



Stop wasting time. Start adding value.

Next level efficiency for Accountants in Practice

An introduction to FYI

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“FYI is more than a document management solution. It’s a way of re-casting all of your processes internally and automating them – **it’s an absolute game-changer.**”

ROB STONE, DIRECTOR OF OPERATIONS ASIA & AUSTRALIA – XERO



The power to transform your practice

FYI is the world's most automated document management platform, built for accountants in practice.

Are you ready to spend less time on admin and compliance – and more time creating value for your clients?

Welcome to the ultimate in online document management, collaboration and automation for the modern accounting practice. At FYI, we've looked at every aspect of how an accountancy practice works, leaving no stone unturned to enhance your efficiency.

FYI was born in the cloud – giving your practice the most robust foundation for a cloud-based future.

Take advantage of enterprise-grade security and full integration with Microsoft 365, your practice management software and other industry-leading apps. With FYI, you can collaborate faster and more effectively, automate processes and reduce the time spent on repetitive tasks.

With proven ROI, you have nothing to lose. And with our simple assisted onboarding process, you can go live in as little as 4 weeks.

FYI's core feature set delivers productivity gains of up to 20% in the first 3 months. And that's just the beginning.

Over **800 leading accounting firms** have transitioned to FYI, with more onboarding every day.



Client story: Cutcher & Neale

“A seismic change to how we worked previously.”



JARROD BRAMBLE
Partner – Cutcher and Neale

Practice: Cutcher & Neale

Established: 1953

Locations: Offices in Brisbane, Newcastle, Sydney and the Phillipines

Size: 145 staff

Legacy system: HowNow

Move to the cloud: 2019

As a thriving practice with teams spanning multiple offices, Cutcher & Neale’s digital transformation was carefully planned. They chose Xero Practice Manager for its open API and moved from HowNow to FYI for document management because of FYI’s powerful integration with XPM.

“We were an early adopter of FYI,” says Jarrod Bramble, Partner at Cutcher & Neale, **“and straight from onboarding, FYI became an absolutely essential part of our business.”**

For Cutcher & Neale, what differentiates FYI from other document management solutions is its ability to automate the capture, creation, filing, and processing of emails, documents and client interactions in a disciplined and searchable platform.

“There are many attributes of FYI that we absolutely love. The task system is outstanding, and it’s had a profound effect on limiting the number of emails we send as a business.”

Job sign-off, job start, and job budgets are all now tasked in FYI. And the process the admin team follows when documents are approved is fully automated.

“As a partner, I have full visibility of all tasks happening in the business, which is a seismic change to how we worked previously.”

Cutcher & Neale has seen huge benefits from embracing FYI as part of its digital transformation and would never go back to its old way of working.

“When considering ROI, it’s almost impossible to put a data point on it. It’s such a huge move from where the firm was to where we are now.”

“Putting an ROI on a whole new way of working doesn’t do it justice – it’s like a new company.”

“What continues to impress us the most about FYI is that it’s always improving. It’s with us for the long haul and always making changes to keep up with new ways of working. You know for sure it’s blazing a trail into the future.”

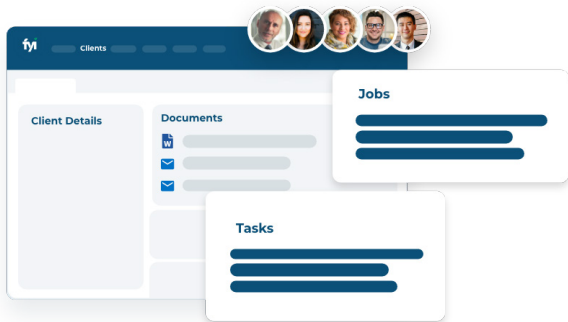
Welcome to your cloud-based digital office

One place for your team to work together. From anywhere.

Store every email and document in the cloud, accessible anywhere, anytime. Every email between clients and your team is stored centrally – not locked away in individual inboxes. Practice documents, templates, policies and procedures are easy for your team to access.

A dedicated workspace for every client

Work from a dedicated workspace for each client, with client details, emails, documents, jobs, and tasks in one shared place for your team. Keep everyone up to date with meetings, phone call records, and file notes always on hand. Documents are automatically captured from external sources and auto-filed in FYI for instant accessibility.



FYI Client Workspace

Deep integration with Microsoft 365 means you can file emails and documents, assign a task, or initiate a workflow without leaving Outlook or Office.



Unlock your inbox. Forget wading through your inbox to manually file or forward emails. FYI can auto-file client emails as they arrive, making them and any attached documents immediately accessible to your team.



