

GETTING STARTED

WELCOME

- ✈ The FYI Mission
- ✈ Learning the Basics
- ✈ Help When You Need It



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

www.fyidocs.com



In This Guide

Welcome to FYI

We're on a mission to save you time
and improve your productivity

Learning the Basics

Your 30-Day Free Trial
How to Login
Key Concepts for New Users
Mastering the Essentials

Help When You Need it

Website resources, FYI Help Centre,
Email Support and Community





WELCOME TO FYI

We're on a mission to save you time
and improve your productivity





Welcome to the world's most automated document management platform

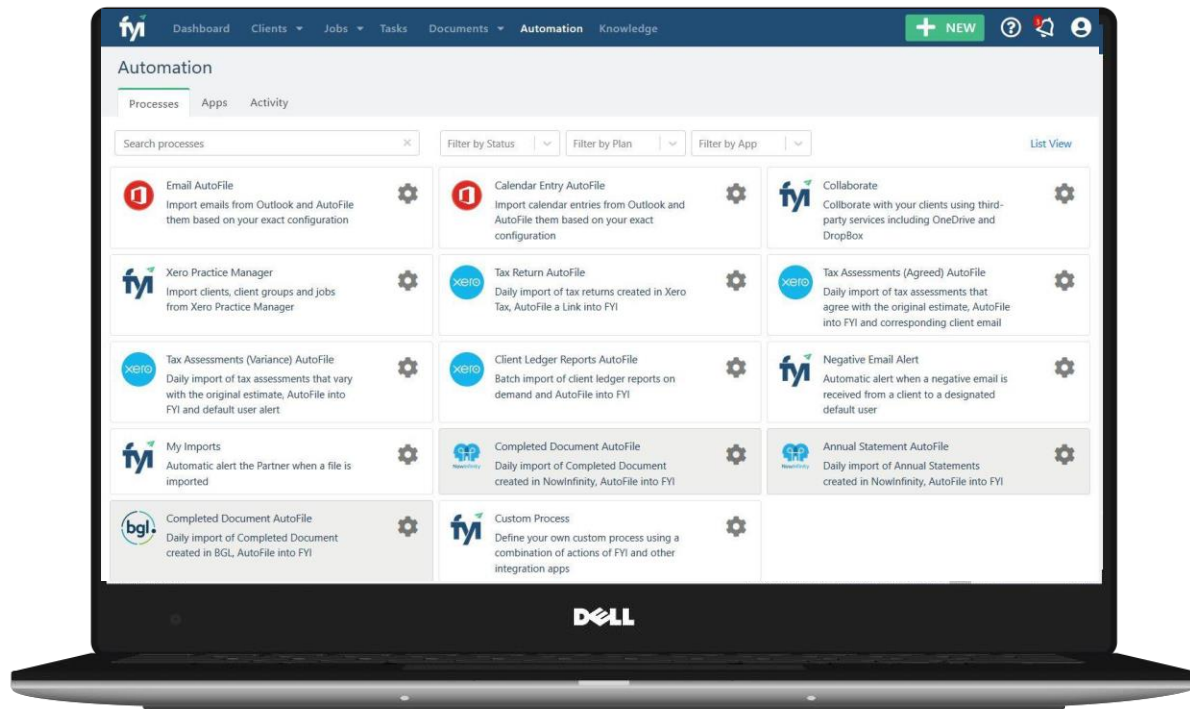
FYI is a new productivity tool built by accountants, for accountants.

Integrating seamlessly with Xero Practice Manager, our unique blend of client-centric document management delivers a step-change in practice automation and efficiency.

We're on a mission to liberate accountants by halving the time spent on compliance through automation.

And we're thrilled to have you on board.

Let's get started!



