MASTERCLASS

OPTIMISING YOUR STATIONERY AND TEMPLATES

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

Meet your hosts

Rob Cameron

Co-Founder and CEO

- FYI is the fourth generation of a product concept Rob has been working on in his 20+ years developing solutions for accountants.
- He is a Chartered Accountant with experience working in suburban practices and larger firms PWC, PKF and Deloitte.
- Rob also led the global product strategy for accountants at MYOB prior to founding FYI

Follow Rob

Jack Thiel

Client Success Manager

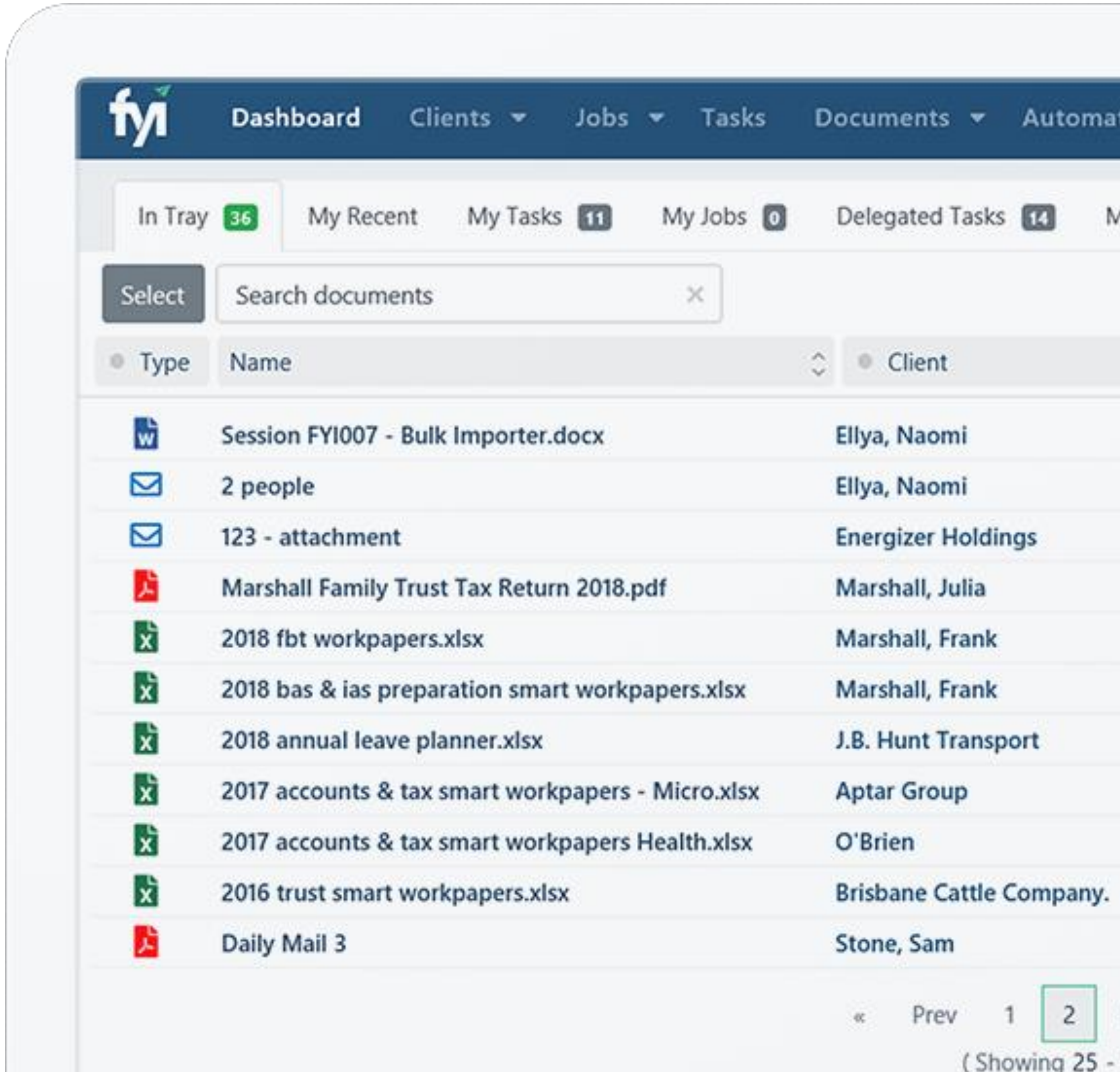
- A Chartered Accountant with more than 5 years working in the profession and a specialisation in SaaS technology
- Jack leads our Client Success Team to ensure FYI clients see early and ongoing return on their investment in FYI

Follow Jack

In this masterclass
Learn how to:

- Create new stationery and templates
- Add stationery and templates to FYI
- Create email signatures and templates
- Administer stationery and templates
- Send Emails from templates

We'll also share an exciting new feature release and some handy tips to help you manage your emails.



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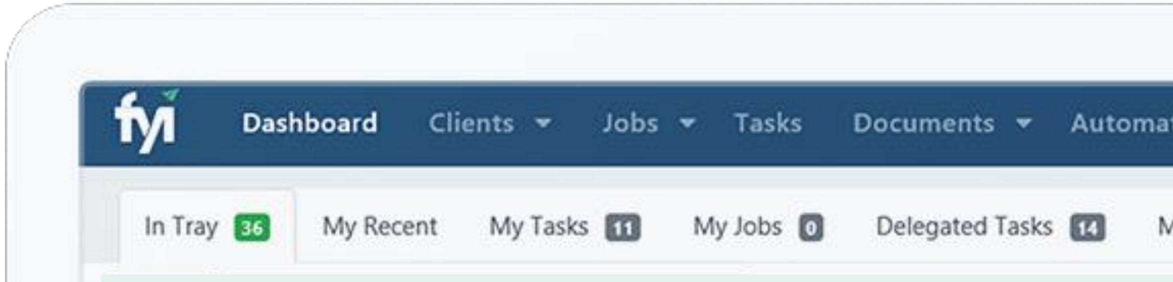


AVAILABLE RESOURCES

- Webinar recording
- Presentation slides
- Best-practice template example
- List of merge fields

Click here to download

STATIONERY vs TEMPLATES

What’s the difference?

