GETTING STARTED
WITH EMAIL MANAGEMENT

- Introduction to AutoFile
- Creating Emails
- Using Templates
- Adding Tasks

THE WORLD'S MOST AUTOMATED
DOCUMENT MANAGEMENT PLATFORM

www.fyidocs.com

In This Guide

INTRODUCTION TO AUTOFILE

For emails, attachments and client meetings.

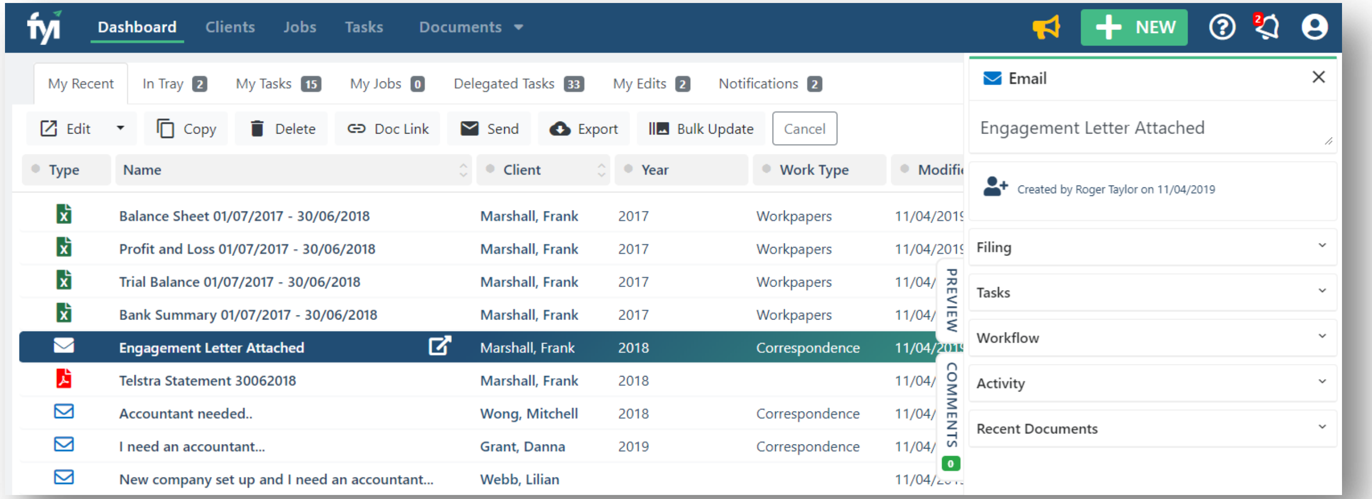
Auto-filing Client Emails

As soon as FYI is deployed, it starts to monitor your **Inbox** and **Sent** items in Outlook, looking for emails that match a **client email address** in **Xero Practice Manager**.

Any client emails received or sent are automatically imported and filed in FYI under the relevant client.

To avoid cluttering your client file, replies to an email thread are automatically filed in FYI based on the filing categories applied to the original email.

Any emails that you do not what to be available to the entire practice can be deleted from your In Tray.



Your Dashboard In Tray lists emails and documents that have been captured and auto-filed by FYI. This is where you can review and check the filing of emails before making them available to the entire team.

Need Help?

Visit FYI Help > Email Management > Filing Email from FYI for an [Introduction to AutoFile]

Auto-filing Email Attachments

Email attachments can be auto-filed as separate documents within FYI.

