



# Managing your practice, made easy

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A guide to implementing FYI Elite

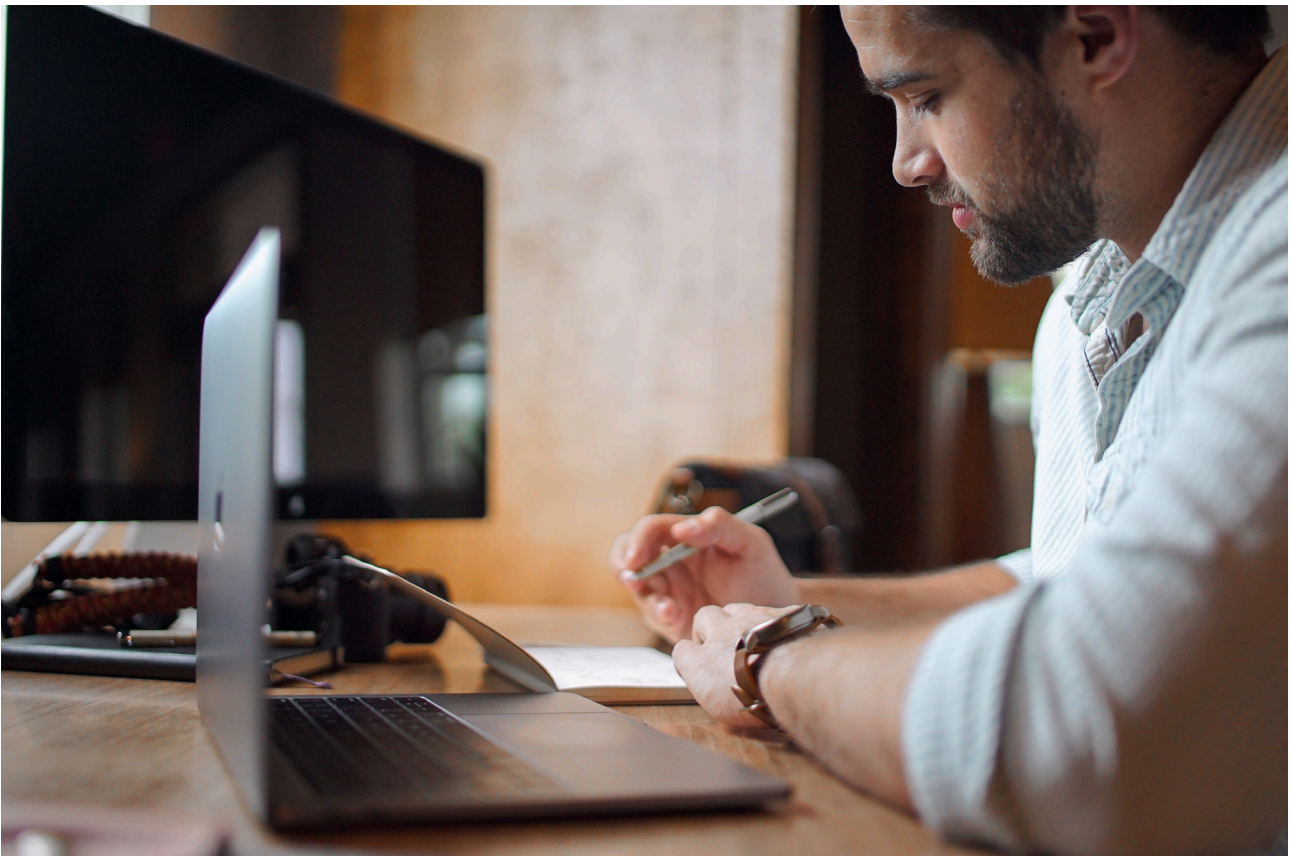


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**“ We’re still finding new ways to use FYI Elite to make our lives easier. And that’s the beauty of it-it’s flexible, it evolves, and it just works. ”**

**JAMES CAREY – PRIME PARTNERS**



# Introduction

## Managing your practice, made easy

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

Our onboarding process makes it easy to transition to FYI Elite. 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 Elite 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 streamlined the steps to get you live as soon as possible.**