Stationery vs. Templates

Stationery = letterheads and email signatures

Templates = body of document or email that sits within the stationery

Growth Partners

{ DATE \@ "MMMM d, yyyy" * MERGEFORMAT }

«Addressee»
«PostalAddress»

Dear «FirstName»,

Yours sincerely,

«AuthorName»
«AuthorRole»

Growth Partners Pty Ltd
Sydney
Level 8, 800 Central Street. Sydney, NSW, 2000
GPO Box 8888 NSW 2001

ABN 76 178 123 888

www.growthpartners.com.au
Telephone 02 9400 1000

Visit FYI Help > Administration
for more information on **Stationery, Templates and Merge Fields**

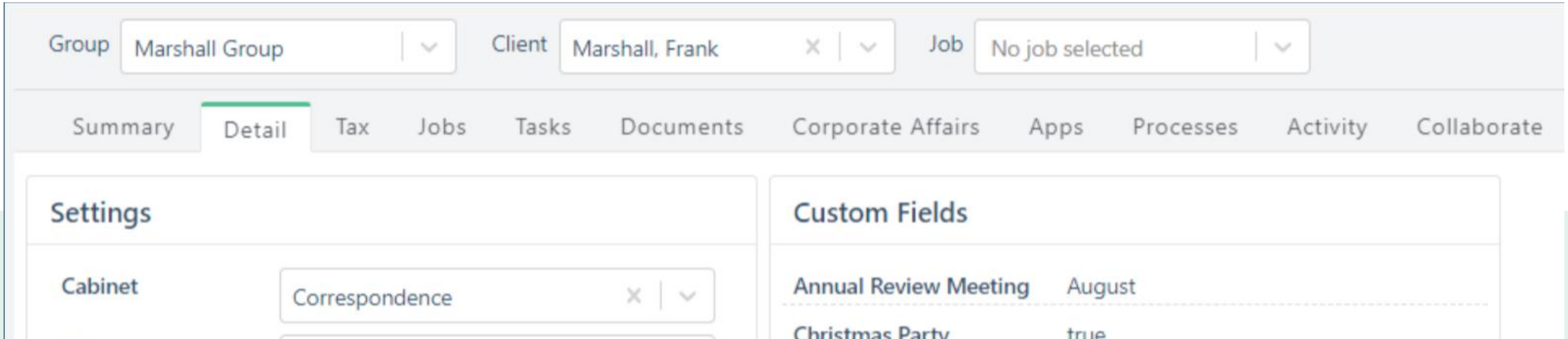
CREATING NEW STATIONERY FROM SCRATCH

Creating New Stationery
Handy Tips

- Click here to download the **list of merge fields** PDF for all the options available.
- Utilise the **reference number** merge field for improved search and retrieval
- It’s important to insert bookmarks into your stationery called **body** and **signature**
- **Conditional / logical fields** are possible in Word

XPM data drives FYI data

- Clean and consistent data in XPM produces the best results in FYI
- Leverage **XPM custom fields** for greater customisation



ADDING STATIONERY AND TEMPLATES TO FYI

Adding Stationery and Templates to FYI

Handy Tips

- Add new stationery and templates via **drag and drop**
- Upload new versions of existing stationery and templates by **removing** and **re-uploading**

Visit FYI Help > Administration
for more information on **Creating Stationery and Templates**

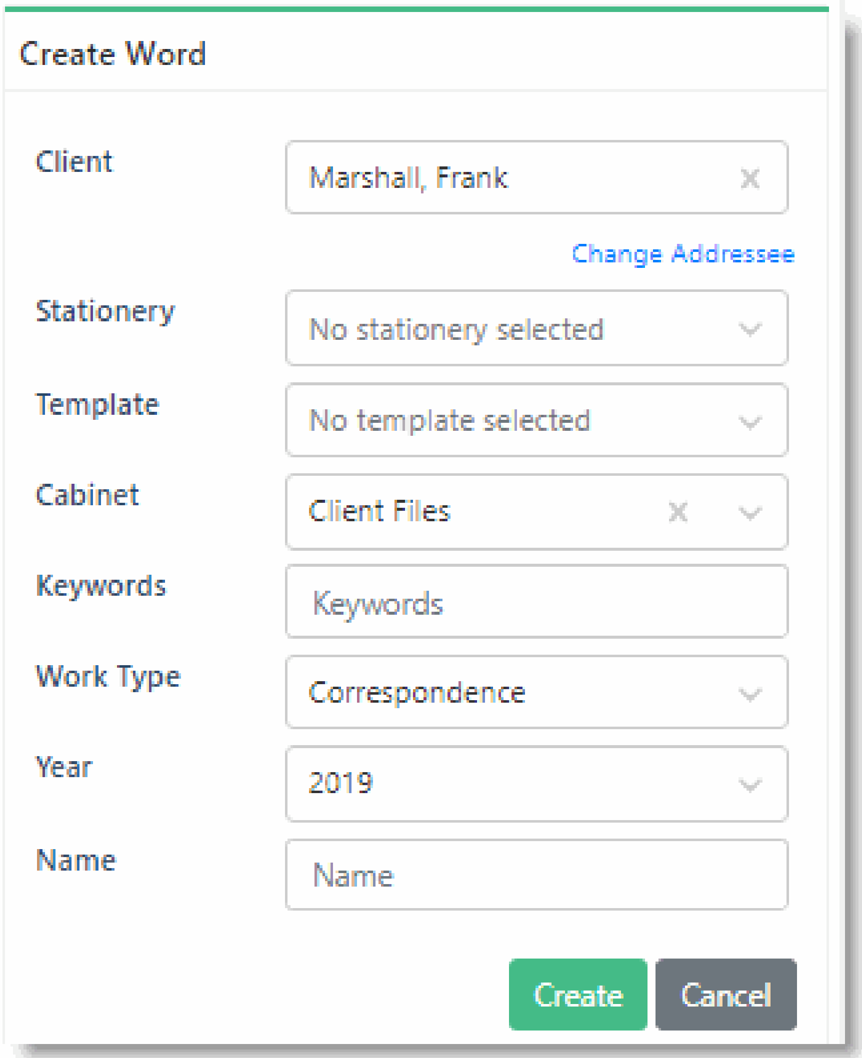
UTILISING STATIONERY AND TEMPLATES

Creating new documents in FYI
Assigning documents for approval
Inserting signatures

