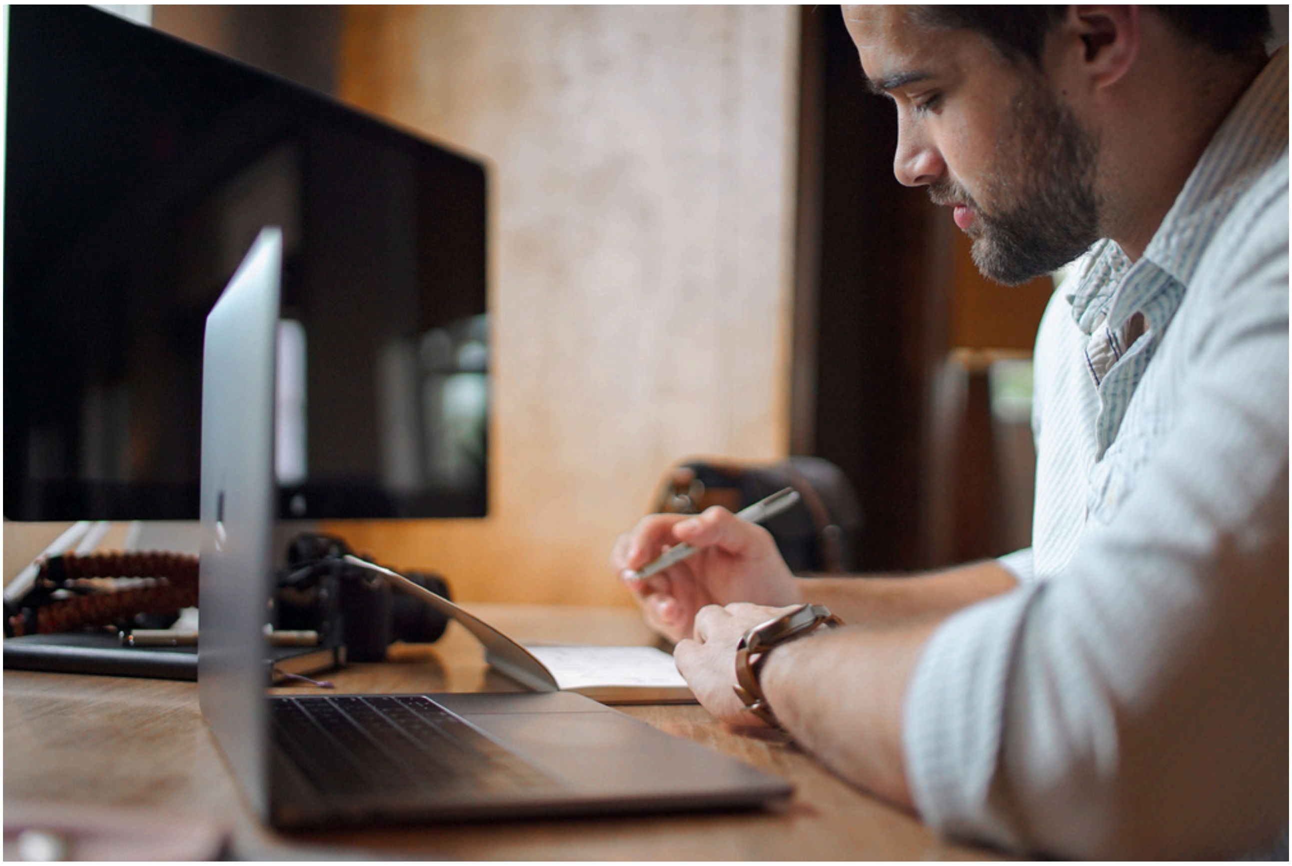
Moving to the cloud, made easy

A guide to implementing FYI

Contents

> “ We have been using FYI for a week, and the time saved already outweighs the initial costs. The transition from MYOB AE to FYI was seamless, and the FYI team walked us through every step. ”

REBECCA REABURN – TOOHEY REID



Introduction

Moving to the cloud, made easy

Changing your document management system may seem like a difficult undertaking – but it doesn't have to be.

