

# Document management and process automation, **purpose-built** for accountants

Take your practice into the Cloud. And never look back.



# Introduction

The benefits of automation are not always easy to achieve, precisely because they are often determined by the software you are using. In other words, the options of what is possible can be limited.

FYI takes the view that value should be built around the core of an accountants working life, documents. And, by empowering you to carefully curate which processes and tasks would benefit you the most from automation.

From simple routines, to ensuring the effective handling of client data and communication, FYI optimises the benefits of working in the cloud, and is proven to deliver tangible ROI.



**Xero and Office 365 integrations:  
the perfect partners**



With Xero and deep Office 365 integration, FYI provides powerful document management and process customisation.

# Removing friction through automation

It's not just about what you save in terms of time. But, what you also gain by putting any kind of document, communication or process on rails.

Rules based, transparent automation takes care of the things that you care about: timeliness, accuracy, completeness.

FYI also connects to a wider ecosystem of familiar software services to open more possibilities for data and process improvement.



## Connect

FYI connects your emails, documents and client data so that working on delivering a quality service can be your focus. It also connects your clients directly through collaboration on cloud based documents, and automations which can be crafted for powerful effect like personalised email reminders.

## Locate

Auto filing Outlook emails, client communication and documents to one place removes the risk of data going missing and important tasks being deprioritised. Custom data fields can also be created to drive automations that will locate the right clients for the right service at the right time.

## Customise

All automations are based on transparent rules which are built with you and can be customised by you. Every firm works in a way that suits them and their service delivery, so FYI allows you to shape and mould these processes to your exact requirements.



20%

time savings within  
three months

2+ hours

saved on every  
compliance job

£1.00

or less per user/per day

## Get more done... from anywhere



Work at the office or  
remotely with everything  
at your fingertips



Collaborate more  
efficiently with your  
team and clients



Automate processes and  
stop wasting time on  
repetitive tasks



Reduce errors and  
improve consistency for  
a better client experience



**Proven** return on investment

# Working the **FYI** way



**1**

Build brand consistency across every document and communication

**4**

Onboard new staff easily with the way you want to work

**2**

Codify and personalise the experience you want your clients to have

**5**

Create an adaptable, controllable, scalable approach

**3**

Eliminate the time needed to manually create folders, copy files, and recreate emails

**Work in the best way, every single time.**



## How we improved job turn around times through automating personalised client communication.

Our belief was that we could improve time and job management by having a more personal approach to communicating with existing clients. Given the amount of communication needed with every job, we needed a much more efficient way of handling this rather than the blanket email approach we had with Mailchimp.

FYI has provided the perfect answer.

### Personalising communication for more effective responses

Now we can create custom fields in XPM, tag specific clients within that field, and then pick it up within an FYI automation. This means we can be so much more targeted with our approach. Not only are we sending highly targeted and relevant emails, they also appear to come from the individual client manager. By adding these personal touches, we are getting a much higher level of engagement.

### Building automation into workflow

We started with a standard workflow which begins with a first email to request their records. This proved really successful and we started seeing things coming in much quicker than before.

We now have an automation that chases the inevitable queries and specifically a task is created to follow up, and another which creates a status that indicates that something is in review, which then sits with me waiting to do the approval. This means everyone can see the status of work and I know where to focus my attention.

Finally when we send something back to the client we send it with a short explainer video. This helps to put the main points down in such a way that the client really takes notice. A task is then created to make sure that we have followed up by phone a couple of days later.

### The impact

We've easily taken a week off the process. Over all clients and across the year, that really builds up huge savings.

***With this level of automation in place you can measure things like the number of phone calls made, not the number of tax returns done, reinforcing the idea of service even for the smallest and simplest of clients.***

