GETTING STARTED
WITH DOCUMENT MANAGEMENT

- *Importing documents into FYI*
- *Creating documents and client interactions*
- *Working with documents*
- *Sending documents to clients*

THE WORLD'S MOST AUTOMATED DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

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1. Importing documents into FYI
   Uploading, filing and storing documents in FYI

2. Creating documents
   Adding stationery and templates
   Creating documents and client interactions

3. Working with documents
   Edit using the power of the desktop

4. Sending documents to clients
   Send via email, OneDrive or postal service

IMPORTING DOCUMENTS INTO FYI

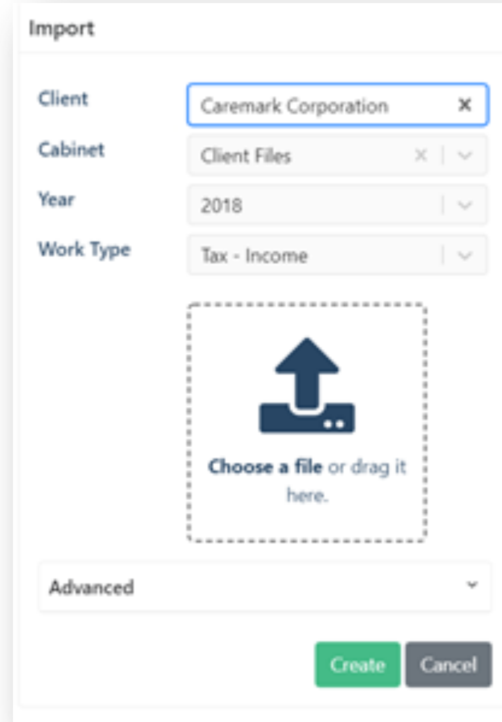
Uploading, filing and storing documents in FYI

Uploading documents in bulk to a Client

Virtually any type of file can be uploaded and stored within FYI.

1. From within FYI, click **+ New** and select **Upload** to display the Import Drawer.
2. Select or enter the filing fields, or change the defaults provided for **Client, Cabinets** and **Categories.**
3. Click **Choose a file** or simply drag one or more files into the Drawer.
4. Once you have added your file or files, click **Create** to file the documents in FYI.

> When using Bulk Upload, you can allocate documents to another user for final review and filing. This is especially useful when scanning and delivering external mail to team members.



Using Bulk Import to upload multiple documents – such as scanned mail – to FYI for review and filing.

Need Help?

Visit FYI Help > Document Management for more information on [Importing Documents into FYI]()

Using Drag and Drop to import documents into a list in FYI

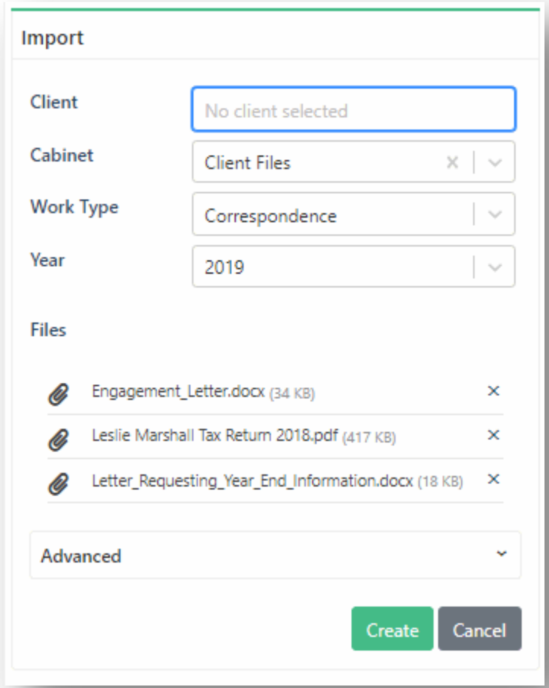
You can drag and drop documents directly from Windows Explorer or from your desktop into any list in FYI.

The **Import** Drawer will appear so you can select Client and filing details.

Filing details selected will apply to all the documents being imported.

The **Advanced** section of the Import Drawer can be used to change the Owner, Filing Status and Workflow to be applied to the imported documents.

When multiple files are added this way, they will all be filed to the same Client, Cabinet and Categories



Drag and drop is a handy way to import a small number of documents and file them to the same Client, Cabinet and Categories.

Need Help?

