

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 regularly 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

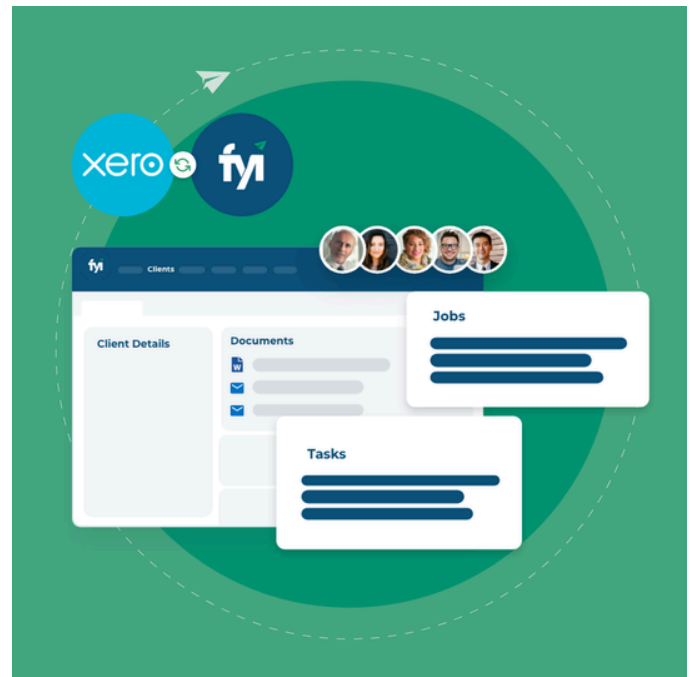
From the moment you sign up to FYI, your Clients, Jobs and Staff are instantly imported from Xero Practice Manager and regularly synchronised with FYI.

Any change in Xero Practice Manager is reflected in FYI.

Additionally, certain changes made in FYI will be synchronised with Xero Practice Manager within minutes. For example, when Time entries are submitted in FYI, or when changes are made to the State, Manager or Partner of Jobs. 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 key practice data is kept in sync across both platforms.

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.

JARROD BRAMBLE
PARTNER
CUTCHER & NEALE



Automatic Sync between FYI and XPM

The following are automatic syncs :

- Overnight sync from Xero Practice Manager to FYI (refer to the table below)
- Changes made in FYI that update Xero Practice Manager are synced within minutes.
- When changes to Client or Job Custom Field values in FYI are synchronised to Xero Practice Manager, a check will be made for any modified Custom Field values for the relevant client or job in Xero Practice Manager and synchronised to FYI within 15 minutes.
- Overnight sync of all Custom Field values will be performed on Friday, Saturday, and Sunday nights. This will minimise the impact of large synchronisations during the working week

[Learn more about overnight sync times](#)

[Learn more about Practice Activity](#)

Status	App	Details
Success	FYI	Document bulk update
Success	XPM	Clients: 3 synced
Success	XPM	Clients: 4 synced
Success	XPM	Jobs: 3 synced
Failure	XPM	[1. Gather Information]; Error creating time sheet
Success	XPM	Workflow Jobs: 1 synced
Success	XPM	Jobs: 9 synced

Activity

Details

Status: Failure
App: XPM
User: Ben Brown
Modified on: 06/09/2023 10:44

Action Required

1. Gather Information
Time cannot be entered against a completed job

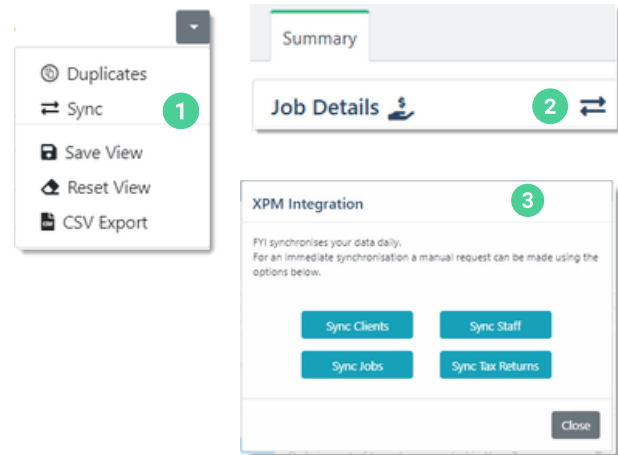
[Resubmit](#)

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

Manual Sync between FYI and XPM

A manual sync from Xero Practice Manager to FYI can be run for Jobs and Clients when required. This is dependent on your settings, refer to the detailed sync information below.