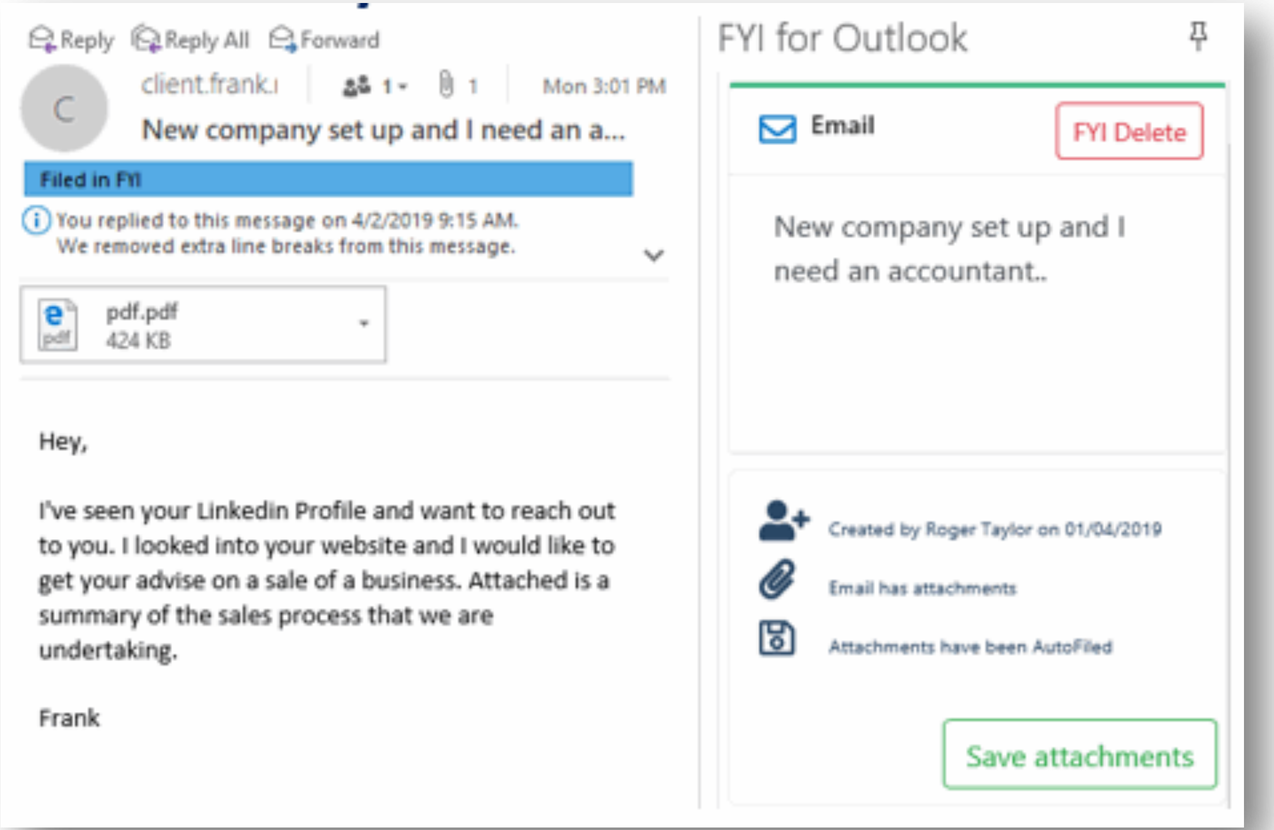
The attachments are filed using the same auto-filing rules that are applied to the email.

Only genuine attachments are filed, and any attachments such as a jpg for a logo or signature are ignored.

The option to turn on auto-filing attachments is available from the **Automation** dashboard, from **Email AutoFile.**

You can also save attachments manually using the **'Save Attachments'** button that appears when you open the FYI Drawer in Outlook.

The filing details for the email in the FYI Drawer will include an icon indicating whether 'Attachments have been AutoFiled'.



Email attachments are filed using the same auto-filing rules as the underlying email.

Need Help?

Visit FYI Help > Email Management > Filing Email from FYI for more information on Email Attachments and Saving Attachments