Our simple assisted onboarding process makes it easy to transition to FYI. And we will work with you to ensure your practice doesn't miss a beat.

This handy guide covers everything you need to know to get the power of FYI working for you.

It explains our recommended approach and the four key phases in our process: Planning, Migration, Configuration and Training.

Our experienced onboarding team will help you migrate your data, configure FYI and train your people. With assistance provided at every turn, the process is easy.

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

More than
900million
documents migrated

1,800+ practices onboarded

33,000+ users trained

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

Over 1,650 leading accounting firms have transitioned to FYI, with more onboarding every day.

It all starts with a good plan

Doing your ground-work

What's the best way to find out if FYI is right for you?

We recommend joining us for a **live demo** first. You're welcome to invite your team and attend more than once. We will be happy to answer any questions.

If you like what you see, jump in and start a **30-day free trial** next. It is the best way to get a 'hands-on' experience of FYI in action. You can sync with your practice management software or get started using sample data.

Developing an onboarding plan

When you're ready for the next step, we can develop a bespoke onboarding plan to suit your unique requirements.

A **Discovery Meeting** is the best place to start. It allows us to learn about your practice, explain the onboarding process in more detail and answer any
questions you might have about transitioning to FYI.

Discovery Meeting Agenda

- How many potential FYI users in your practice?
- Are you already using Microsoft 365?
- What Practice Management Software are you using?
- Where are your documents currently stored?
- How many documents do you want to migrate to FYI?
- Can you estimate how much data (in gigabytes)?
- Would you like to migrate both client and non- client files?
- Are you open to modifying your existing filing structure to adhere to FYI best practices?

Once we've determined how much assistance you require, we will provide an **onboarding proposal** for your approval.

Try for free – no obligation

- Access all features on the Pro plan for 30 days
- Invite your team to explore the platform
- Access our in-app eLearning courses
- Get guidance from our practice specialists

Our Onboarding Services can be scaled to match the size of your firm and the complexity of your data migration and project management needs.

Options include:

- **QuickStart Onboarding**
  For practices that don't require any assistance with the migration of their documents.
- **Assisted Onboarding**
  Transition to FYI with guidance from an FYI Onboarding Specialist. Includes data migration, set-up, and training for both admins and users.
- **Concierge Onboarding**
  For larger practices needing complex data migration and more hands-on assistance with project management.

Talk to us about scheduling a discovery meeting with the FYI team.