Comprehensive

## Onboarding Wizard

Unpaid and paid invoices from the past

## 18 months

Seamless migration of

## WIP Data

- ✓ Go Live in as little as 1 day
- ✓ No downtime for your team
- ✓ Hit the ground running
- ✓ Fast pay-back

**Over 100 leading accounting firms have transitioned to FYI Elite, with more onboarding every day.**

**PRIME  
PARTNERS**  
CHARTERED ACCOUNTANTS

**Bullôt & Rankine**  
Chartered Accountants

**Wallace Diack**  
CHARTERED ACCOUNTANTS

**TaxCentric**  
Business Advisory

**DC&A**  
ACCOUNTANTS AND BUSINESS ADVISORS

**“ 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. ”**

**MARC PROCTOR - BULLOT & RANKINE**

# It all starts with a good plan

## Doing your ground-work

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

Our [Elite Hub](#) has been created to provide you and your team with an on-demand demonstration of the Elite Plan and associated features so you can see the new standard in practice management with FYI.

If you like what you see, and meet the eligibility requirements, you can upgrade to Elite today or request our Onboarding Services to assist you to upgrade and transition to FYI Elite.

## Developing an onboarding plan

If you'd like assistance from our team to onboard to Elite, we can develop a bespoke onboarding plan to suit your unique requirements.

Simply fill in our Onboarding Form to request your Elite Onboarding Service. The information you provide to us ensures your experience is as smooth as possible.

Once complete and we've determined how much assistance you require, the team will be in touch to confirm your Onboarding Journey to Elite and provide an [onboarding proposal](#) for your approval.

After you've accepted your proposal, a **Kick-Off Meeting** is scheduled with your Onboarding Consultant to start your journey. It allows us to explain the onboarding process in more detail and answer any questions you might have about transitioning to FYI Elite.

## Kick-Off Meeting Agenda

- Assign your project team and define your onboarding timelines including confirming your Go Live date.
- Plan the actions required to setup and configure FYI Elite to your requirements.
- Run through your Training Plan.

## Try for free – no obligation

- Set up a 30-day FYI Elite Trial
- 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:

- ✓ **Self-Serve Onboarding**  
Transition to FYI using our user-friendly onboarding wizard. Empowering you to manage your upgrade and migration at a time that suits you.
- ✓ **Assisted Onboarding**  
Transition to FYI with guidance from an FYI Onboarding Specialist. Includes guidance with WIP migration, set-up, and training for both admins and users.
- ✓ **Concierge Onboarding**  
For larger practices with multiple teams or needing more hands-on assistance with project management.

**Unsure whether you meet the pre-requisites for FYI Elite? [Find out now.](#)**

### Welcome Olivia Williams

This is your Practice Management Onboarding Workspace. Here you can work your way through migrating to FYI. Click on each section to expand the details. Where available, click on the link to open the relevant function in FYI. When each section is complete, click the Tick Box in the header to mark that section as complete, and track your progress.

✓ Before you begin	▼
✓ Configure Settings	▼
✓ Training	▼
✓ Switch on FYI as PM	▼
✓ Invoice & WIP Migration	▼
✓ Configure and Update Jobs	▼
✓ Finalise Migration Reconciliation	▼
✓ Reporting	▼
✓ Go Live and Next Steps	▼

Dedicated in-app Onboarding Wizard to track your progress.



