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
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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

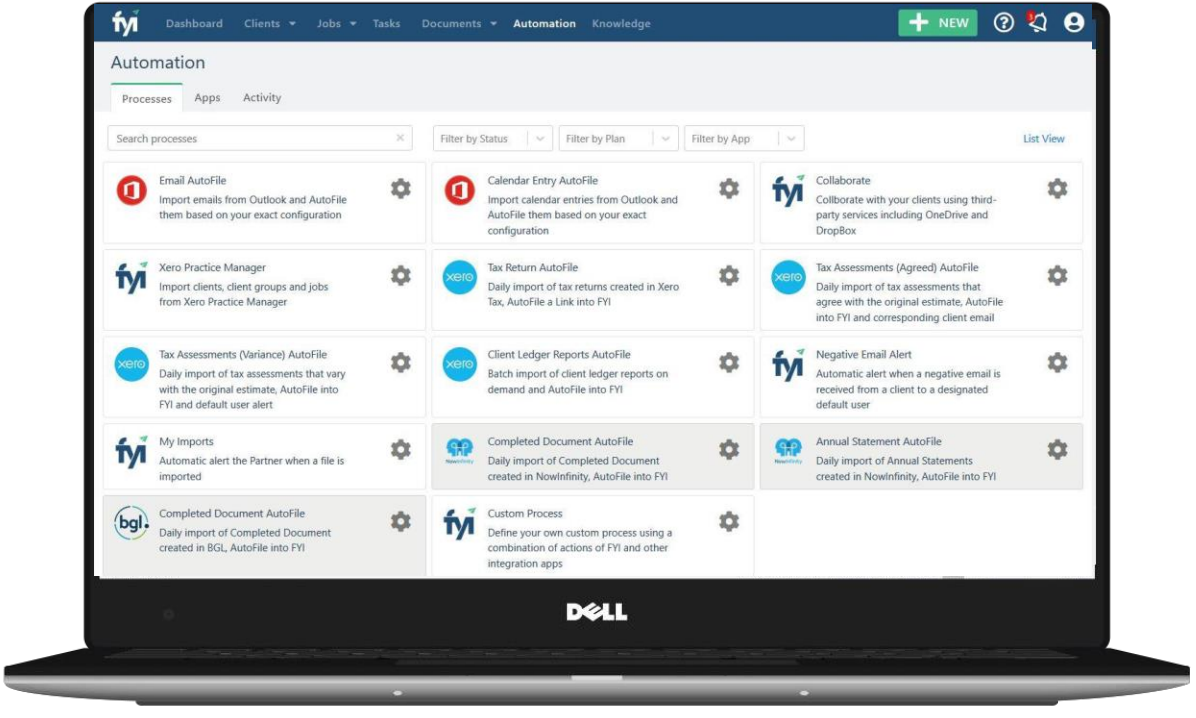
FYI is a new productivity tool built by accountants, for accountants.

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.

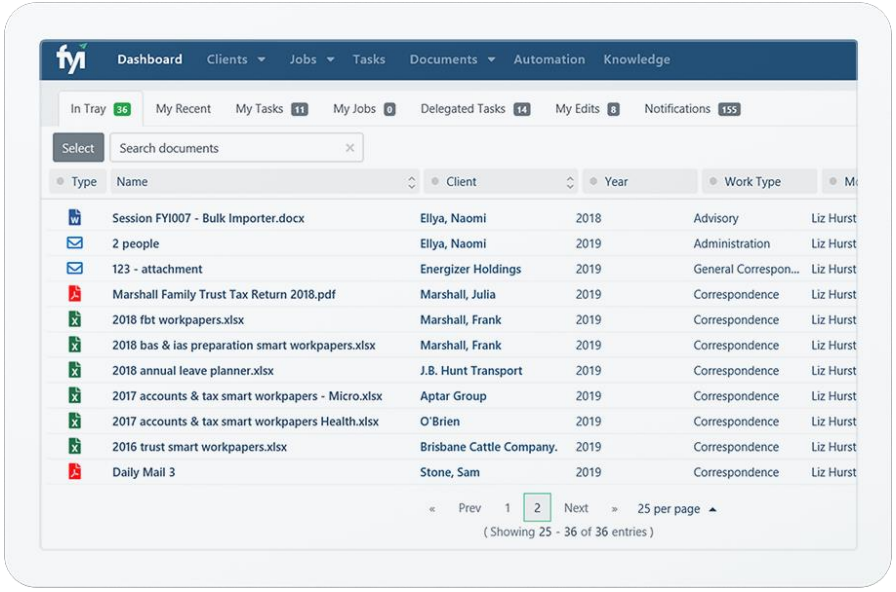
We've conducted a detailed study with a range of practices to understand where time is spent on compliance jobs today.