Locate information in seconds

Navigate seamlessly between Group, Client and Job workspaces for faster document retrieval. Search, filter, and sort to find what you need in an instant.

Streamline document creation, practice-wide

Create standard emails and documents in the blink of an eye using practice templates that merge client data from your practice management system. Link, view and share documents faster with single mouse clicks for a range of document actions.

Discover more effective ways to collaborate

Co-edit documents with your team and clients and share documents securely to deliver exceptional client service. Accessing new information 'live' via a document saved in FYI is a hyper-efficient way to gather and share information. Secure shared folders mean clients can upload documents, which are automatically filed to the client file in FYI.

Maximise efficiency practice-wide

Get more done every day

With FYI, you can shave minutes off a vast range of daily tasks, adding up to hours weekly.

Delegate and manage tasks with ease

Delegate tasks without leaving Outlook or Office. Add tasks to any email, document, phone call record or meeting note, with clear to-do lists for every team member. Share task lists and use comments and notifications to enhance collaboration and efficiency.

Accelerate workflows and be more responsive

Speed up the review and approval of documents and get work done faster. Control approvals, save time with electronic signatures and know the workflow status of any document.

Work with Xero Practice Manager Jobs in FYI

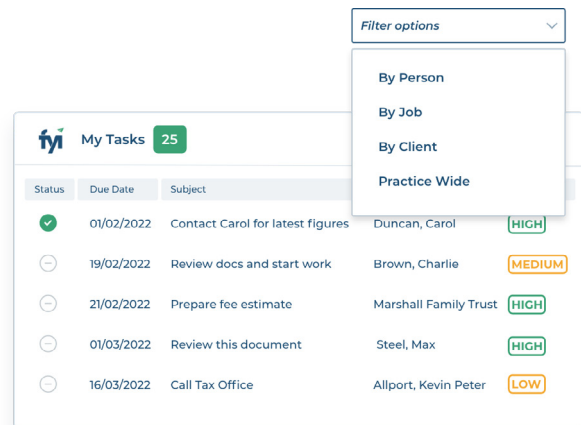
Automatic two-way sync with Xero Practice Manager means you can maintain jobs from within FYI. File emails and documents to XPM jobs, work from a dedicated job workspace and keep track of time spent versus budget without leaving FYI. Kanban-style job boards make it super-easy to visualise work and see where bottlenecks might be arising.

Take the pain out of time recording

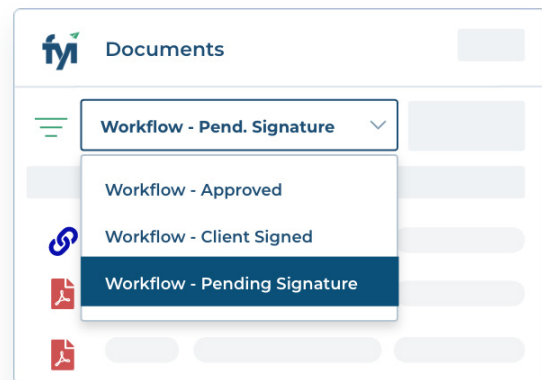
Save an estimated 15 minutes per user per day with pre-populated time sheets that can be completed in just a few clicks and automatically synced to XPM.

“FYI’s task system is outstanding and has had a profound effect on limiting the number of emails we send as a business.”

JARROD BRAMBLE, PARTNER – CUTCHER & NEALE



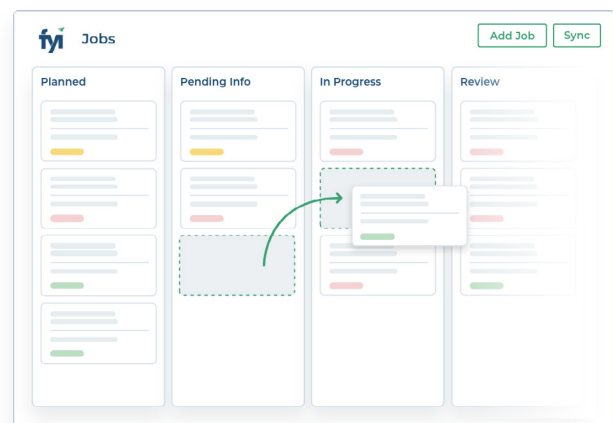
Prioritise and manage tasks with ease



Update document status instantly

“FYI’s jobs board will completely transform the way we manage our workflow, reports and meetings. It’s a real game changer!”

