FYI ELITE

Automated document and practice management

A new standard in practice management, seamlessly integrating document and practice management to drive efficiency and productivity. Offering time & billing, reports, client maintenance, employee management, and more, Elite empowers your practice for greater efficiency and success.

Why manage your practice, when you can automate it.
A proven and compelling return on investment.

Proven ROI > Time Savings of up to 20%

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Integrating FYI Elite into our operations has been great. What used to be a four-hour task for GST invoicing now takes just fifteen minutes, showcasing the system's power to streamline our workflows drastically. Beyond efficiency, Elite has given us unparalleled real-time control and insight into our practice's data for the first time in years, revolutionising our management capabilities. The transition was seamless, with our team quickly adapting to new processes like timesheets and invoicing with minimal fuss.

MARC PROCTOR, DIRECTOR
MORRISON & ASSOCIATES

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The migration process with FYI was seamless. Our team has found timesheets and invoicing much easier with FYI Elite. It's hard to quantify the efficiencies gained at this early stage, but drafting invoices from FYI has definitely become more efficient.

NATHAN GILBODY, DIRECTOR
NATHAN GILBODY CA

fyi Monthly Draft Invoice

fyi Compliance - Year End Process

fyi Client Ledger Disbursement

fyi Completed Job Profitability Report

A transformative solution, designed to offer an integrated solution for document and practice management, driven by FYI's process automation and workflow capabilities.

Revolutionise the way you manage your practice, with FYI Elite.

fyi

More time for more

Elite Best Practice

Welcome to a new standard of practice management. Seamlessly integrating document and practice management features purpose-built for accountants to drive efficiency and productivity. Our consultants will help you to get the most out of the Elite Plan features with our best practice service.

This service is for you if:

- ✓ You've upgraded and completed the Elite Onboarding Wizard

- ✓ You need assistance to start automating your practice management processes

- ✓ You don't have resources to build custom processes and views to get the most out of Elite

Service details:

Kick Off	Configure Best Practice	Training	Check In
30 minute kick-off call with your consultant to discuss the services and Elite Best Practice Custom Views and Automations.	Your consultant configures Elite Best Practice Custom Views and Processes in your FYI platform, ready for you to test and activate at your convenience.	60 minute session with your consultant to run through your new Best Practice Views and Automations with instruction to test and activate.	30 minute check in call with your consultant to run through any questions you may have after using your Best Practice configurations.

TOTAL INVESTMENT*	£720

If you're interested in this package, complete the form to book in with our consultants to kick off your project.

BOOK THIS PACKAGE

Automated document and practice management, purpose-built for accountants.
Why manage your practice, when you can automate it.

*this service is tailored to import twelve specific pre-made custom processes from the FYI automation library *only*. These will be onboard a new employee, employee probation management, employee performance management, offboard an employee, draft time entry reminder, draft disbursement reminder, recurring invoices, draft invoice reminder, overdue invoice reminder, WIP write off on completed jobs, monthly reports, and create time for sent emails. These twelve processes *cannot* be altered.

More time for **more**