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.

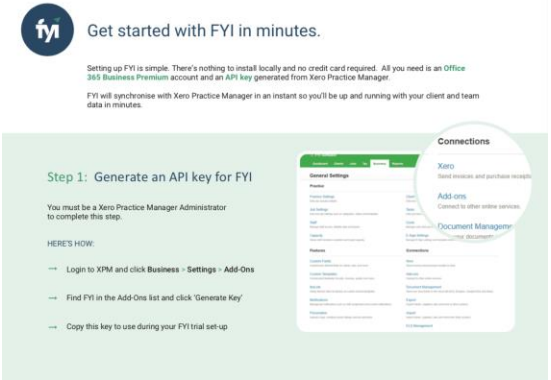
- ✓ Regular Load Penetration and Testing
- ✓ Constant Innovation
- ✓ Each practice retains ownership rights to content uploaded to FYI

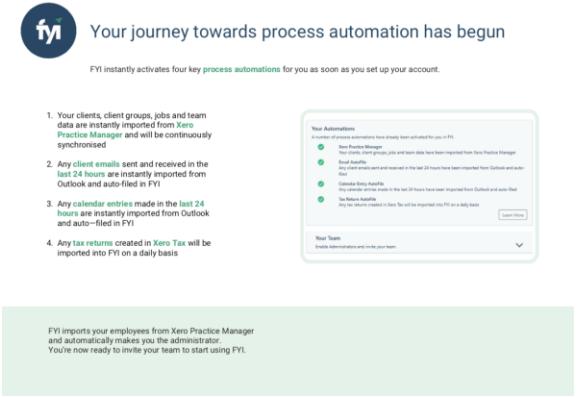
LEARNING THE BASICS

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.



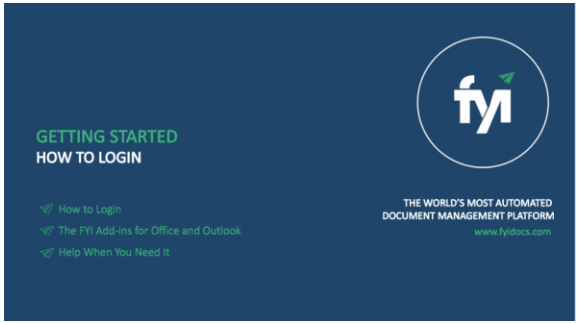


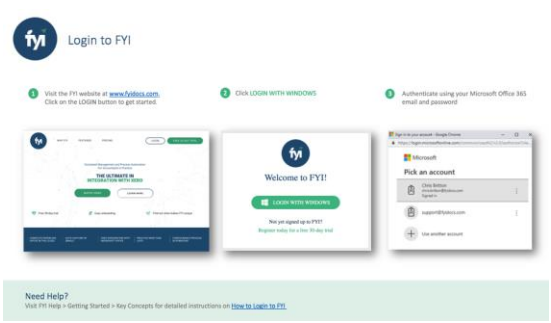
Need Help?