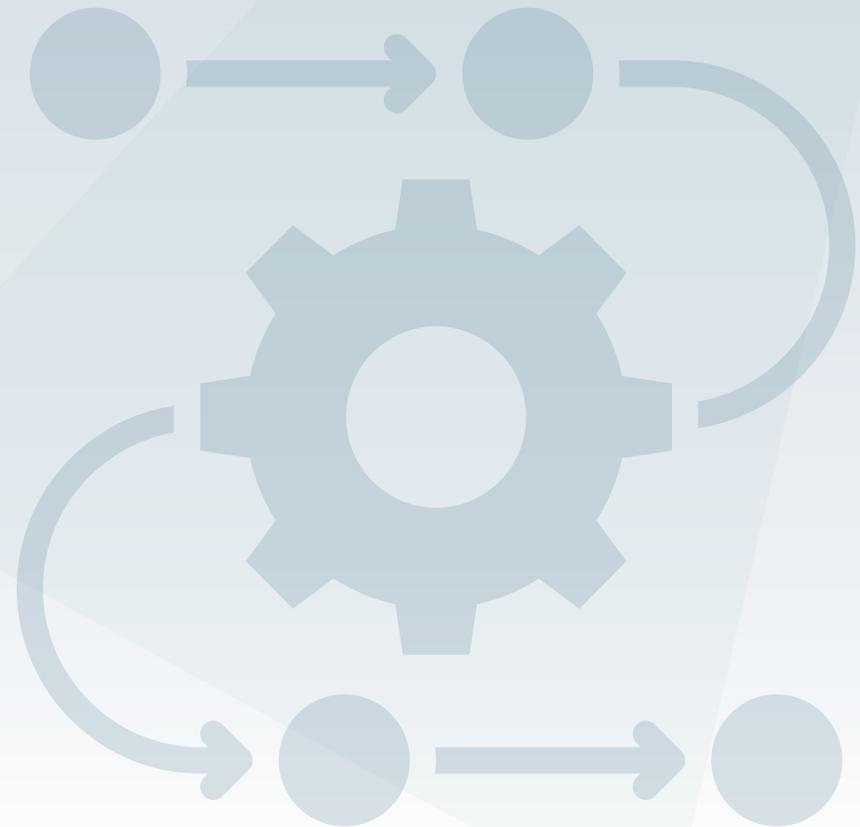
**Dave Forrester – TaxAssist Accountant, Keighley**

# Implementing automation

Getting started with FYI is made easy by working with our experienced team, regardless of what systems you currently use.

Our Automations Library means you can get started with some preset routines and the templates you'll need in just five clicks.

But you'll always be in control, with exception reporting for added assurance.



## Easy to get started

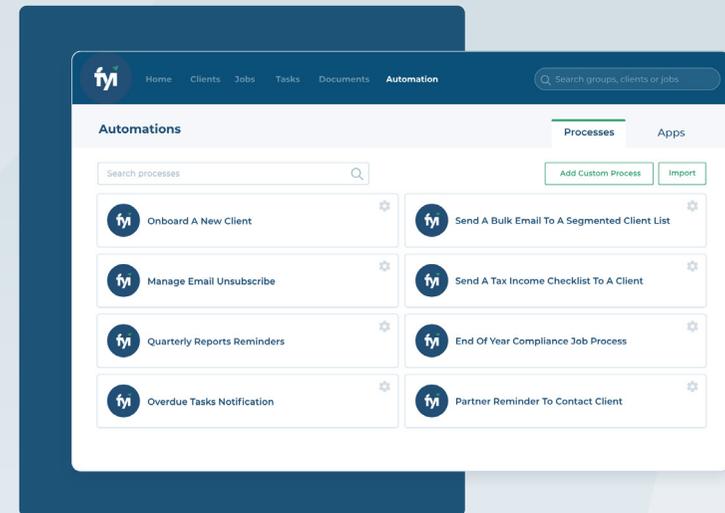
Our skilled and experienced team are here to support you from start to finish. Some aspects are more technical than others - but whether you are moving systems or starting from scratch, we'll provide you with a structured way to get up and running.

## Easy to use

Take the opportunity to review how you work, and build how you want to work from the very beginning. FYI is designed to be as flexible and intuitive as possible for both administrators and staff.

## Easy to take at your own pace

The possibilities are endless when it comes to automating processes and communications, so starting in a controlled and meaningful way is often the best approach. Work with your team and our experts to drive powerful iterations and drive maximum value.



400 million

documents migrated

900

practices onboarded

13,500

users trained

## Onboarding re-imagined, so it works for you!



Go Live in as little as four weeks.



No downtime for your team.



Fast pay-back. Hit the ground running.



**Easy onboarding**

## Case study two



# How we consolidated our practice management approach and prepared for future growth.

Even with extensive testing we've been unable to find practice management software that works for us, so have used a variety of systems. The flexibility and visual nature of Trello has worked well, but the way we were storing emails wasn't very efficient. Also, Trello is fine when there are a few team members but the pathway over the next few years is to acquire another practice. This means more rigour is needed.

