

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



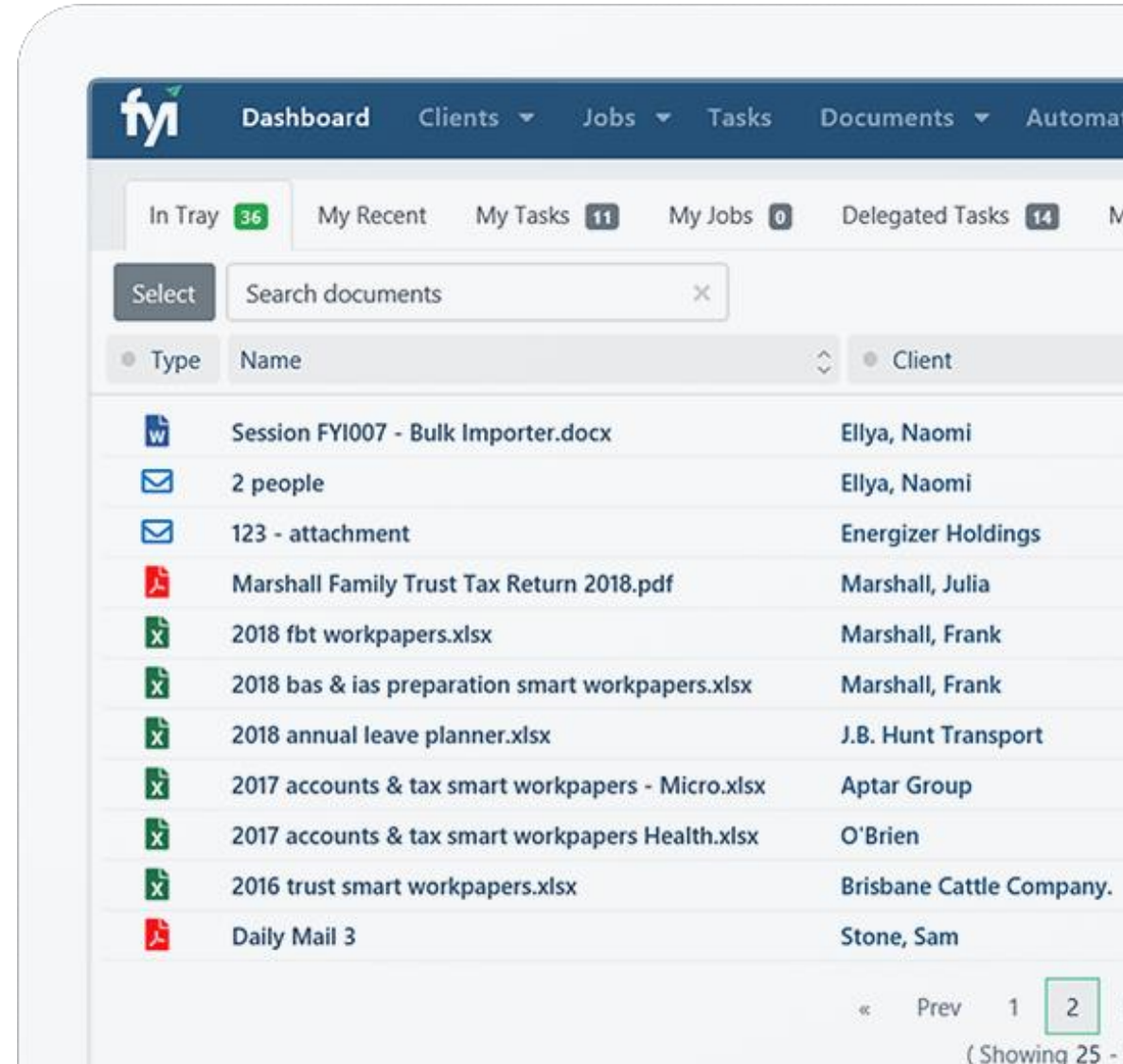
[Follow Jack](#)



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.