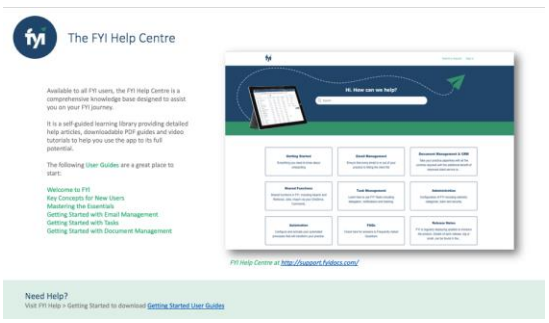
Visit FYI Help > Getting Started to download our Onboarding Guide on Starting Your 30-Day Free Trial

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.





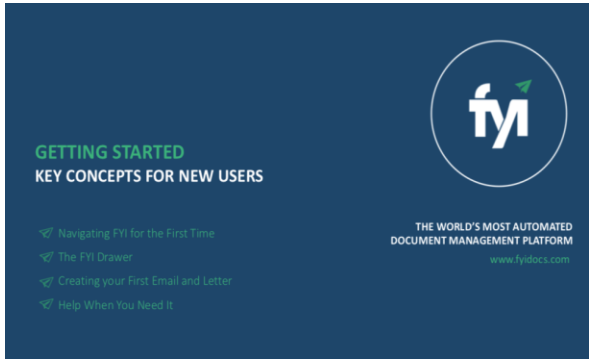


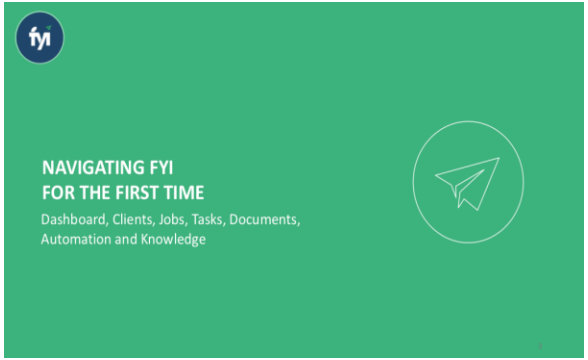
Need Help?

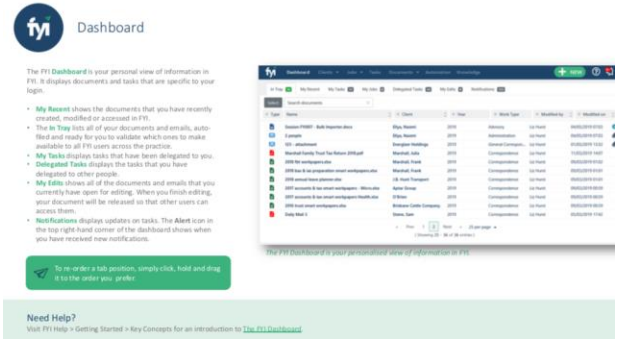
Visit FYI Help > Getting Started to download our User Guide covering How to Login

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.





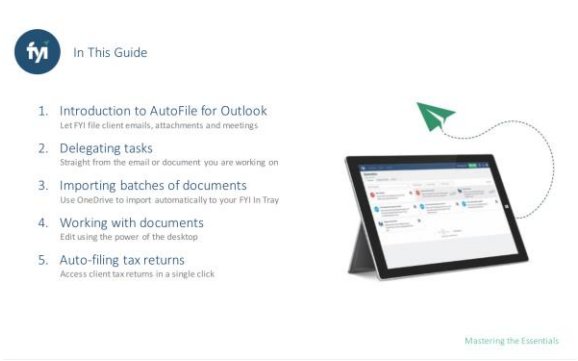


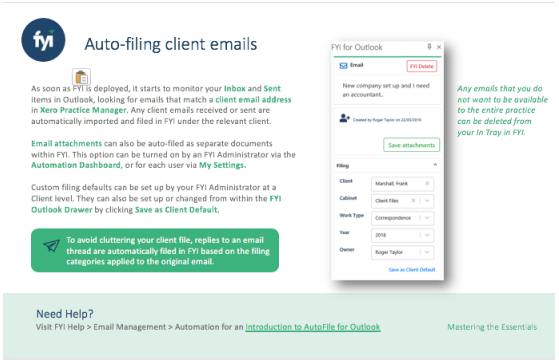
Need Help?

