

GETTING STARTED ONBOARDING

- Discovery
- Migration
- Configuration
- Training



THE WORLD'S MOST AUTOMATED
DOCUMENT MANAGEMENT PLATFORM



GETTING STARTED

This guide outlines the three components to your implementation of FYI:

- 1. **Migration of your data**
- 2. **Configuration of FYI for your practice**
- 3. **Training your team.**

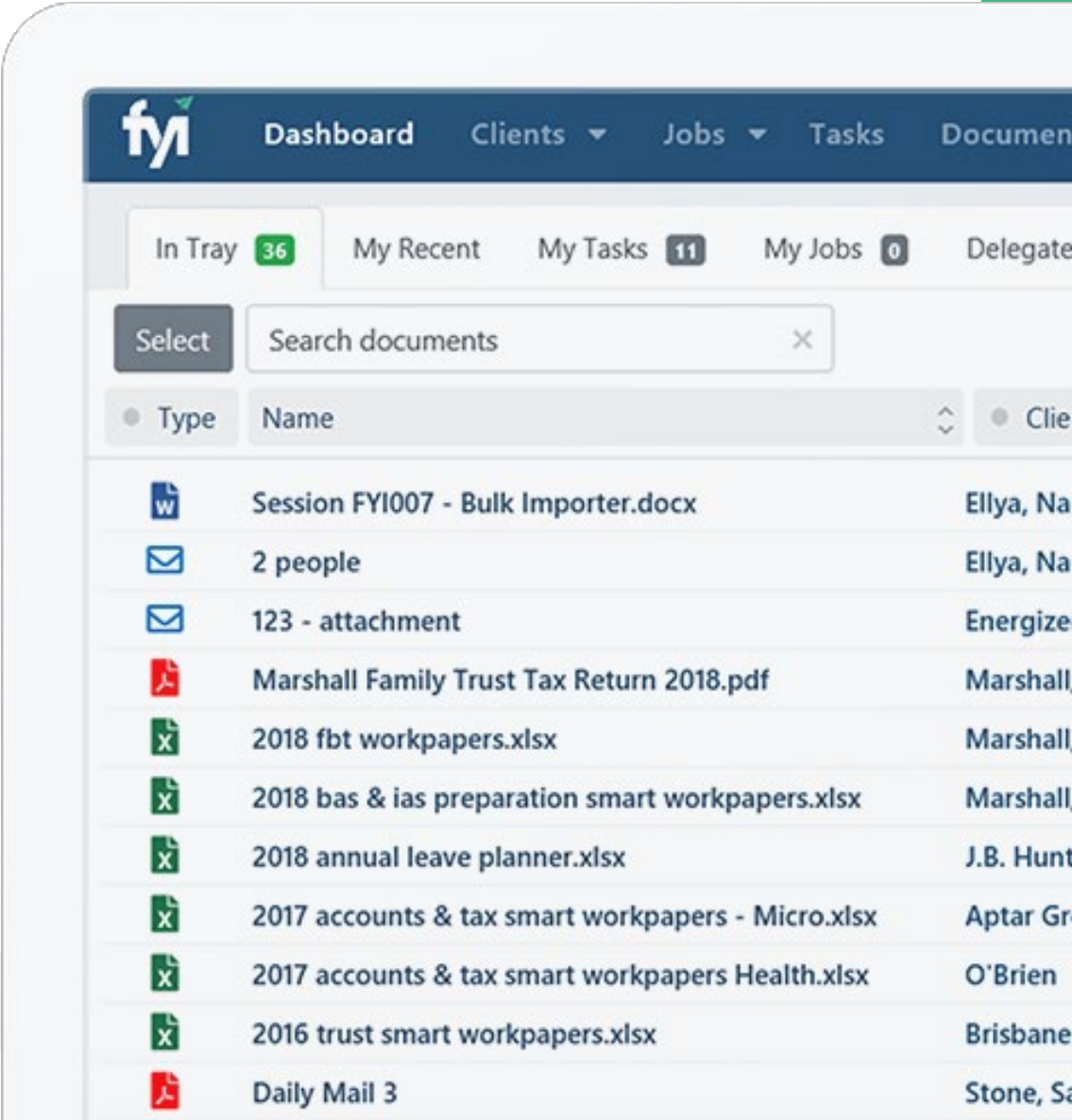
In many instances, practices can self-implement FYI using our **DIY Migration** tools and resources to guide you through each phase.

Alternatively, the FYI Client Success team can provide an **Assisted Onboarding** plan. This plan and associated costs must be reviewed and approved by your practice before we proceed.

The best approach for your practice will depend on the size and complexity of your historical data, number of users and amount of training required.