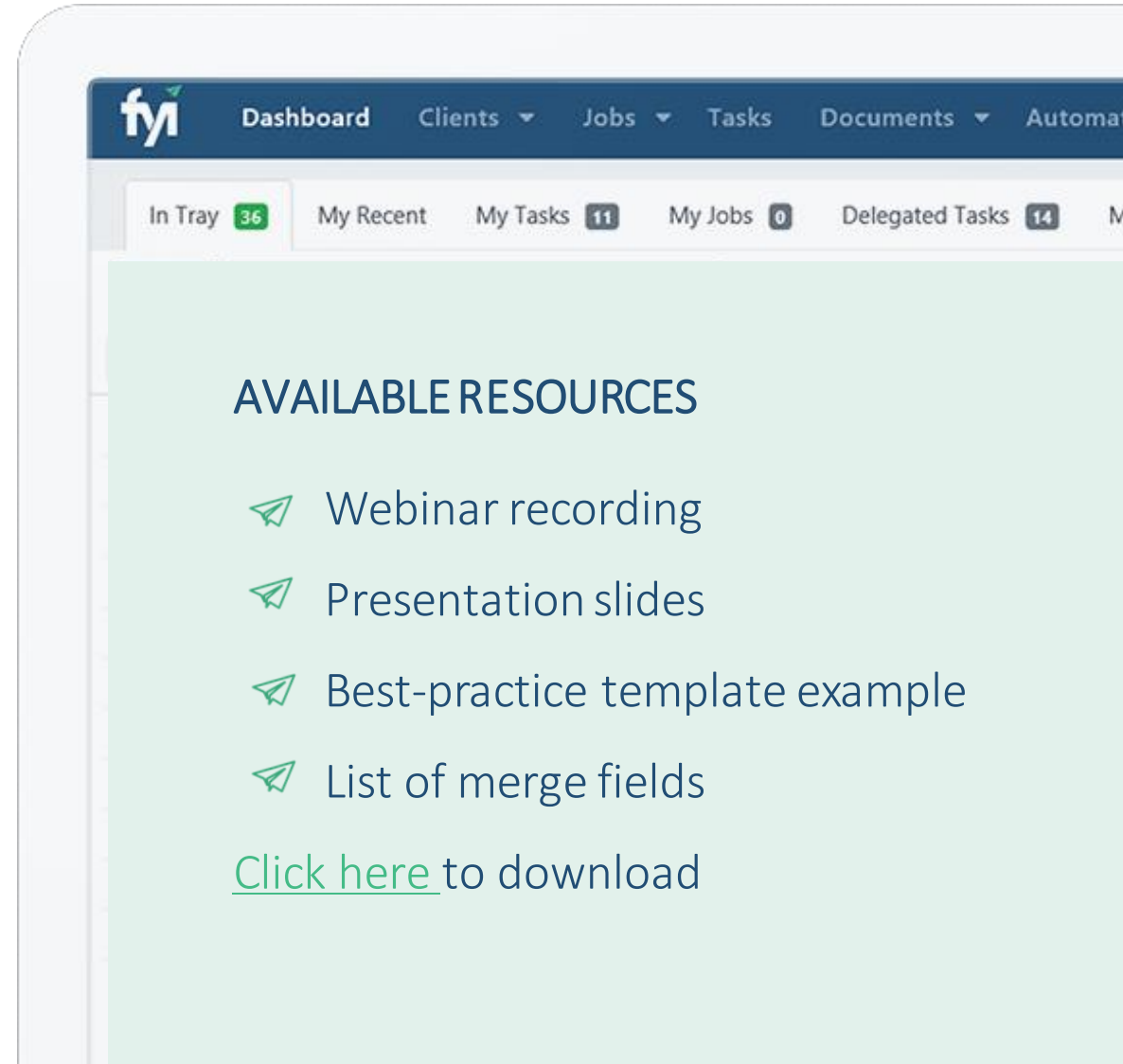




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- ✈ Administer stationery and templates
- ✈ Bullet point number 5

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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»,

I

Yours sincerely,

I

«AuthorName»
«AuthorRole»

Growth Partners Pty Ltd ABN 76 178 123 888
Sydney
Level 8, 800 Central Street. Sydney, NSW, 2000
GPO Box 8888 NSW 2001

