FYI & XPM
Quick Reference Guide

Maintain a single source of truth for clients, staff, jobs and time.

FYI's deep integration with Xero Practice Manager enables a universal view of each client in FYI without having to maintain multiple platforms.

- **What happens when you sign up with FYI**
- **Automatic sync process**
- **Manual sync process**
- **Single source of truth**
- **Recommendation for managing jobs**

FYI works closely with Xero to deliver a comprehensive feature set and seamless integration.

FYI synchronizes with Xero Practice Manager on a daily basis and updates information related to your Clients, Staff and Jobs. This means you don't have to maintain data in multiple locations.

Xero Practice Manager continues to be your single source of truth for client information. Any change in Xero Practice Manager is automatically reflected in FYI.

- ✓ Clients, Jobs and Staff are instantly imported from Xero Practice Manager (XPM) and continuously synchronised in FYI.
- ✓ Your Client's Tax Returns can also be retrieved from Xero Tax and filed in FYI via the Automations feature in FYI.
- ✓ Additional Automations based on FYI's integration with Xero can also be configured to suit your practice.

Getting started with FYI

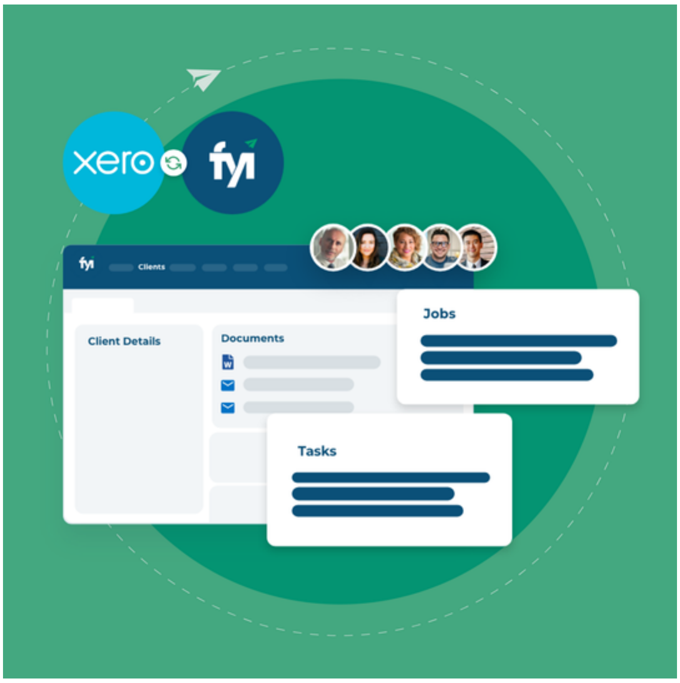
From the moment you sign up to FYI, your Clients, Jobs and Staff are instantly imported from Xero Practice Manager and continuously synchronised with FYI.

Any change in Xero Practice Manager is reflected in FYI.

Additionally, certain changes that are made in FYI will update Xero Practice Manager and these will be synced within minutes. For example, when Time entries are submitted in FYI, or when changes are made to the State, Manager or Partner of Jobs, these are synchronised to Xero Practice Manager. The Job Name, Budget, Custom Fields, Start Date and Due Date can also be updated in FYI and these changes will sync to Xero Practice Manager.

This ensures that Xero Practice Manager continues to be your single source of truth for client information.

Synchronisations occur both automatically and manually, covered further below.



> FYI's integration with XPM is really profound. It makes document management a breeze, and we now use FYI to manage jobs, reporting, tasks and workflow using the solid foundations that XPM provides.
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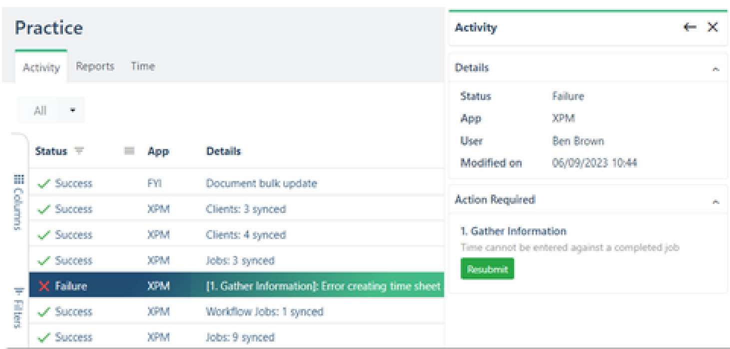
> JARROD BRAMBLE
> PARTNER
> **CUTCHER & NEALE**