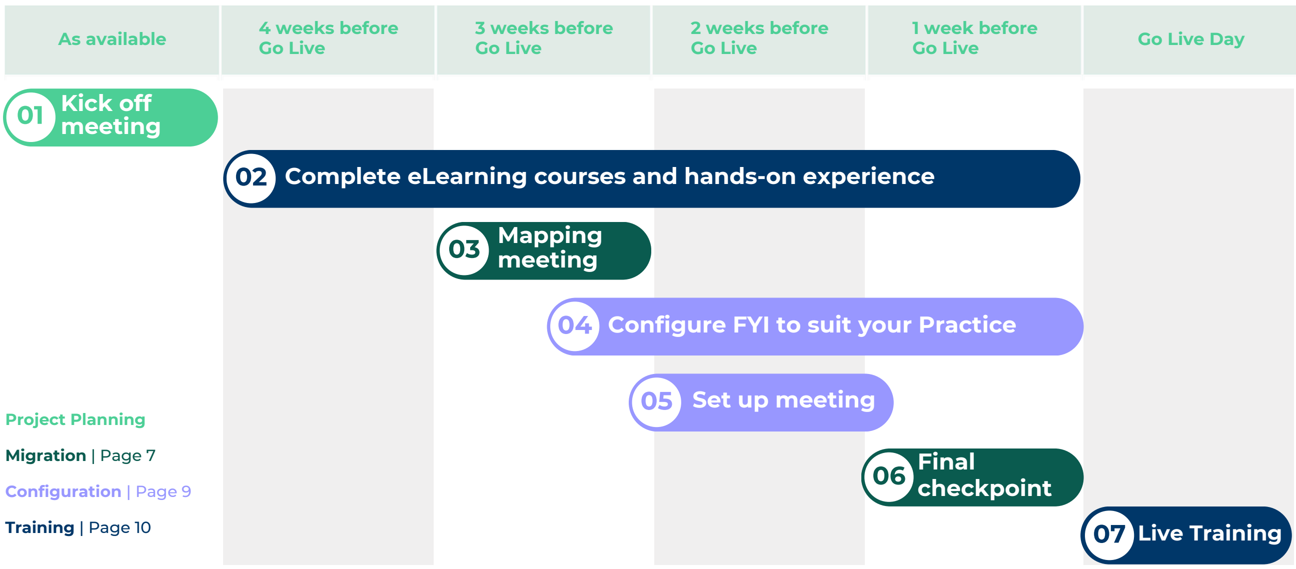
The onboarding process

Or, how FYI likes to make your life easy!

As soon as your onboarding proposal is approved, our Onboarding team will reach out to arrange a Kick-Off Meeting. Our standard process follows 7-steps, each customised to suit your practice.

> We'll always do our best to onboard you as quickly as possible. Please allow at least 4 weeks for onboarding, depending on availability and your practice's specific requirements.

Figure 1: Outline of the assisted onboarding process



1

- Create a project plan
- Book your Go-Live date
- Schedule key dates for data migration
- Develop your training plan

2

- Appoint your FYI Champions and get underway with eLearning
- Admins to complete Learn for New Users courses then proceed to Learn for FYI Admins
- Learn for New Users, our introductory eLearning courses must be completed by every member of your team
- All users to complete hands-on exercises using sample clients in FYI platform

3

- Your Onboarding Consultant will set up your filing structure in FYI, map your data and start syncing documents from your legacy DM store
- Your documents will be filed in FYI according to your specifications

4

- The FYI team will set up your practice letterhead and email signature for you
- Follow our checklist to configure key settings for **Day 1**
- eLearning courses for admins are a useful resource

5

- Your onboarding consultant will assist with configuring FYI
- Practice settings will be reviewed

6

- Review of initial filing of documents in FYI
- Post migration admin
- Finalise practice set-up
- Check progress on eLearning, with all key courses to be completed before Go Live.

7

- Customised to suit your team and practice
- Dedicated core feature workshops for Email AutoFile and Automations
- Your questions answered by an FYI expert

eLearning courses for new users and admins will prepare you for Go Live

Learning the Essentials (45 mins)	Getting Started as an FYI Admin (60 mins)
Building your Foundations (45 mins)	Managing Templates and Stationery (30 mins)

Refer to page 11 for more detail

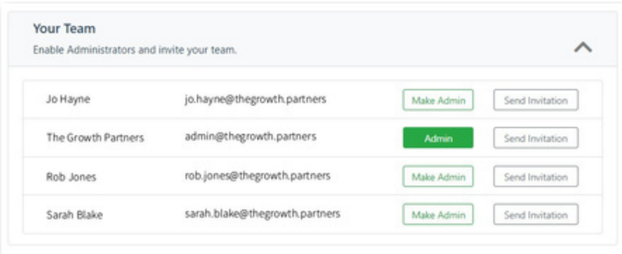
Creating your project team

We encourage you to nominate a **Project Leader** for your implementation of FYI, as well as one or more **FYI Champions**.

Your FYI champions will be responsible for:

- Developing an in-depth understanding of how FYI functions
- Assisting with the setup and configuration of FYI to suit your practice
- Assisting when you are ready to onboard the rest of your team
- Responding to minor queries and trouble-shooting
- Driving internal acceptance of FYI across your practice

They should be technically competent, fast learners who are willing and able to make decisions on behalf of your practice and provide direction to the rest of your team.