Visit FYI Help > Document Management for more information on [Importing Documents into FYI]

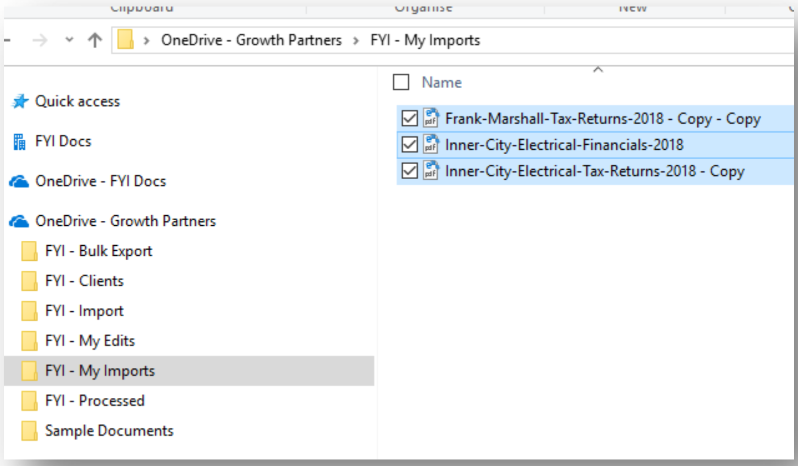
Importing batches of documents

Via integration with **Office 365**, each FYI user has a system folder automatically created for them within their **OneDrive** called **FYI - My Imports.** This provides a simple and efficient way to batch import documents into FYI.

Simply drag and drop documents into your **FYI - My Imports** folder and they will automatically appear in your FYI **In Tray**, ready to be filed.

The **FYI - My Imports** folder is especially useful when you are scanning documents or printing to PDF from any application, seamlessly adding batches of documents straight into FYI.

When documents are imported this way, they are moved from FYI – Imports into another OneDrive folder called FYI – Processed. This folder – which is automatically generated by FYI – must exist for Imports to work correctly.



In Windows Explorer, the FYI – My Imports folder is normally found in your OneDrive – FYI Docs folder

Need Help?

Visit FYI Help > Shared Functions > OneDrive for instructions on how to use [Importing Documents into FYI]

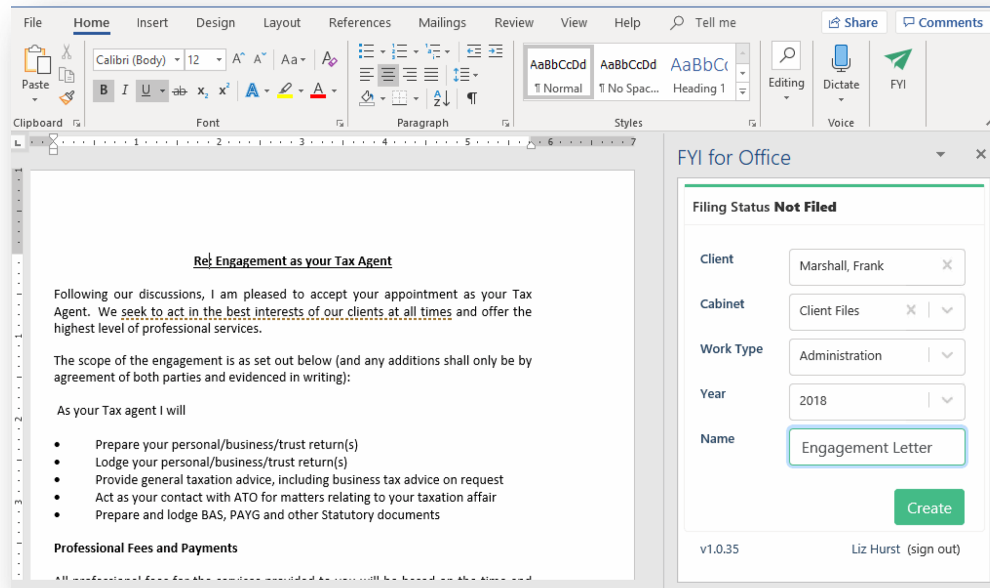
Saving an Office Document to FYI

When creating a new document in Word, Excel or Powerpoint, you can file it in FYI directly from Office using the **FYI Drawer.**

Here's how;

1. Click the FYI icon in the Office ribbon menu to display the **Drawer**.
2. Complete or accept the filing details including;
   - **Client**
   - **Cabinet**
   - **Categories**
   - **Name**
3. Click **Create** to save the document in FYI

> If you need to edit the document once it has been created, open it from FYI in order to save the changes.



Creating an Office document and saving it in FYI.

Need Help?

