GETTING STARTED
AS AN FYI ADMINISTRATOR

- Setting Up Your FYI Account
- Learning the Basics
- Configuring FYI for Your Practice
- Making the Most of Your 30-day Free Trial

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

In This Guide

Setting up your FYI account

Starting your 30-day free trial.

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Configuring FYI for Your Practice

Setting your practice up for success.

Making the Most of Your Free Trial

Onboarding FYI champions, mastering the essentials and developing your practice roll-out plan.

For Administrators

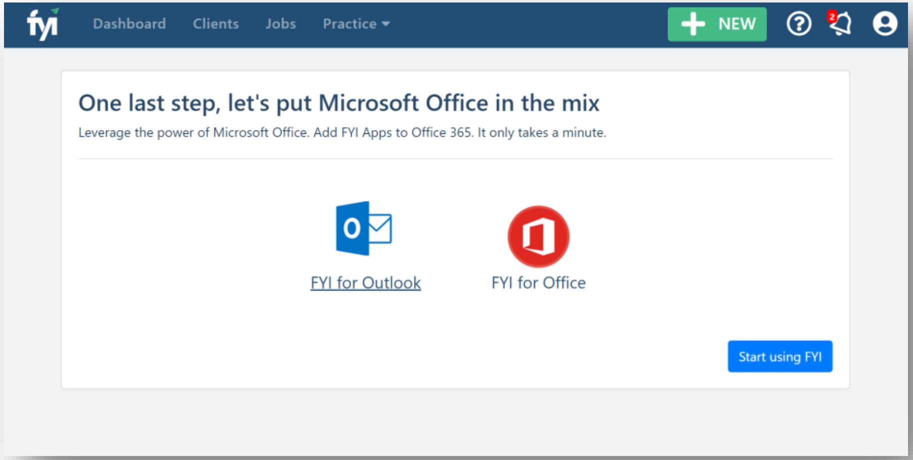
SETTING UP YOUR FYI ACCOUNT

Starting your 30-day free trial
and your first process automations.

Setting up your FYI account

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 so you'll be up and running with your client and team data in minutes.

Don't forget to add the FYI Apps to your practice Office 365 account for both Office and Outlook. This must be done before you can start using FYI.



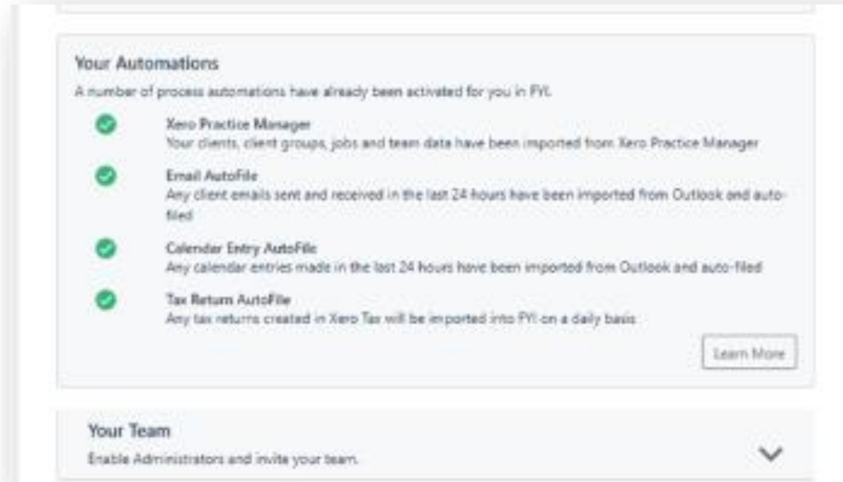
Need Help?

Visit FYI Help > Getting Started > For Administrators for detailed instructions on each step required to start your 30-Day Free Trial

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-filed in FYI
3. Any **calendar entries** made in the **last 24 hours** are instantly imported from Outlook and auto—filed in FYI
4. Any **tax returns** created in **Xero Tax** will be imported into FYI on a daily basis



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?