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





Creating New Stationery

Handy Tips

XPM data drives FYI data

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

Group Marshall Group | v

Client Marshall, Frank x | v

Job No job selected | v

Summary

Detail

Tax

Jobs

Tasks

Documents

Corporate Affairs

Apps

Processes

Activity

Collaborate

Settings

Cabinet Correspondence x | v

Custom Fields

Annual Review Meeting August

Christmas Party true



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

Create Word

Client	<div>Marshall, Frank</div> <div>Change Addressee</div>
Stationery	<div>No stationery selected</div>
Template	<div>No template selected</div>
Cabinet	<div>Client Files</div>
Keywords	<div>Keywords</div>
Work Type	<div>Correspondence</div>
Year	<div>2019</div>
Name	<div>Name</div>

Create

Cancel





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

Send for Signature

Client	Marshall, Frank	✕
Service	DocuSign	▼
Service Status	Draft	▼
Subject	Contract for new trust	

Workflow

Status	Pending Client Signat...	✕	▼
--------	--------------------------	---	---

Include reference ☒

Contract for new trust (424 KB) ✕

CreateCancel





Inserting signatures Handy Tips

- Upload your signature via [My Settings](#)

A screenshot of the FYI web application's 'My settings' page. The top navigation bar is dark blue with the FYI logo and links to Dashboard, Clients, Jobs, Tasks, and Documents. On the right of the navigation bar are icons for a megaphone, a green '+ NEW' button, a help icon, a notification bell with a red '3', and a user profile icon. The 'My settings' section has four tabs: Profile, Documents (which is selected and highlighted with a green underline), Security, and Devices. Under the 'Documents' tab, there are two main sections. The left section is titled 'AutoFile defaults' and contains three rows of dropdown menus: 'Cabinet' set to 'Client Files', 'Work Type' set to 'Correspondence', and 'Year' set to '2018'. The right section is titled 'Approval signature' and contains the text 'Your digital signature used for document approval'. Below this text is a sample of a handwritten signature, 'Liz Harst', in black ink. At the bottom right of this section is a green button labeled 'Upload new signature'.

Visit [FYI Help > Document Management > Working with Documents](#)
for more information on [Adding your digital signature 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

The screenshot shows the FYI email editor interface. At the top, there are fields for Name, State (set to Draft), Categories, Work Type (No option selected), and Year (No option selected). Below these is a rich text editor with a toolbar containing icons for bold, italic, underline, font size (15), font family (Segoe UI), text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, image, and source code. The main text area contains the placeholder "Please enter email template...". To the right of the editor is a "Filter merge fields" section. It shows a list of available merge fields under the heading "FYI - (30)". The fields are organized into a grid: Addressee, Bank Account, Bank BSB, Business Number, Business Structure, Client Code, Company Number, Contact Name, Email, Export Code, First Name, Last Name, Manager, Mobile, Name, Other Name, Partner, Phone, Postal Address, Postal City, Postal Country, Postal Postcode, Postal Region, Salutation, Street Address, Street City, Street Country, Street Postcode, Street Region, and Title. Below this list are several dropdown menus: "OTHER - (16)", "XERO_TAX - (6)", "XERO - (3)", "COMPLIANCE - (1)", and "XPM - (3)". At the bottom right of the interface are "Save" and "Cancel" buttons.



Visit [FYI Help > Administration](#) for more information on [Stationery and Templates for Email](#)



SENDING EMAILS FROM TEMPLATES

Adding attachments





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**

The screenshot displays the email creation interface. The top section shows a preview of an email template titled "Income Tax Return for Signing - 2018". The template includes fields for Name, State, Categories, Work Type, and Year. Below these fields is a rich text editor with a toolbar and a "Filter merge fields" button. The email body starts with "Dear «ContactName»" and contains text about income tax returns for 2018.

The bottom section shows the "Create Email" dialog. It includes fields for Client (Marshall, Frank), Template (No template selected), Cabinet (Income Tax Return for Signing - 2018), Work Type (NOA), Year (NOA), Name (NOA - Payable, NOA - Refund, PHONE), and a Standard Email Response button.