Automatic Sync between FYI and XPM

The following are automatic syncs:

- A sync from Xero Practice Manager to FYI occurs overnight
- Changes made in FYI that update Xero Practice Manager are synced to Xero Practice Manager within minutes.

Note: If the automatic sync failed, this is reported in the Practice Activity with a message to request a manual sync.



[Learn more about overnight sync times]

[Learn more about Practice Activity]

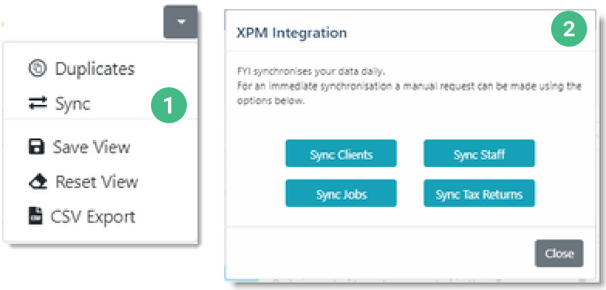
Manual Sync between FYI and XPM

A manual sync from Xero Practice Manager to FYI can be run, as and when needed.

1. All users can run a sync for Clients and Jobs using the Sync function on the Clients list or Jobs list (This is dependent on your settings, refer to the detailed sync information below).

   The Sync function is included in the View Tools button at the end of the column headings.

2. FYI Admins can run a sync for Clients, Jobs, Users (Staff) and Tax Returns from the Xero Practice Manager App in the Automation dashboard.



The following is a summary of when events and changes in Xero Practice Manager or FYI are synced.

From	Action	To	Automatic Sync	Manual Sync
Client Data				
xero	Create, Edit a Client(s)	fyi	Overnight	All Users can request
	Archive Client(s)			
	Create, Edit or Delete Client Contacts			
	Create, Edit or Delete Client Groups			
	Create, Edit or Delete Client Details		Incremental sync every 15 minutes	
fyi	Edit Client Manager or Partner	xero	Immediate sync	All Users can request
	Edit Client Details - Beta			N/A
	Add, Edit or Delete Client Custom Field definitions		Queued ~15 minutes	
	Add, Edit or Delete Client Custom Field values			
xero	Add, Edit or Delete Client Custom Field definitions	fyi	Overnight (unless disabled in XPM)	N/A
	Add, Edit or Delete Client Custom Field values			All Users can request

Note about Rate Limits

Rate limits were introduced by Xero as part of their OAuth 2.0 change. This means there is a set amount of requests that can be made each day to synchronise data between FYI and Xero Practice Manager. As these rate limits are set by Xero for app partners, FYI is unable to increase the limit for practices.