Creating new documents in FYI

Handy Tips

- When creating new documents in FYI, select your preferred **stationery** and **template** from the **FYI Drawer**
- FYI will **automatically** populate merge fields (where the data exists)
- If the data does not exist, or the merge field is not correct, then the merge field title will remain in place upon document creation

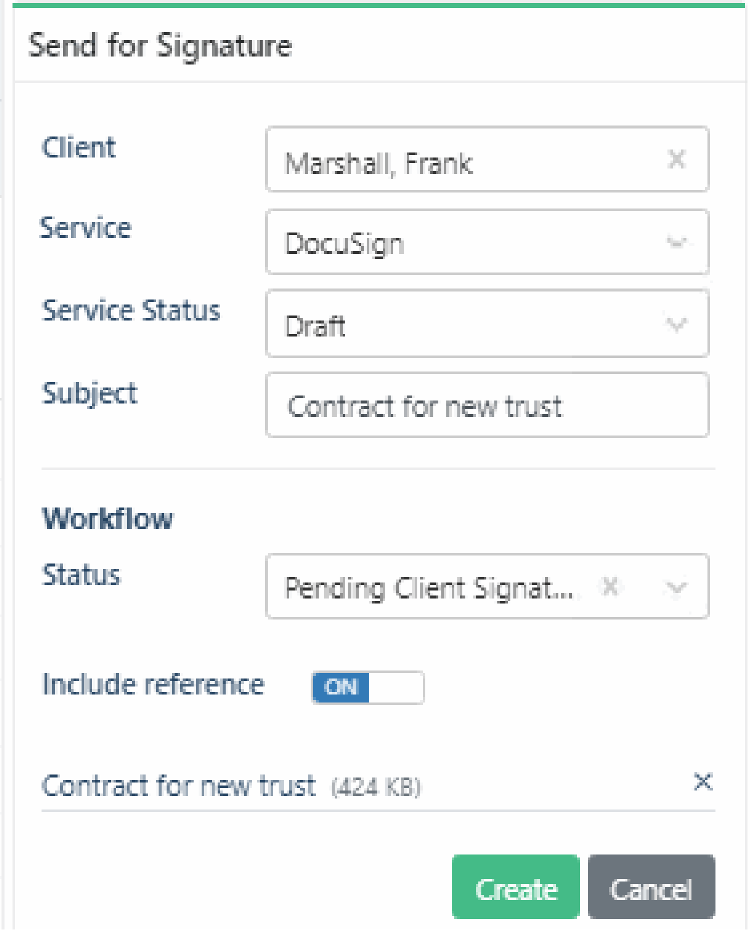


Visit FYI Help > Document Management
for more information on [Creating a New Word Document]

Assigning documents for approval

Handy Tips

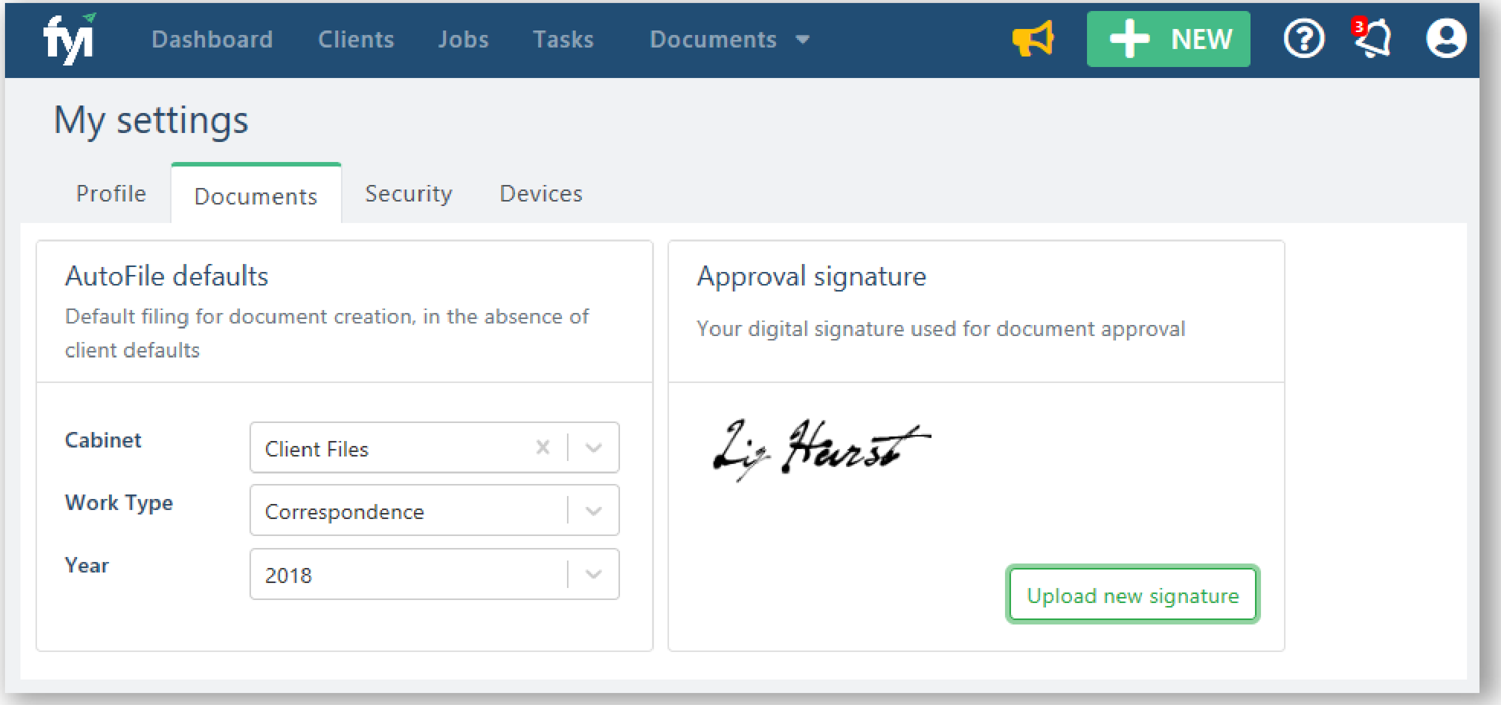
- Request a signature via the **workflow** function in the FYI Drawer
- The designated approver will receive a **special task** in FYI
- The approver can approve the document from the FYI drawer, and then from within Word, easily **insert their signature**
- Word documents can be **converted to .pdf** without leaving FYI



