

# 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:



An example best-practice template

Merge fields document (also available at: Support.fyidocs.com) THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

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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!



### STATIONERY V TEMPLATE









# HOW TO CREATE NEW STATIONERY FROM SCRATCH





- 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

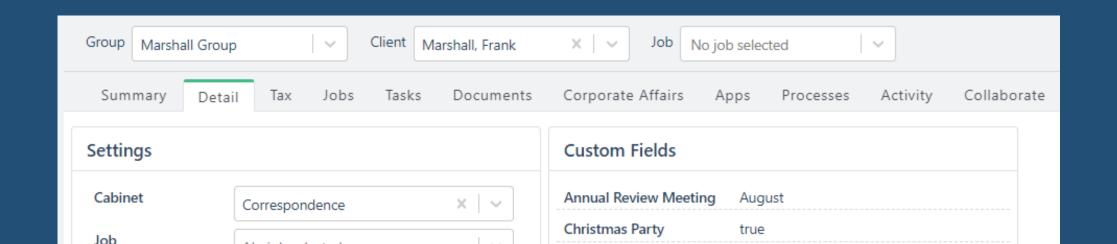


### TIP!

### XPM DATA DRIVES FYI DATA

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







# HOW TO ADD STATIONERY & TEMPLATES TO FYI







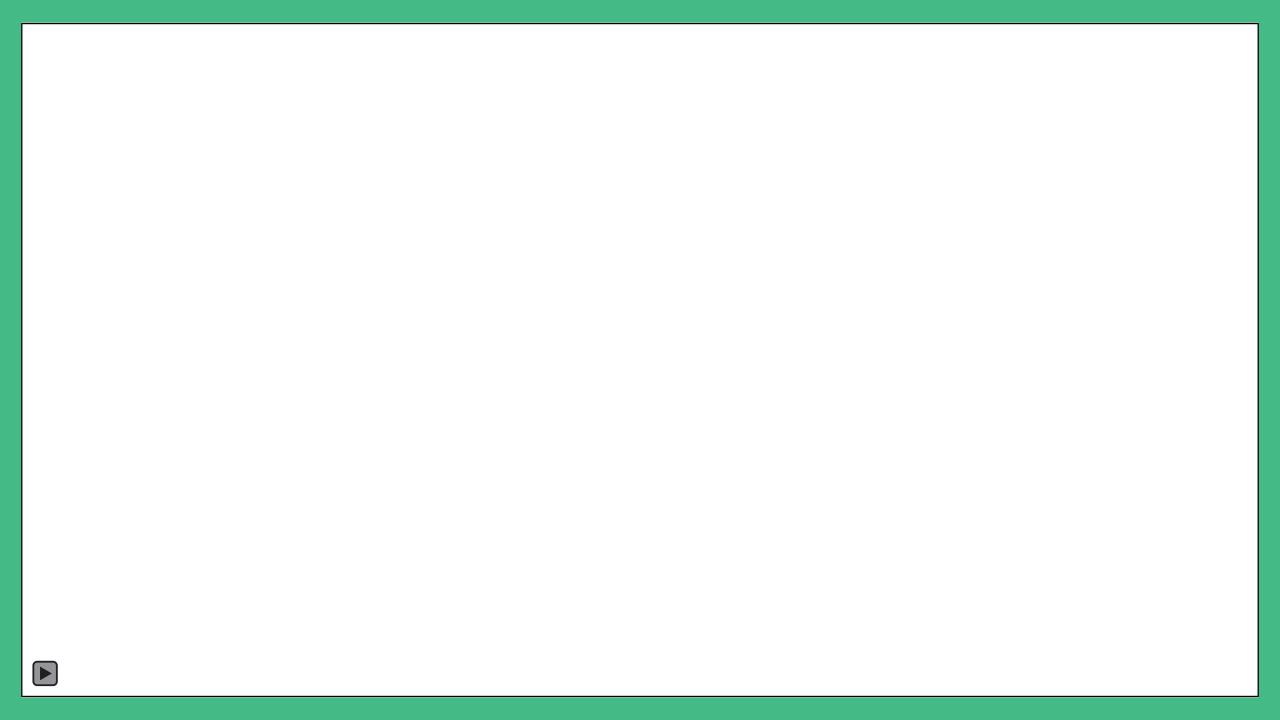






# HOW TO UTILISE STATIONERY & TEMPLATES









\* 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





- 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









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

Use of **FYI merge fields to personalise email signature** 



## TIP!

# PRACTICE-WIDE EMAIL SIGNATURES









# HOW TO SEND EMAILS FROM TEMPLATES (WITH ATTACHMENTS)









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