Creating your project team

Getting started as an FYI champion

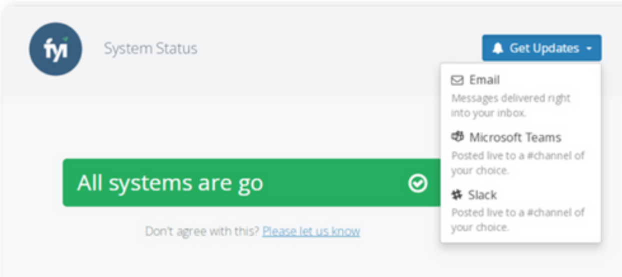
1. **The FYI website is a great place to start.**
You can learn about key features, explore integrations, and book a demo for a tour of the platform. You'll find webinars to watch on demand, and stories from practices that are successfully using FYI to change the way they work. You can also explore our Automation Library for a selection of processes you could be implementing in your practice.

2. **Complete your FYI Learn courses before Go Live.**
It takes less than 2 hours, to complete the courses for new users. Additional courses for admins will tell you everything you need to know to configure FYI and manage your templates and stationery. Refer to page 11 for details.

3. **Subscribe to platform updates.**
Stay up to date with what's new in FYI. Simply opt-in via our Status page to receive updates by email, Microsoft Teams or Slack.

4. **Visit the Help Centre.**
This is where you will find articles, videos and other handy resources to help you learn how to use FYI.

5. **Join the FYI Community on Facebook.**
Keep up to date with new features and connect with other practices to ask questions and share ideas.



Visit status.fyi.app to opt-in to receive platform updates

Migrating your documents

The successful migration of 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 any specific requirements.

The table below shows the data we can extract and migrate across to FYI. The final result depends on the discipline of your existing folder structure. The FYI team will work with you to coordinate data migration with an agreed Go Live date. We aim to deliver a clean transition, with access to all your documents from day one.

We have successfully migrated data from:

MYOB DM | SuiteFiles | SharePoint
HowNow | HowNow X | Windows Explorer
Nimbus | Virtual Cabinet | CCH | Handisoft
GoogleDrive | DropBox | Box | OneDrive
Deltek | M-Files | IRIS Docs

Data that can be migrated to FYI:

	MYOB	Virtual Cabinet	HowNow	SuiteFiles	Nimbus	Folder-Based Systems*
Client	✓	✓	✓	✓	✓	✓
Year	✓	✓	✓	✓	✓	✓
Document Name	✓	✓	✓	✓	✓	✓
Document Type	✓	✓	✓	✓	✓	✓
Date Created	✓	✓	✓	✓	✓	✓
Date Modified	✓	✓	✓			
Reference Number	✓	✓	✓			
Cabinet	✓	✓				
Categories	✓	✓				

*Folder-based systems refer to document storage such as Dropbox, Box, SharePoint etc.
**Final result depends on the discipline of your existing folder structure

The Migration Process Explained

1 Setting up your Filing Structure

To begin, your Onboarding Consultant will help set up your filing structure in FYI. We can replicate your existing filing cabinets or advise on best-practice if you are open to change. You can migrate both client and non-client files, and we can provide a recommended filing structure for both.

2 Data Mapping

This step involves the mapping of document folders from your historical source into FYI.

- We auto-match Clients (if they match a Client Code, Export Code or Client Name from your practice management software) and Years
- Documents are refiled in specific cabinets or filed to a generic 'pre-FYI' cabinet

3 Data Migration

As soon as your filing structure and mapping instructions are agreed, we will show you how to initiate a live continuous sync of your data from your legacy DM store to FYI. Any newly created or edited documents will also sync.

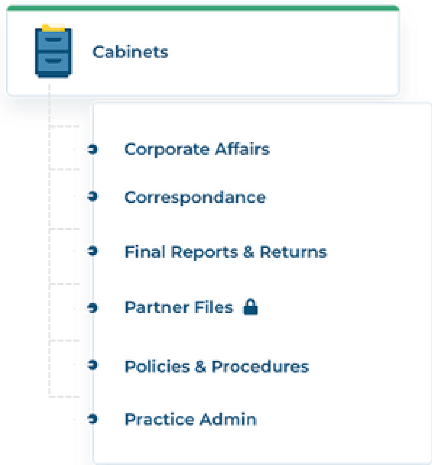
- Your team will still have access to your existing DM system and can edit or create documents as usual.
- There is **no downtime** for your practice.
- Your documents will be imported into FYI and filed to your specified Cabinets.
- Cabinet and client security will be set prior to your documents syncing to FYI to ensure secure access is maintained.

