ONBOARDING

INITIAL SET UP

- Office 365 Integration
- Xero Integration
- Practice Stationery
- Automation Settings
- Your FYI Account

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

In This Guide

Office 365 Integration

FYI Add-ins for Office and Outlook
OneDrive Set up

Xero Integration

XPM Synchronisation
Verifying your Clients and Team

Practice Stationery

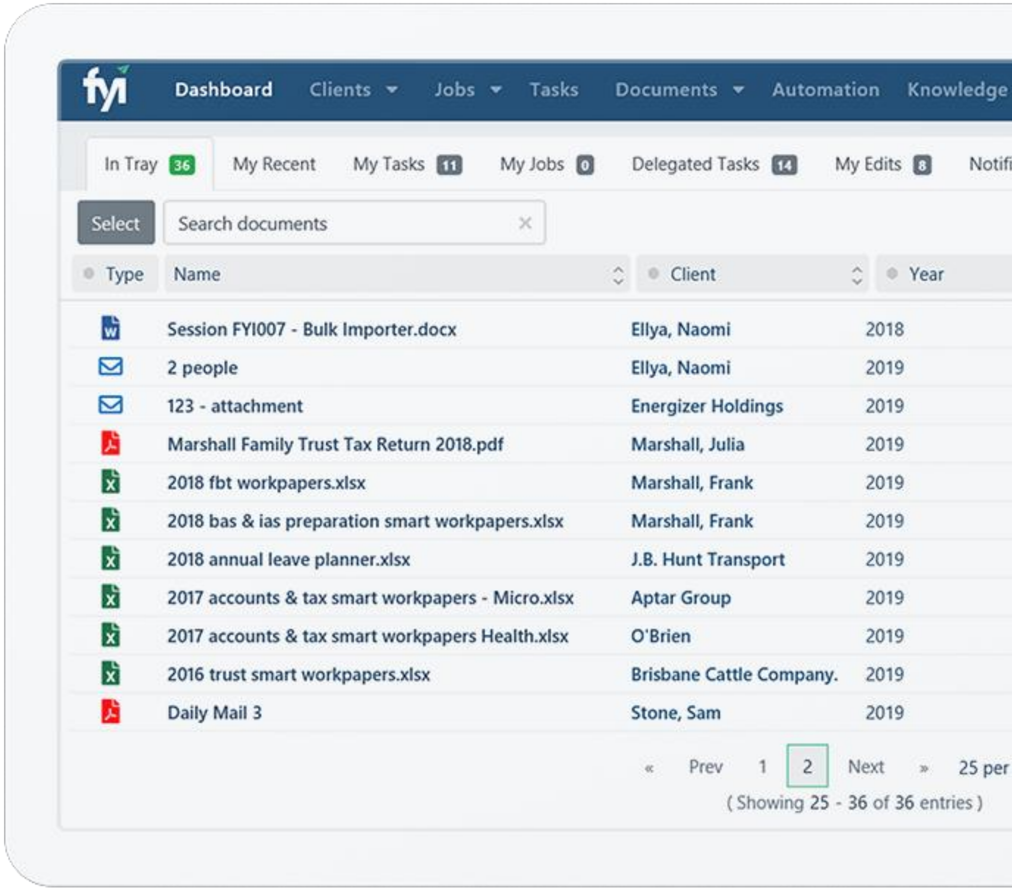
Assisted Set-up

Automation Settings

Email AutoFile
Email Attachment AutoFile
Calendar Entry AutoFile

Your FYI Account

Confirming Active Users
Your Billing Details and Subscription



OFFICE 365 INTEGRATION

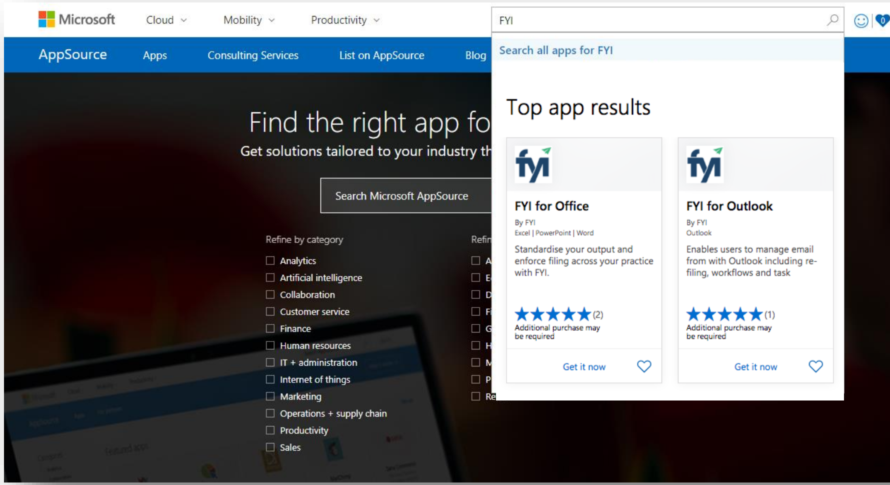
FYI Add-ins for Outlook and Office
OneDrive Set-Up