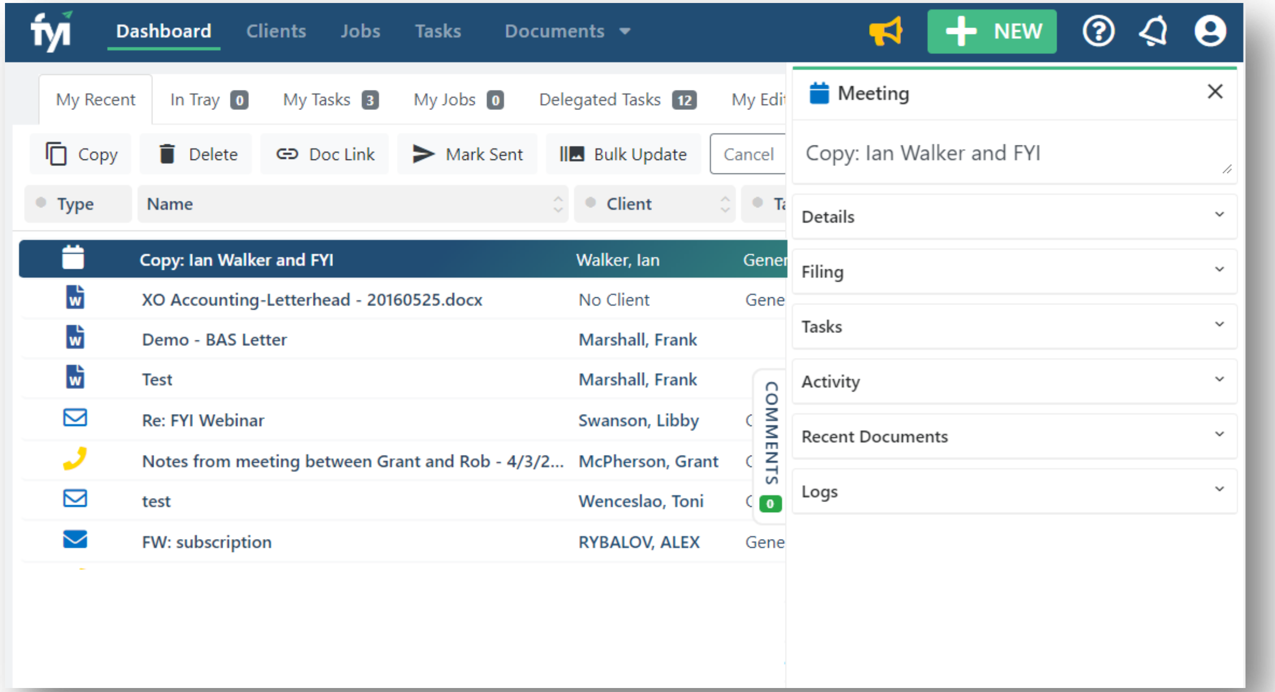
Auto-filing Calendar Entries

The **Calendar Entry AutoFile** process automatically imports and files all client meetings from your Users' Outlook calendars.

They are created as **Meetings** in FYI.

Any Calendar entries including an email address of a Client are automatically imported and filed.

This process automation is run retrospectively, so that only calendar entries for Meetings that have actually occurred in the past are imported.



Calendar Entry AutoFile allows your practice to automatically store a record of all Client meetings within the Client file.

Need Help?

Visit FYI Help > Email Management > Filing Email from FYI for an [Introduction to AutoFile]