A **Migration Cut-Off** date will be agreed upon as part of your onboarding plan. This is usually 3pm one business day before your Go Live date.

Documents created and edited after the agreed cut-off date will need to be saved locally and can easily be imported into FYI after your Go Live date.

4 Post Migration Admin

Resolve any unmatched clients and identify archived clients to ensure your documents are stored in FYI correctly.



Starting your live sync 2 - 3 weeks before Go Live allows the FYI team to complete an initial refile of your documents. After a review with your project team, a final refile will also be completed for you.

Always Secure. All FYI data is stored in Amazon AWS data centres. Your documents will sit in a store that is unique to your practice, with the highest levels of encryption available.

Ready for Go Live. Your onboarding plan is designed to ensure your document migration is completed in time for your Go Live day. With every relevant historical document filed in FYI, your team can hit the ground running.

> **"Transferring our files onto the FYI platform was easy, and we have been pleased with the easy access to records and use of templates for standard letter and email generation."**

BILL MANCER, DIRECTOR,
RISE ACCOUNTANTS LIMITED

Configuring FYI to suit your practice

Below is a helpful summary of tasks involved in the setup and configuration of FYI. Simply follow our checklist to configure the features you'd like to use from Day 1.

Detailed instructions for each item on your checklist will be provided in your Kick-Off meeting. Start by completing your **eLearning courses for FYI Admins**, and you'll have all the information you need to be set up for success. Refer to page 11 for details.

FYI is pre-loaded with 'best practice' configurations to help you get started. These include:

- Defaults for Filing Cabinets and Categories
- Default User Groups
- Default Practice Settings
- Sample Stationery and Email Signature
- Sample Templates
- Sample Process Automations

Preparing to Go Live Checklist:

1 Before you Begin	Start your 30-day Free Trial Install the FYI Add-ins for Office and Outlook Install the FYI Desktop App Optimise each user's computer for use with FYI	Active Users will automatically sync from your Practice Management software.
2 Initial Setup	Complete Learn Course: Getting Started as an FYI Admin Set up User Groups and assign admin rights to your FYI Admins Practice Letterhead & Email Signature setup Setup your Practice OneDrive Admin Account Check your Email AutoFile Settings and Defaults Provide a list of clients to be secured in FYI with limited user access permissions	To prepare for your Mapping Meeting, simply familiarise yourself with FYI's default configurations for Cabinets and Categories. The FYI team will set up your practice letterhead and email signature in FYI, ready for your approval.
3 Start getting the most out of FYI	Complete Learn Course: Managing Templates & Stationery Create an Email in FYI to test your Email Signature Create a Letter in FYI to test your Practice Letterhead Create some email and document templates Update your default views for your search requirements	To get the best experience in FYI
4 Once you're up and running!	Set up the way you'd like your Job States and Board to display Set up user authorisation levels for Workflow approvals Set up and configure Collaborate to share documents securely with your clients Connect FYI to your favourite apps Activate Sample Automations shipped with FYI Import Sample Automations from the Automations Library	**Popular automations to explore:** • **Document Import and AutoFile** e.g. Automatic Import of ASIC Statements • **Client Management** e.g. Onboarding a New Client • **Compliance** e.g. Establishing a New Entity • **Email Marketing** e.g. Send a Bulk Email to all Clients • **Summary Notifications** e.g. Client Signed Notification

Training your team

Get your team up to speed with a combination of eLearning, hands-on exercises and live training.