- 1 All users can run a sync for Clients. The **Sync** function is available in the View Tools button at the end of the column headings.
- 2 All users can run a sync for individual Jobs. This will update job details and job custom fields. The **Sync Job** button is available in the Summary tab for each job.
- 3 FYI Admins can run a sync for Clients, Jobs, Users (Staff) and Tax Returns from the Xero Practice Manager App in the Automation - Apps tab.



Sync Frequency

The following summarises the sync frequency when changes made in Xero Practice Manager or FYI.

From	Action	To	Automatic Sync	Manual Sync
Client Data				
xero	Archive Client(s)	fyi	Overnight	
	Create, Edit a Client(s)		Queued ~15 minutes	All Users can request
	Create, Edit or Delete Client Contacts			N/A
	Create, Edit or Delete Client Groups			All Users can request
	Create, Edit or Delete Client Details			
fyi	Edit Client Manager or Partner	xero	Queued ~15 minutes	All Users can request
	Create, Edit Client Details			N/A
	Add, Edit or Delete Client Custom Field definitions			
	Add, Edit or Delete Client Custom Field values			
xero	Add, Edit or Delete Client Custom Field definitions	fyi	Queued ~15 minutes* or Overnight Fri-Sun	All Users can request
	Add, Edit or Delete Client Custom Field values			

Notes

- *Changes made to Client Custom Fields in XPM will only be synchronised if there are also updates to the Client Details for example, the Client Partner, or if a change made in FYI triggers a bi-directional sync.
- 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.

Sync between FYI and XPM

From	Action	To	Automatic Sync	Manual Sync
Job Data				
fy	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.	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 enabled in FYI)		Queued ~15 minutes	
xero	Create a Job	fy	Queued ~15 minutes	All Users (if enabled) ~5-10 minutes
	Edit Job State(s), Edit or Delete a Job		Overnight	All Users can request
	Create and apply Job Category to active Job(s)		Queued ~15 minutes* or Overnight Fri-Sun	All Users can request
	Create, Edit or Delete Job Custom Field definitions			All Users can request
	Add, Edit or Delete Job Custom Field values*			All Users can request
fy	Add, Edit or Delete Job Custom Field definitions	xero	Queued ~15 minutes	N/A
	Add, Edit or Delete Job Custom Field values			
xero	Create or Edit a Job Template(s)	fy	Overnight	All Users (if enabled) ~5-10 minutes
	Create or Edit XPM Tasks for Jobs			All Users can request
	Create or Edit XPM Task for Jobs when Workflow Jobs enabled in FYI			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	fy	Overnight	FYI Admins
	Delete Users		User needs to be set to inactive in FYI	User needs to be set to inactive in FYI
	Create Tax Returns		Overnight	FYI Admins
fy	Create or Delete Time (with status of Submitted)	xero	Queued ~15 minutes	N/A

Notes

- *Changes made to Job Custom Fields in XPM will only be synchronised if there are also updates to the Job Details for example, the Job State is updated, when a new job is created, or if a change made in FYI triggers a bi-directional sync.
- All Job Custom Field values for active jobs will sync during the weekend overnight sync, regardless of the source of the change in XPM.

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 regularly 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.

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.

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.

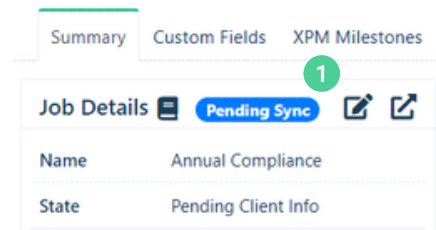
[Learn more about AutoArchive Documents](#)

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.

It is recommended that no further edits are made to the Job until the Pending Sync has 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.fyi.app