AUTOFILE SETTINGS

Default settings and configurations

AutoFile Settings

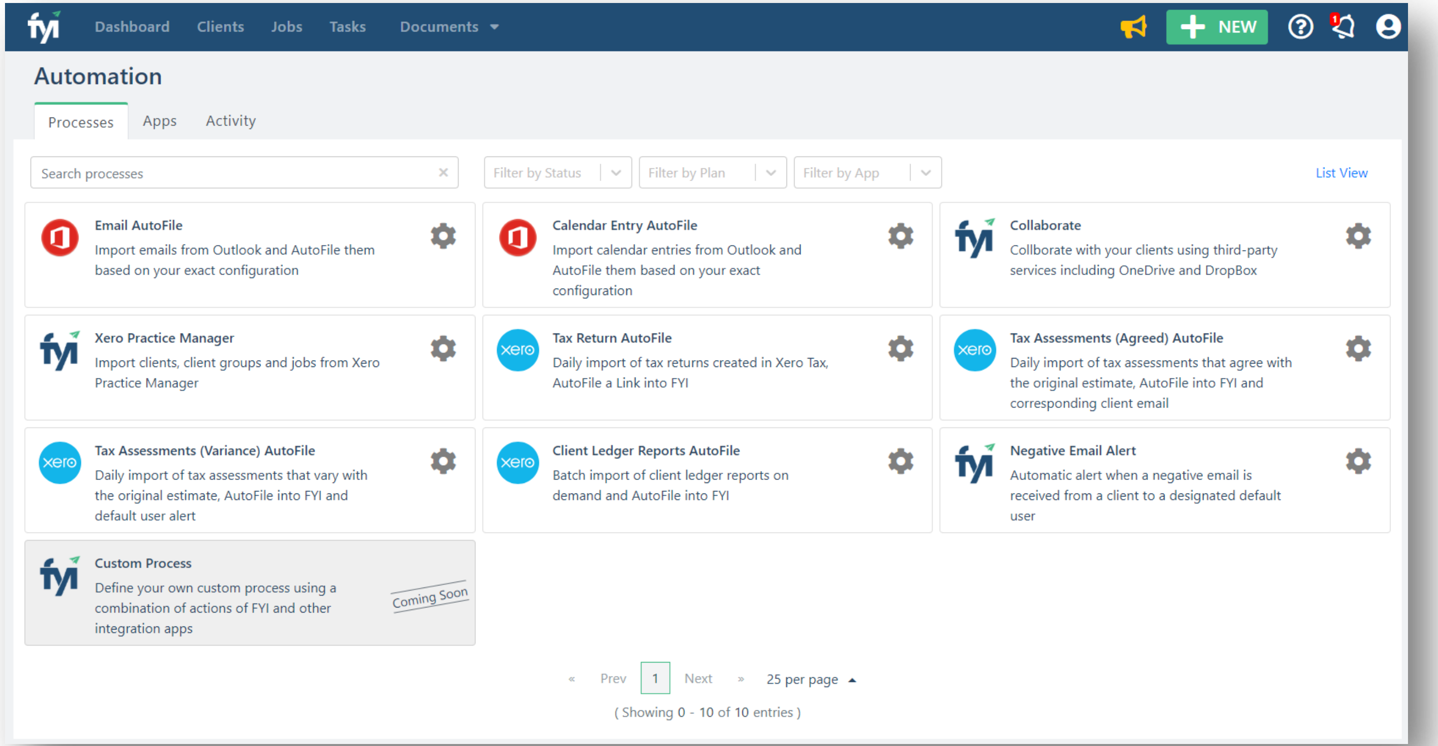
Emails are intelligently auto-filed by FYI based on a combination of the conversation thread, template defaults, client defaults and/or user defaults.

Email AutoFile settings define how incoming emails from Outlook and any attachments to these emails are managed and auto-filed.

Calendar Entry AutoFIle settings allow you to turn ON the auto-filing of Client meetings.

These are set up by your FYI Administrator via the **Automation** Dashboard.

From FYI, click **Settings** in the top right-hand corner, select **Practice Settings** and then **Automation** to access the Automation Dashboard.



The Automation Dashboard is where you can configure practice-wide settings for Email AutoFile and Calendar Entry AutoFile

Need Help?

Visit FYI Help > Automation > System Processes for more information on [Email AutoFile Settings and Exclusions] and [Calendar Entry AutoFile]