Visit FYI Help > Automation > Collaborate
for more information on [Using Digital Signatures]

Inserting signatures
Handy Tips

- Upload your signature via My Settings



Visit FYI Help > Document Management > Working with Documents
for more information on **Adding your digital signaure to documents**

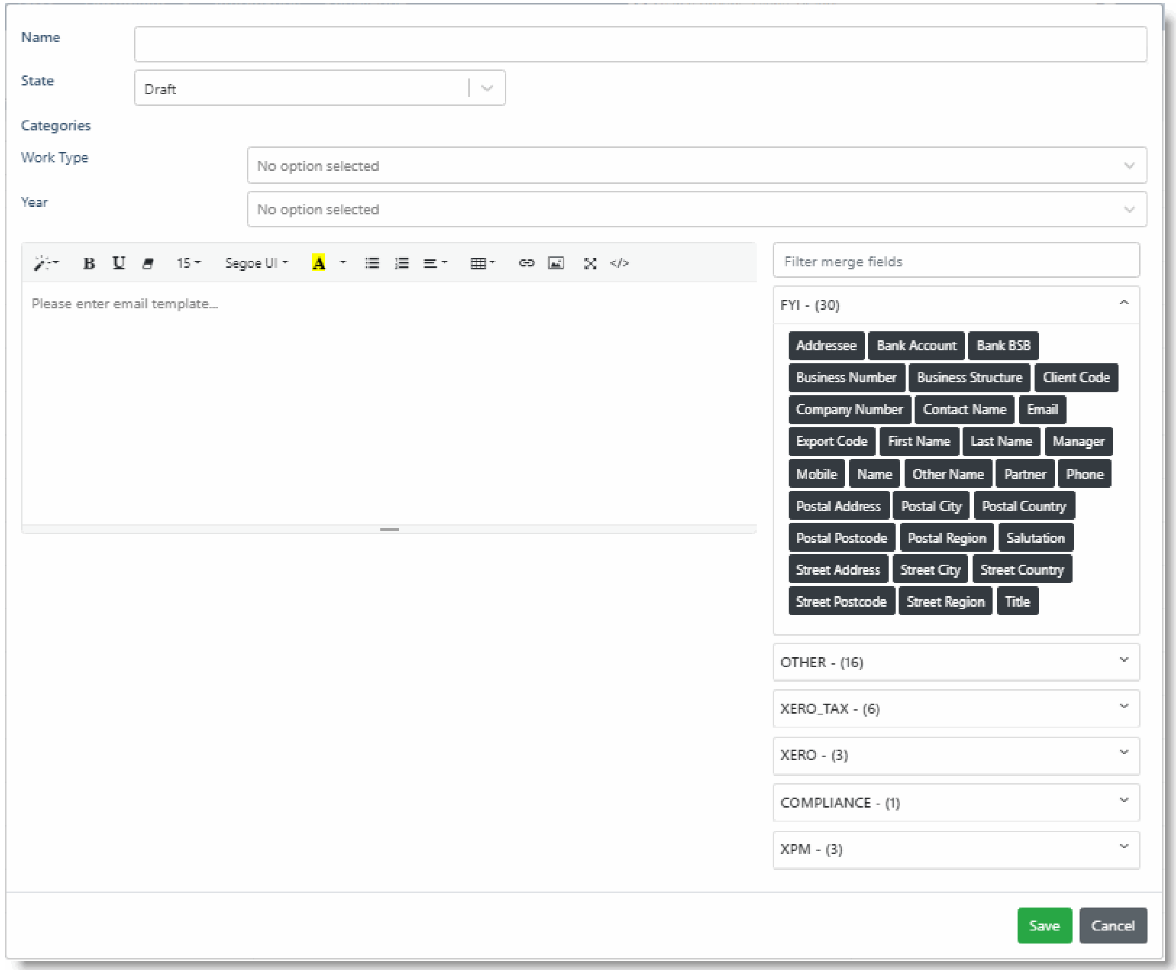
CREATING EMAIL SIGNATURES AND TEMPLATES

Creating email signatures and templates

Handy Tips

- Add practice-wide **email templates** and publish them for use by the team
- Leverage FYI, XPM and other **merge fields** from within the email editor
- Practice-wide **email signatures** ensure consistency amongst staff (+ easy to update)
- Use FYI merge fields to **personalise** your email signature

Practice-wide email signatures are required for you to leverage automated processes



Visit FYI Help > Administration
for more information on **Stationery and Templates for Email**