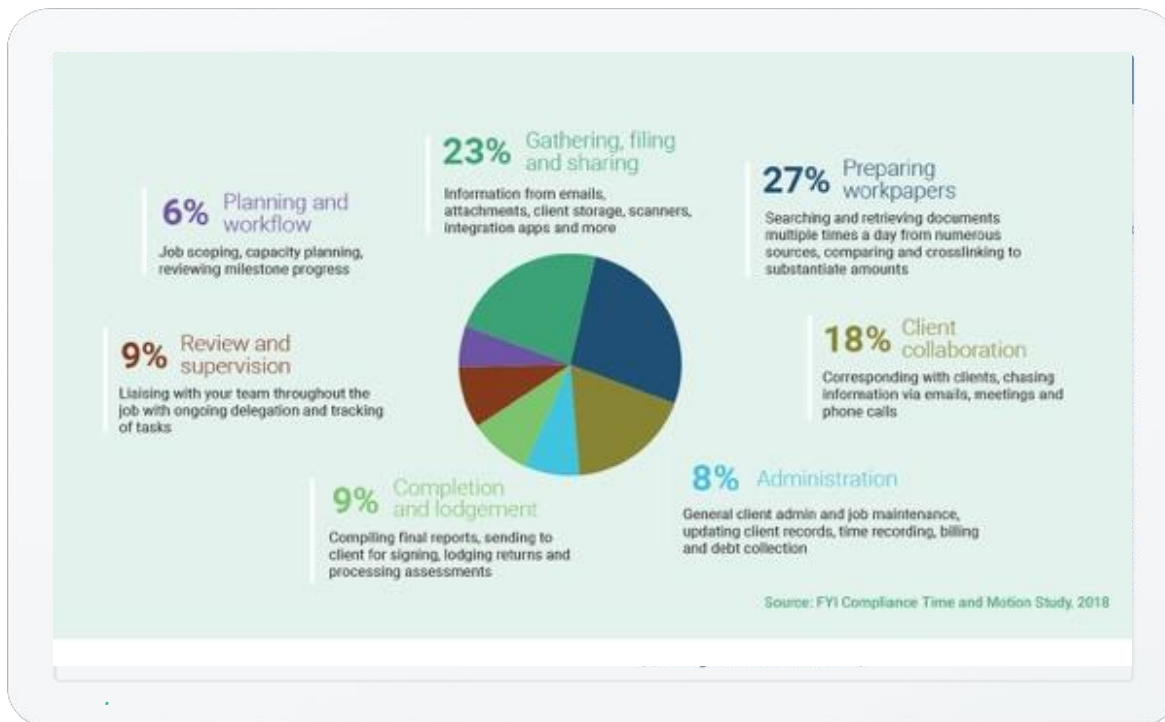


Where does the time go?

Compliance work requires the completion of repetitive tasks across jobs and clients.

We've conducted a detailed study with a range of practices to understand where time is spent on compliance jobs today.

This knowledge drives the FYI product roadmap to maximise time savings across your practice.

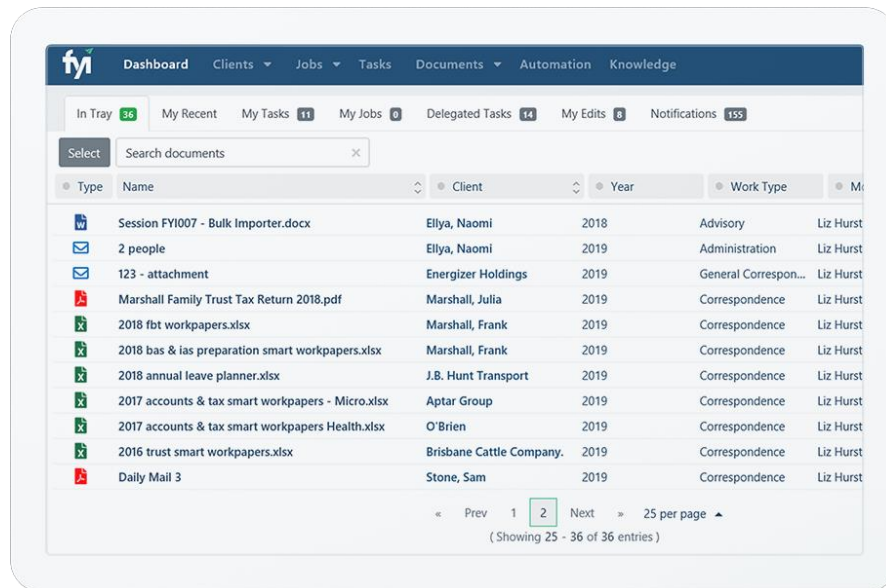




FYI delivers a step-change in practice automation and efficiency

By streamlining the capture of client information and automating repetitive tasks, FYI shaves minutes off every client job.

All documents move effortlessly through the practice, supported by practice templates, electronic workflows and approvals.



Automatic email filing in Outlook



Paperless document management



Configurable process automation



Embedded task management



Client relationship management



Integration with industry leading apps



XPM Job management



Powerful search and retrieval



Purpose-built approval workflows



Proven return on investment

Every feature of the FYI platform is designed to save time, remove manual steps and increase productivity.