AutoFile Settings

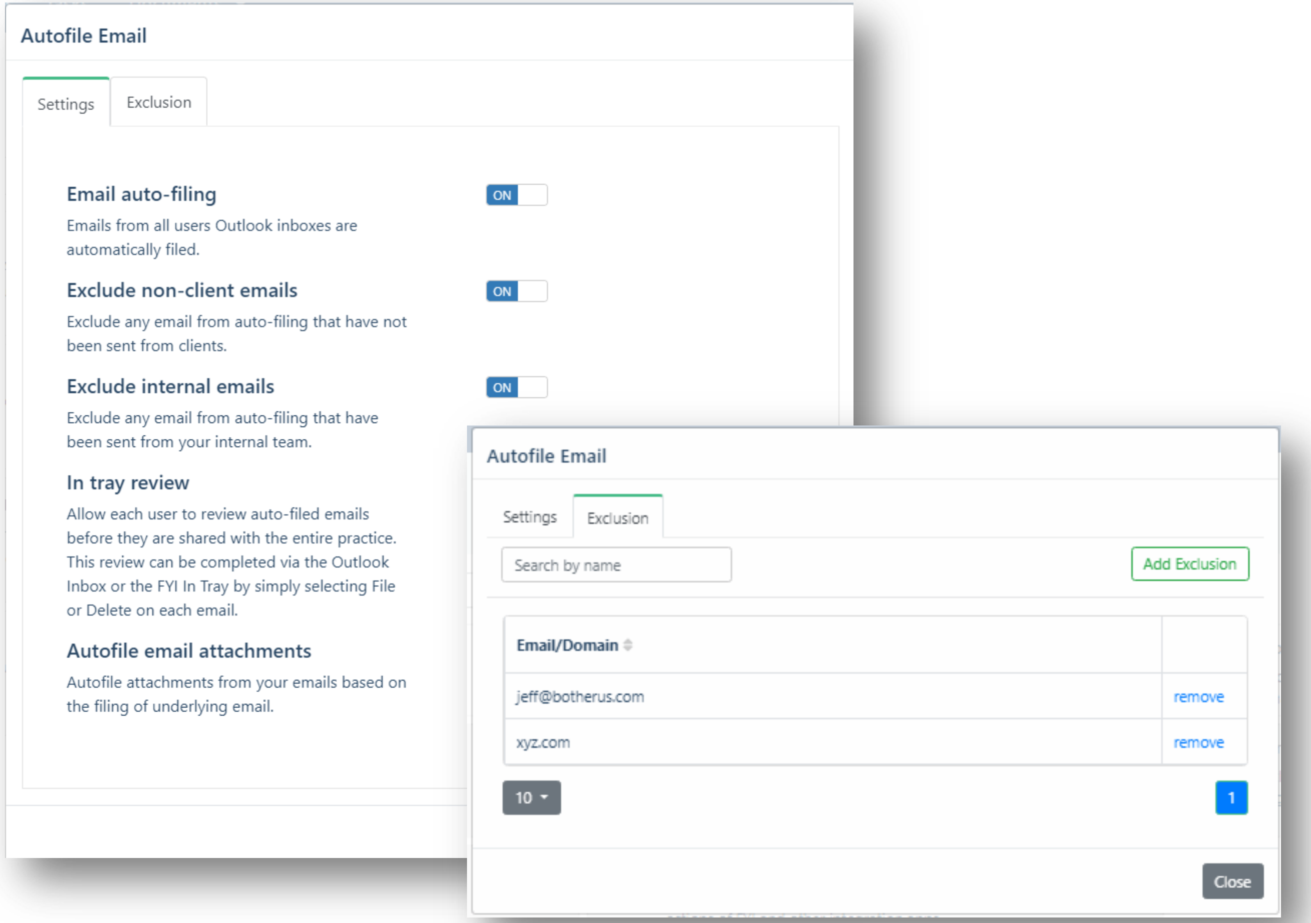
When **Email Auto-filing** is turned **ON**, Client emails from all User's Outlook Inboxes are automatically filed in FYI.

Emails that have not been sent from a Client email address in XPM can be excluded from filing in FYI. As can internal emails that are sent by users within your practice's email domain.

In Tray Review allows each user to review their auto-filed emails before they are available to the entire practice. Many practices prefer to turn this **OFF** at a practice-level so that Client emails are automatically imported into FYI and auto-filed in the team environment.

AutoFIle Email Attachments allows attachments to be auto-filed as separate documents in FYI, based on the filing rules of the underlying email.

> Individual Users can over-ride the practice default for **In Tray Review** by adjusting the defaults for their own login.



Exclusions allow your practice to identify emails sent from specific email addresses or domains and block them from being filed automatically.

Need Help?

Visit FYI Help > Automation > System Processes for more information on [Email AutoFile Settings and Exclusions]

AutoFile Defaults for a Client

FYI's auto-filing defaults can be set for each Client in the practice via the Clients Workspace.