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

The screenshot displays the FYI Automation interface. At the top, a dark blue navigation bar contains the FYI logo and menu items: Dashboard, Clients, Jobs, Tasks, Documents, Automation, and Knowledge. Below this, the 'Automation' section is active, with sub-tabs for Processes, Apps, and Activity. A search bar labeled 'Search processes' and two filter dropdowns, 'Filter by Status' and 'Filter by Plan', are visible. A large white box with a grey border highlights the 'Custom Process' section. It features the FYI logo, the title 'Custom Process', and a description: 'Define your own custom process using a combination of actions of FYI and other integration apps'. An 'Add' button is located in the top right corner of this box. Below the highlighted section, a grid of process cards is shown. Each card includes an integration logo (xero, FYI, or bgl.), a title, a description, and a gear icon for settings. The cards are: 'Tax Assessments (Variance) AutoFile' (xero), 'Client Ledger Reports AutoFile' (xero), 'My Imports' (FYI), 'Completed Document AutoFile' (NowInfinity), 'Completed Document AutoFile' (bgl.), and 'Custom Process' (FYI).

Automation

Processes Apps Activity

Search processes × Filter by Status Filter by Plan

Custom Process

Define your own custom process using a combination of actions of FYI and other integration apps

Add

xero Tax Assessments (Variance) AutoFile
Daily import of tax assessments that vary with the original estimate, AutoFile into FYI and default user alert

xero Client Ledger Reports AutoFile
Batch import of client ledger report demand and AutoFile into FYI

fyi My Imports
Automatic alert the Partner when a file is imported

NowInfinity Completed Document AutoFile
Daily import of Completed Document created in NowInfinity, AutoFile into

bgl. Completed Document AutoFile
Daily import of Completed Document

fyi Custom Process
Define your own custom process using



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

Autofile Email

Settings

Exclusion

Email auto-filing

Emails from all users Outlook inboxes are automatically filed.

ON

Exclude non-client emails

Exclude any email from auto-filing that have not been sent from clients.

ON

Exclude internal emails

Exclude any email from auto-filing that have been sent from your internal team.

ON

In tray review

Allow each user to review auto-filed emails before they are shared with the entire practice. This review can be completed via the Outlook Inbox or the FYI In Tray by simply selecting File or Delete on each email.

ON

Autofile email attachments

Autofile attachments from your emails based on the filing of underlying email.

