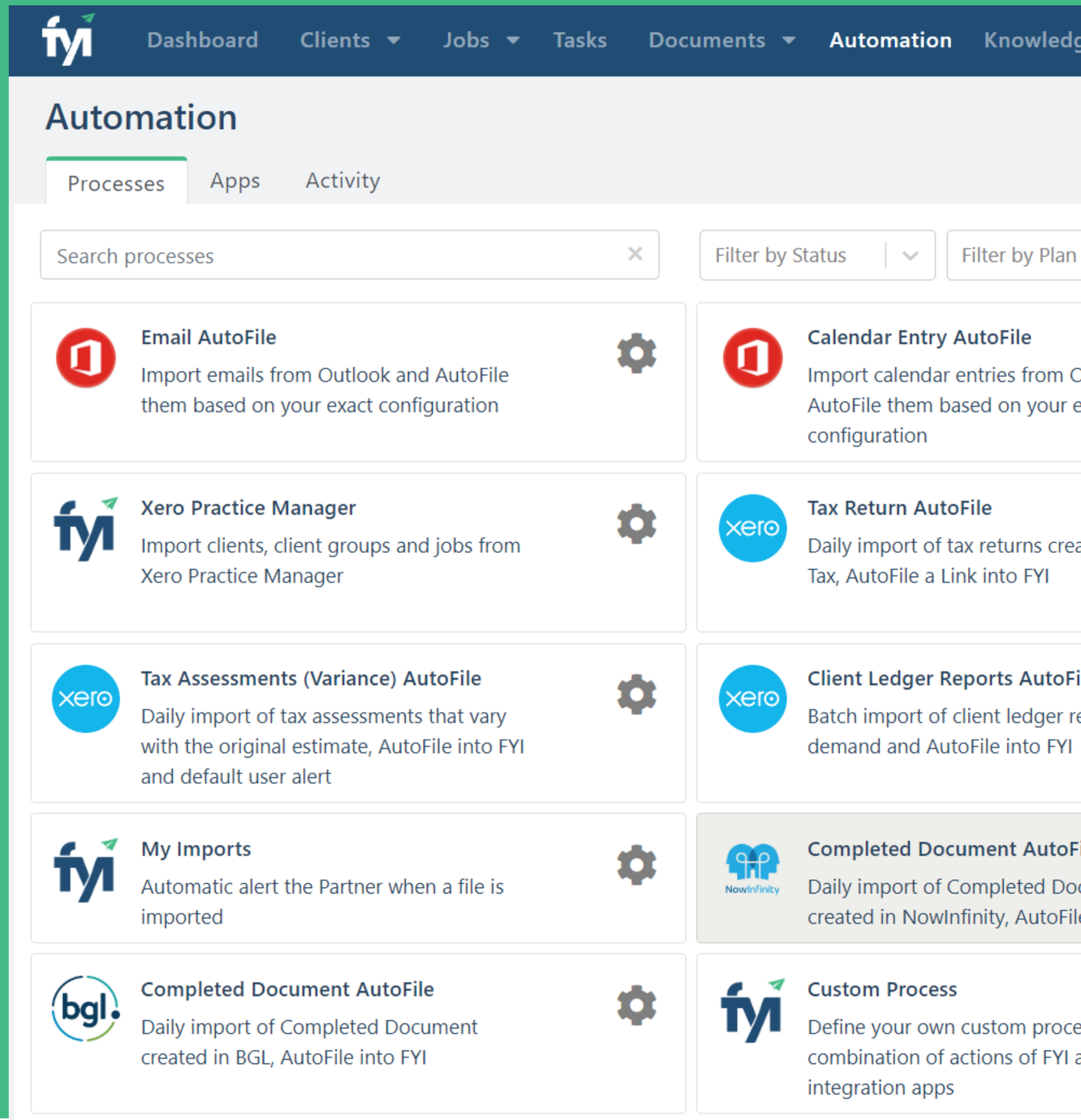


Preparing workpapers

Searching and retrieving documents multiple times a day from numerous sources, comparing and cross-linking to substantiate amounts

PROCESS **AUTOMATIONS**

- Automatically capture and file client documents from BGL, OneDrive, and in the near future, from DropBox and Drive
- Batch-create, import and auto-file consistently named sets of reports from your **Client's Xero Ledger** with a single click



EMAILS
MEETINGS
SCANNING
TAX
COMPANIES
SMSF
LEDGER
INVOICES
WEALTH
DROPBOX
ONEDRIVE
GOOGLE DRIVE
Dashboard
Clients
Practice
Reed, Hank
View client group data
Summary
Detail
Tasks
Documents
Integrations
Processes
Select
Client Files
Recent Documents
Search documents
Hide Threads
ON
Type
Name
Client
Work Type
Year
Modified by
Modified on
Meeting to discuss apps
Lets meet to discuss apps
Scanned Letter
Re: Chase up on unsigned Advice Engagement letter
RE: Advice on app purchase
Mobile Devices
Invoicing Requirements
Hank Reed 2018 Tax Return
Spacebud Pty Ltd
Repco
PFD
NEW CENTURY HOTEL SUPPLIES PTY LTD
MultiInvoiceFile
Hayward Video Invoice
GPL Solutions
Items: 13
Unread: 10
All folders are up to date.
DELL