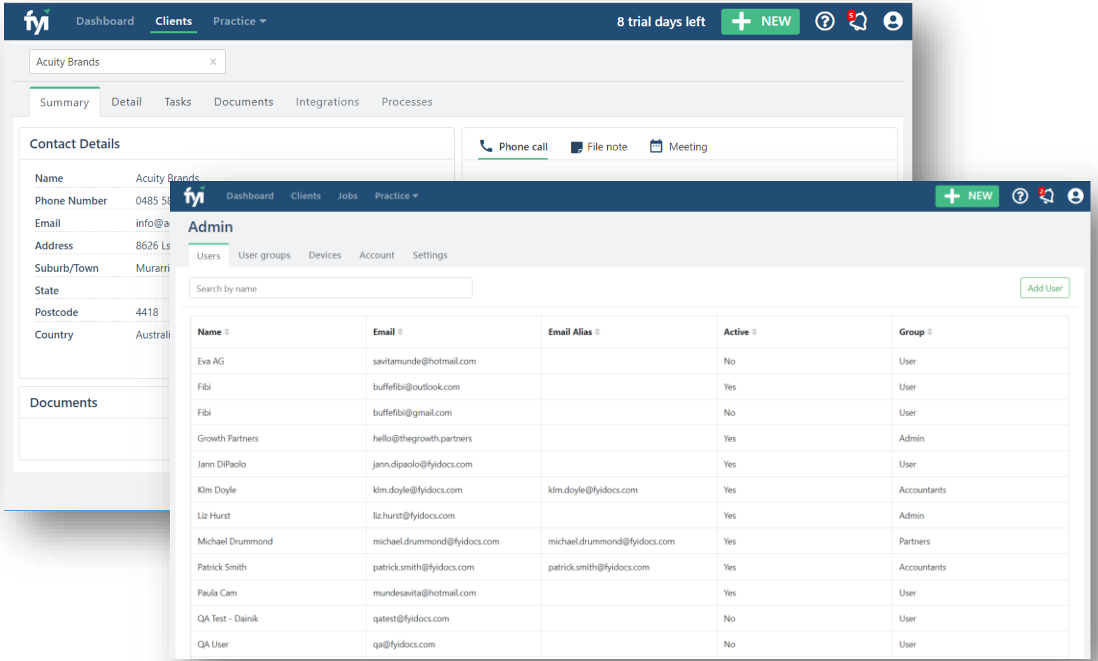
Visit FYI Help > Getting Started > Key Concepts for an introduction to [Getting Started with Automations]

Verifying your integration with Xero Practice Manager

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

1. Navigate to **Clients** and search for an active Client to check that their name, address, email and phone details appear correctly. If relevant, you can also check that their **Client Group** appears in the drop-down menu.

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.



Your contacts and team will synchronise automatically from Xero Practice Manager

Need Help?

Visit FYI Help > Administration > App Integrations for an overview of Xero Practice Management Integration including where to find details about FYI integration with Xero Ledger and Xero Tax.

LEARNING THE BASICS

Introduction to the FYI Platform

Key concepts for new users

The **Get Started : Key Concepts for New Users** Guide is a handy resource for new users who are just starting out with FYI. It covers the basics, including;

How to login

- Accessing the FYI web app

Navigating FYI for the first time

- Introduction to FYI navigation
- The FYI drawer

Where to begin

- Mastering the essentials

Where to get help when you need it

- FYI website resources, Help Centre, Email Support and Community

If you feel you'd benefit from a guided training session, simply email the FYI support team at **support@fyidocs.com**.
We will be happy to advise on your options.

Need Help?

Visit FYI Help > Getting Started > Key Concepts for an Introduction to the FYI Platform

CONFIGURING FYI FOR YOUR PRACTICE

- Cabinets and Categories
- User Groups and Active Users
- Settings for Email AutoFile
- Stationery and Templates

Before onboarding new users

Here is a summary of configurations the Administrator must complete before onboarding new users to FYI.

CHECKLIST FOR ADMINISTRATORS	
CONFIGURING FYI FOR YOUR PRACTICE	❑ Review and update Cabinets ❑ Review and update Categories ❑ Set up User Groups and levels of security ❑ Confirm Active Users and allocate to User Groups ❑ Confirm Email AutoFile Settings and Exclusions ❑ Add Templates for Email ❑ Add Stationery for Word Documents ❑ Add Templates for Word, Excel and Powerpoint
SYSTEM TESTS	❑ Verify Xero Practice Manager integration ❑ Create a test email ❑ Create a test letter

Need Help?

Visit FYI Help > Getting Started > For Administrators for instructions on each item on the [Checklist for Administrators]

Cabinets and Categories

Cabinets store documents according to the broad divisions of operations within the practice. FYI comes shipped with best practice default cabinets, including **Client Files, Partner Files, Practice Admin** and **Training.**

Security controls dictate which users can access documents within a Cabinet. You can configure the number of cabinets and the naming conventions applied to suit your practice.