ADAM WILSON, PARTNER
– WILSON ACCOUNTING



Update FYI's Jobs Board with a simple drag 'n' drop

Save time with automated processes

Automate daily admin to save hours of routine work

With FYI, you can automate documentation, filing, communication and other repetitive tasks, freeing up your team to concentrate on creating more value for your practice and your clients.

Save time retrieving and filing documents

Automatically import and file tax returns, assessments, financial reports, corporate compliance and other documents.



Automate tedious compliance work

Let FYI auto-create meetings, tasks, emails and documents for repetitive compliance work, with job states and key dates updated automatically.

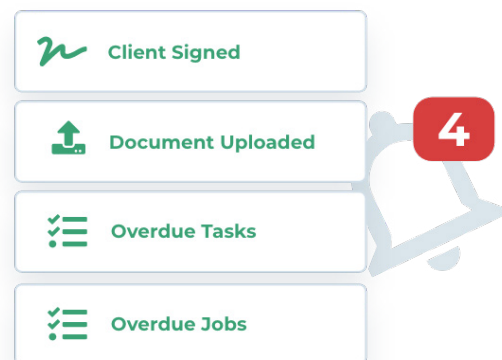


“The deeper you explore what FYI can do, the more you realise that it’s the automations that make your life so much easier.”

ANDREW HOLDSWORTH,
PRACTICE MANAGER – BBB PARTNERS

Let FYI remind you of the important stuff

Make sure you miss nothing! Receive automatic reminders when tasks are overdue or documents are uploaded, signed or ready for approval.



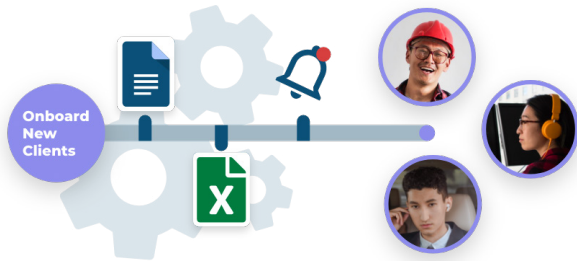
Make email marketing a breeze

Send an email or e-newsletter to all clients or a segmented list. You can even include attachments and auto-manage email unsubscribes.



Deliver the best client service ever

Automate new client onboarding, quarterly report reminders, tax return checklists, reminders to contact clients, and more.



“We use FYI automations in the background so that as soon as a document is approved, the processes that our admin team need to follow are now fully automated.”

JARROD BRAMBLE, PARTNER – CUTCHER & NEALE

Automations ready to go

Check out our Automation Library for a range of common processes in accounting practices.

- Auto-create emails and tasks, update jobs, and more.
- Email and document templates included
- Customise to suit your practice, test, and activate!

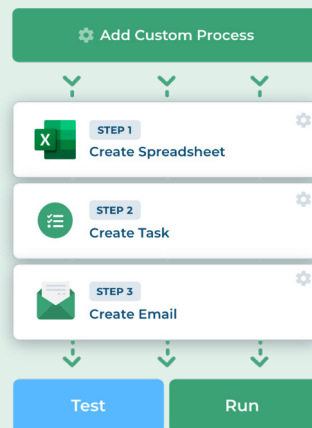


Work won't feel like work with this level of automation.

Or create your own

Use FYI to schedule recurring work to repeat automatically.

- Automate any multi-step task across client service, marketing, admin or HR.
- Save hours of routine work every week by controlling when automations run
- Configure process steps to suit your practice.



Empower your team to automate processes their way – limited only by their imagination!

Client story: BBB Partners

“We just want to automate more and more now.”



ANDREW HOLDSWORTH
Practice Manager – BBB Partners

Practice: BBB Partners

Established: 1980s

Locations: South Melbourne

Size: 48 staff including 4 partners

Legacy system: MYOB

Move to FYI: January, 2020

BBB Partners decided to move to the cloud in order to offer full workplace flexibility to their team – including the ability to work from home.

The firm was using MYOB but found it wasn't integrating with other aspects of their business, or supporting how they saw themselves working in the future, and so the Partners made the switch to Xero.

“FYI was a natural choice given its capacity to integrate so well with Xero, and other solutions in the Xero eco-system.” says Andrew Holdsworth, Practice Manager at BBB Partners. **“Such integrations are so useful; and each one has been carefully considered by FYI in terms of how firms can reap very real benefits in efficiency, time-saving and more.”**

“At the time we had no idea that in just a few short months the world would change, COVID would hit, and working from home would become a necessity.”