Automation

Processes Apps Activity

Search processes | Filter by Status | Filter by Plan | Filter by App | List View

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
Collborate with your clients using third-party services including OneDrive and DropBox

Xero Practice Manager
Import clients, client groups and jobs from Xero Practice Manager

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

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

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 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

Completed Document AutoFile
Daily import of Completed Document created in NowInfinity, AutoFile into FYI

Annual Statement AutoFile
Daily import of Annual Statements created in NowInfinity, AutoFile into FYI

Completed Document AutoFile
Daily import of Completed Document created in BGL, AutoFile into FYI

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

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

EASY
ONBOARDING

EASY ONBOARDING

TRANSITION TO THE CLOUD WITH OUR PROVEN IMPLEMENTATION PROCESS

- Up and running within 4 weeks
- Import historical documents
- Assisted onboarding
- Self-guided implementation resources

SPECIAL OFFFER TO
THE GAP CLIENTS

ACCEPT ONBOARDING PROPOSAL BY 31 MARCH
½ PRICE PRO FOR 6 MONTHS

STARTER	INTERMEDIATE	PRO
Email & Task Management	Document Management	Process Automation
$5	**$25**	**$50**
Per user/month	Per user/month	Per user/month

ONBOARDING TIMELINE

- BEGIN TRIAL
- BOOK DISCOVERY CALL
- ACCEPT ONBOARDING PROPOSAL
- PLAN IMPLEMENTATION
- GO LIVE!

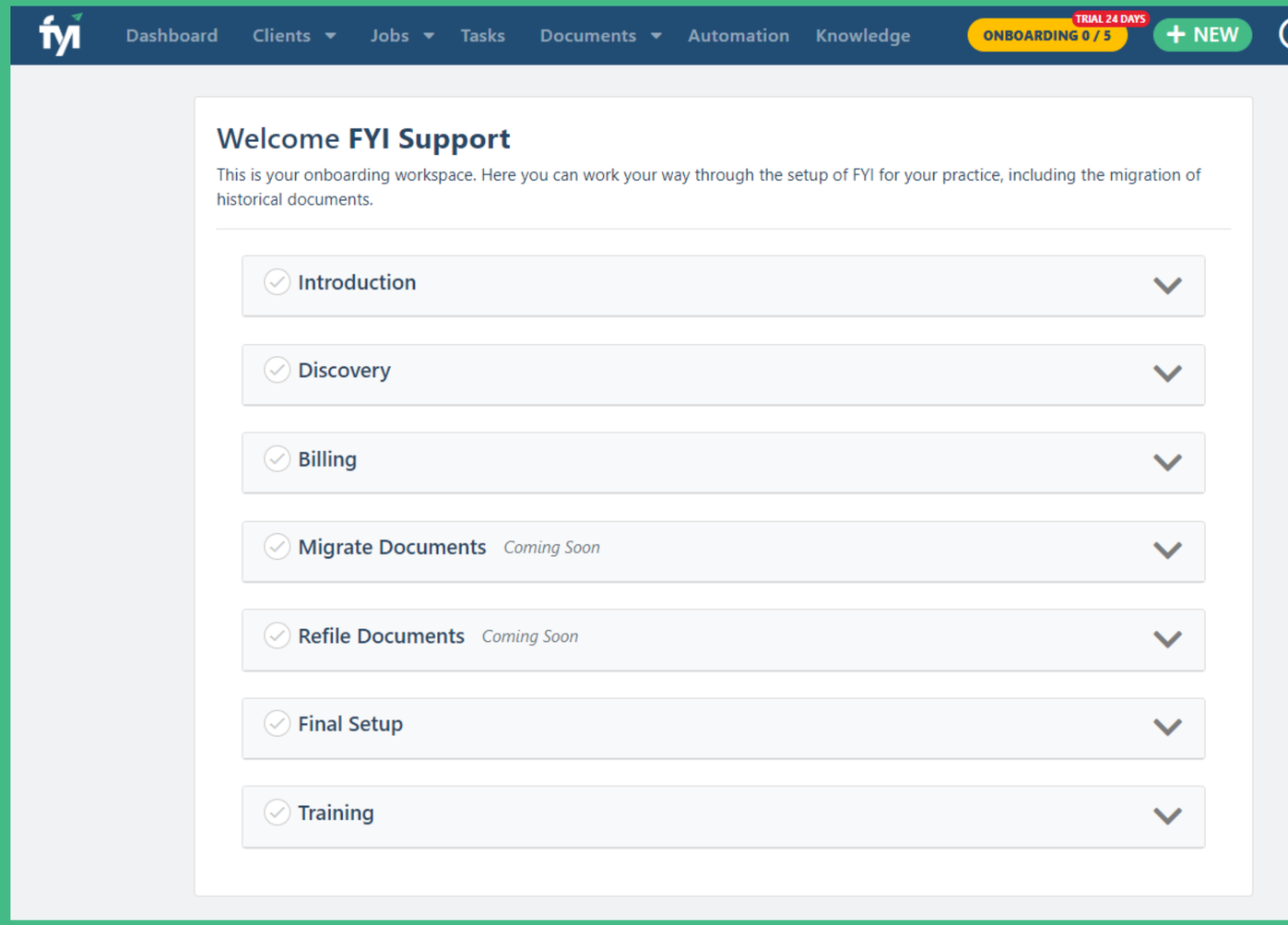
Today	1-2 Weeks	2-3 Weeks	3-4 Weeks	March Onwards
				½ price extends accordingly