Installing the FYI Add-ins for Office and Outlook

To ensure that FYI can leverage the full benefits from your practice Office 365 subscription, you need to add the FYI for Office and the FYI for Outlook apps to your Practice Office 365 account.

This is a mandatory step, that must be completed before your team begins using FYI.

Note: you must be an Office 365 Administrator for your practice to complete this function on behalf of other users.



Go to http://appsource.Microsoft.com to download the FYI apps from the Microsoft store.

Need Help?

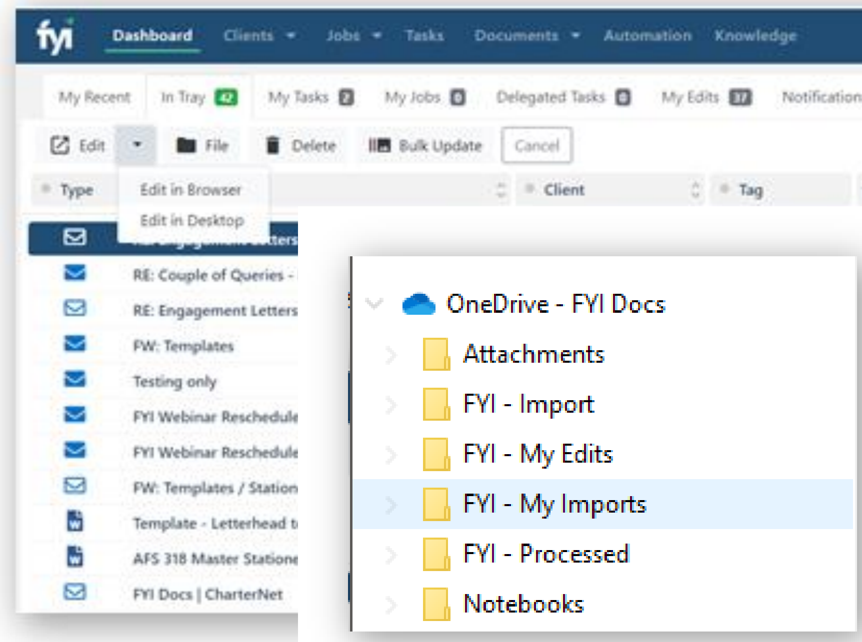
Visit FYI Help > Administration > Practice Set Up for information on [Adding the FYI Apps to Your Practice Office 365 Account]()

Setting Up OneDrive for FYI Users

Here's how to ensure each FYI user's OneDrive is linked to FYI and synchronising to the desktop.

1. Highlight an Office document within FYI and select **Edit in Browser** to open it in Office online.
2. Open a new browser tab and **login to Office.com** using the same login credentials used for FYI.
3. Select **OneDrive** from the Office 365 Apps and then click on **Sync** in the top action menu.
4. Once the synchronisation has been completed, you should see your OneDrive system folders in Windows Explorer.

When set up correctly, you will be able to use the **Edit in Desktop** function from within FYI. After selecting **"Finished Editing"**, the uploaded document will be automatically synced into FYI and made available to other users to edit.



Need Help?