Our core feature set is already generating time savings of up to 20%. And process automation takes these productivity gains to another level entirely.

We are actively working with partners across the industry to broaden FYI's scope and increase your automation capabilities.



We release new features and updates every week to enhance the product.



Increase cost savings:

Lower your operating costs and increase your throughput



Improve processes:

Get more done in less time, configure existing and new processes as needed



Redeploy resources to higher value functions:

Free up your time to focus on adding more value to the client



Improve productivity:

Minimise time spent on manual, error-prone processes



Improve quality:

Increase compliance and auditability, increase consistency with standardised processes



Improve client service:

Eliminate human errors, improve customer satisfaction



Improve compliance:

Everything is automatically recorded for historical auditability





Security and trust

FYI was born in the cloud and built with unequalled security in mind.

Our platform is a certified ATO Digital Service Provider and has ISO 27001 certification, an international standard for information security management.



Data Security

Rest assured knowing your documents are protected both in the cloud and in transit with the highest levels of encryption available.

- ✓ Data encrypted on multiple levels
- ✓ Microsoft Windows authentication
- ✓ Certified and trusted



Reliability

Our architecture and product development lifecycle is guided by best practice to ensure the reliability of the FYI platform.

- ✓ AWS Well-Architected Framework
- ✓ 24/7 protection
- ✓ Tier 1 hosting



Future Proofed

We have developed the platform for long term scalability and extensibility so it will grow and evolve with your practice.

- ✓ Regular Load Penetration and Testing
- ✓ Constant Innovation
- ✓ Each practice retains ownership rights to content uploaded to FYI



LEARNING THE BASICS

Getting Started: Your 30-Day Free Trial

How to Login

Key Concepts for New Users

Mastering the Essentials





Getting Started Your 30-Day Free Trial

The **Getting Started: Your 30-Day Free Trial** Onboarding Guide provides instructions on setting up your FYI account.


GETTING STARTED
YOUR 30-DAY FREE TRIAL

- 🕒 Go live in minutes
- 🔓 Access all features
- 🔍 See what makes FYI unique



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Get started with FYI in minutes.

Setting up FYI is simple. There's nothing to install locally and no credit card required. All you need is an Office 365 Business Premium account and an API key generated from Xero Practice Manager.

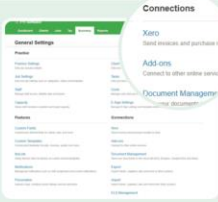
FYI will synchronise with Xero Practice Manager in an instant so you'll be up and running with your client and team data in minutes.

Step 1: Generate an API key for FYI

You must be a Xero Practice Manager Administrator to complete this step.

HERE'S HOW:

- Login to XPM and click **Business > Settings > Add-Ons**
- Find FYI in the Add-Ons list and click 'Generate Key'
- Copy this key to use during your FYI trial set-up




Connections

Xero
Send invoices and purchase receipts

Add-ons
Connect to other online services.

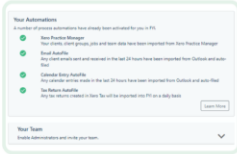
Document Manager



Your journey towards process automation has begun

FYI instantly activates four key **process automations** for you as soon as you set up your account.

1. Your clients, client groups, jobs and team data are instantly imported from **Xero Practice Manager** and will be continuously synchronised
2. Any client emails sent and received in the last 24 hours are instantly imported from Outlook and auto-filled in FYI
3. Any calendar entries made in the last 24 hours are instantly imported from Outlook and auto-filled in FYI
4. Any tax returns created in Xero Tax will be imported into FYI on a daily basis



Your Automations

A list of all process automations that have been activated for you in FYI.

- 🔄 **Xero Practice Manager**
Your clients, client groups, jobs and team data have been imported from Xero Practice Manager and will be continuously synchronised.
- 📧 **Client Emails**
Any client emails sent and received in the last 24 hours have been imported from Outlook and auto-filled.
- 📅 **Calendar Entries**
Any calendar entries made in the last 24 hours have been imported from Outlook and auto-filled.
- 📄 **Tax Returns**
Any tax returns created in Xero Tax will be imported into FYI on a daily basis.

Your Team
Enable Administrators and invite your team.

FYI imports your employees from Xero Practice Manager and automatically makes you the administrator. You're now ready to invite your team to start using FYI.