Visit FYI Help > Document Management for more information on [Importing Documents into FYI]()

CREATING DOCUMENTS

Creating documents and client interactions

Adding stationery and templates

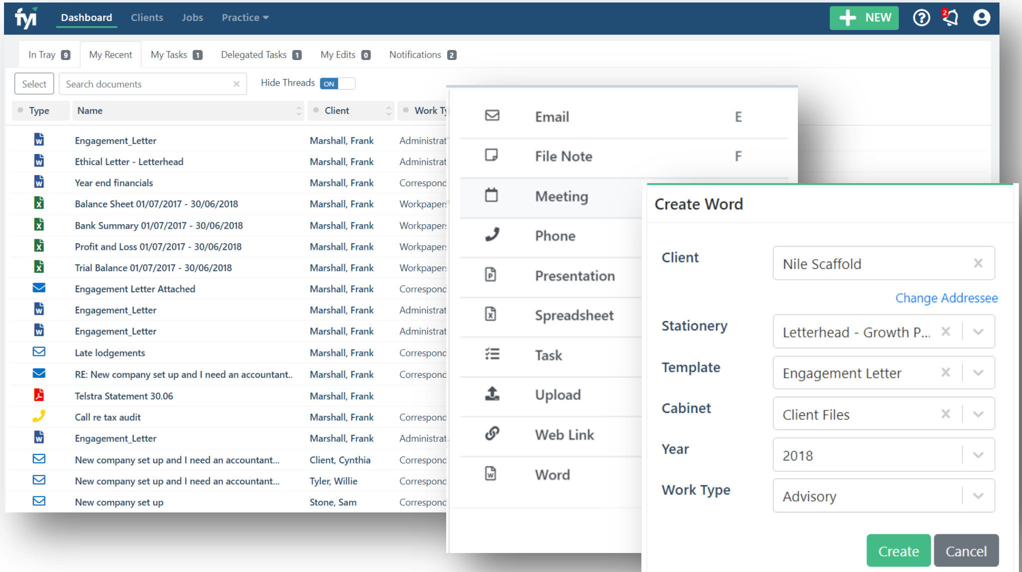
Creating New Documents

By clicking **+New** you can create **Word** documents, **Excel** spreadsheets and **Powerpoint** presentations that are automatically filed by client.

You will be prompted to;

1. Select the type of document you wish to create
2. Pre-file the document, adding details such as;
    - **Client**
    - Which **Stationery** and/or **Templates** to apply
    - Which **Cabinet** to store the document in
    - Which **Categories** to tag the document with, for example **Year** and **Work Type**
3. Click **Create** to open the document.

You can also use **+New** to create a **Web Link** to a document located at an external URL and file this link in FYI by Client.



Creating a new document that is automatically filed by client

Need Help?

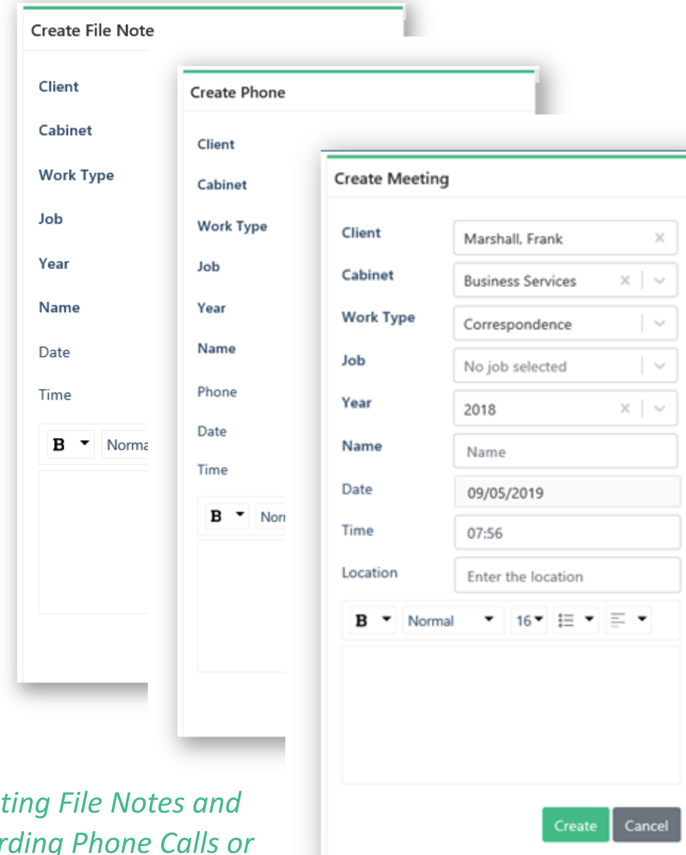
Visit FYI Help > Document Management for more information on Creating Documents in FYI.