Visit FYI Help > Administration > Practice Set Up for instructions on [Setting Up OneDrive for FYI Users]

XERO INTEGRATION

XPM Synchronisation

Verifying your Clients and Team

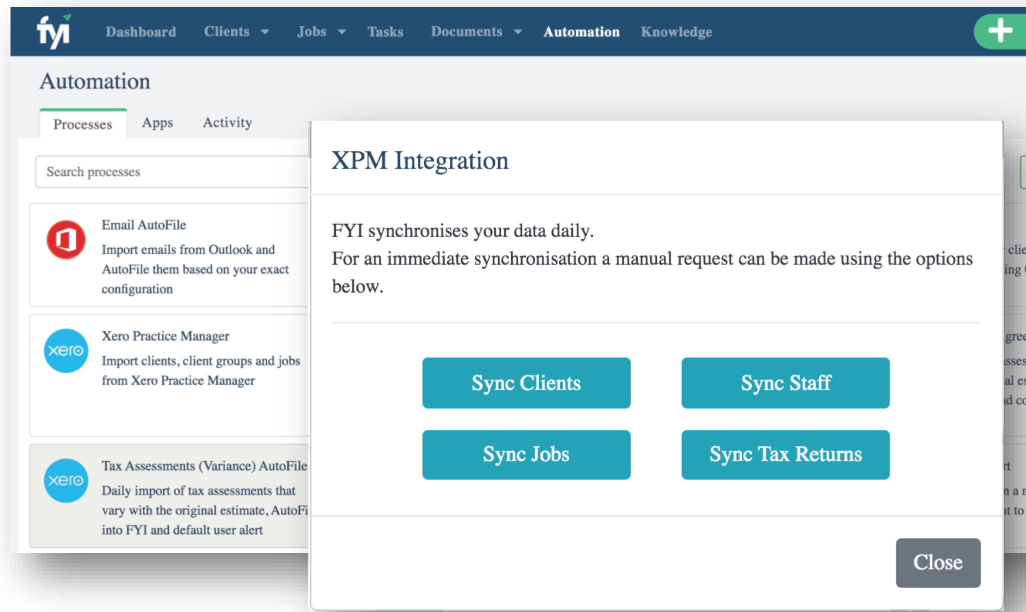
Synching with XPM

FYI synchronises with **Xero Practice Manager** on a daily basis and updates your **Client, Staff, Jobs** and **Tax Return** information.

This means you don't have to maintain data in multiple locations. **XPM continues to be your single source of truth for client information.** Any change in XPM is automatically reflected in FYI.

For an instant update, administrators can run a **manual sync** with XPM from the Automation dashboard.

1. From FYI, click **Automation** and the **Processes** tab will appear.
2. In the **Xero Practice Manager** process, click the cog icon to run a manual sync of **Clients, Staff, Jobs** or **Tax Returns**



Need Help?

Visit FYI Help > Automation > Xero Practice Automations for information on Synchronising with Xero Practice Manager

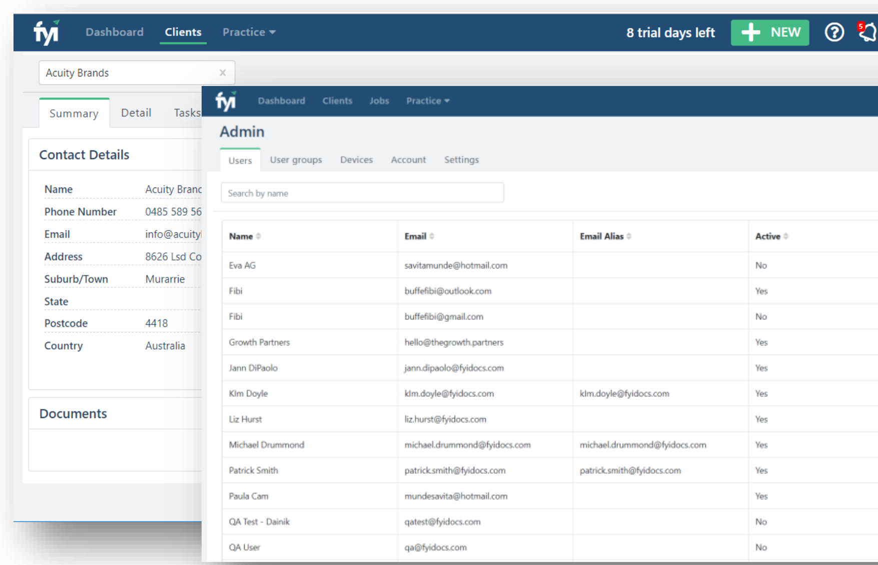
Verifying your Clients and Team

To verify that the synchronisation process has been completed correctly, you can;

1. Type the name of a **Client** or **Group** into the FYI search bar to check that their name, address, email and phone details appear correctly in FYI.

2. Navigate to **Settings** in the top right hand corner and select **Practice Settings > Admin.** Here you can check that all Team Members recorded in XPM appear correctly in FYI.