BBB Partners commenced onboarding with FYI towards the end of 2019. **“FYI was with us the whole way through,”** says Andrew, **“the support was amazing. We were very lucky to be fully operational when the pandemic hit. All team members easily pivoted to working from home – all they had to do was log in to FYI as if they were in the office.”**

FYI prides itself on really smart integrations with complementary solutions that make day-to-day tasks in an accounting firm so much easier to complete.

“We use the wealth app, MyProsperity, and we approached FYI to see if they could integrate with it. They made it happen for us. They are an incredible business in the way that they listen to their clients.”

“What FYI has really helped us with is taking away those menial, small, and tedious tasks that just don't need to be done by an individual.”

“They can be part of an automated process that, once created, will trigger a chain of small processes, and assign the right task to the right staff member.”

“We just want to automate more and more now – it's a fantastic feature.”

Andrew believes FYI is a product that every accounting practice needs to have “purely for the ability to grow and to make the lives of accountants far easier.”

FYI has definitely been a game-changer for BBB Partners and is sure to contribute to their future success.

Best-of-breed integrations

Recover more time in more places, with seamless integration with partner apps across the accounting industry.

Integrate FYI with Microsoft 365 and your practice management software to build a strong foundation for your practice app stack. Add integrations with your chosen apps for digital signing, corporate compliance and other tools to remove the need for portals or scanning solutions and increase productivity through reduced re-keying of data.

Microsoft 365

FYI is deeply integrated with Microsoft products such as Outlook, Word, Excel and PowerPoint. This provides the backbone to FYI's intelligent auto-filing features, the ability to edit documents natively using the richness of Microsoft's desktop applications, and an additional layer of security. You can also send documents to clients securely using OneDrive.

Practice Management Software

FYI integrates with a number of Practice Management solutions, including Xero Practice Manager, Xero Tax and GreatSoft. This ensures you can retain a single source of truth for your practice data and removes the need to manually update multiple software platforms.

Xero Suite

Integrate with the Xero Suite, including Xero and Xero Tax to auto-create direct links to tax returns and activity statements, and allow FYI to retrieve and auto-file key financial reports from Xero files.

Direct integration with **Xero Practice Manager** syncs your clients, staff and XPM jobs into FYI. You don't have to maintain data in multiple locations and can merge client data into templated emails and documents to boost productivity.

“FYI was a natural choice given its capacity to integrate so well with Xero, and other solutions in the Xero eco-system. Each integration has been carefully considered to ensure firms can reap very real benefits in terms of efficiency and time-saving.”

ANDREW HOLDSWORTH, PRACTICE MANAGER –
BBB PARTNERS

Digital Signing Apps

Simplify your workflow processes and enhance the client experience by integrating with popular digital signing apps Annature, DocuSign, Adobe Sign, FuseSign and myprosperity.

Corporate Compliance Apps

Integrate with leading corporate compliance providers BGL and NowInfinity to automatically retrieve and auto-file your client's corporate documents in FYI.

Practice Apps

Integrate with a range of practice apps – such as Zapier, FuseDocs, ATO Smart Docs, and more - to turbo-boost your use of FYI's full feature set.



Proven return on investment

How FYI pays off in practice

Compare the time FYI saves your practice to what it costs. You'll see a proven and compelling return on investment.

Every feature of the FYI platform is designed to supercharge practice efficiency, save time, and increase productivity.

- ✓ Reduce the hours spent on repetitive admin
- ✓ Get more done, every day
- ✓ Reduce human error, improve consistency, and deliver a better client experience
- ✓ Make auditing easy with automatic records of everything
- ✓ Stay productive in the new world of 'work from home'
- ✓ Collaborate more efficiently with your team and clients

Recover time for the work that adds real value to your clients.

“Putting an ROI on a whole new way of working doesn't do it justice – it's like a whole new company.”

JARROD BRAMBLE, PARTNER – CUTCHER & NEALE

20% time savings within three months

Within three months of adopting FYI, firms that rely on manual processes can expect time savings of up to 20% simply by using FYI's core feature set. And that's just the start. The more processes you automate, the faster the efficiencies add up.

We're on a mission to save your practice up to 50% of time spent on compliance and admin, freeing up staff for higher-value work.

Even on our top-tier 'pro plan', FYI costs less than \$1.75 per user per day. Compared to standard hourly charge-out rates, the ROI in timesaving alone is compelling.