Recording Client Interactions

You can also use **+New** to create a **File Note**, or a record of a **Phone Call** or **Meeting**, that is automatically filed by Client.

You will be prompted to;

1. Select the type of client interaction you wish to create – **File Note, Meeting** or **Phone Call.**
2. Pre-file the document, adding details such as;
   - **Client**
   - **Subject** – a name to identify the interaction in lists
   - Which **Cabinet** to store the document in
   - Which **Categories** to tag the document with, for example **Year** and **Work Type**
   - **Date, Time** and **Location**, depending on the type of interaction
3. Click **Create** to save the interaction in FYI.



Creating File Notes and recording Phone Calls or Meetings

Need Help?

Visit FYI Help > Document Management for more information on Recording Client Interactions.

Creating Stationery

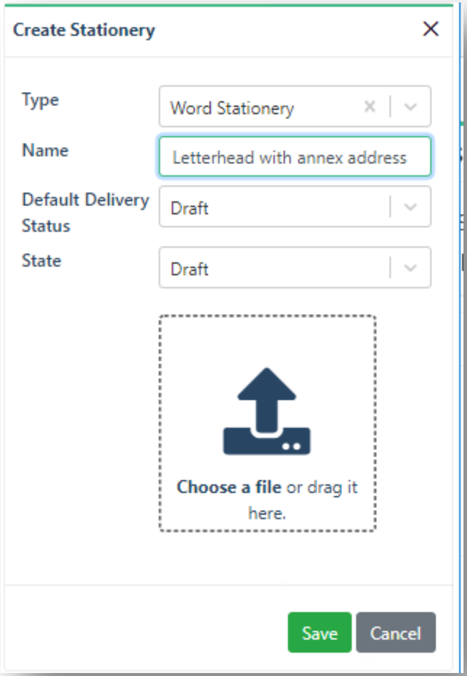
Any stationery used in your practice, such as letterhead with company logo, address details, and merge fields can be set up within FYI.

Stationery must be set up and maintained by an FYI administrator in **Settings > Practice Settings > Documents > Stationery.**

The Stationery can be defined as **Published, Draft** or **Archived**. It will only be available to users if it is Published.

FYI comes with sample documents pre-installed. These are designed to help you set up your own Stationery files, and show Merge Codes that you can use, such as **Contact Name** and **Postal Address.**

Word Stationery can hold images, text and merge fields in the document, header and footer .



Choose a file to upload an existing template or drag and drop it into FYI

Need Help?

Visit FYI Help > Administration > Practice Templates for more information on Adding Stationery.

