Example Training Plan

A checklist of training resources to help your team make optimal use of the FYI platform

	STARTER	INTERMEDIATE	PROFESSIONAL
USER LEVEL:	Email and Task Management	Document Management & CRM	Advanced Automations
OBJECTIVE:	The most efficient way to manage emails	Go completely paperless in the cloud	Automate document creation, email communication and filing
DESIRED OUTCOMES:	Automatically file client emails, including attachments	Leverage conversation threading	Store internal documents in Knowledge Cabinets that are easily searched
	Leverage email templates for more efficient client communications	Utilise the FYI Drawer in Office	Electronically review, approve and lock documents before they leave your practice
	Automatically file Outlook calendar entries for Client meetings	Import, file and store documents in FYI	Record workflow status of documents to keep track of progress
	Delegate and manage tasks across the practice	Create Word, Excel and PowerPoint documents from FYI	Utilise scanned signatures
	Utilise comments to improve internal collaboration	Leverage Practice stationery and document templates	Send documents to clients securely using Microsoft OneDrive
	Request a manual sync of XPM jobs and clients	Utilise seamless check-in/check-out to edit shared documents	Auto-file client source documents from OneDrive, BGL, NowInfinity and more
	Scan incoming client emails for negative sentiment and alert partners	Leverage versioning and audit trails on complex documents	Automate Tax Assesment correspondence (COMING SOON)
		Capture every client interaction including phone calls, file notes and meeting minutes	Utilise custom processes to automate everyday, repetitive tasks (COMING SOON)
		Search, sort and filter for a complete view of the client or group	
		Utiltise both standard and custom views to find what you are looking for	
		Display and maintain XPM jobs within FYI, adding commentary for your team	
		File emails and documents at a job level, adding tasks for easy job management	
		Record time from within FYI, with information synched back to XPM	
		Batch import a pre-defined set of client ledger reports to support workpapers	
RESOURCES FOR NEW USERS:	Key Concepts for New Users	Getting Started with Document Management	
	Tutorial for Beginners	Creating Documents and Client Interactions	
	Getting Started with Automations	Managing Documents Like a Pro	
	Getting Started with Email Management		
	Getting Started with Tasks		
PRIORITY TASKS FOR ADMINS:	Add the FYI Apps to your Office 365 Account	Add practice email signatures to FYI	Set up bespoke Knowledge Cabinets
	Set up OneDrive for all Users	Set Up Practice Stationery	Assign approval authority to individual users
	Confirm Active Users and Assign Security to Cabinets	Deploy Word and Excel templates with merge fields	Configure Advanced Automations:
	Deploy email templates with merge fields	Share Custom Views	Collaborate
	Configure Starter Automations:	Enable filing by Job	BGL Import
	Email AutoFile Settings	Configure Intermediate Automations:	Now Infinity Import
	Calendar Entry AutoFile Settings	Client Ledger Reports AutoFile	Custom Processes (COMING SOON)
	Tax Return AutoFile	My Imports	Tax Assessments (COMING SOON)
	Negative Email Alert		
RESOURCES FOR ADMINS:	Onboarding: Initial Set-Up Guide	Optimising Stationery & Templates Masterclass	
	Onboarding: Post-Migration Admin		