[Click here](#) for more information on **Getting Started**





THE ONBOARDING **PROCESS**

DISCOVERY

Choose an onboarding strategy for your practice

- D-I-Y
- Assisted
- Concierge

CONFIGURATION

- Cabinets & Categories
- User Groups
- Active Users
- Account Set-up
- Practice Letterhead
- Email Signatures

MIGRATION

- Data Migration
- Filing
- Post-Migration Admin

TRAINING

- Key Concepts for New Users
- Tutorial for Beginners
- Getting Started as an Administrator



[Click here](#) for more information on **The Onboarding Process**



DISCOVERY

A **Discovery Meeting** with your Client Success team is the first step in developing an onboarding plan for your practice.

This allows us to learn about your practice and recommend an onboarding strategy to suit your unique requirements.

Your Practice Today	Your Transition to FYI
<ol style="list-style-type: none">1. Number of users2. Where your documents are currently stored3. Your current filing structure4. Any unique requirements eg. non-client files	<ol style="list-style-type: none">1. Pre-requisites: Office 365 and Xero Practice Manager2. How much data do you want to migrate to FYI?3. Your preferred filing structure in FYI4. Your preferred go-live date



[Click here](#) to download the meeting agenda and instructions on how to book your **Discovery Meeting**



YOUR PROJECT TEAM

Getting the full benefits from FYI's existing features and evolving process automations requires commitment from management and your entire team.

We recommend you nominate a **Project Leader** and one or more **FYI Champions** from within your team to assist with the implementation, onboarding and ongoing usage of FYI across your practice.

Your champions should be technically competent, fast-learners and hold relatively senior positions in your business so that they can make decisions and provide appropriate direction to other team members.

An FYI Champion's Role and Responsibilities

- Get familiar with FYI's full feature set during your 30-Day Free Trial
- Assist the Administrator with set up and configurations to FYI to suit your practice
- Develop an in-depth understanding of how FYI functions
- Assist as required when you are ready to onboard the rest of your team
- Respond to minor queries and trouble-shooting, using the FYI Knowledge base as a point of reference for all users
- Monitor and drive internal acceptance of FYI across your practice to ensure ongoing return on investment.



[Click here](#) for more information on **Appointing FYI Champions**



CONFIGURING FYI

This is a useful summary of tasks to consider before onboarding new users to FYI.

If you choose **Assisted Onboarding**, your FYI Client Success Manager will cover these items and more in a **Checkpoint Meeting** prior to your go-live date.

FYI SET-UP CHECKLIST

Before Migrating Documents to FYI

- ☐ Set up your Cabinets and Categories
- ☐ Create User Groups
- ☐ Set up Active Users
- ☐ Set Up your FYI Account

Before Onboarding Your Practice

- ☐ Set up practice letterhead
- ☐ Set up email signatures



[Click here](#) for instructions on how to **Configure FYI for your Practice**



DATA MIGRATION

The successful migration of your historical documents into FYI is a fundamental part of onboarding. The approach we take for your migration will vary depending on your legacy system.

We have successfully migrated data from the following platforms:

- MYOB DM
- SuiteFiles
- SharePoint
- HowNow
- Nimbus
- Windows Explorer
- Virtual Cabinet
- Handisoft
- DropBox
- Google Drive

MIGRATION

Consider options for **Assisted** or **DIY** migration.

FILING

Ensure your documents are filed in your preferred Cabinets and Categories in FYI.

POST MIGRATION ADMIN

Perform a few simple admin tasks to ensure your historical documents are stored in FYI effectively.

If you require assistance, the FYI team will work with you to get secure remote access to your data and co-ordinate the migration. Our aim is to deliver a clean cutover to FYI with your team having access to WIP documents from Day 1.



[Click here](#) for an introduction to **Migrating Historical Documents**



TRAINING YOUR TEAM

Start by inviting your team to log-in to FYI to get familiar with the main navigation and complete a few basic tasks prior to your Go Live training.

RESOURCES FOR NEW USERS

- Navigating FYI for the First Time
- Key Concepts for New Users
- Tutorial for Beginners

RESOURCES FOR ADMINS

- Getting Started as an FYI Admin
- Best practice filing
- Optimising Stationery and Templates



[Click here](#) for resources to assist you with **Training your Team**



ASSISTED ONBOARDING PRICING

IN BETA

D-I-Y

- Easy to use DIY tools
- Live document sync
- Video walkthroughs
- Access to training online

FREE

SIMPLE

- Simple filing structure
- 0-500gb data
- No custom requirements
- Access to training online

\$1,000-\$2,500

COMPLEX

- Complex filing structure
- 500-1tb data
- No custom requirements
- Access to training online

\$2,500-5,000

CONCIERGE

- Complex filing structure
- 1tb+ data
- Custom requirements
- Recommended for 30+ users

Contact Us

[Submit a request](#) [Sign in](#)

 Search

Everything you need to know when starting out, from introducing your team to FYI, to starting a free trial, to onboarding the entire practice

Welcome to FYI

Starting your 30-Day Free Trial

How to Login

Onboarding Introduction

Clients

Discovery Meeting

Tasks

Assisted Onboarding

[See all 10 articles](#)