ON

Maintain thread filing state

All emails in the thread maintain the same filing state

OFF



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





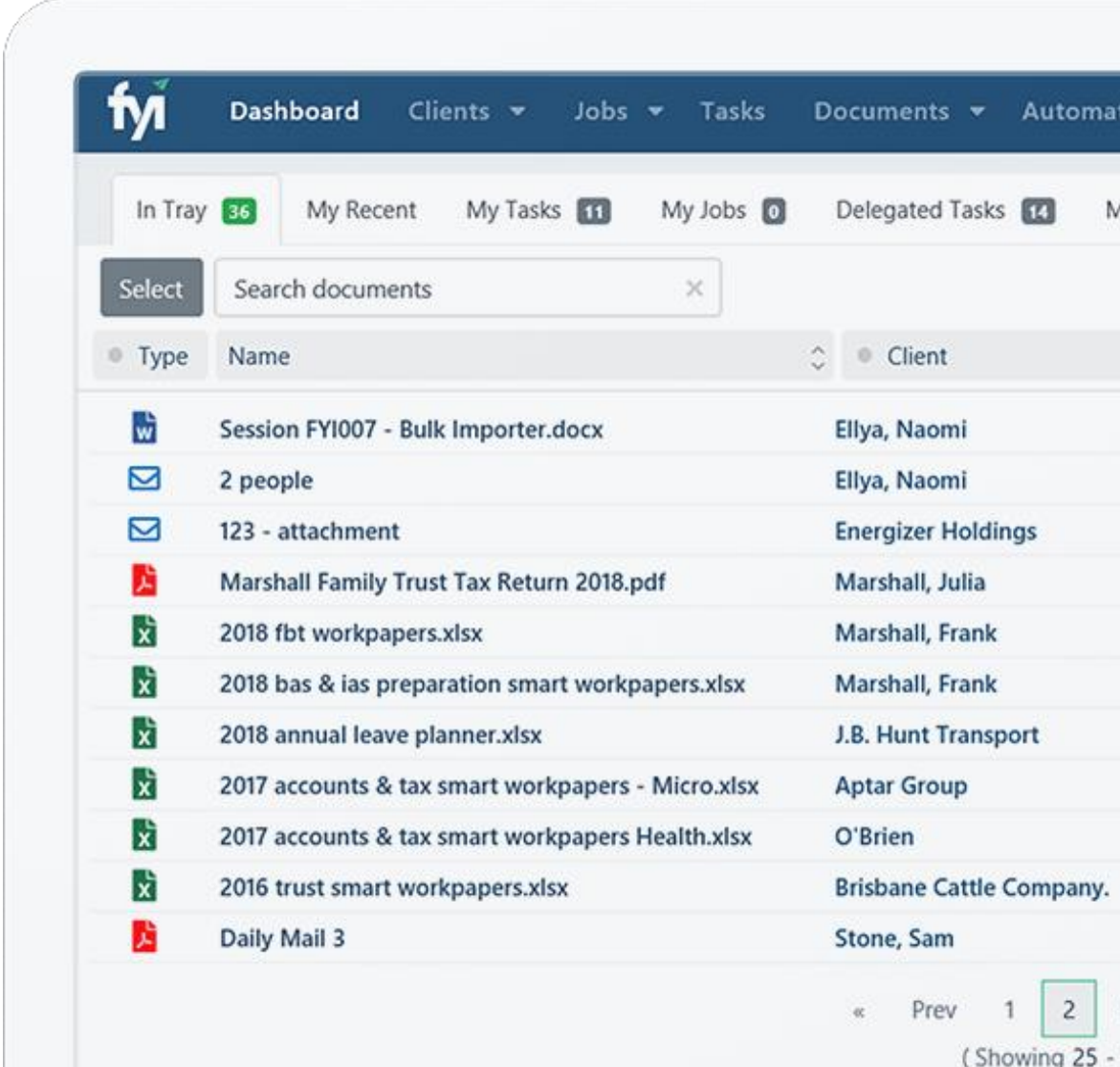
What to take-away from this session

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



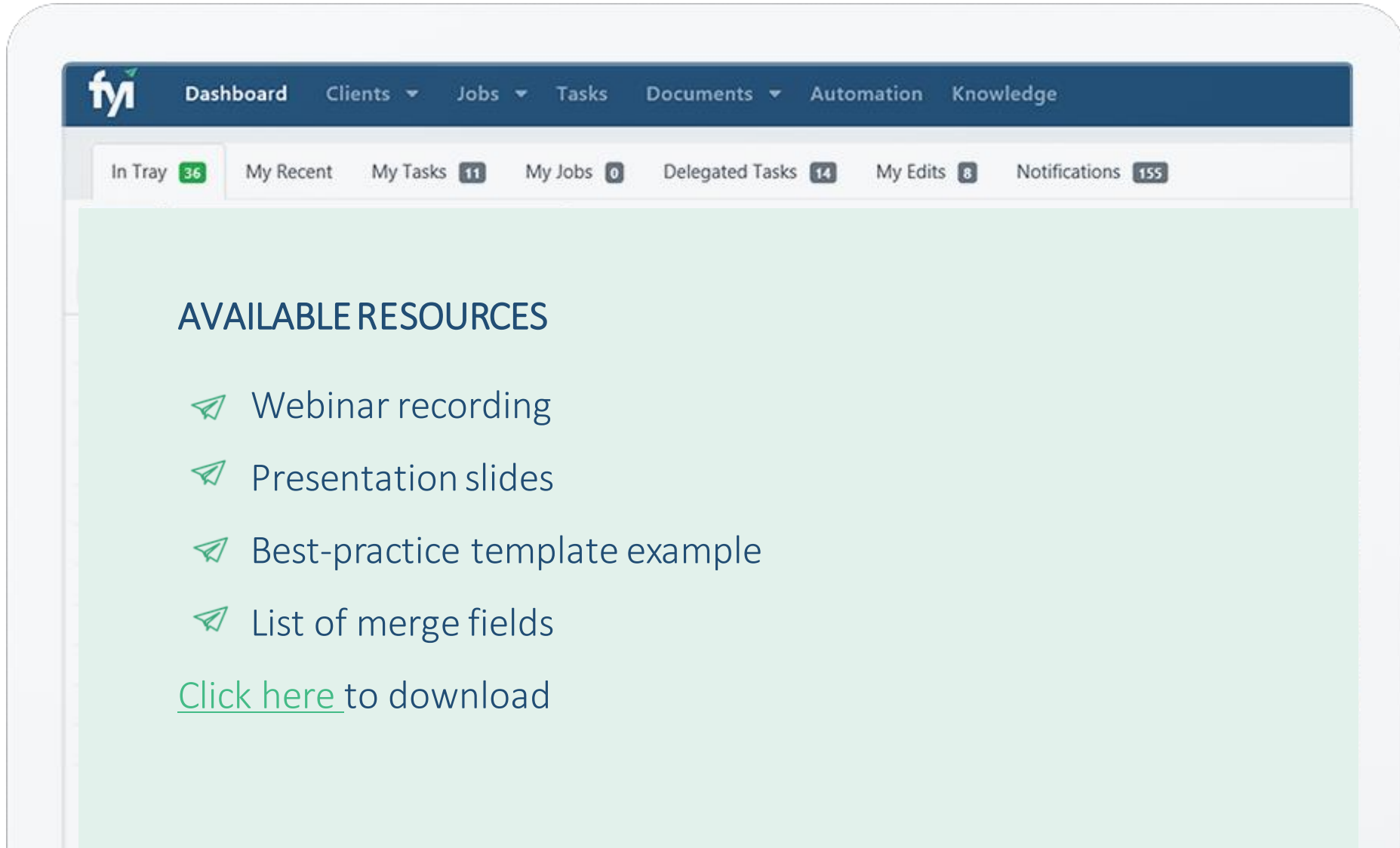
The screenshot displays the FYI Dashboard interface. At the top, there is a navigation bar with the FYI logo and tabs for Dashboard, Clients, Jobs, Tasks, Documents, and Automation. Below this, a summary bar shows 'In Tray' with 36 items, 'My Recent', 'My Tasks' with 11 items, 'My Jobs' with 0 items, and 'Delegated Tasks' with 14 items. A 'Select' button and a 'Search documents' input field are visible. The main content area is a table with columns for 'Type', 'Name', and 'Client'. The table lists various documents and tasks, including 'Session FYI007 - Bulk Importer.docx' assigned to Ellya, Naomi; '2 people' assigned to Ellya, Naomi; '123 - attachment' assigned to Energizer Holdings; 'Marshall Family Trust Tax Return 2018.pdf' assigned to Marshall, Julia; '2018 fbt workpapers.xlsx' assigned to Marshall, Frank; '2018 bas & ias preparation smart