3. Navigate to **Jobs** and search for an active job to check the client, group, dates, budget and assigned individuals appear correctly.



Your contacts and team will synchronise automatically from Xero Practice Manager

Need Help?

Visit FYI Help > Xero Practice Automations to learn how to [Verify your Synchronisation with XPM for the First Time]

PRACTICE STATIONERY

Assisted Set-Up

Setting Up Your Practice Stationery

As part of your **Assisted Onboarding Plan**, your FYI Client Success team will help set up your practice stationery in FYI.

All you need to do is provide;

1. An example of your practice letterhead indicating your company logo and standard header and footer details (in Microsoft Word format)

2. An example letter populated with any merge fields from Xero Practice Manager, such as addressee, postal address, salutation, author name etc.

Once set up in FYI, we will email your new stationery back to you for approval.


Growth Partners

{ DATE \@ "MMMM d, yyyy" * MERGEFORMAT }

«Addressee»
«PostalAddress»

Dear «FirstName»,

Yours sincerely,

«AuthorName»
«AuthorRole»

Growth Partners Pty Ltd ABN 76 178 123 888
Sydney
Level 8, 800 Central Street. Sydney, NSW, 2000
GPO Box 8888 NSW 2001

www.growthpartners.com.au
Telephone 02 9400 1000

Need Help?

Visit FYI Help > Administration for further information on [Creating Stationery]

AUTOMATION SETTINGS

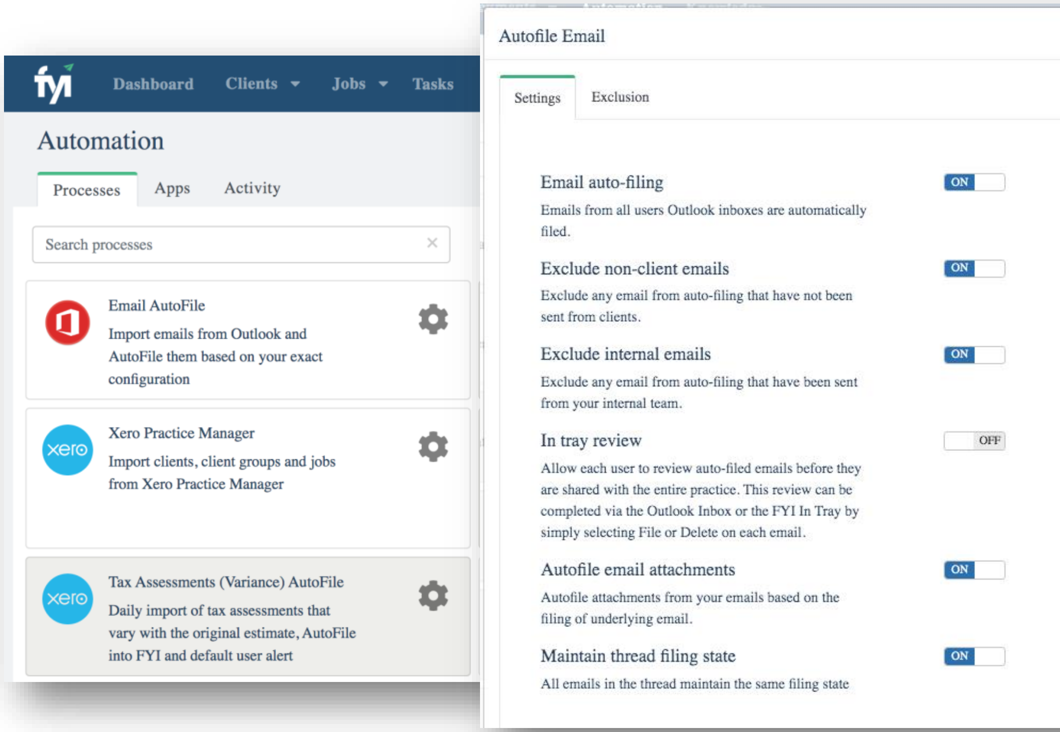
Email AutoFile
Email Attachment AutoFile
Calendar Entry AutoFile

Email AutoFile

Email AutoFile Settings control how the automatic filing of email from Outlook is managed.

Two important options to consider turning on or off before go live include:

- **In tray review** - allows each user to review auto-filed emails before they are shared with the entire practice.
- **Email attachments** – auto-filed based on the filing of the underlying email



Simply click on the cog icon next to the Email AutoFile process to configure for your practice.