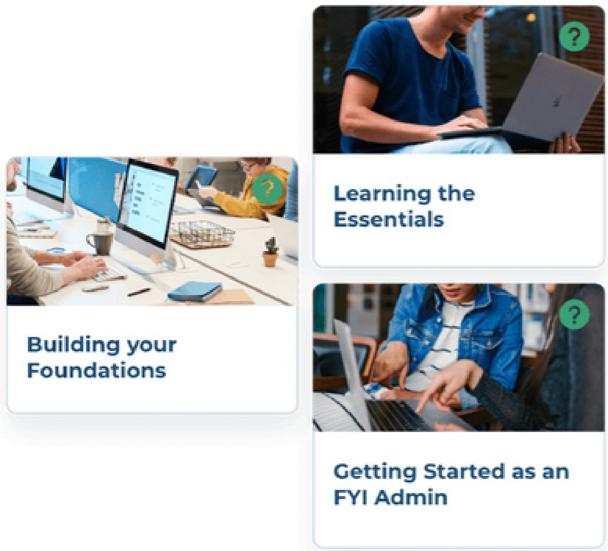
Learn at your own pace

Our comprehensive eLearning program, **Learn**, is delivered in-app and available to every FYI user at no extra cost. With courses regularly updated as features evolve, this is a valuable learning resource for new starters, or as a refresher for your team. Put yourself to the test with interactive exercises designed to get you using FYI like a pro.

- Minimal time and effort required
- Progress at your own pace
- Keep track of each completed course

Get hands-on before going live

Put yourself to the test with Prework for New Users to be completed in your FYI platform. Take knowledge from Learn and complete interactive exercises with sample clients, so that each new user is ready for Go Live.



Live Q&A Training

A live group training session will be scheduled within the first two weeks of Go Live Day. This allows our specialists to provide guidance on how to use FYI and to answer any questions you may have. We will also run a day-in-the-life scenario to put you on the path to start getting the most out of FYI. Including additional workshops dedicated to core feature training for Email AutoFile and Automations within your first four weeks of Go Live.

> “This has been the easiest transition that I have ever experienced in moving systems. You have done a great job in getting us prepared. Our staff are now using FYI and really love it.”

JOS PEMBERTON, ADMINISTRATOR, AVID BUSINESS AGENCY (NZ)

eLearning courses for new users and admins will help your team get started and learn how to use FYI like a pro.

Learn for new users

In less than two hours, every new FYI user can be ready to hit the ground running when you Go Live.

Learning the Essentials
Allow 45 mins

- Navigating FYI
- Navigating the Client Workspace
- Filing your documents
- Using the + button to create emails, documents, tasks and more

Building your Foundations
Allow 45 mins

- Locating documents
- Uploading and importing documents to FYI
- Creating and editing documents in FYI
- Filing emails
- My Settings

Learn for new admins

Everything you need to know to configure FYI to suit your practice.

Getting Started as an FYI Admin
Allow 60 mins

(Complete in preparation for your mapping meeting)

- Setting up your Cabinets and Categories
- Completing your initial setup
- Applying your filing defaults
- Managing your Practice Settings
- Checking Practice Templates

Managing Templates and Stationery
Allow 30 mins

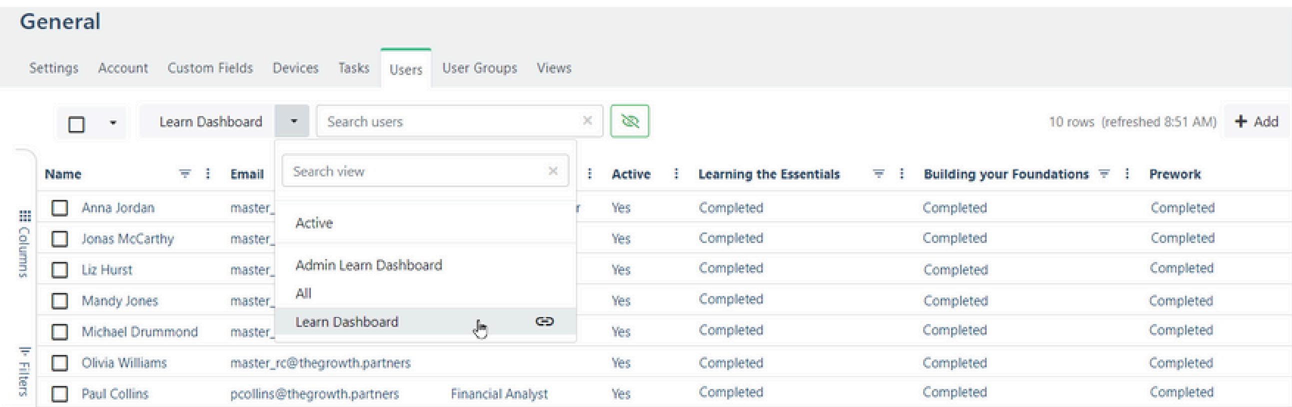
- Getting Started with Templates and Stationery
- Managing your Email Signatures
- Managing your Stationery
- Managing your Templates