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.





Need Help?

Visit FYI Help > Getting Started to download our User Guide covering Mastering the Essentials

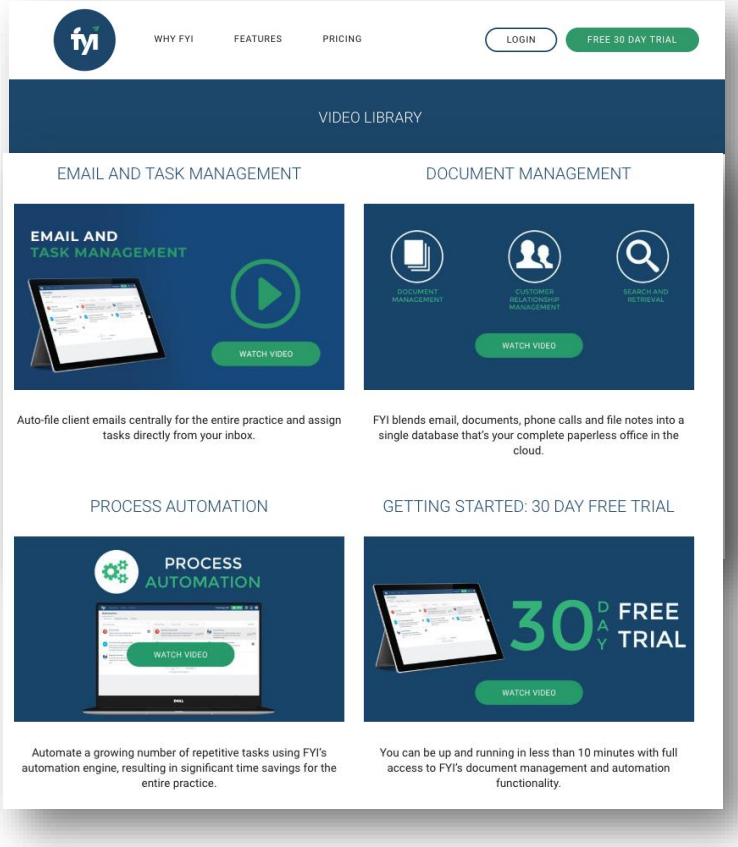
HELP WHEN YOU NEED IT

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.

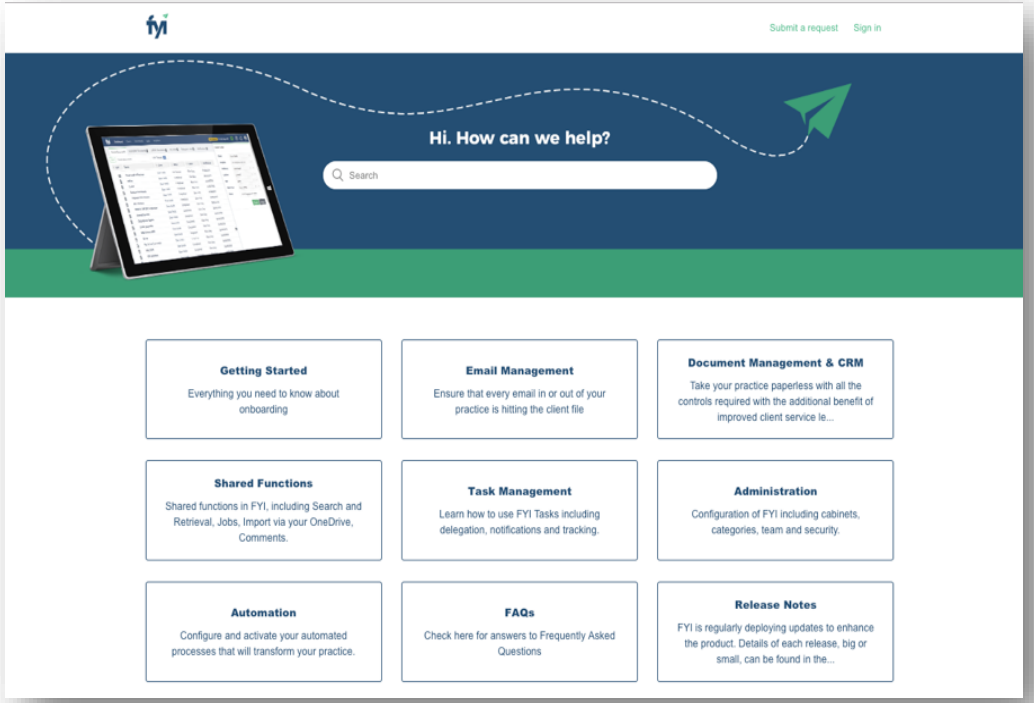
- Visit the video library to watch videos introducing the platform and key features
- Join a live product demonstration webinar to get a tour of the platform.
- Join the FYI Community to get news and updates on product releases and have the best of our blog delivered to your inbox.
- Access the FYI Help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