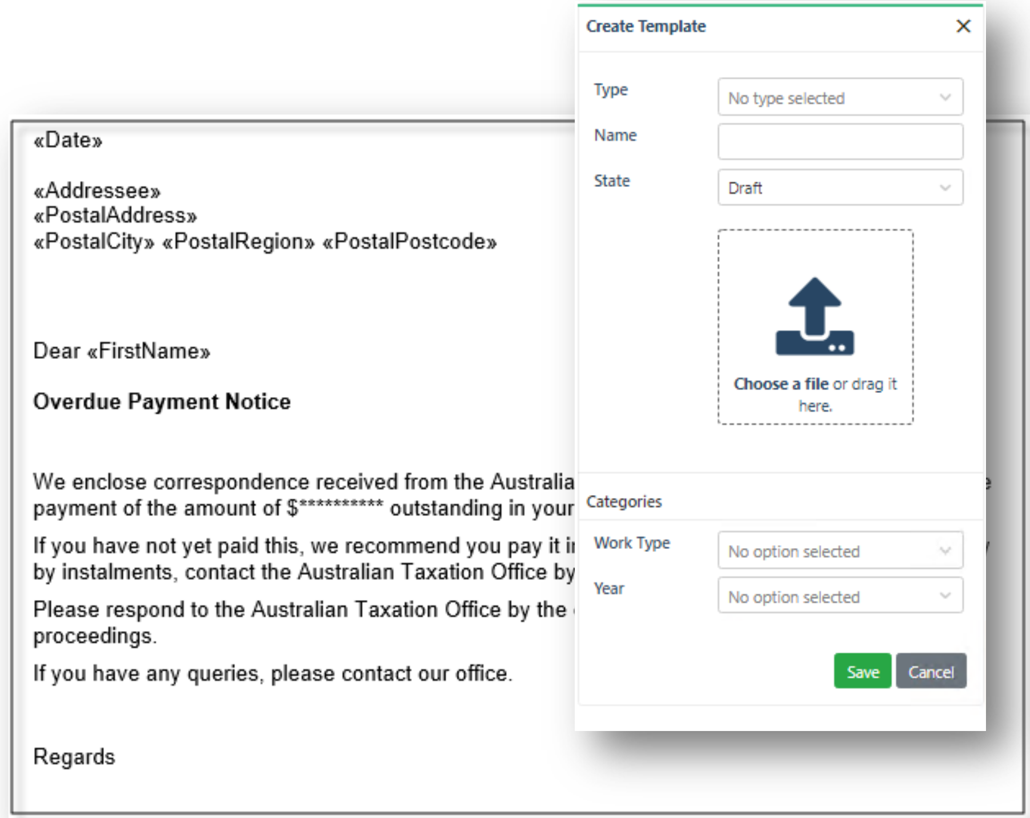
Creating Templates

Templates can be created in FYI for **Word, Excel** and **Powerpoint** documents using standard images and text.

You can include **Merge Fields** from Xero Practice Manager in a Template.

These can only be set up and maintained by an FYI Administrator in in **Settings > Practice Settings > Documents > Templates.**

A Template will only be available for selection when creating new documents, if it is **Published**.



Example of a Word Template including merge fields

Need Help?

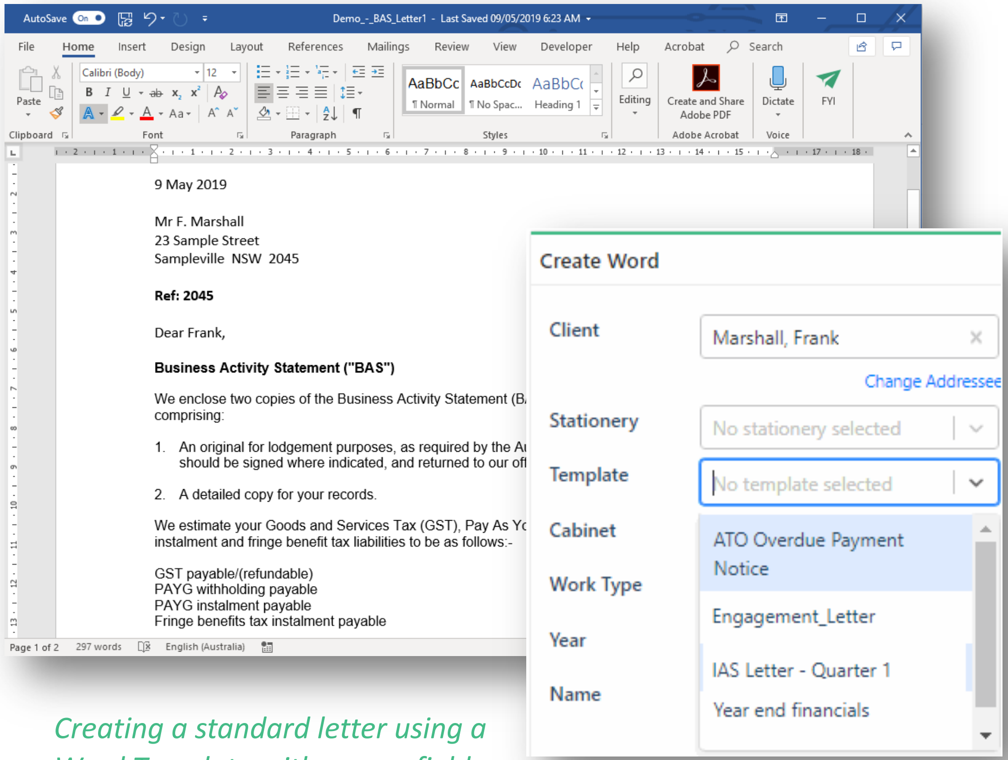
Visit FYI Help > Administration > Practice Templates for more information on [Creating Templates for Word, Spreadsheet or Presentation]

Creating Documents from Templates

Creating Documents from Templates held in FYI is simple.

1. From FYI, click **+ New** and select **Word, Spreadsheet** or **Presentation** from the list of document types.
2. In the Drawer, select the **Client** to display any filing defaults, and then select the **Template** you want to use.
3. Filing **Categories** will change as relevant to match the Template selected.
4. Click **Create** to open the Document in Word, Excel or Powerpoint and automatically populate any merge fields.

From the Workspace, you can use the shortcut key W, S or P to create a Word, Excel or Powerpoint document using Templates



Creating a standard letter using a Word Template with merge fields

Need Help?