Easy Onboarding

Work your way through the setup of FYI for your practice without leaving your browser.

ONBOARDING **WORKSPACE**

- Be guided through the onboarding process in-product.
- Take your practice from trial to live, with links and guides to setup key features and arrange document migration.

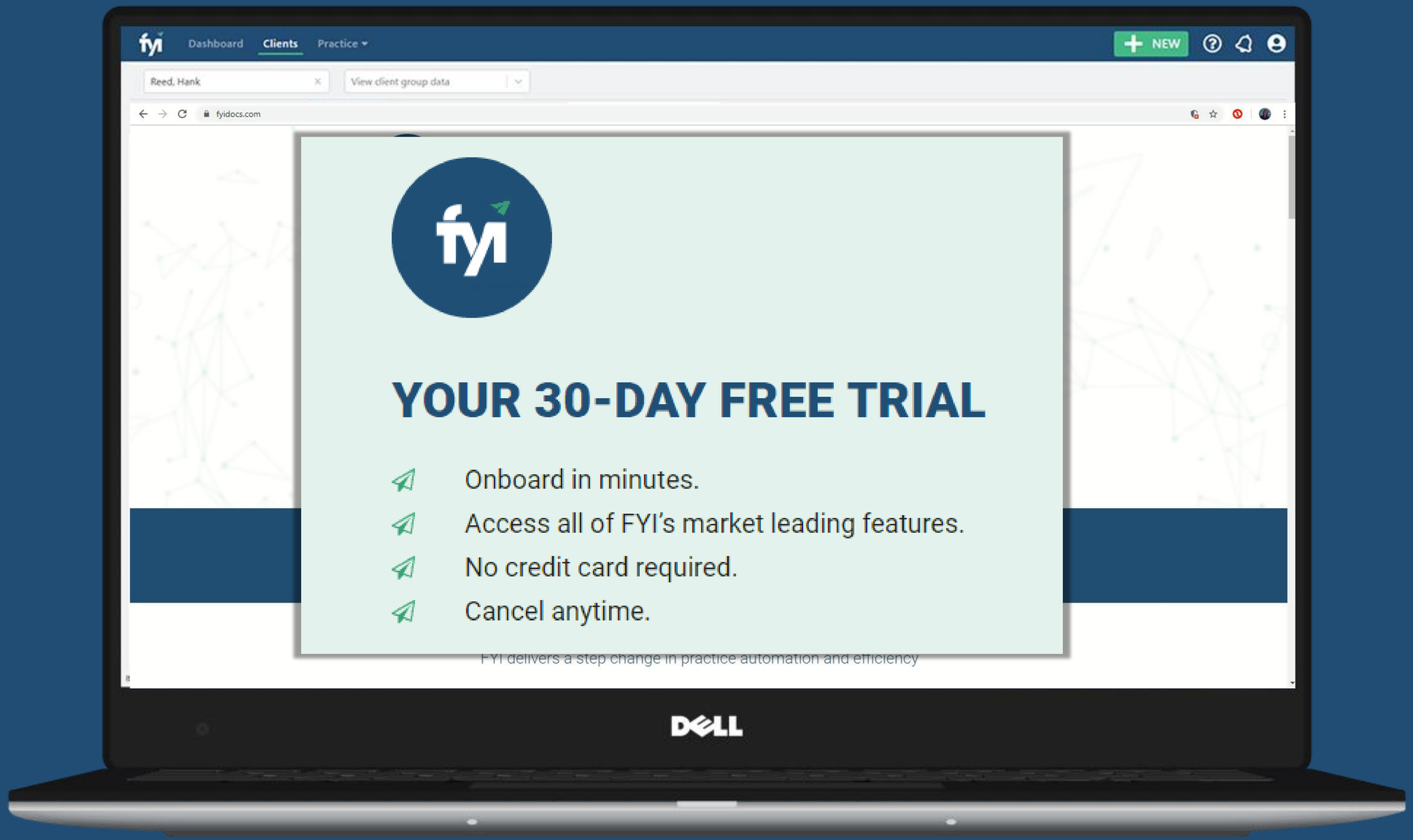


START YOUR

30-DAY FREE TRIAL

TODAY

FYIDOCS.COM



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