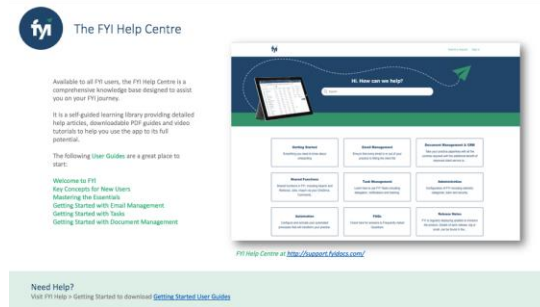
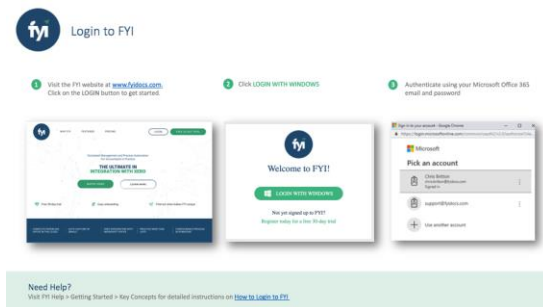
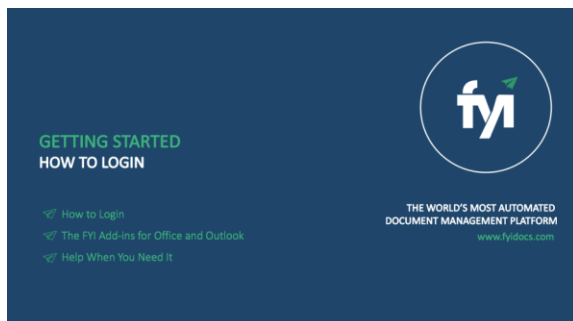
Need Help?

Visit FYI Help > Getting Started to download our Onboarding Guide on [Starting Your 30-Day Free Trial](#)



Getting Started How to Login

The **Getting Started: How to Login** User Guide covers the steps new users need to follow when logging in to FYI for the first time.



Need Help?

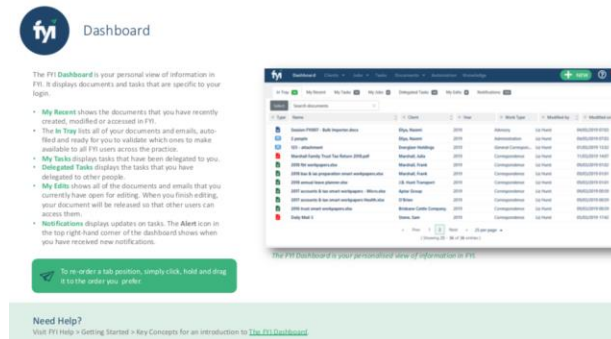
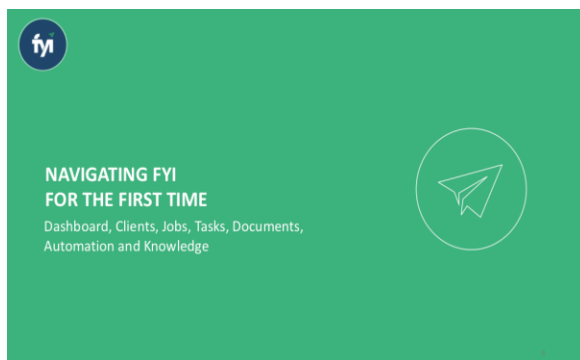
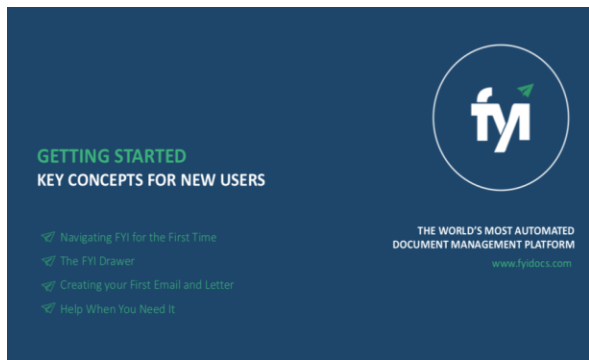
Visit FYI Help > Getting Started to download our User Guide covering [How to Login](#)



Getting Started

Key Concepts for New Users

The **Getting Started: Key Concepts for New Users** Guide is an introduction to the FYI platform for new users who are just starting out with FYI.