Visit FYI Help > Document Management for more information on Creating Documents from Templates.

WORKING WITH DOCUMENTS

Edit using the power of the desktop

Working with documents

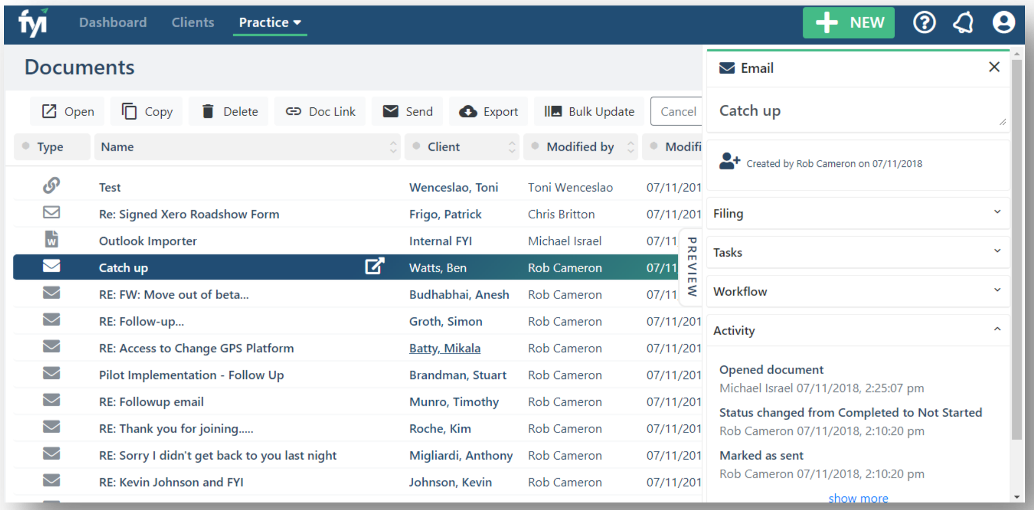
The **Tool Bar** and **Drawer** in FYI provide a variety of familiar options used when working with documents, and more!

Use the **Tool Bar** to Open, Copy, Delete, Send, Export or Bulk Update documents, or to create a Document Link.

Use the **Drawer** to;

- **Preview** a snapshot of the contents of a document before opening it.
- Check or change **Filing** details such as Cabinets and Categories.
- Add **Comments** and **Tasks** to a document
- View **Activity** on a document
- Open **Previous versions** of a document or **Save a new version**

Bulk Update allows you to change the **Filing** fields, **Send**, **Delete** or **Export** multiple documents in one go.



Using the Tool Bar and Drawer in FYI to work on documents

Need Help?

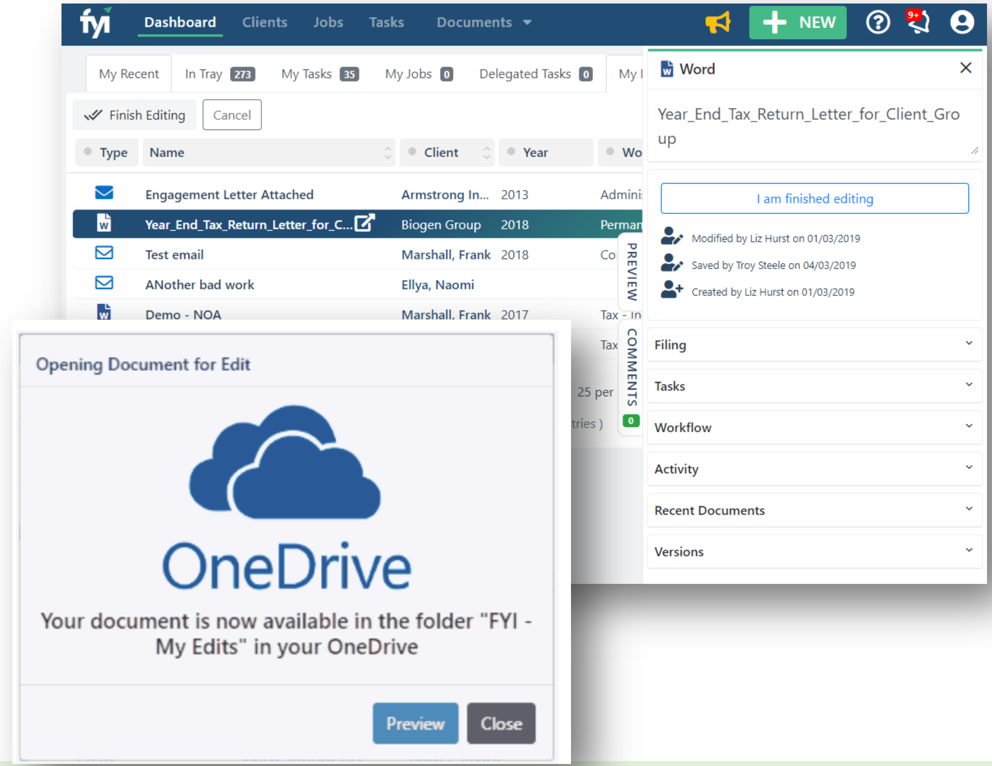
Visit FYI Help > Document Management for information on [Document Management Basics](#).