Need Help?

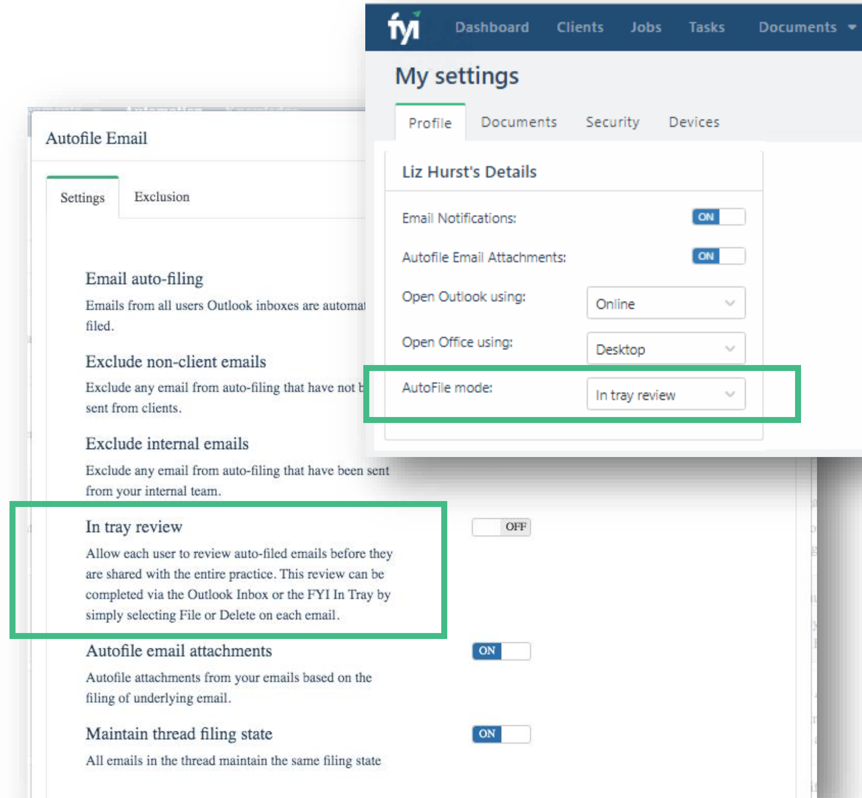
Visit FYI Help > Automation > Outlook Automations for an introduction to Email AutoFile Settings and Exclusions

InTray Review of Emails

In Tray Review can either be turned **ON** or **OFF** for the **practice** as a whole, or at a **User level** by adjusting the **AutoFile mode** in each User's Settings.

Most practices turn this feature **OFF** at a practice level to ensure that the majority of client emails are automatically filed in FYI and can be accessed by the broader team.

In Tray Review is mostly used by senior team members as it gives them a higher degree of control over the filing of sensitive client emails.



Need Help?

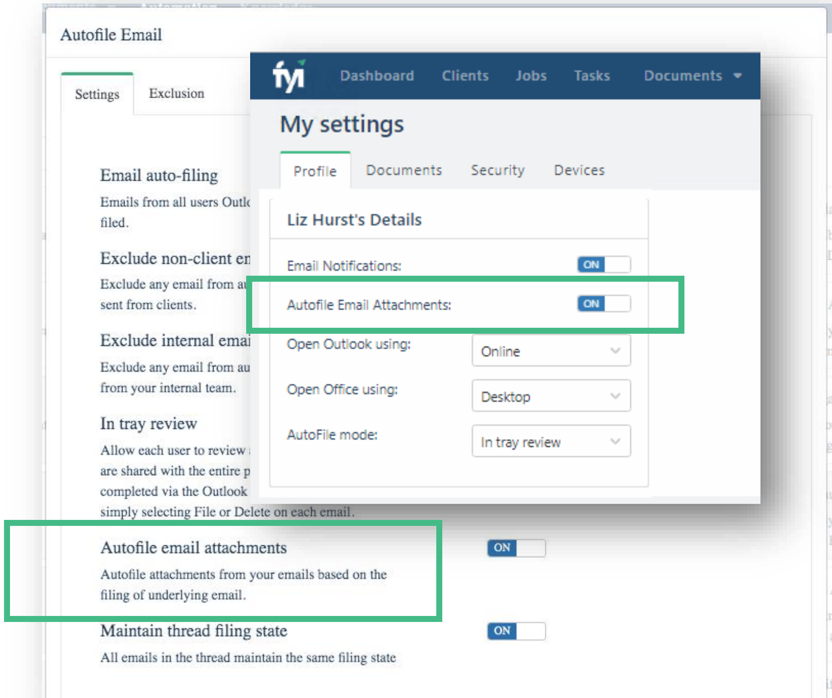
Visit FYI Help > Automation > Outlook Automations for an introduction to Setting AutoFile Defaults for your own Login

Auto-filing Email Attachments

Email attachments can be auto-filed as separate documents within FYI.