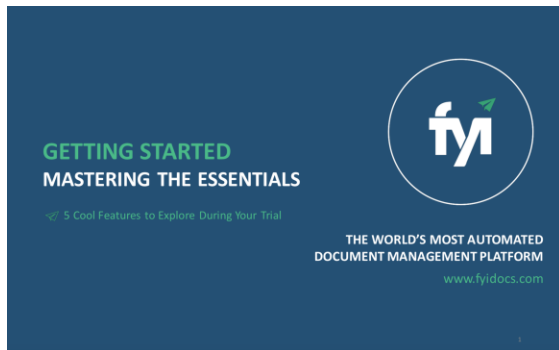
Need Help?

Visit FYI Help > Getting Started to download our User Guide covering [Key Concepts for New Users](#)



Getting Started Mastering the Essentials

The **Getting Started: Mastering the Essentials** Guide is an introduction to 5 cool features to explore during your 30-day free trial.



In This Guide

1. Introduction to AutoFile for Outlook
Let FYI file client emails, attachments and meetings
2. Delegating tasks
Straight from the email or document you are working on
3. Importing batches of documents
Use OneDrive to import automatically to your FYI In Tray
4. Working with documents
Edit using the power of the desktop
5. Auto-filing tax returns
Access client tax returns in a single click



Mastering the Essentials



Auto-filing client emails

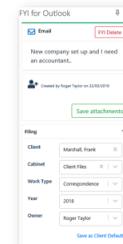


As soon as FYI is deployed, it starts to monitor your **Inbox** and **Sent** items in Outlook, looking for emails that match a client email address in **Xero Practice Manager**. Any client emails received or sent are automatically imported and filed in FYI under the relevant client.

Email attachments can also be auto-filed as separate documents within FYI. This option can be turned on by an FYI Administrator via the **Automation Dashboard**, or for each user via **My Settings**.

Custom filing defaults can be set up by your FYI Administrator at a Client level. They can also be set up or changed from within the FYI Outlook Drawer by clicking **Save as Client Default**.

To avoid cluttering your client file, replies to an email thread are automatically filed in FYI based on the filing categories applied to the original email.



Any emails that you do not want to be available to the entire practice can be deleted from your In Tray in FYI.

Need Help?

Visit FYI Help > Email Management > Automation for an [introduction to AutoFile for Outlook](#)

Mastering the Essentials

Need Help?

Visit FYI Help > Getting Started to download our User Guide covering [Mastering the Essentials](#)



HELP WHEN YOU NEED IT

Website resources, the FYI Help Centre,
email support and community





Start your journey at
www.fyidocs.com

The FYI website is a great place to start learning about FYI.

- Visit the [video library](#) to watch videos introducing the platform and key features
- Join a live product demonstration [webinar](#) to get a tour of the platform.
- Join the [FYI Community](#) to get news and updates on product releases and have the best of our blog delivered to your inbox.
- Access the [FYI Help Centre](#)

fyi WHY FYI FEATURES PRICING LOGIN FREE 90 DAY TRIAL

VIDEO LIBRARY

EMAIL AND TASK MANAGEMENT

DOCUMENT MANAGEMENT

PROCESS AUTOMATION

GETTING STARTED: 30 DAY FREE TRIAL

Auto-file client emails centrally for the entire practice and assign tasks directly from your inbox.

FYI blends email, documents, phone calls and file notes into a single database that's your complete paperless office in the cloud.

Automate a growing number of repetitive tasks using FYI's automation engine, resulting in significant time savings for the entire practice.

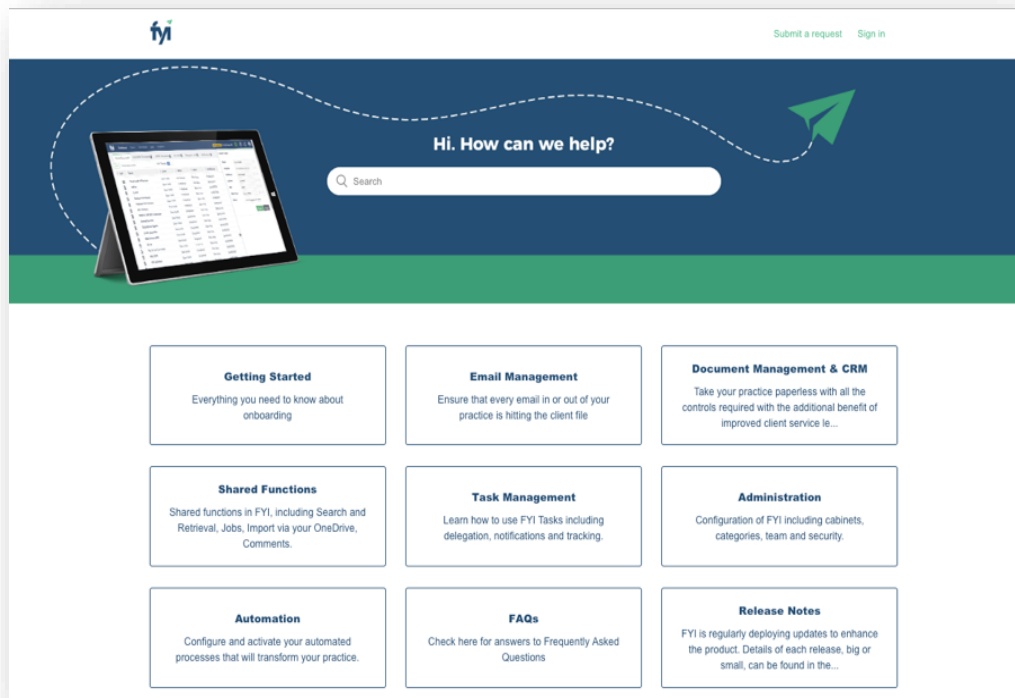
You can be up and running in less than 10 minutes with full access to FYI's document management and automation functionality.