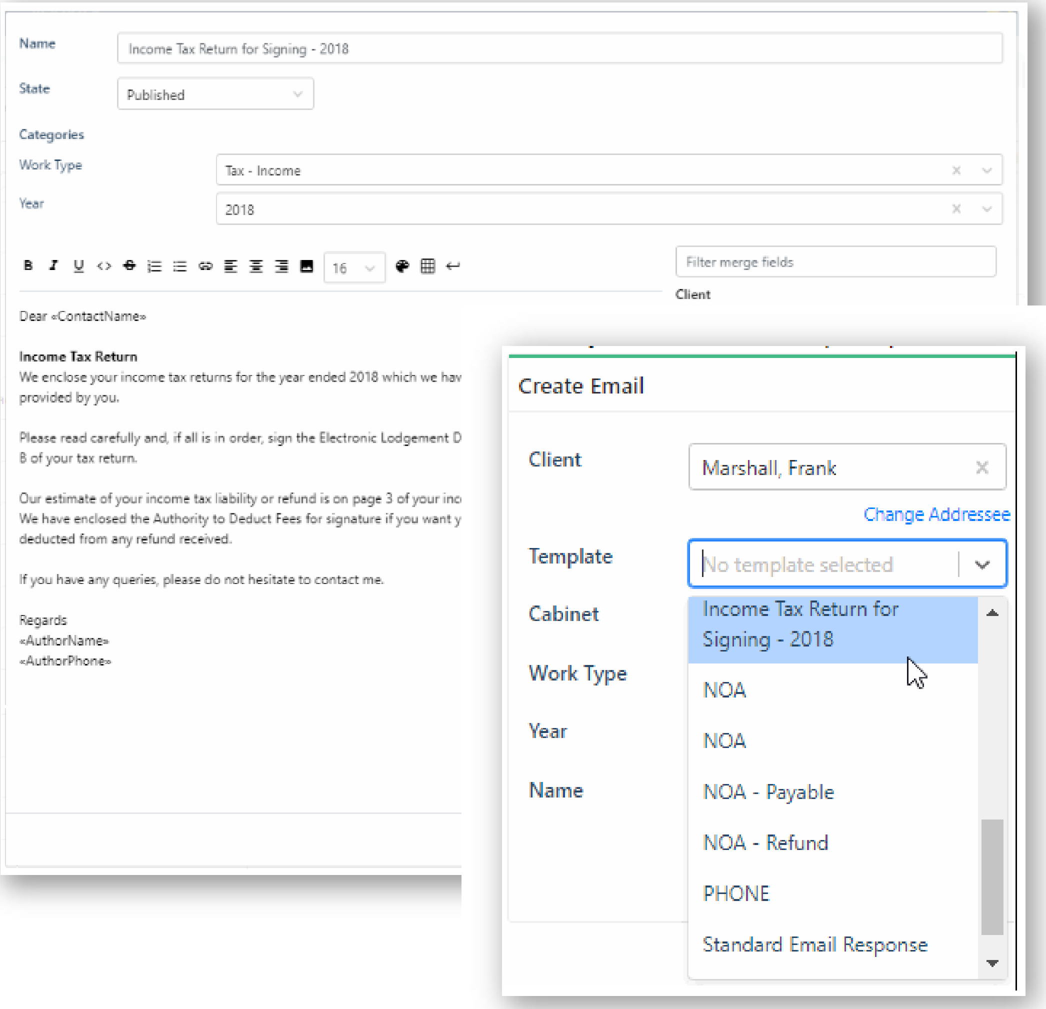
SENDING EMAILS FROM TEMPLATES

Adding attachements

Sending emails from templates

Handy Tips

- Creating new emails from templates can be done via the **+New** button
- If you want to **add attachments**, select these before you click Send
- Attachments can be **converted to .pdf** upon creation of the email
- Attachments can be sent via **secure OneDrive links**



Visit FYI Help > Email Management > Sending Emails
for more information on [Creating Emails from Templates]

ADMINISTERING STATIONERY AND TEMPLATES

Template states
User group functionality
Knowledge cabinets
Accessing content from Change GPS

Administrating stationery and templates

Handy Tips

- Update **template states** (Draft, Published or Archived) to control which ones are accessible to team members
- Determine which users can create or edit templates via the **user group** functionality within **Practice Settings > Admin**
- View templates in the **Knowledge** tab and add your own bespoke knowledge cabinets relevant to your practice

Administering stationery and templates

Change GPS integration

- Client friendly documents, available when you need them
- No need to re-invent the wheel
- Proven to work
- Ensure consistency and efficiency throughout your practice