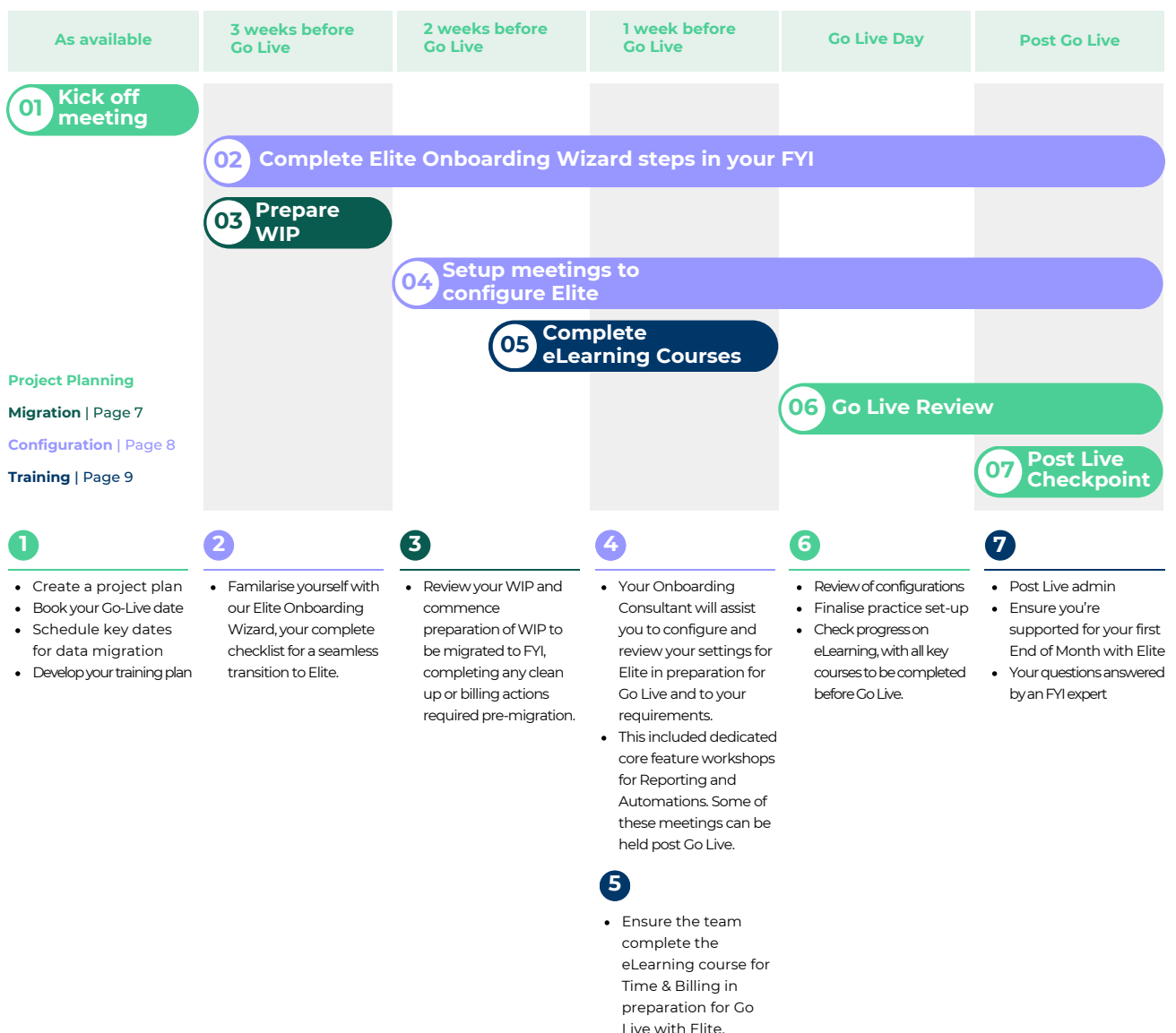
# The onboarding process

## 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**



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

Time and Billing (60 mins)

**Refer to page 10 for more detail**

# Creating your project team

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

Your FYI champions will be responsible for:

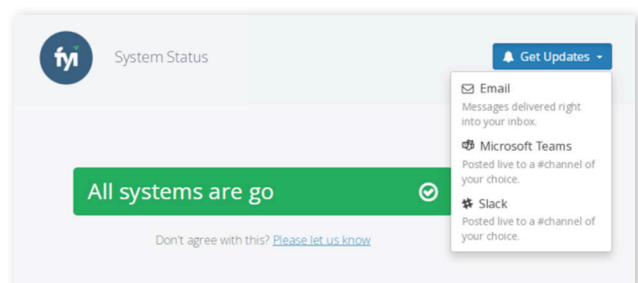
- Developing an in-depth understanding of how FYI Elite functions
- Assisting with the setup and configuration of FYI Elite to suit your practice
- Assisting when you are ready to onboard the rest of your team
- Responding to minor queries and trouble-shooting
- Driving internal adoption of FYI Elite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

You may need to review permissions for your Champions to ensure they can assist where applicable for your onboarding journey to Elite.