Editing using the power of desktop applications

FYI allows you to edit **Word, Excel, Powerpoint** and **PDF** documents natively and exclusively using the richness of desktop applications.

Select **Edit** in any document list in FYI to work on a document.

FYI will automatically check to ensure no other team member is currently editing, and then seamlessly download the document to the **FYI - My Edits** folder in your OneDrive.



> Select **I am Finished Editing** for the updated document to be uploaded to FYI

Need Help?

Visit FYI Help > Document Management for instructions on how to [Opening and Editing Documents]

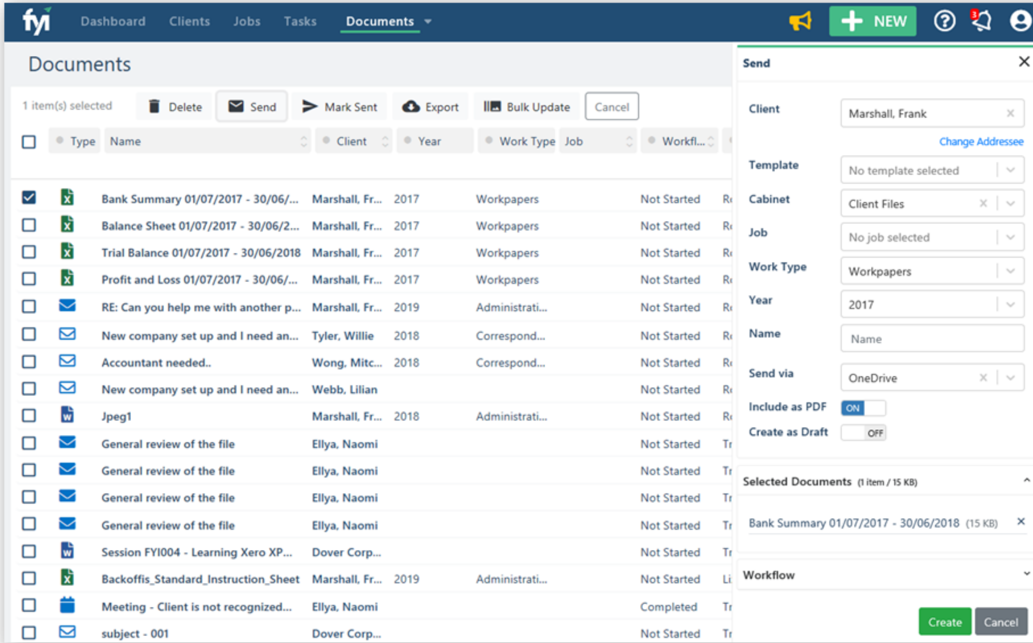
SENDING DOCUMENTS TO CLIENTS

Send via email, OneDrive or the postal service

Sending documents via email

Send allows you to send documents via email either in native form or as PDF attachments. The underlying email is automatically filed in FYI and a record of the send is shown in the Activity of each document that is sent.

1. Select the documents and click **Send** in the tool bar to display the **Send by Email** drawer.
2. Select the options for the cover email as follows;
   - **Template**
   - **Filing** choices and **Name**
   - **Include as PDF** or the original file types.
   - **Create as draft** or send immediate.
3. Use **Workflow** to select **Pending Client Signature** if being sent for signing.



Create as Draft allows users to customise the email from Outlook before sending.

Need Help?

Visit FYI Help > Document Management for information on Sending Documents via Email.