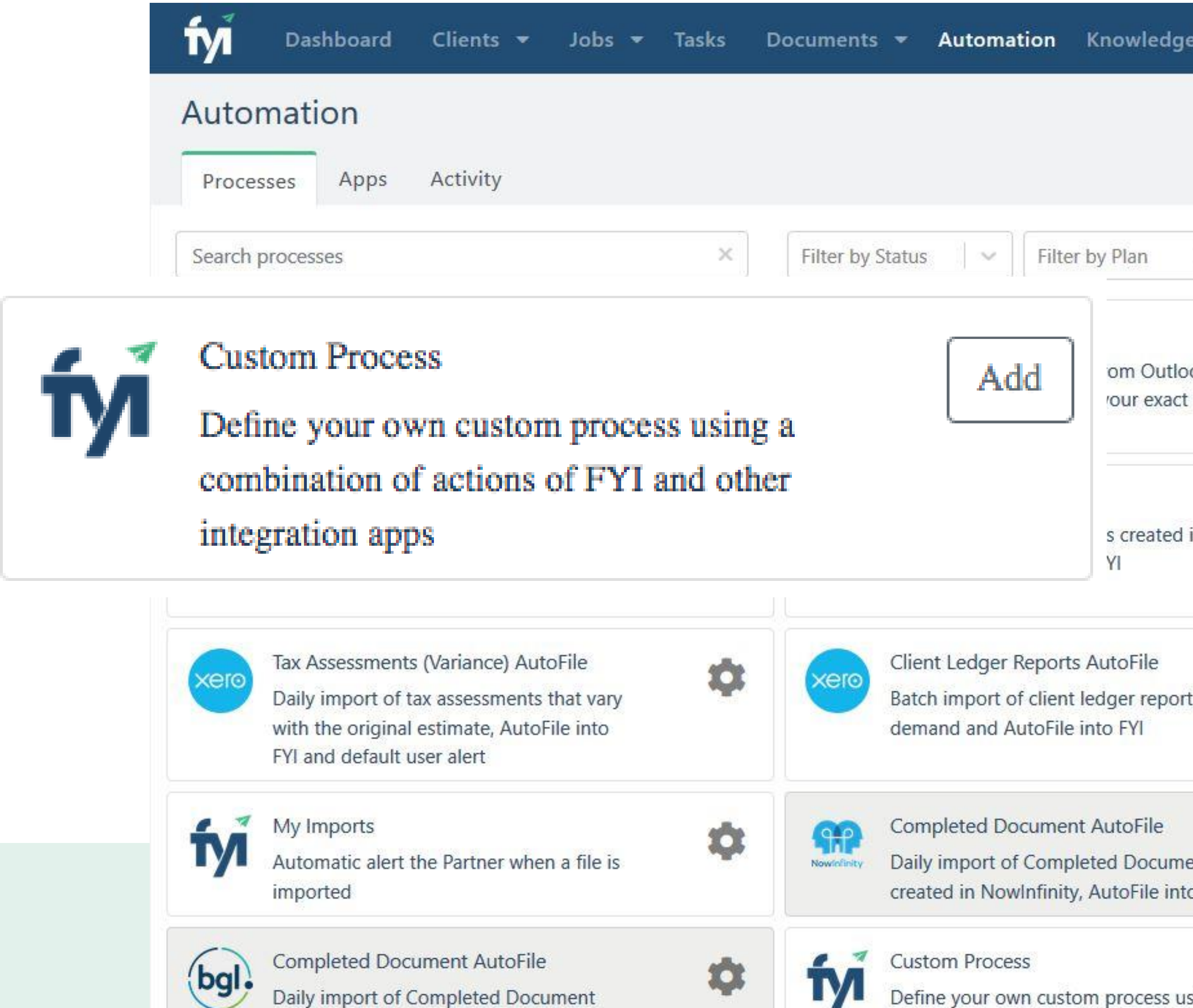
COMING SOON

CUSTOM PROCESSES

Custom Process Example

Creating a scheduled email for select clients

- Set up a **series of steps** to be performed by FYI automatically (eg. create tasks and documents, send emails and more…)
- Define the **trigger** (manual or scheduled) for each process
- Add **process filters** to run processes for select clients, partners etc
- Assign tasks as **'blocking'** to control the process flow



SPOTLIGHT ON

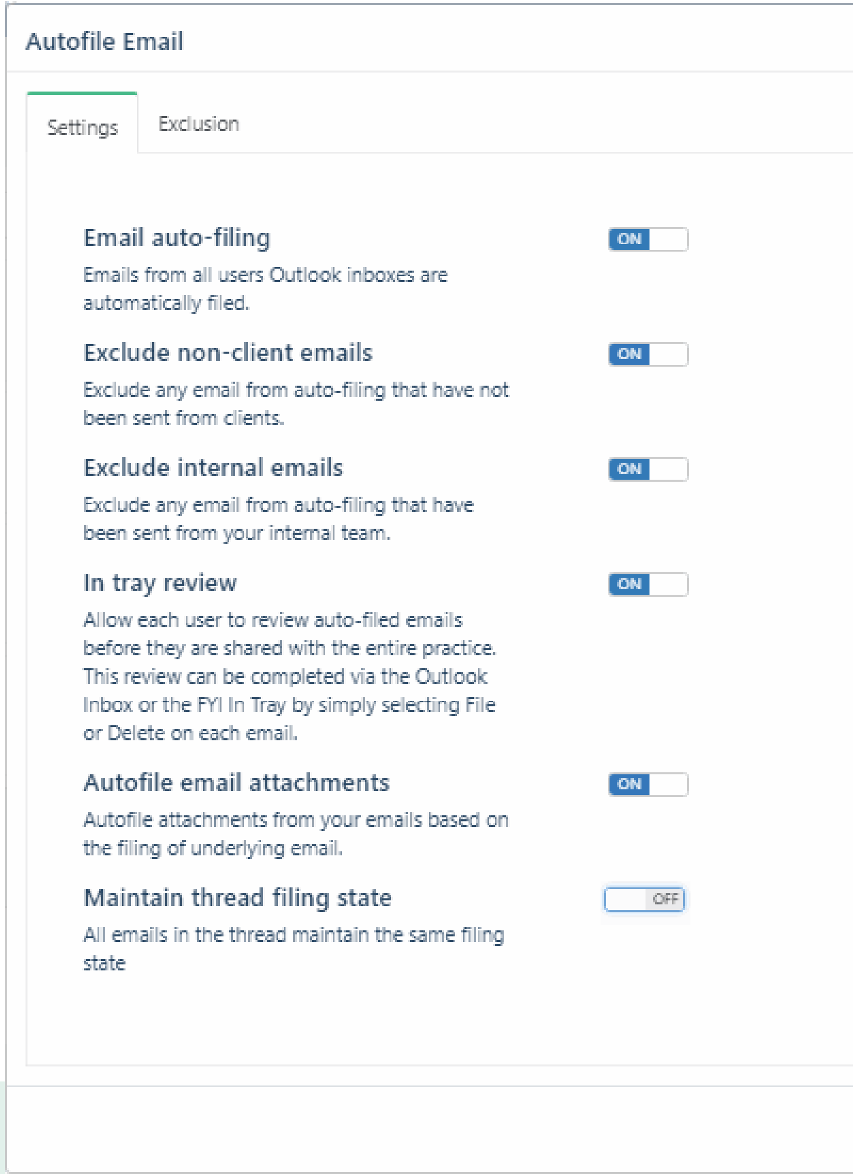
EMAIL BEST PRACTICE

AutoFile vs In-tray review

What's right for you?

When making this decision, we recommend considering:

- Quantity of emails
- Confidentiality
- Available time

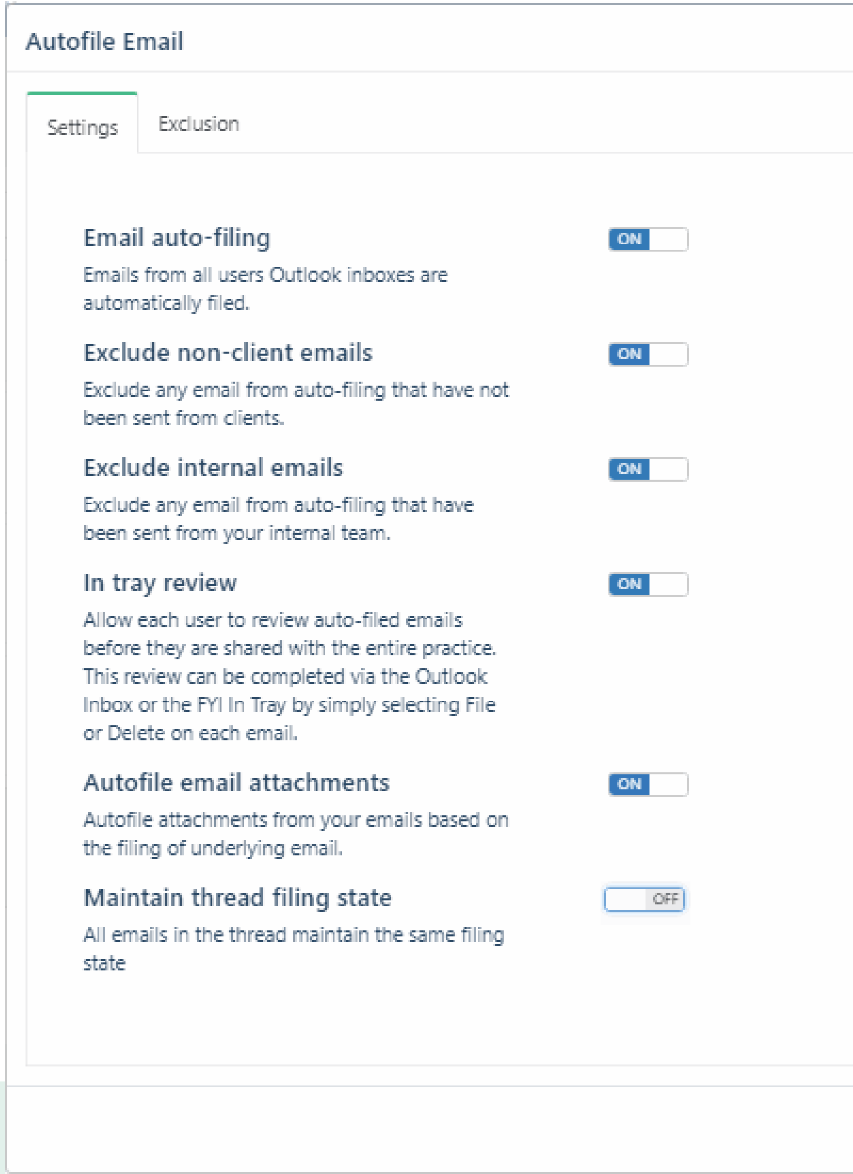


Visit FYI Help > Outlook Automations
for more information on **Email Auto-file Settings and Exclusions**

AutoFile Settings

What's right for you?

AutoFile Approach	No AutoFile	In-Tray Review On	AutoFile
Control	Most	Moderate	Least
Time & Effort	Most	Moderate	Least
Recommended For:		New Users	Advanced Users



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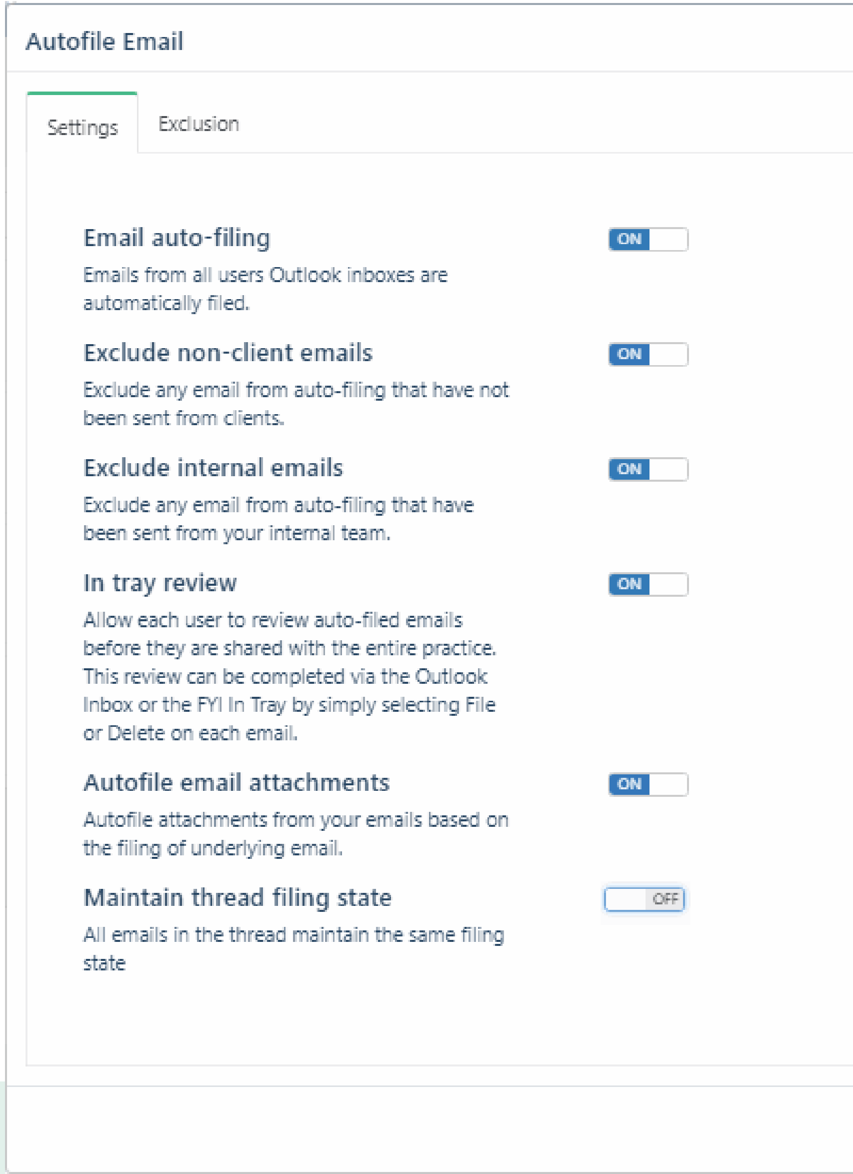
AutoFile vs In-tray review

What's right for you?