The attachment(s) are filed using the same auto-filing rules that is being applied to the email. Only genuine attachments are filed, and any attachments such as a jpg for a logo or signature are ignored.

The auto-filing of attachments can be configured across the practice or for each user via "My Settings".



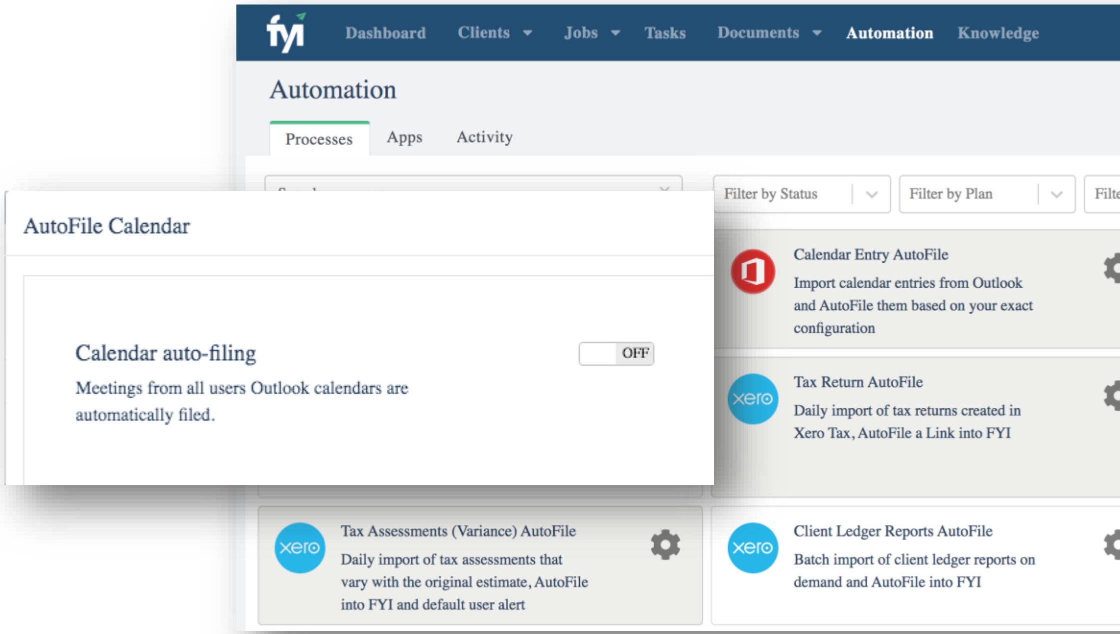
Turn auto-filing of Email attachments ON or OFF via the Email AutoFile process on the Automation Dashboard..

Need Help?

Visit FYI Help > Automation > Outlook Automations for an introduction to Setting AutoFile Defaults for your own Login

Calendar Entry AutoFile

The **Calendar Entry AutoFile** process automatically imports and files all client meetings from your Outlook calendar. They are created as **Meetings** in FYI. This allows your practice to automatically store a record of all client meetings.



Editing the Calendar Entry AutoFile

1. In **Calendar Entry AutoFile**, click the cog icon to edit this process.
2. The setting for the Calendar Entry AutoFile can either be "On" or "Off".

Need Help?

Visit FYI Help > Automation > Outlook Automations for an introduction to [Calendar Entry AutoFile]

YOUR FYI ACCOUNT

Active Users
Your Billing Details and Subscription

Confirming Active Users

When FYI imports your employees from Xero Practice Manager they are automatically set as **Active Users** in FYI.