Get hands-on with FYI

Using sample clients and interactive exercises, get hands-on with FYI before going live.

Prework for new users
30 mins

- Filing emails from Outlook
- Sending emails from FYI
- Creating and filing documents
- Creating meeting records
- Searching for documents
- My settings



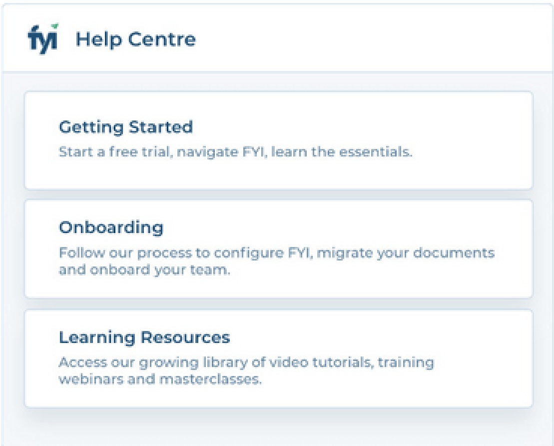
Dedicated in-app Learn Dashboards allow you to easily track course completion at an individual user level.

Help when you need it

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

Technical support is always at hand

Support is included in your monthly subscription at no extra cost. Our technical support team is available during business hours to answer your queries. For more complicated issues, we'll initiate an outbound call. If you need help, you can submit a request in-app, via the Help Centre, or simply send an email to support@fyi.app.



With support and development teams working closely together, issues are resolved quickly and prevented from re-occurring.

15 or less
open queries, on average at any point in time

2 hrs or less
guaranteed response time

Help yourself, anytime

Visit the FYI **Help Centre** to access our growing library of help articles, release notes, video tutorials and other resources that will help you use FYI to its full potential. Find everything you need to know about using FYI as a new user, new admin, or seasoned FYI pro.

FYI User Community

Join the FYI User Community on Facebook to keep up to date with new features and best practices, share tips and get ideas to ensure your practice is getting the most out of FYI. Ask a question and hear what other FYI users from across Australia, New Zealand and the UK have to say.

Your questions answered

Getting Started

Are there any pre-requisites for using FYI?

Yes, there are two pre-requisites for using FYI in your practice.

Firstly, FYI is deeply integrated with **Microsoft 365** to deliver email and document automation. Microsoft 365 **Business Standard** is the minimum license required to be able to edit documents from FYI using the desktop versions of Office or Outlook. We cannot guarantee optimal performance if you are using volume-licensed Office products.

Secondly, integration with your practice management software allows you to sync your practice data with FYI and avoid having to maintain data in multiple locations. Connect with **Xero Practice Manager** to sync your clients, client groups, team, jobs, and timesheets. You can set up FYI using **Xero Tax**, but in this instance, FYI will only sync your Clients. Alternatively, you can connect using **GreatSoft**, **MYOB AE, APS, CCH or IRIS.**

Do I need to prepare my data before syncing with my practice management software?

With client and contact data syncing from your practice management software, it is useful to ensure the following information is up to date at its source.

- Client and contact email address
- Postal and physical address
- Clients assigned to Groups
- Salutation and Addressee added to Contacts fields (in Xero Practice Manager only)
- ACN's entered for companies (AU only)

What can I do in FYI during the 30-day Free Trial?

The entire feature set of the FYI pro plan is available to explore during your free trial. You can start by creating sample letters, importing and filing emails, delegating tasks and most importantly, activating automations. This is where your step change in practice efficiency and client service really kicks in.