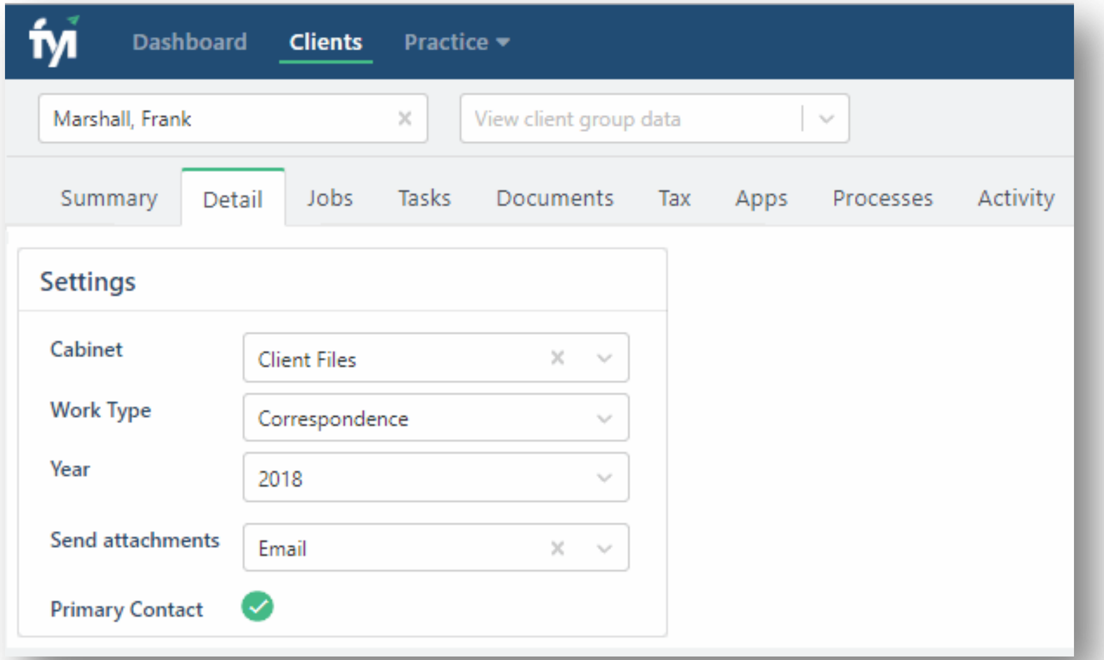
Default auto-filing rules can be set here for the **Cabinets** and **Categories** such as **Work Type** and **Year.**

This is also where you can set the **Primary Client** for a Client Group.

Where the Client is part of a group structure, often entities within the group will have the same email address. By selecting one of the Clients in the group as the **Primary Client**, this Client will take precedent for the purpose of auto-filing emails.

Only Primary Clients are considered by FYI during auto-filing of emails.

Duplicates is a utility allowing admins to nominate the primary contact for each client group across the practice, ensuring that emails are auto-filed to the correct entity.