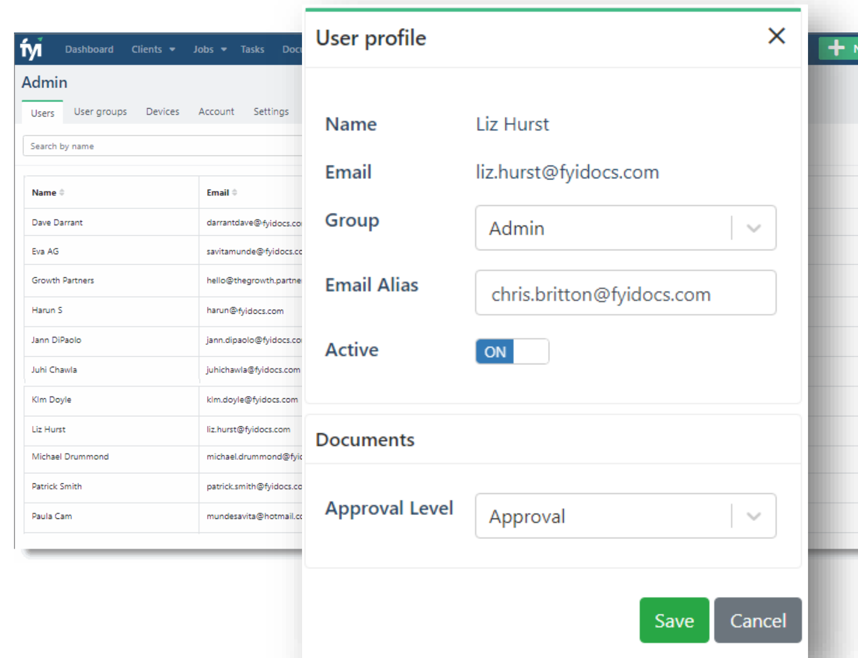
Each **Team Member** must be flagged as **Active** or **Inactive**, with all Active users added to relevant **User Groups** within FYI.

This step finalises your document security.

Active users will be able to access all of FYI's features during the free 30-day trial period. Mark any Team Members as **Inactive** if they will not be using FYI.

Visit the help article below for instructions on how to;

- Make a User Active or Inactive
- Assign a User Group and Approval Level to an Active User
- Make a User an Administrator
- Set Approval Levels



Need Help?

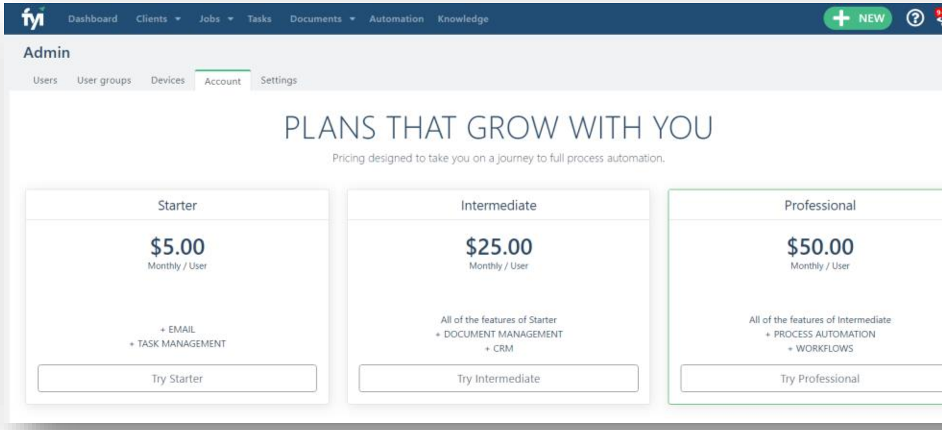
Visit FYI Help > Administration > Practice Set Up for instructions on Confirming Active Users, Allocating a Group to each User

Adding Your Billing and Details and Subscribing to a Plan

At the completion of your 30-Day Free Trial, you will need to select an FYI subscription to suit your practice.

1. From FYI, click **Settings** in the top right-hand corner
2. Select **Practice Settings** from the drop-down menu, and then **Admin**
3. Go to the **Account** tab to choose a plan.
4. Enter your credit card details and click **Update Billing Details**.

You will need to provide your Credit Card Details as a requirement of the Assisted Onboarding process. This can be done while you are still on a 30-Day Free Trial and before subscribing to a plan.



Upgrade your FYI plan at any time via your Practice Settings > Admin > Account

Need Help?

Visit FYI Help > Administration > for information on [your FYI Account]

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

WEB APP
app.fyidocs.com

HELP CENTRE
support.fyidocs.com

EMAIL SUPPORT
support@fyidocs.com