Manual Sync between FYI and XPM

From	Action	To	Automatic Sync	Manual Sync
Job Data				
fyi	Create a Job	xero	Queued ~15 minutes	N/A
	Edit a Job(s) Details (Name, State, Budget, Manager, Partner)		Updates to Jobs are queued ~15 minutes Bulk updates are run with an Automation Process.	If Maintain Jobs in FYI is set to “Off” All Users ~5-10 minutes
	Edit Workflow Job State to a “Cancelled” or "Completed" State in FYI, autocompletes the XPM Task in XPM (when Workflow Jobs enbled in FYI)		Queued ~15 minutes	
xero	Create, Edit or Delete a Job(s)	fyi	Overnight	All Users (if enabled) ~5-10 minutes
	Edit a Job State(s)			
	Create and apply Job Category to active Job(s)			All Users
	Create, Edit or Delete Job Custom Field definitions		Overnight (unless disabled in XPM)	FYI Admins
	Add, Edit or Delete Job Custom Field values			All Users
fyi	Add, Edit or Delete Job Custom Field definitions	xero	Queued ~15 minutes	N/A
	Add, Edit or Delete Job Custom Field values		Updates to Jobs are queued ~15 minutes Bulk updates are run with an Automation Process.	
xero	Create or Edit a Job Template(s)	fyi	Overnight	All Users (if enabled) ~5-10 minutes
	Create or Edit XPM Tasks for Jobs			All Users
	Create or Edit XPM Task for Jobs when Workflow Jobs enabled in FYI			If Maintain Jobs in FYI is set to “Off” All Users ~5-10 minutes
	Tick checkbox to complete Task in XPM, autocompletes the Workflow Job in FYI (when Workflow Jobs enabled in FYI)			
Other				
xero	Create or Edit Users	fyi	Overnight	FYI Admins
	Delete Users		User needs to be set to inactive in FYI	N/A
	Create Tax Returns		Overnight	FYI Admins
fyi	Create or Delete Time (with status of Submitted)	xero	Queued ~15 minutes	N/A

Single Source of Truth

Using Xero Practice Manager as your single source of truth for client information ensures you don't have to maintain data in multiple locations.

Sync Process

Any new or updated Client records in Xero Practice Manager are continuously synchronised with FYI to ensure FYI is a robust platform for managing your client relationships allowing you to:

- Record every client interaction including emails, documents, phone calls, file notes and meetings with a dedicated workspace for each client and instant access to recent interactions.
- Automatically capture client documents from external sources and file them consistently.
- Collaborate seamlessly with clients.
- Create custom processes to automate any CRM tasks unique to your practice.

Archive Process

- When a client is archived or deleted from your Practice Management Software, the client will be archived in FYI, ensuring the historical records are kept intact.
- Archived clients will not be displayed in the Active Client List, or in the Global Search.

Tip: You can AutoArchive your documents for any deleted or archived client with FYI. And FYI Admin can enable this from Practice Settings - Document Settings by checking AutoArchive Documents.

Learn more about AutoArchive Documents

Recommendation for Managing Jobs

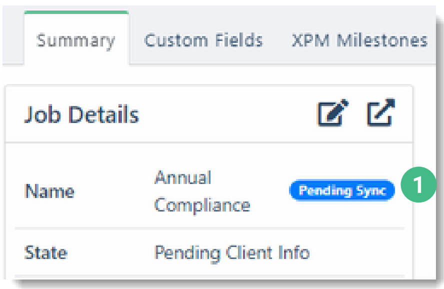
To maximise the comprehensive feature set and seamless integration between FYI and XPM for Jobs, and to ensure the systems are kept in sync, once the jobs are created our recommendation for managing jobs are as follows:

- ✓ Make all updates of Job States within FYI.
- ✓ Job States updated for individual Jobs (from the Job Summary tab or from the Job drawer) will sync immediately.
- ✓ Job States updated using Bulk Update will sync within 15 minutes.
- ✓ Do not run a manual Job Sync after updating. This will not push the updated Job State from FYI any quicker.
- ✓ Once the decision has been made to make all updates to Job States in FYI, do not update in Xero Practice Manager directly.

Notes

1. A job will be marked with a 'Pending Sync' tag while waiting for the updates to be synced with Xero Practice Manager.

   This tag is located beside the Job Name in the Job Summary and prevents updates from being overwritten by a user selecting the Sync from PM button. Once the updates have synced to Xero Practice Manager, the tag will be cleared.



2. Your team may also choose to record timesheets in FYI. Time entries entered in FYI are synced back to Xero Practice Manager.

This guide is intended to provide general guidance to assist you to maximise the use of FYI when integrated with Xero Practice Manager. For any specific best practice advice regarding the use of Xero Practice Manager we advise to get in touch with your Xero Account Manager or the Xero Support Team for further guidance.

For more information about integrating with XPM, visit the FYI Help Centre at support.fyidocs.com