workpapers.xlsx' assigned to Marshall, Frank; '2018 annual leave planner.xlsx' assigned to J.B. Hunt Transport; '2017 accounts & tax smart workpapers - Micro.xlsx' assigned to Aptar Group; '2017 accounts & tax smart workpapers Health.xlsx' assigned to O'Brien; '2016 trust smart workpapers.xlsx' assigned to Brisbane Cattle Company; and 'Daily Mail 3' assigned to Stone, Sam. At the bottom right, there is a pagination control showing 'Prev', '1', and '2' (highlighted), with a note '(Showing 25'.

Type	Name	Client
	Session FYI007 - Bulk Importer.docx	Ellya, Naomi
	2 people	Ellya, Naomi
	123 - attachment	Energizer Holdings
	Marshall Family Trust Tax Return 2018.pdf	Marshall, Julia
	2018 fbt workpapers.xlsx	Marshall, Frank
	2018 bas & ias preparation smart workpapers.xlsx	Marshall, Frank
	2018 annual leave planner.xlsx	J.B. Hunt Transport
	2017 accounts & tax smart workpapers - Micro.xlsx	Aptar Group
	2017 accounts & tax smart workpapers Health.xlsx	O'Brien
	2016 trust smart workpapers.xlsx	Brisbane Cattle Company.
	Daily Mail 3	Stone, Sam



Masterclass resources

Available to download





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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