FYI Help

Available to all FYI users, the FYI Help Centre is a comprehensive knowledge base designed to assist you on your FYI journey.

It is a self-guided learning library providing detailed help articles, downloadable PDF guides and video tutorials to help you use the app to its full potential.



Find onboarding guides, user guides and tutorials, help articles and more

Need Help?

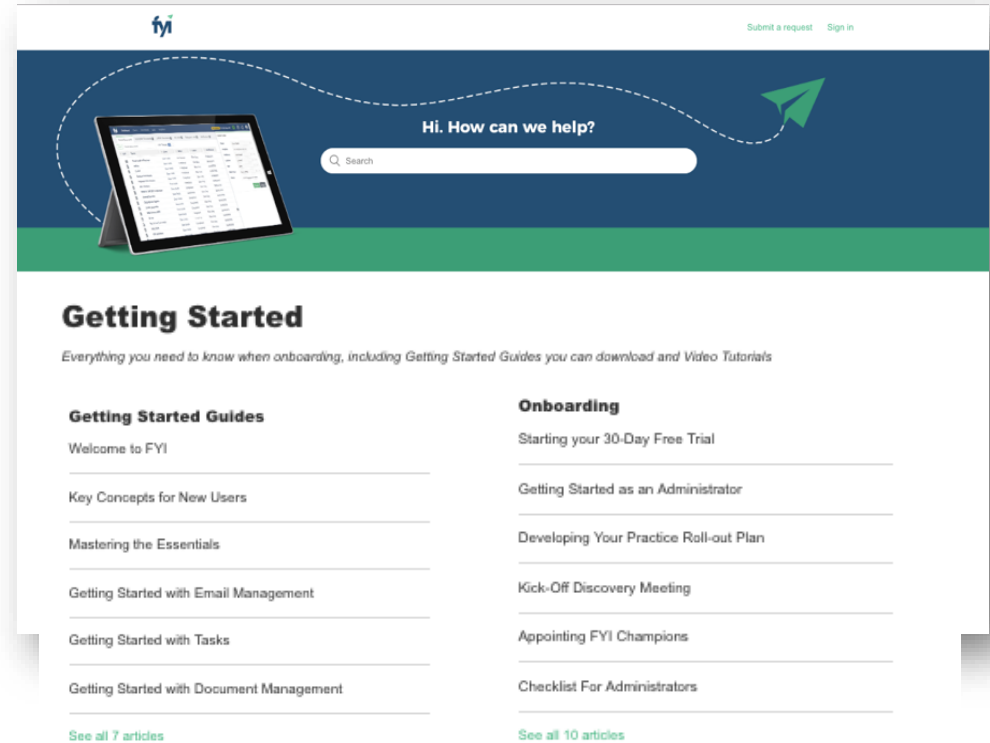
Visit the FYI Help Centre at www.support.fyidocs.com



Help Getting Started

Visit [FYI Help > Getting Started](#) to access everything you need to know when onboarding, including:

- Getting Started [User Guides](#) you can download and [Video Tutorials](#)
- [Onboarding Guides](#) and [Help Articles](#) for Administrators



Need Help?

[FYI Help > Getting Started](#) covers everything you need to know when onboarding



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.



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WEB APP

app.fyidocs.com

HELP CENTRE

support.fyidocs.com

EMAIL SUPPORT

support@fyidocs.com