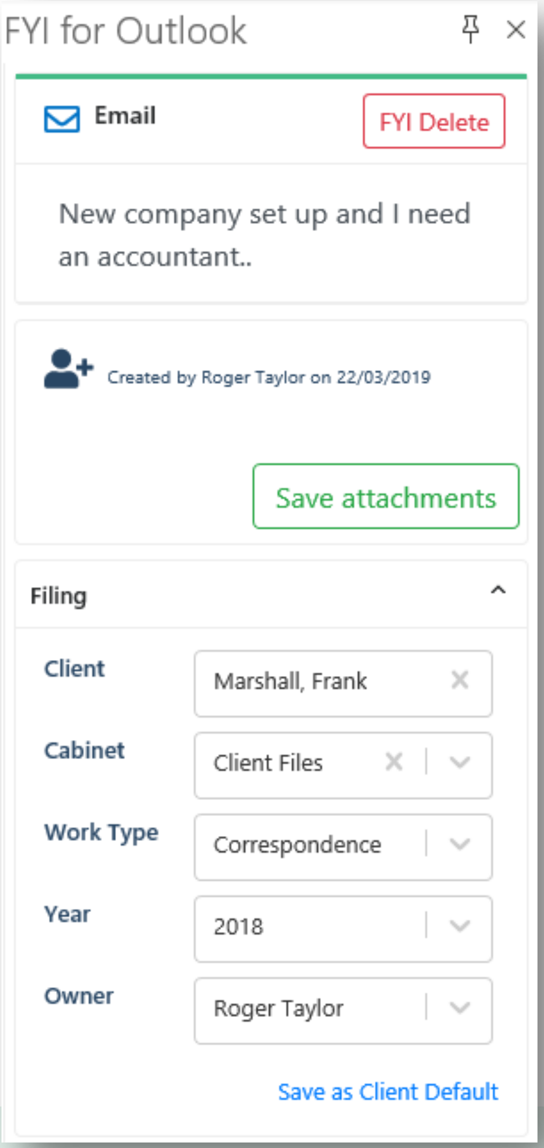


The Clients > Detail tab holds settings for auto-filing defaults and Primary Client.

Need Help?

Visit FYI Help > Document Management> Creating Documents in FYI for more detailed information on [Setting Filing Defaults for a Client]

AutoFile Defaults for Cabinets and Categories



AutoFile defaults for the **Cabinets** and **Categories** used for each Client can also be set up or changed from within Outlook using the **Save as Client Default** button in the FYI Drawer.

Simply access the **FYI Drawer in Outlook**, and select or change auto-filing defaults for **Cabinet**, **Work Type** and **Year** by clicking **Save as Client Default**.

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Save as Client Default is a quick and easy way to confirm auto-filing rules to be applied at a Client level.

Need Help?

Visit FYI Help > Email Management > Filing Email from Outlook for information on [Setting Filing Defaults for a Client from Outlook]

AutoFile Defaults for Individual Users

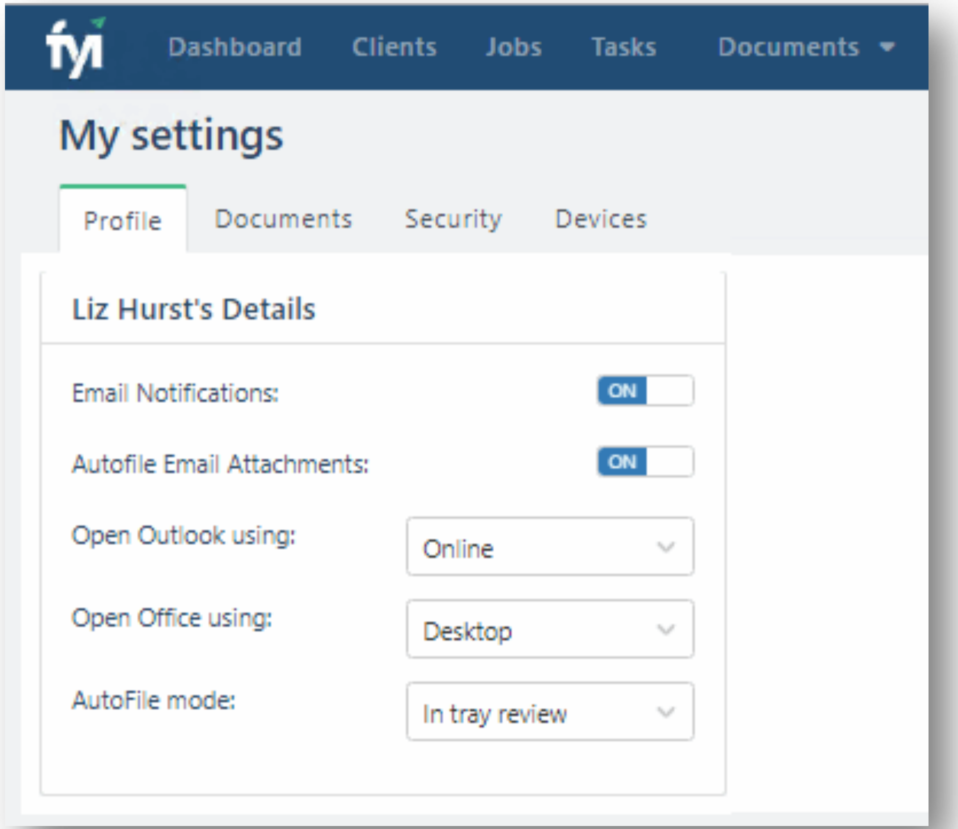
Personal filing defaults can be set up to reflect the preferences of individual Users. These over-ride the practice settings defining how emails are auto-filed.