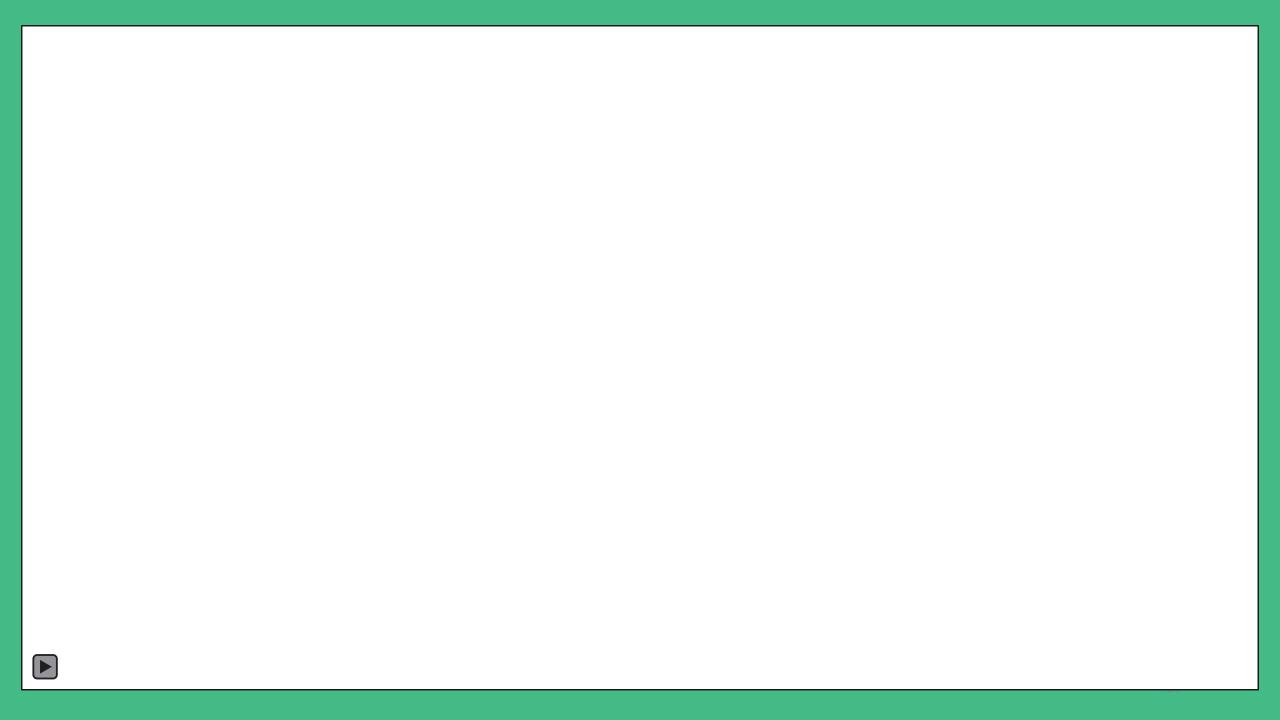
Attachments can be sent via **secure OneDrive links** 



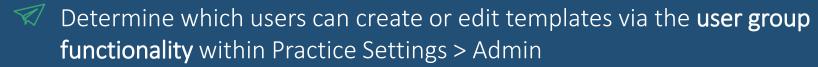


# HOW TO ADMINISTER STATIONERY & TEMPLATES









View templates in the Knowledge tab and add other practice related knowledge cabinets



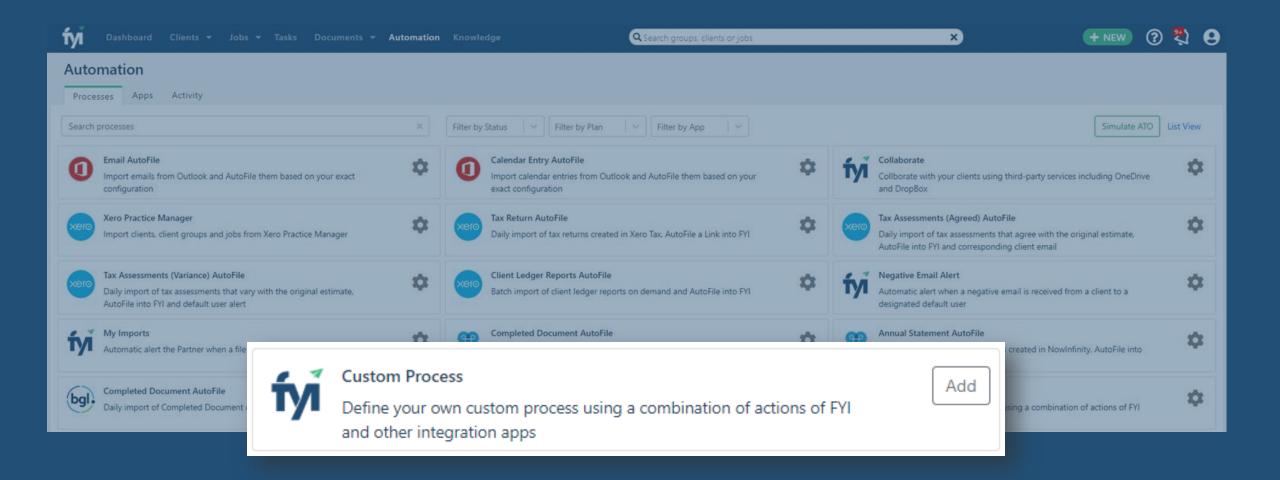


# CONTENT PARTNER CHANGE GPS

- 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!







# HOW TO CREATE A SCHEDULED EMAIL FOR SELECT CLIENTS

**USING CUSTOM PROCESSES** 









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** 

# SPECIAL TOPIC 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**

NC.

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



- 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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### **DECEMBER MASTERCLASS!**

WHEN: THUR,  $12^{TH}$  OF DEC @ 12.30PM AEST

WHAT: BEST-PRACTICE FILING

**INVITES WILL BE SENT VIA EMAIL SHORTLY!** 



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