



Discovery Meeting Agenda

About FYI

- Our client success team
- Platform prerequisites

About Your Practice Today

- How many potential FYI users in your practice?
- Are you already using Office 365 and Xero Practice Manager?
- Where are your documents currently stored?
- How many documents do you want to migrate to FYI? If possible, please share storage size and any other relevant information.
- How consistent and disciplined is the structure of your client files?
- Would you like to migrate non-client files to FYI also?
- Are there any requirements unique to your practice that you'd like us to consider?

Our Assisted Onboarding Process

- Set-up
- Migration
- Configuration
- Live Training

Next Steps

- Review and approve our assisted onboarding proposal
- Start a free trial
- Appoint FYI champions



Frequently Asked Questions

Are there any pre-requisites for using FYI? FYI is deeply integrated with **Office 365** to deliver email and document automation. Microsoft Business Standard is the minimum licence required. Integration with **Xero Practice Manager** allows you to sync your clients, client groups, team and jobs without having to maintain data in multiple locations.

Where is our data stored? For Australian and New Zealand clients, data is stored in Amazon's AWS data centres in Sydney. For our UK clients the data is hosted in AWS's London data centres. As we become a global provider, we will host FYI in the UK and the US.

How is our data backed up? Your data is dynamically backed up by Amazon as part of their core service. Amazon provide inbuilt offsite backups, disaster recovery, multiple sites synch etc. Practices can also back-up their own data locally.

Does FYI Comply with Privacy Laws? FYI complies with both Australian and UK privacy laws. We are committed to preventing unauthorised access to or disclosure of customer information.

If I want to leave FYI can I export my documents? Yes. Your practice always owns your data. If you want to leave, anyone with the role of administrator can download your documents in a logical folder hierarchy representing critical metadata.

How difficult is the data migration process? It's easier than you might think. We have built-for-purpose tools and having onboarded hundreds of practices to FYI from a variety of legacy systems, so we've seen pretty much everything when it comes to filing structures.

How long does it take to migrate my documents? This depends on the size of your data and internet connection and could take from a few hours to over a week. Subject to availability, the assisted onboarding process normally takes at least 3 weeks, depending on the amount of preparation required.

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 structures to reduce the amount of change experienced by your team.

Do I need to prepare my data before migrating to FYI? It is useful 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 refileing tools.

Can I maintain my existing MYOB cabinet and category structures? Yes. We are able to sync both the MYOB documents and the MYOB database. [Click here](#) to see the information we extract with your files.

How do you match our client folders to clients in XPM? What if they don't match? 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 match these to XPM using our 'Resolve Clients' function. This makes correcting slight mis-spellings easy to resolve 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 will always be accessible in FYI from the archived clients section.