MASTERCLASS TOPIC
OPTIMISING YOUR STATIONERY & TEMPLATES

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

TODAY'S RESOURCES

Speakers:

Rob Cameron
CEO & Founder

Jack Thiel
Client Success Manager

Post-Masterclass:

➤ Recording and copy of presentation

➤ An example best-practice template

➤ Merge fields document
(also available at: Support.fyidocs.com)

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LET'S SHOW YOU **HOW TO**:

🖅 Create new stationery and templates from scratch

🖅 Add stationery and templates to FYI

🖅 Utilise stationery and templates in FYI

🖅 Assign documents for approval and insert signatures

🖅 Create email templates & signatures

🖅 Administer stationery & templates

And lastly, we will touch on an upcoming feature release
and a few handy tips to help you manage your emails!

FYI MASTER CLASS

STATIONERY V TEMPLATE

- Stationery = letterheads, email signatures
- Template = body of document or email [sits within the stationery]

HOW TO CREATE NEW STATIONERY FROM SCRATCH

SUMMARY

⟫ **Merge fields document** available on the FYI help center at support.fyidocs.com

⟫ **Stationery** = letterhead
Template = body of document

⟫ 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

TIP!

XPM DATA DRIVES FYI DATA

Clean and consistent data in XPM produces the best results

Leverage XPM custom fields for greater customisation

Group	Marshall Group	∨	Client	Marshall, Frank	×	∨	Job	No job selected	∨

Summary **Detail** Tax Jobs Tasks Documents Corporate Affairs Apps Processes Activity Collaborate

Settings

Cabinet   Correspondence   × | ∨

Job

Custom Fields

Annual Review Meeting   August

Christmas Party   true

HOW TO ADD STATIONERY & TEMPLATES TO FYI

SUMMARY

- Add new stationery & templates via drag and drop

- Upload new versions of existing stationery & templates, by removing and reuploading

HOW TO UTILISE STATIONERY & TEMPLATES

SUMMARY

- When **creating new documents in FYI** select your preferred stationery and template from the drop-down menu in the 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 upon creation the merge field title will remain in place.

HOW TO ASSIGN DOCUMENTS FOR APPROVAL AND INSERT SIGNATURES

SUMMARY

➤ **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**

➤ **Convert word documents to .pdf** without leaving FYI

➤ **Upload your signature** via My Settings

HOW TO CREATE EMAIL TEMPLATES & SIGNATURES

SUMMARY

- Add practice-wide email templates, publish them for use by the team

- Leverage FYI, XPM and other merge fields from within the email editor

- Add a practice-wide email signature, ensuring consistency amongst staff

- Use of FYI merge fields to personalise email signature

TIP!

PRACTICE-WIDE EMAIL SIGNATURES

- Clean and consistent results for all team members (+ easy to update)
- Required for you to leverage automated processes

HOW TO SEND EMAILS FROM TEMPLATES (WITH ATTACHMENTS)

SUMMARY

- Creating new emails from templates can be done via the +New button

- If you want to add attachments, select these beforehand and hit Send

- Attachments can be converted to .pdf upon creation of the email

- Attachments can be sent via secure OneDrive links

HOW TO ADMINISTER STATIONERY & TEMPLATES

SUMMARY

- Update template states (Draft, Published and Archive) to control which ones are accesible 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 other practice related knowledge cabinets

CONTENT PARTNER
CHANGE GPS

- Client friendly documents available when you need them
- No need to reinvent the wheel, proven documents are available
- Ensure consistency and efficiency throughout your practice

COMING SOON
CUSTOM PROCESSES!

Q Search groups, clients or jobs   ✕

+ NEW   ?

Automation

Processes   Apps   Activity

| Search processes ✕ | Filter by Status ▾ | Filter by Plan ▾ | Filter by App ▾ | Simulate ATO   List View |

Email AutoFile
Import emails from Outlook and AutoFile them based on your exact configuration   ⚙

Calendar Entry AutoFile
Import calendar entries from Outlook and AutoFile them based on your exact configuration   ⚙

Collaborate
Collborate with your clients using third-party services including OneDrive and DropBox   ⚙

Xero Practice Manager
Import clients, client groups and jobs from Xero Practice Manager   ⚙

Tax Return AutoFile
Daily import of tax returns created in Xero Tax, AutoFile a Link into FYI   ⚙

Tax Assessments (Agreed) AutoFile
Daily import of tax assessments that agree with the original estimate, AutoFile into FYI and corresponding client email   ⚙

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

Client Ledger Reports AutoFile
Batch import of client ledger reports on demand and AutoFile into FYI   ⚙

Negative Email Alert
Automatic alert when a negative email is received from a client to a designated default user   ⚙

My Imports
Automatic alert the Partner when a file   ⚙

Completed Document AutoFile
... created in NowInfinity, AutoFile into   ⚙

Annual Statement AutoFile

Completed Document AutoFile
Daily import of Completed Document   ⚙

... using a combination of actions of FYI   ⚙

Custom Process
Define your own custom process using a combination of actions of FYI and other integration apps | Add |

HOW TO CREATE A SCHEDULED EMAIL FOR SELECT CLIENTS

USING CUSTOM PROCESSES

SUMMARY

- Set up a **series of steps to be performed by FYI automatically** (create tasks and documents, send emails and more)

- **Define the trigger** (manual or schedule) for each process

- **Add process filters** to run processes for select clients, partners etc.

- **Assign tasks as 'blocking'** to control the process flow

THAT'S ALL FOR STATIONERY & TEMPLATES!

Refer to our Help Center at support.fyidocs.com for helpful articles, guides and videos

Getting Started

Everything you need to know when onboarding, including Getting Started Guides you can download and Video Tutorials

Email Management

Ensure that every email in or out of your practice is hitting the client file

Document Management

Take your practice paperless and improve your management of client relationships

Search and Retrieval

Jobs

Tasks and Comments

EMAIL BEST PRACTICE

EMAIL BEST PRACTICE APPROACH

AutoFile verse 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
ON

Emails from all users Outlook inboxes are automatically filed.

Exclude internal emails
ON

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

Maintain thread filing state
ON

All emails in the thread maintain the same filing state

Exclude non-client emails
ON

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

In tray review
ON

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.

Autofile email attachments
ON

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

WHAT AUTOFILE SETTINGS ARE RIGHT FOR YOU?

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

SUMMARY

- Determine the **email AutoFile settings** that are right for you

- **Setup exclusions** to avoid spam or other annoying emails

- Define different **individual AutoFile settings** if this is your preference

THAT'S A WRAP!
TAKEAWAYS AND ACTIONS

XPM data is important.
Book time to review XPM data, ensure consistency amongst clients in fields such as 'salutation' and leverage custom fields!

Invest in good templates.
- Prepare a style guide for your templates (fonts, sizes, etc)
- Prepare 5 Word templates
- Prepare 5 email templates
- Setup your practice email signature

THANK YOU!
WE ARE LOOKING FORWARD TO SEEING YOU AT OUR NEXT MASTERCLASS!

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app.fyidocs.com

HELP CENTRE
support.fyidocs.com

EMAIL SUPPORT
support@fyidocs.com