What happens when the trial period ends?

If you choose to subscribe to FYI at the end of your trial, all the emails, documents, settings and integrations you've added remain available when you Go Live. If you choose not to subscribe, simply download your documents, and your entire account and data will be permanently deleted.

QUICK TIP

Make sure you have installed the FYI Add-ins for Office and Outlook and optimised your computer for use with FYI.

Explore FYI's complete feature-set in a 30-Day Free Trial

- No obligation
- No need to migrate all your docs first
- Operational in minutes

> "The system we used to have just didn't have the same level of integration that Xero and FYI...could provide to us."

SAM HORSMAN, BUSINESS PRINCIPAL & PARTNER, PJS FINANCIAL

Onboarding

Is there a cost associated with the FYI onboarding process?

Yes – the FYI Team will develop an **assisted onboarding** plan to make sure you transition smoothly and hit the ground running. Our onboarding specialists will guide you through the migration of your historical documents, set up and configuration of FYI, and then host a live group training session customised to your team and practice. Pricing for our assisted onboarding services varies depending on the size of your firm and the complexity of your data migration and project management needs.

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.

How do I know which plan is right for my practice?

Our **Intermediate** plan provides instant results with a more efficient way to manage documents and clients. Upgrade to **Pro** to access a wider range of features, including advanced automations. Our **Elite** plan is the most comprehensive, offering extensive employee and practice management capabilities and should only be considered once the foundational features of the Intermediate and Pro plans have been mastered, which typically takes around 3 months. You can upgrade your account any time you like.

Do we need a third-party consultant to assist us with implementation and training?

If you would prefer to work with a third-party consultant for implementation and training, we have a range of independent experts to choose from.

> “ FYI has been a huge boon for our practice given the challenges around COVID. We are comfortably able to send the majority of our staff to work from home thanks to your great software. ”

ALISTAIR SCANLON, PARTNER,
SCANLON RICHARDSON ACCOUNTING

Data Migration

How complex is the data migration process?

It's easier than you might think. We have built-for-purpose tools and have onboarded hundreds of practices to FYI from a variety of legacy systems. When it comes to document filing structures, we've seen pretty much everything.

How long does it take to migrate my documents?

This depends on data volume and internet connection and could take anywhere from a few hours to a few days. The assisted onboarding process can take as little as 4 weeks, depending on availability and the amount of preparation required.

What data is migrated along with my documents?

In most instances, we can extract data such as document name, type, date created and date modified, and migrate it across to FYI. Depending on your legacy system, we may also be able to migrate the client, group, cabinet, year, work type and more for each document.

Can I maintain my existing folder structures?

FYI takes a database approach to data storage and is not folder-based. However, we can replicate your existing filing structures to reduce the impact of change experienced by your staff.

Do I need to prepare my data beforehand?

It is helpful to have all client folders at one level of the folder hierarchy before migrating to FYI. However, it is easy to cleanse your data after migration using FYI's refiling tools.

Can I maintain my existing MYOB cabinet and category structures?

Yes. We can sync both the MYOB documents and the MYOB database.

How do you match our client folders to clients in XPM? What if they don't align?

We match client folders to XPM through a name, client code, export code or XPM ID. If we are unable to find a match, we will create an 'unmatched client'. You can then match these clients to XPM using our 'Resolve Clients' function. This makes it easy to correct slight misspellings across hundreds of client folders.

What happens to archived client data on migration?

If the client is archived or not in XPM, we will create an unmatched client for these documents. This unmatched client is not linked to a client in XPM but will always be accessible in FYI from the archived clients' section.

Who owns our data? And what happens if we decide to cancel our subscription?

Your practice always owns your data. If you want to leave at any time, anyone with the role of administrator can export your documents in a logical folder hierarchy representing critical metadata.

> “ Changing document management systems was a huge call for our practice. It wasn’t until we came across FYI that we were able to make the right decision. ”

SAM HORSMAN, PRINCIPAL - PJS FINANCIAL

Visit fyi.app to book a platform tour