## Getting started as an FYI champion

- 1 The Elite Hub is a great place to start.**  
You can learn about key features, view the on-demand demo, get answers to FAQ', and stories from practices that are successfully using FYI Elite 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 with FYI Elite.
- 2 Complete your FYI Learn course and Learning Resources before Go Live.**  
It takes less than 1 hour, to complete the core Time and Billing course for new users. Additional Learning Resources are available in our Help Centre, including on-demand, best practice webinars so you can get up and running with Elite features quickly. Refer to page 10 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](https://status.fyi.app) to opt-in to receive platform updates



# Migrating your WIP and importing Invoices

The successful migration of your Work in Progress (WIP) to FYI Elite is a fundamental part of onboarding.

Investing time in housekeeping for your WIP and Jobs is critical to the success of your migration. We recommend identifying and reviewing any jobs with outstanding balances and determine whether the WIP should be invoiced or written off. In addition, ensure jobs are marked complete where appropriate.

Setting the Migration Date in FYI sets the date that data will be synchronised from your practice ledger to import your invoices into FYI.

Our process ensures a seamless migration to FYI of all time entries, paid invoices, and credit notes for the last 18 months, as well as unbilled WIP and outstanding invoices and credit notes.

The final migration process and result varies depending on your historical Practice Management software and housekeeping mentioned above.

By leveraging our user-friendly wizard, you're empowered to manage the migration at a time that suits you, ensuring zero interruption to your team's workflow.

**Always Secure.** All FYI data is stored in Amazon AWS data centres. Your data 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 migration is completed for your Go Live day. With all relevant WIP data in your platform so your team can hit the ground running.

**“ The migration was smooth and simple, and while the team is still adjusting to daily timesheets and a new invoicing system, the support from FYI has been invaluable. The key highlight for us has been the proactive support and timely action on feedback, which has made the transition smoother. ”**

**NICOLE BLANCHARD**  
TAXCENTRIC BUSINESS ADVISORY

# Configuring FYI Elite to suit your practice

Below is a helpful summary of tasks involved in the setup and configuration of FYI Elite. Simply follow our checklist to ensure a seamless upgrade to Elite.

Detailed instructions for each item on your checklist can be located in the Onboarding Wizard in your Platform. We also recommend completing all **eLearning courses in the Learn for Elite section**, and you'll have all the information you need to be set up for success. Refer to page 11 for details.

**Document and practice management unite, driven by FYI's advanced process automation and workflow capabilities.**

- Time & Billing
- Reports
- Client Maintenance
- Employee Management
- AutoTime
- Capacity Planning

## Preparing to Go Live Checklist:

1 Before you Begin	<ul style="list-style-type: none"> <li>✓ Tidy WIP in your existing practice manager</li> <li>✓ Optional: Create Cabinet and/or Categories to file invoices and reports</li> </ul>	Streamline the migration process by reviewing unbilled WIP, and writing off any redundant or outdated entries.
2 Initial Setup	<ul style="list-style-type: none"> <li>✓ Enable Time &amp; Invoices in Practice Settings</li> <li>✓ Configure Invoice settings, including lock dates, default due dates and Xero approval state</li> <li>✓ Setup Rates and Time types for time entries</li> <li>✓ Apply Rates to Users and update User Productivity and Working Hours.</li> <li>✓ Review and update User Group permissions</li> <li>✓ Setup Custom Fields required for Time and Billing reporting</li> <li>✓ Draft Job Templates</li> </ul>	Ensure you review the resources and tutorials in the Onboarding Wizard at each step to configure your Elite settings for successful Go Live experience.
3 Training and Migration	<ul style="list-style-type: none"> <li>✓ All team members to complete Elite Learn Courses</li> <li>✓ Commence using FYI for time entry and billing</li> <li>✓ Complete Invoice and WIP Migration to FYI</li> <li>✓ Finalise Job settings and apply new Job Templates</li> </ul>	Ensure the team complete their eLearning Courses and commence recording time and billing inside FYI for a seamless migration
4 Once you're up and running!	<ul style="list-style-type: none"> <li>✓ Review Master Report Templates and update as required</li> <li>✓ Set up Automations for your Invoicing, Reporting and more</li> <li>✓ Set up Custom Views in Time and Invoice lists for instant data visibility</li> </ul>	<b>Popular automations to explore:</b> <ul style="list-style-type: none"> <li>• <b>Recurring Invoices</b> Auto-create monthly recurring invoices.</li> <li>• <b>WIP Write Off Completed Jobs</b> Auto-create Final invoices for completed jobs with positive WIP balances.</li> <li>• <b>Create Time on Sent Emails</b> Auto-create draft time entries for the entire team for sent emails.</li> <li>• <b>Draft Time Entry Reminder</b> Automatically notify the team to submit time entries.</li> </ul>