FYI was attractive because the Office 365 integration solves the email problem, the kanban style board approach mirrors Trello, and the benefits of automating some processes and introducing standardised templates makes life so much easier.

### Making the move

Getting started was easy, and the support we received has been fantastic. Once the data was in we've been gradually moving the workflows over, as I wanted the team to feel confident in the approach.

### Gaining insight and control also saves time

FYI has given me even better insights into what is happening. I can see how jobs are coming along, what needs my attention and even started using time recording to help us schedule better.

Templates are a huge time saver too, for example with payroll clients we can bring in all the standard information automatically and just add the variable PAYE data before firing off. Or our AML checklist, which pulls in client details, and I know if the templates are updated all the new checklists will be the latest versions.

Getting the automation right, means templates are brought in at the right time in a workflow and we save so much time.

### Our approach is codified in FYI

The whole approach has allowed us to be more organised and much more efficient. And from a growth point of view, bringing in a new team member is so easy, because you can see what work they should be doing and they let the system guide them in the way we do things.

**Jessica Pillow – Founder & Director, Pillow May**

# Security and trust

Client data and technical delivery are at the core of our approach to security and trust. But we also understand that it's the human factors which are essential for confidence and that make the biggest difference to you and your clients.



 <p><b>Architecture</b> AWS Well-Architected Framework</p>	 <p><b>Authentication</b> Microsoft Windows Authentication</p>	 <p><b>Availability</b> 24/7 data protection</p>	 <p><b>Backup</b> Every document and version fully restorable</p>
 <p><b>Certification</b> Certified at the highest international standards</p>	 <p><b>Data Security</b> Highest levels of data encryption</p>	 <p><b>Disaster Recovery</b> Full protection in case of disaster</p>	 <p><b>Hosting</b> Secure, fast, reliable hosting</p>

## Enterprise-grade security right from the start



### Secure

Highest levels of data encryption and data security



### Reliable

99.99% uptime



### Future Proof

Engineered for long-term scalability

## Transparency at all times

Create, monitor and review every process so you can feel confident that you know what's going on and that you have control at all times.

## Roles and permissions

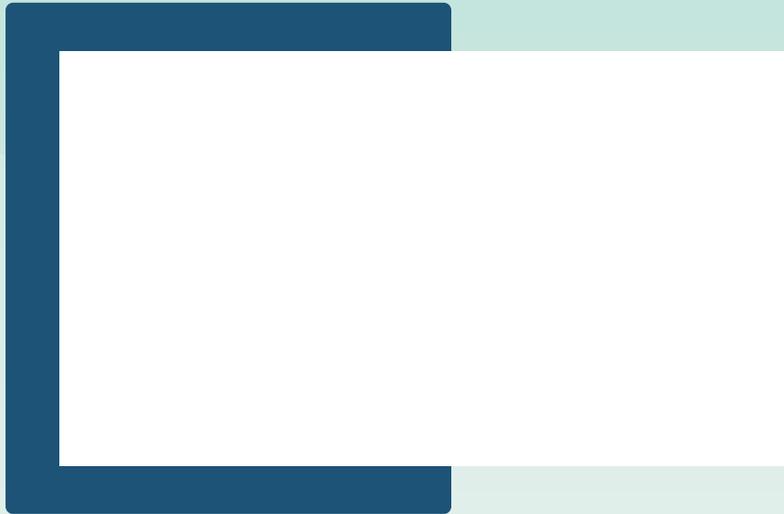
Lockdown FYI so staff can use it with confidence and changes are made only by those authorised to do so.

## Secure collaboration

Work with clients, on the same documents, in the same place, but always with you in control.



**Better protection for total peace of mind**



**We are on the verge of not just clients and accountants looking at cloud bookkeeping, but actually being close to realising the digital practice.**

For firms looking for richer functionality around workflow automation and document management, FYI adds a new layer to the experience of Xero Practice Manager (XPM).

I've been so impressed with relatable functionality, email auto filing and ways of working that you might expect to see in a CRM system. It brings big functionality to firms of all sizes, and is a great example of the democratisation of software.

Pushed on by regulatory change, and the need to build capacity, bringing together XPM and Office 365 with FYI will be a great addition for your firm.

**Ian Phillips – Head of Partner Sales, Xero**

**Want to see FYI in action?**

Visit [www.fyidocs.com/uk](http://www.fyidocs.com/uk) and book a demo.