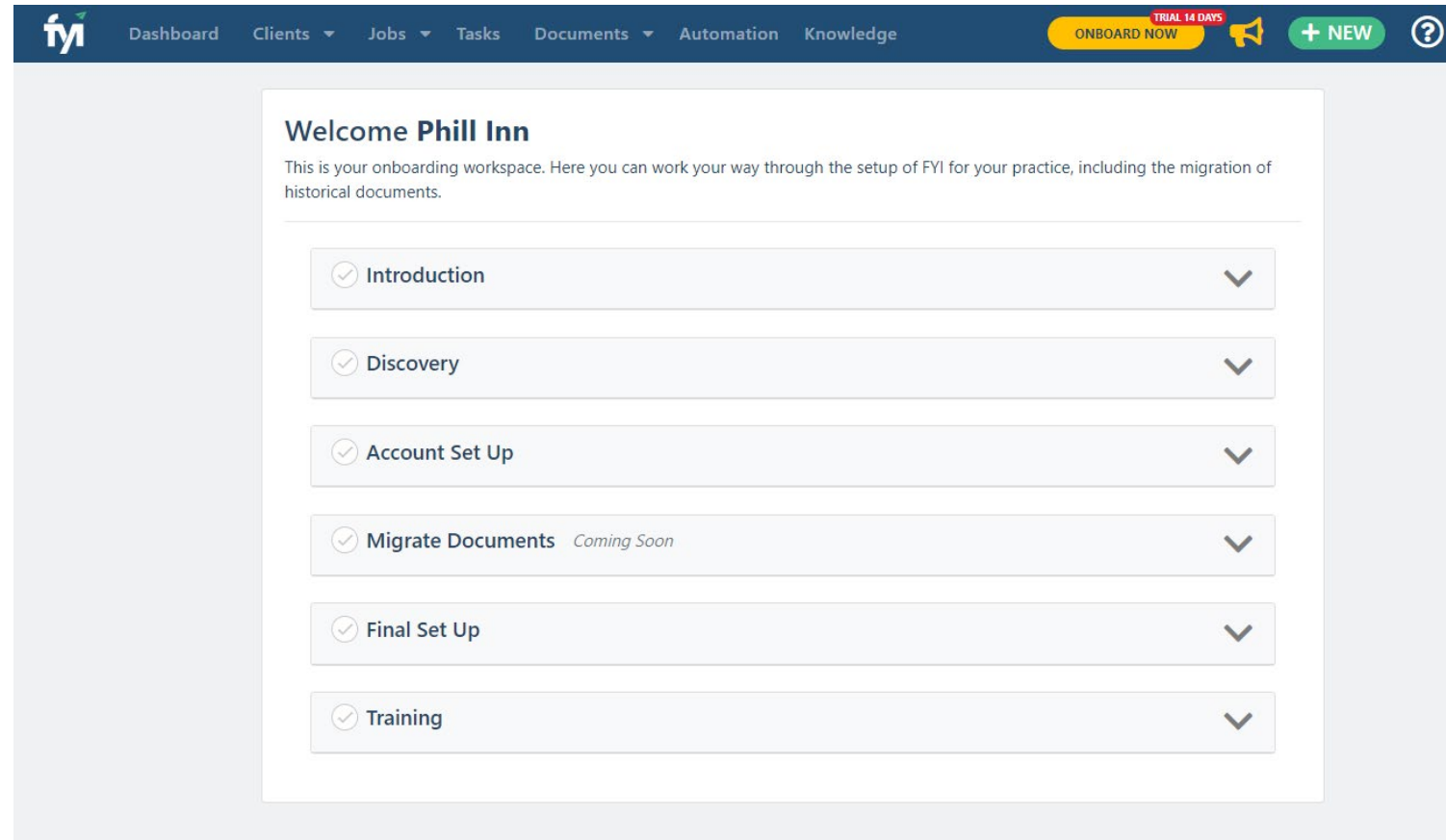
Introduction to FYI



IN-PRODUCT SUPPORT

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.



[Click here](#) to view the onboarding workspace in FYI



LEARNING RESOURCES

The FYI knowledge base provides a growing library of Training Webinars and Tutorials to assist your self-guided learning.

Keep an eye out for our Masterclasses each month!



Visit **FYI Help** for more information on [Learning Resources](#)



[Submit a request](#) [Sign in](#)

Hi. How can we help?

 Search

Learning Resources

Access our growing library of masterclasses, training webinars and tutorials.

Getting Started

Key Concepts for New Users

Tutorial for Beginners

Mastering the Essentials

Email Management

Getting Started with Email Tutorial (10 mins)

Getting Started with Email Management

Deep-Dive into Email AutoFile

Outbound Client Correspondence

Resources for Admins

Getting Started as an FYI Admin

Best Practice Filing

Optimising your stationery and templates

Task Management

Getting Started with Tasks Tutorial (5 min)

Getting Started with Tasks

Document Management

Automation

WEB APP

app.fyidocs.com

HELP CENTRE

support.fyidocs.com

EMAIL SUPPORT

support@fyidocs.com



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