- Determine the email AutoFile settings that are right for you
- Set up **exclusions** to avoid spam or other annoying emails
- Define different **individual** settings if this is your preference



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THAT'S A WRAP!!

SOME NEXT STEPS

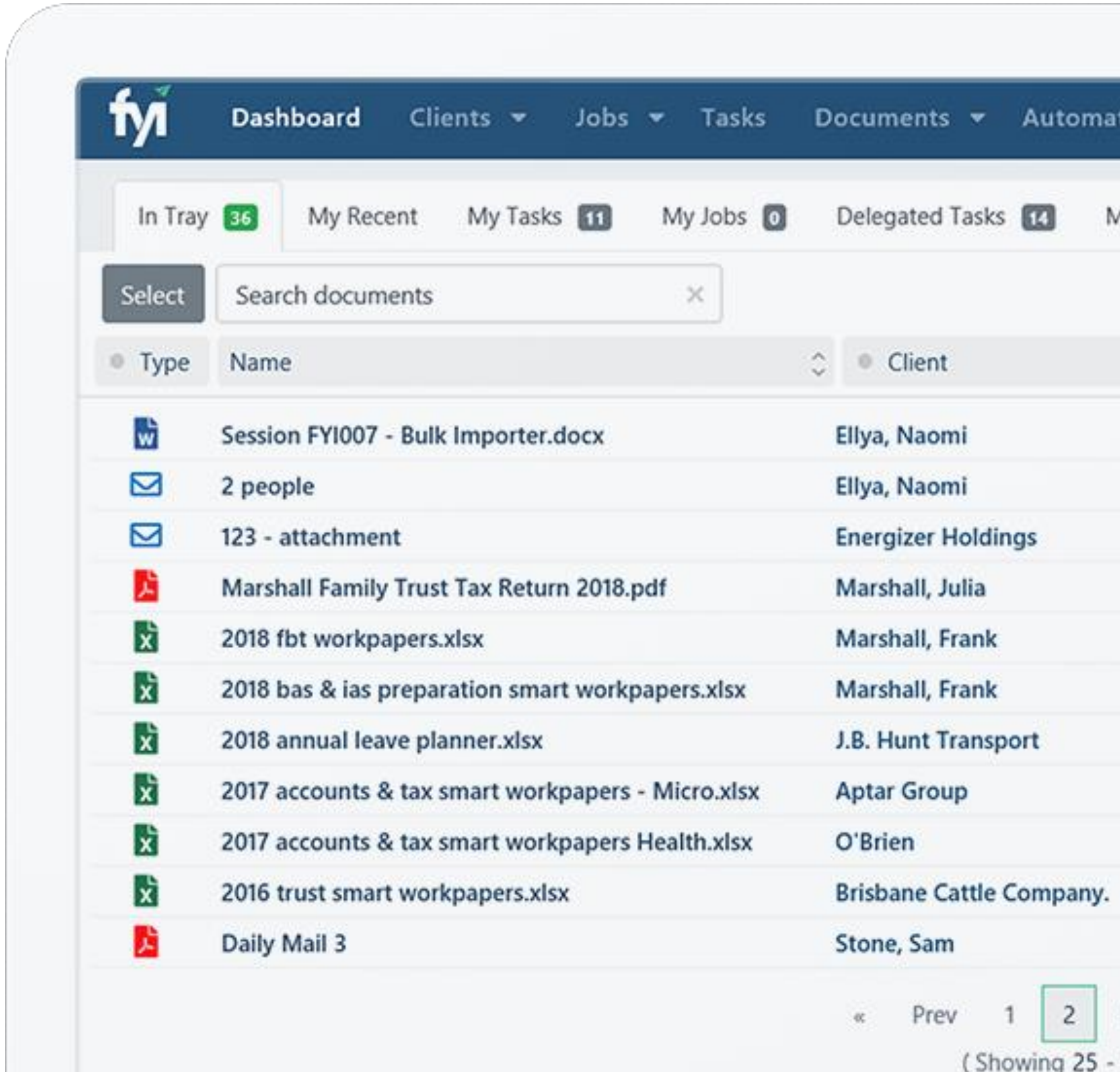
What to take-away from this session

XPM data is important

- Book time to review your XPM data
- Ensure consistency amongst clients in fields such as ‘salutation’
- Leverage custom fields

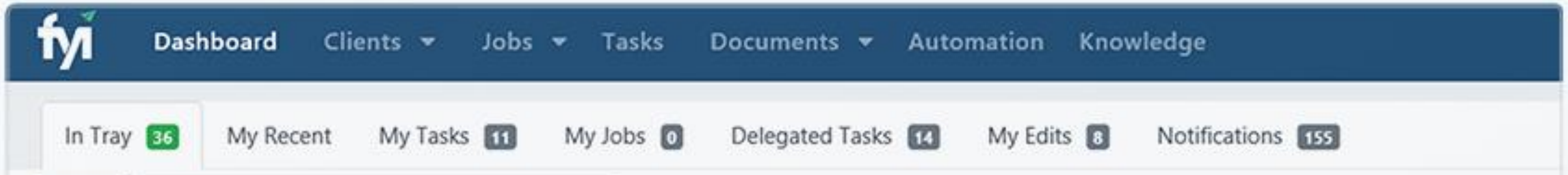
Invest in good templates

- Prepare a style-guide for your templates (fonts, sizes etc)
- Prepare 5 x Word templates
- Prepare 5 x email templates
- Set up your practice signature



Masterclass resources

Available to download



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Next Masterclass

Save the Date

COMMUNITY MASTERCLASS

Hosted by FYI

Thursday, 12th December
12:30pm AEST

Best Practice Document Filing

Join Rob Cameron, CEO of FYI, and Jack Thiel, Customer Success Manager at FYI, for a strategic perspective on how to optimise and future proof your filing structure.

In this masterclass you'll learn:

- Why the document filing structure you choose today will determine your ability to leverage data in the future
- How FYI leverages jobs in Xero Practice Manager to create efficient filing methods
- How best-practice filing can be detailed, simple and efficient
- **Plus how you can setup the best practice filing structure in your firm's instance of FYI**

FOR MORE INFORMATION

www.support.fyidocs.com

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