Visit the Help Centre for instructions on how to;

- Display existing Cabinets
- Change a Cabinet
- File documents by Xero Practice Manager Job Name
- Add a Category to a Cabinet
- Add a New Cabinet
- Remove a Cabinet

Categories are the way documents are tagged with meta-data to create a filing structure. Categories can be used as filters on lists when displaying information in FYI.

FYI uses **Work Type** and **Year** as initial default Categories, but others can be set up to suit the requirements of your practice – for example, **Tax, Audit, Administration** and more.

Visit the Help Centre for instructions on how to;

- Display existing Categories
- Remove a Category
- Change a Category
- Change or add options to a Category
- Add a new Category

Need Help?

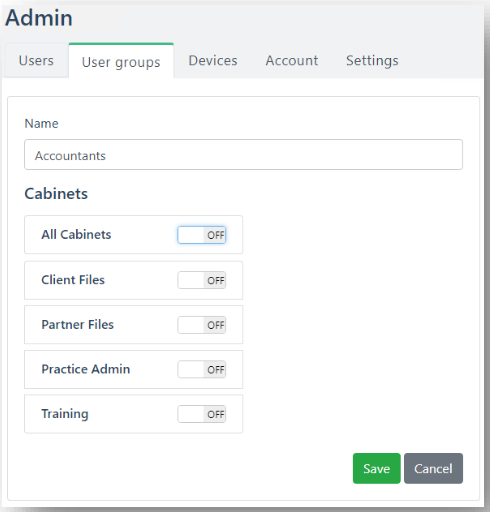
Visit FYI Help > Administration > Practice Set Up for an introduction to [Managing Cabinets] and [Managing Categories]

User groups and active users

Security levels defining which users can access which documents are controlled by **User Groups** and the **Cabinets** that are specified in each group. In general, there are at least three user groups within a practice:

- Partners
- Administrators
- Accountants

Visit the Help Centre for instructions on how to add User Groups and select the Cabinets each group can see.



Need Help?

Visit FYI Help > Administration > Practice Set Up for instructions on Creating User Groups

User groups and active users

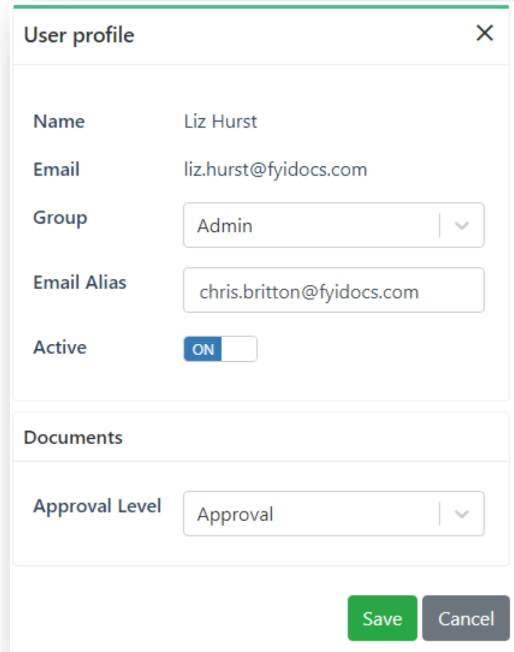
When FYI imports your employees from Xero Practice Manager they are automatically set as **Active Users** in FYI.

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 Centre 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



New team members are automatically imported into FYI as Active Users when they are added to Xero Practice Manager.

Need Help?

Visit FYI Help > Administration > Practice Set Up for instructions on [Configuring Active Users]

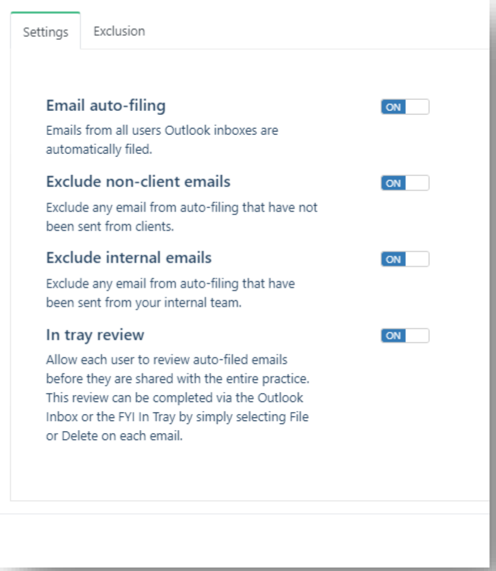
Settings for Email AutoFile

New emails are intelligently auto-filed in FYI based on a combination of the conversation thread, template defaults, client default and/or user defaults. **Email AutoFile Settings** control how the automatic filing of email from Outlook is managed.