SAVE 2+ hours = hundreds of hours saved per year
on every compliance job

SAVE 20+ mins
gathering, filing,
and sharing data

SAVE 30+ mins
auto-creating emails
and documents

SAVE 10+ mins
tracking progress and
document approvals

SAVE 15+ mins
delegating tasks and
sharing documents

SAVE 15+ mins
on completion and
lodgement

SAVE 30+ mins
on timesheets and exports
to Xero Practice Manager

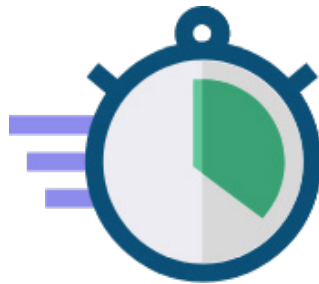
Learn more at fyidocs.com/proven-roi/

Security and reliability



Enterprise-grade security right from the start

With FYI, your data resides in enterprise-grade AWS cloud servers, encrypted and stored in line with ISO27001 for the highest levels of security, reliability and long-term scalability.



99.99% plus availability

Since our beta launch in November 2019, the total time offline has been 17 minutes. This represents better than 99.99% availability, exceeding industry best-practice.



Future-proofed to grow with your business

FYI has been engineered using best-practice architecture to ensure the platform scales in the future. We're constantly innovating the platform to enhance your efficiency and productivity, increase your responsiveness to clients, and support your practice into the future.

Better protection for total peace of mind

Protecting your files in the Cloud is our top priority. Rest assured, knowing your client's data has the highest levels of protection and availability – no matter what.

Architecture – designed to make the most efficient use of AWS infrastructure, the FYI platform is secure, high-performing, and resilient.

Authentication – FYI leverages Microsoft Windows Authentication, which is trusted globally for its high standard of security and reliability.

Availability – your data is protected 24/7. Robust service recovery procedures can be initiated in the event of an unscheduled outage.

Backup – Amazon provides inbuilt offsite backups, disaster recovery and multiple sites synchronisation. Every document and version is fully restorable.

Certification – FYI is ISO 27001:2019 certified, an approved Digital Service Provider to the ATO, and complies with GDPR and privacy laws in Australia, New Zealand and the UK.

Data Security – the highest levels of data encryption are employed to ensure your information is safe and protected from unauthorised access.

Disaster Recovery – your data is replicated to multiple data centres and backed up in case of disaster.

Hosting – Secure, fast, reliable hosting. All data is stored in Amazon's AWS data centres in Sydney and London, with each practice's documents allocated to a discreet store.

Easy onboarding

Your hassle-free road to success

Changing your document management system may seem complex – but it doesn't have to be. We provide expert assistance to practices of all sizes to help you migrate your documents, configure FYI and train your team.

- ✓ Go Live in as little as 4 weeks
- ✓ No downtime for your team
- ✓ Hit the ground running
- ✓ Fast pay-back

We've automated the steps to get you live as soon as possible, with proven results.

More than

350million
documents migrated

800+ practices
onboarded

12,000+ users
trained

“The transition from MYOB AE to FYI was seamless, and the FYI team walked us through every step.”

REBECCA REABURN – TOOHEY REID

A smooth transition in 3 phases

Migrating your documents

Successfully migrating your historical documents to FYI is a fundamental part of onboarding. To determine the right approach, we'll consider your legacy system, filing structure, and specific requirements. Our experts will oversee the migration of your documents, with flexible filing options and a comprehensive audit built into the process.

Configuring FYI to suit your practice

The FYI team will set up your practice letterhead and email signature for you. Follow our checklist to set up and configure the features you'd like to use. eLearning courses for FYI Admins provide all the information you need.

Training your team

Get your team up to speed with the right combination of eLearning and live training. Hands-on exercises to be completed in-app will ensure each new user is ready for Go Live.

Ongoing Support

The FYI team is geared to support thousands of FYI users and action all requests promptly.

- Your monthly subscription includes technical support at no extra cost. Our support and development teams work closely to resolve any issues quickly.
- Visit the **FYI Help Centre** to access our growing library of help articles, release notes, video tutorials and other resources.

Join the **FYI User Community** on Facebook to:

- Keep up to date with new features and best practices
- Share tips and ideas to ensure your practice gets the most out of FYI.

“ We believe that if you’re not in the cloud, you’re not a firm of the future. Straight from onboarding FYI became an absolutely essential part of our business. The commitment that the FYI team has shown to our success has been fantastic. ”

JARROD BRAMBLE, PARTNER - CUTCHER & NEALE

Book a demo or start a 30-day free trial at

www.fyidocs.com