FYI 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

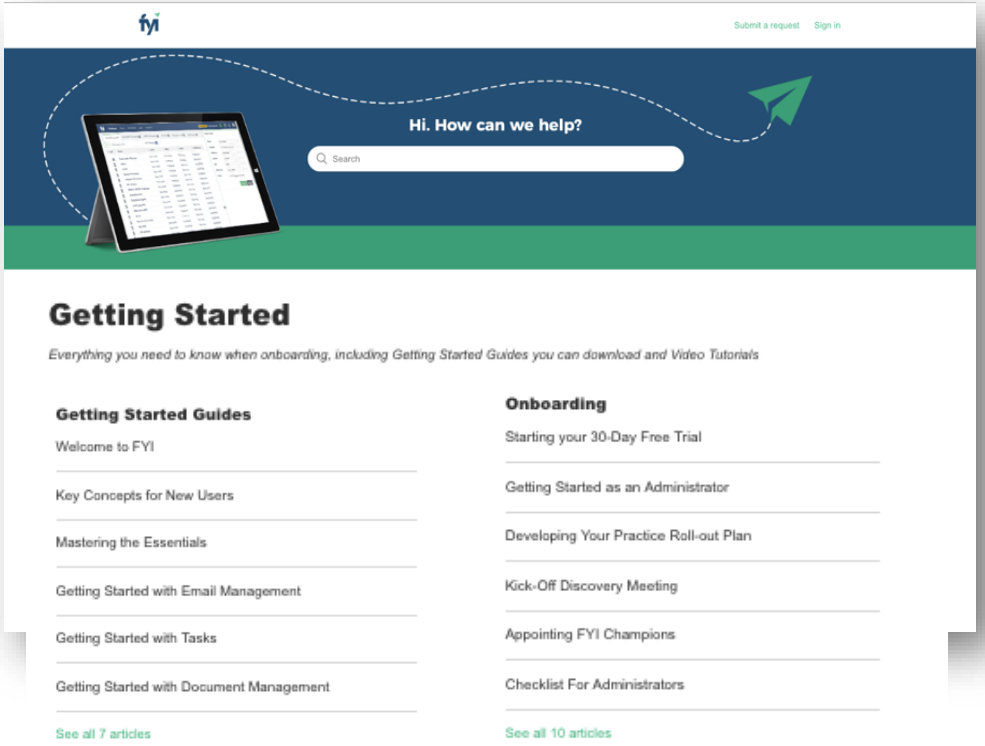
Need Help?

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.

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WEB APP
app.fyidocs.com

HELP CENTRE
support.fyidocs.com

EMAIL SUPPORT
support@fyidocs.com