Options include;

- **Email auto-filing** > emails from all users' Outlook inboxes are automatically filed into FYI.
- **Exclude non-client emails** > excludes any emails that have not been sent by clients
- **Exclude internal emails** > excludes any emails sent by your internal team
- **In tray review** > allows each user to review auto-filed emails before they are shared with the entire practice. This review can be completed via Outlook or within FYI.

Exclusions allow your practice to block certain emails from being filed automatically. These settings and exclusions can only be managed by an FYI Administrator.



Need Help?

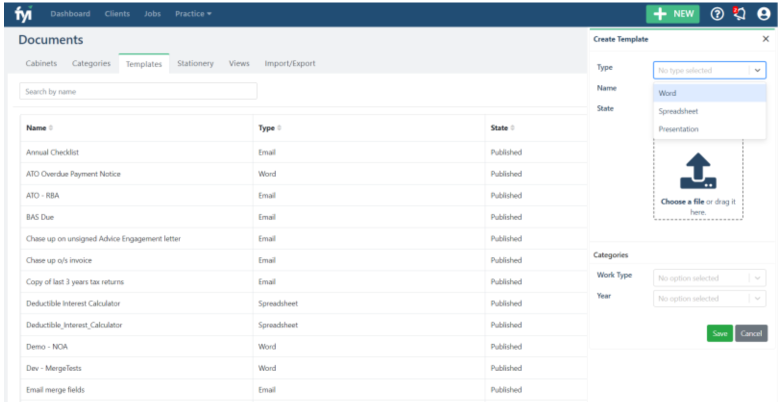
Visit FYI Help > Automation > System Processes for a detailed explanation of [Email AutoFile Settings and Exclusions]

Adding stationery and creating templates

Creating templates in FYI with a combination of standard text, images and merge fields will drastically improve productivity and quality control across your practice.

Before onboarding new users, the administrator should set up the following;

1. **Email Templates** - FYI comes with a selection of sample documents pre-installed to help you set up your own templates.
2. **Stationery Templates** - can be created for Word Documents including your digital letterhead.
3. **Document Templates** - can be created in Word, Excel, and Powerpoint.



Need Help?

Visit FYI Help > Administration > Practice Templates for instructions on how to [Create Templates]

Testing your set-up

There are two simple tests the administrator can run to check your start-up configurations in FYI.

1. Creating a Test Email from within the FYI app

- Click **+ New** on the FYI Dashboard and select **Email** from the list of document types.
- Complete filing details in the **FYI Drawer**, including Client, Addressee, Template, Categories and more.
- Click **Create** to launch Outlook and finish drafting the email.
- When you send the email it will automatically be **filed in FYI.**

2. Creating a Test Letter using a Word Template and Stationery that you set up earlier

- Click **+ New** on the FYI Dashboard and select **Word** from the list of document types.
- Complete filing details in the **FYI Drawer**, including Client, Addressee, Template, Stationery, Categories and more.
- Click **Create** to launch Word and finish drafting the letter.
- When you save and close the document it will automatically be filed in FYI.

Need Help?

Visit FYI Help > Email Management > Sending Email for instructions on how to Create an Email in FYI
Visit FYI Help > Document Management & CRM > Creating Documents in FYI for how to Create Word Documents in FYI

MAKING THE MOST OF YOUR FREE TRIAL

Onboarding FYI champions,
mastering the essentials
and developing your practice roll-out plan

FAQ's about your free trial

Your free trial period provides access to all of FYI's features, before deciding which plan is right for your practice. Use your first 30 days to configure FYI for your practice and appoint a group of 'champions' to start familiarizing themselves with FYI's many features.

What can I do in FYI during the 30-day trial?
FYI's entire feature set is available to explore in the trial. You can start by creating sample letters, importing emails, delegating and tracking tasks and activating automations. This is where your step-change in efficiency and client service really kicks in.