# Training your team

Get your team up to speed with a combination of eLearning and workshops with our specialists.

## 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

## Dedicated Feature Workshops

Post your Go Live Day our specialists will organise dedicated feature workshops to train you on core Elite features and functionality for Reporting and Automations, to ensure you can automate your practice management with Elite.

## End of Month Support

To ensure your upgrade to Elite is complete, we provide a dedicated specialist to support your first End of Month cycle using FYI, including guidance for Reporting and WIP requirements.



**Time and  
Billing**



**Creating Excel  
Reports**



**Employee  
Management**

**“ 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 - NATHAN GILBODY CA**

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

<b>Learn for all users</b>  <b>Everything the team needs to know about using FYI for Practice Management.</b>	<b>Time and Billing</b> Allow 60 mins	<ul style="list-style-type: none"> <li>Working with Jobs</li> <li>Creating Time and Disbursements</li> <li>Creating and managing Invoices</li> </ul>

<b>Elite Best Practice Masterclass</b>  <b>On-demand masterclass showcasing Elite features and best practices.</b>	<b>Onboarding &amp; Data Conversion</b> Allow 45 mins	<ul style="list-style-type: none"> <li>How to use the Elite Onboarding Wizard</li> <li>Steps to migrate your WIP to FYI</li> <li>Considerations for Job Management with new, enhanced features available on the Elite Plan</li> </ul>
	<b>Automate your Practice Management</b> Allow 45 mins	<ul style="list-style-type: none"> <li>Automatically create jobs for all scenarios and billing needs</li> <li>Automatically create timesheet entries for day-to-day tasks like sending emails</li> <li>Set and forget invoicing and disbursements with Automation</li> </ul>
	<b>Your Practice Data</b> Allow 45 mins	<ul style="list-style-type: none"> <li>Create Excel Reports using FYI Master Report Templates</li> <li>Create Views for instant access to your data</li> <li>Automate monthly practice reports</li> </ul>
	<b>Managing Clients and Employees</b> Allow 45 mins	<ul style="list-style-type: none"> <li>Adding Clients</li> <li>Managing Employees</li> <li>User Group Permissions</li> <li>Automate Client and Employee management</li> </ul>

General									
Settings Account Custom Fields Devices Tasks <b>Users</b> User Groups Views									
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Columns Filters	Name	Email	Search view		Active	Learning the Essentials	Building your Foundations	Pework	
	<input type="checkbox"/> Anna Jordan	master_	Active		Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Jonas McCarthy	master_			Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Liz Hurst	master_	Admin Learn Dashboard		Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Mandy Jones	master_	All		Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Michael Drummond	master_	Learn Dashboard		Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Olivia Williams	master_rc@thegrowth.partners			Yes	Completed	Completed	Completed	
	<input type="checkbox"/> Paul Collins	pcollins@thegrowth.partners	Financial Analyst		Yes	Completed	Completed	Completed	