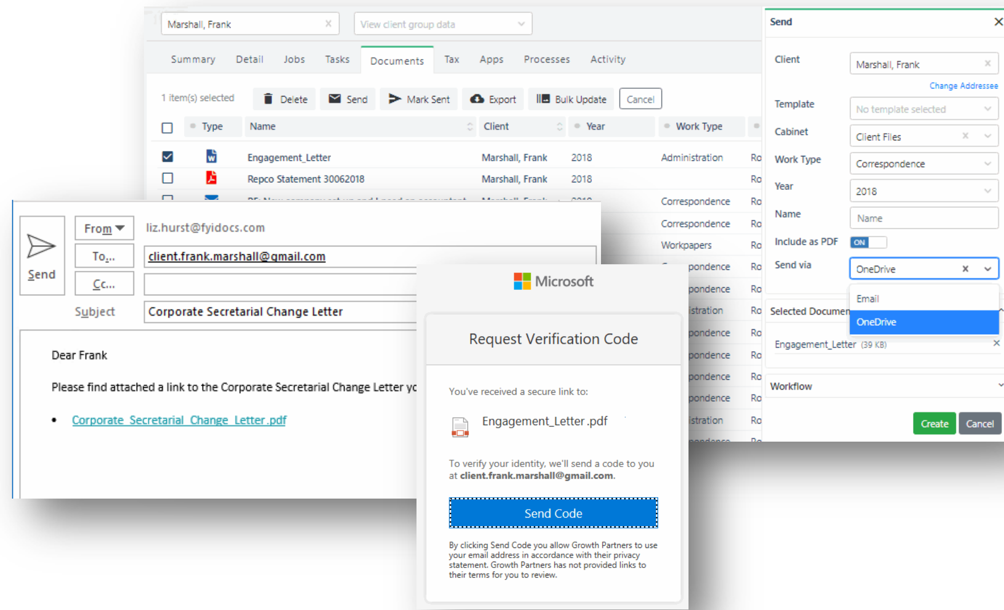
Sending documents via OneDrive

The **Collaborate a**utomation allows you to securely send documents to clients via your practice's OneDrive account. This provides an alternative to email when sending sensitive attachments.

Send via OneDrive sends an email with a hyperlink to the document that has been placed in a Client folder within your practice's OneDrive.

An email to the Client is created including a secure link to each document. Clicking on the link prompts a request for a verification code which must be entered to access linked documents

An FYI Administrator needs to set up the Collaborate automation for your practice so you can Send via OneDrive



Using the Collaborate automation to send documents via OneDrive

Need Help?

Visit FYI Help > Automation > Collaborate for information on Send via OneDrive.

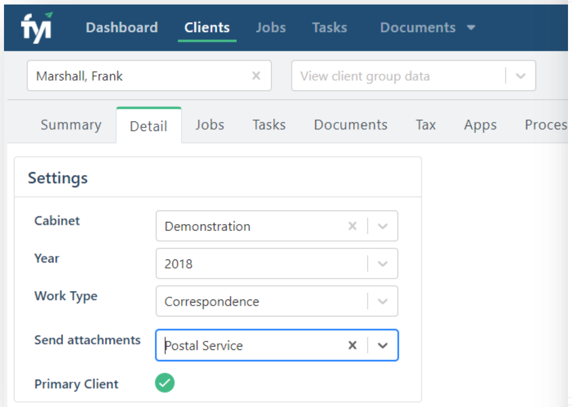
Sending documents in the post

If a document has been sent in the post, you can use the **Mark Sent** tool bar function to change the **Delivery Status** to **Sent.**

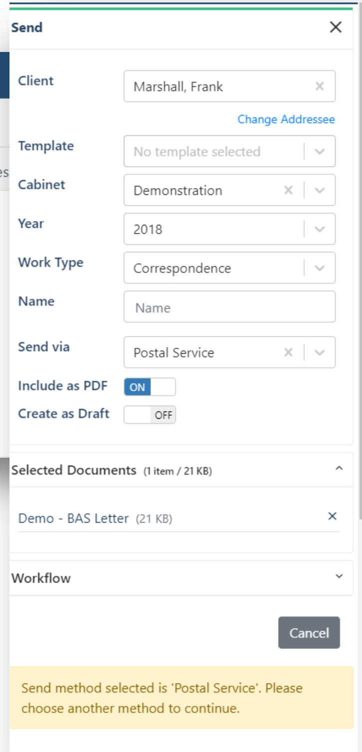
Postal Service can be set as a default preference for Clients who need hard copies of documents to be sent in the mail.

If so, when using the Send wizard, users will be prompted with **"Send Method selected is 'Postal Service'. Please choose another method to continue".**

The user can either select **Cancel** to stop the email Send and send the document by post, or overrule the postal preference by changing **Send via** to Email or OneDrive.



Setting and changing the preference for sending documents to clients



Need Help?

Visit FYI Help > Document Management for information on [Sending a Document via the Postal Service]

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WEB APP
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