What level of support does FYI provide?
We provide email support and access to a comprehensive knowledge base

Who owns my data? And if we decide to cancel our subscription, what happens?
Your practice always owns your data. If you want to leave at any time, your administrator can download all documents in a logical folder hierarchy.

What happens when the trial period ends?
If you choose to subscribe as a client, all the documents, settings and integrations created during your trial are seamlessly available when you go live. If you decide not to subscribe, you can easily download your documents and your entire account and data will be permanently deleted.

How do I know which plan is right for my practice?
Our Starter plan is where most practices begin their FYI journey and will provide instant results with a more efficient way to manage emails. Once your team has mastered email management, you will be ready to upgrade to the Intermediate plan to access FYI's unique blend of document management and CRM. Advance to FYI Pro to access all features, putting your practice at the fore-front of process automation. You can upgrade your account any time you like. We expect over time almost all practices will end up on FYI Pro due to the level of automation it offers.

Do I have to commit to a long-term contract?
Nope! There are no long-term contracts required with FYI. Your account is a month-to-month commitment designed to help support your growth.

Do we need a consultant to train us?
No. We have designed FYI from inception to be self-deployed. The feature set has been shaped around three manageable implementation steps, and we provide comprehensive online support materials to help you on your journey. However, if you would prefer to work with a consultant, then we have a range of independent experts to choose from.

Onboarding your FYI Champions

During your free 30-day trial period, we recommend appointing a small group of **FYI Champions** and onboarding them so that they can explore FYI's many features.

Your FYI champions can assist in ensuring FYI is set up to meet the needs of your practice and help map out core work-flows.

They will develop an in-depth understanding of how FYI functions, and be able to assist when you are ready to onboard the rest of your team.

Make sure your FYI Champions are set up as Active and assigned to a User Group in FYI.

It is a good idea to conduct some initial testing amongst your small group of FYI Champions to ensure your configurations are correct before implementing FYI practice-wide.

Before introducing FYI's email management features to the broader team, your test group might;

- ✓ Check that all client emails received in the last month are visible in their FYI In Tray
- ✓ File the client emails that they wish to retain in FYI, making them available to all FYI Users.
- ✓ Send and receive emails for a few days to test your practice configurations and adjust as necessary.

Need Help?

Visit FYI Help > Getting Started > For Administrators for instructions on how to Invite New Users

Mastering the essentials

The **Get Started: Mastering the Essentials Guide** outlines five cool features to explore during your trial;

1. Auto-filing client emails
   Let FYI do your filing for you!
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

Need Help?

Visit FYI Help > Getting Started > Key Concepts to download our guide to Mastering the Essentials

Developing your practice roll-out plan

Use our top-level project plan as a guide to help plan your practice-wide implementation of FYI.

FYI STATUS:	FREE TRIAL	STARTER	INTERMEDIATE	PROFESSIONAL
OBJECTIVE:	Begin Your Journey	Launch Email Management	Upgrade to Document Management & CRM	Go Pro with Process Automation
	All plans FREE for 1st 30 days Onboarding FYI Champions is key to success.	Rapid adoption. Instant benefits.	When all staff are using FYI proficiently for email management you are ready to step-up.	Let FYI process repetitive tasks through the use of automation
DESIRED OUTCOMES:	Explore all FYI features Onboard FYI Champions Select your FYI plan Develop your practice roll-out plan	Automatically file every client email. Delegate and manage tasks across the practice. Deploy email templates with merge fields to increase productivity	Standardise your output and enforce filing across the practice. Have a complete client file, capturing every interaction and meeting. Search, sort and filter for a complete view of the client or group	Automate Tax Assessment correspondence. Batch import a predefined set of client ledger reports to support workpapers Scan incoming client emails for negative sentiment and alert partners. Import client invoices from Xero Practice manager, and much more!
PRIORITY TASKS:	Configure FYI for your practice Perform system tests Appoint and train FYI Champions	Invite all users to login to FYI Email Management Training Monitor progress	Configure Practice Templates and Stationery Plan and migrate historical documents Document Management Training Monitor progress	Configure FYI for full process automation Train team.
SUGGESTED TIMEFRAME:	Week 1-4	Week 5-6	Week 7-8	Week 9+

Need Help?

Visit FYI Help > Getting Started > For Administrators to download the Implementation Guide and develop a roll-out plan to suit your practice.

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

WEB APP

app.fyidocs.com

HELP CENTRE

fyidocs.zendesk.com

EMAIL SUPPORT

support@fyidocs.com