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

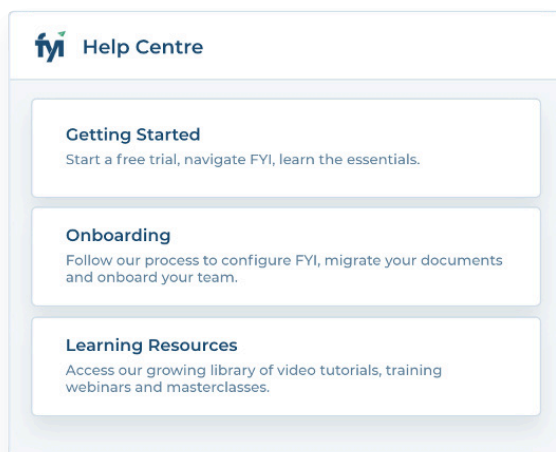


## Help when you need it

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](mailto: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

### What if I am not an FYI user?

To adopt and implement **Elite**, we require you to be an **existing FYI client**. This is the stepping-stone approach we've always encouraged our clients to take; start with document management, experiment with process automation then move on to the more advanced Elite Plan.

If you're not currently an FYI client, we recommend beginning your journey with us, you can [book a platform tour](#) with our team.

### If my practice is using a different Practice Management system to Xero, can my data be migrated to FYI?

We will be extending compatibility beyond XPM to ensure FYI Elite integrates seamlessly with a variety of practice management solutions.

### If I switch to the Elite Plan, will I still need Xero Practice Manager?

FYI Elite Plan will serve as your primary platform for practice management, seamlessly synchronising with Xero to ensure all necessary data for Xero Tax compliance is maintained. FYI Elite complements the broader Xero suite by syncing with connected Xero ledger accounts for invoicing, preserving all contact information. This dual-functionality ensures that FYI Elite not only serves as a comprehensive platform for managing client data and practice activities but also maintains a cohesive workflow with Xero's suite of tools.

### What impact will adopting FYI Elite have on my team?

Adopting FYI Elite will have minimal impact on your team's daily operations. The activation process is quick, requiring about an hour, with an additional two hours needed for configuring essential practice management settings, such as User Rates, Productivity Targets, and Job Templates. While there's no disruption to staff activities, there might be slight delays in invoicing operations until job templates are fully set up.

### Is there a trial Elite?

To avoid complications with your current login to platforms, it is recommended that you first create stand-alone trials on specific platforms that integrate with FYI. This way, you can explore the broad capabilities of Elite at your own pace, without impacting your day-to-day operations. [Find out how to set up your Elite trial.](#)

#### QUICK TIP

- ✓ We recommend practices are live in FYI for three months before upgrading to Elite. We have found that the transition is easiest and most successful for practices that are familiar with FYI's document management features, as these features are widely used as part of Elite.

#### Experience FYI Elite's value without the full cost commitment with our introductory offer.

- First 3 months of Elite at Pro pricing
- No obligation
- Discount applied to your invoice

### 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.



## Onboarding & Data Migration

### What does the implementation process involve, and what data gets migrated?

The implementation process for FYI Elite involves a comprehensive migration of your practice's data to ensure a smooth transition.

Here's what gets migrated:

- **WIP Data and Invoices:** We'll import unbilled WIP data, unpaid invoices, and you will have the option to include paid invoices up to 18 months prior.
- **Timesheet Data:** We'll import all Timesheet data for the last 18 months.
- **Client and Job Data:** Thanks to the existing synchronisation with practice management, all client and job data will be seamlessly integrated into FYI Elite, eliminating the need for manual data entry.

### 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.

### How long does it take to migrate my data?

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.

### Do I need to prepare my data beforehand?

We recommend identifying and reviewing any jobs with outstanding balances and determine whether the WIP should be invoiced or written off. In addition, ensure jobs are marked complete where appropriate. This will ensure only the outstanding and required WIP is migrated to FYI.

### 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 and data.



**“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.”**

MARC PROCTOR – BULLOT & RANKINE

### Is training available for FYI Elite?

Absolutely! To familiarise yourself with FYI Elite and make the most of its features, we recommend starting with our video demonstration found in our [Elite Hub](#). For a deeper dive, [explore our Learning Resources](#) or [visit the Help Centre](#).

For practices looking for more personalised guidance, we offer assisted and concierge onboarding and can tailor a proposal to suit your specific requirements. Feel free to [request an onboarding proposal](#).



More time  
for **more**



**fyi.app**