To configure your personal filing defaults from FYI, go to **Settings** in the top right-hand corner and select **My Settings** from the drop down menu.

When **Email Notifications** are turned **ON**, you will be notified when you have been assigned a **Task**, when a Task you initiated has been completed, and when you are referenced in a **Comment.**

Selecting **In Tray Review** as your **AutoFIle mode** will over-ride the practice default and add emails to your In Tray for review before they are shared with the entire practice.

> In Tray Review is mostly designed to give senior team members a higher degree of control over email auto-filing to reflect the potential sensitivity of the client emails they receive.



Use My Settings > Profile to set your individual preferences for auto-filing.

Need Help?

Visit FYI Help > Getting Started > Document Management > Creating Documents in FYI for more information on [Setting AutoFile Defaults for your own Login]

AutoFile Defaults for Individual Users (continued)

To save time filing emails and documents for a specific client, the **My Settings** > **Documents** tab provides the ability to set filing defaults at a User level for Cabinets and Categories.

If a Client does not have filing defaults set up already, your own personal defaults will be used.

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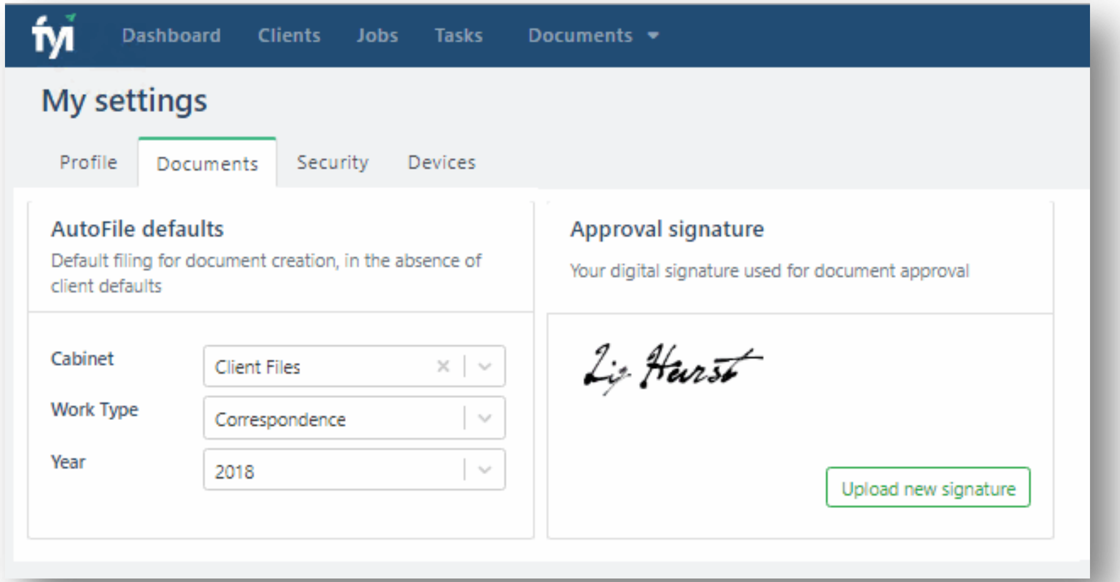
This is also where your digital signature can be uploaded to use for document approvals.



Use My Settings > Documents to set your individual preferences for auto-filing.

Need Help?

Visit FYI Help > Getting Started > Document Management > Creating Documents in FYI for more information on [Setting AutoFile Defaults for your own Login]()

FILING EMAILS

Using the FYI Drawer
for email filing....and more!

Using the Drawer in FYI

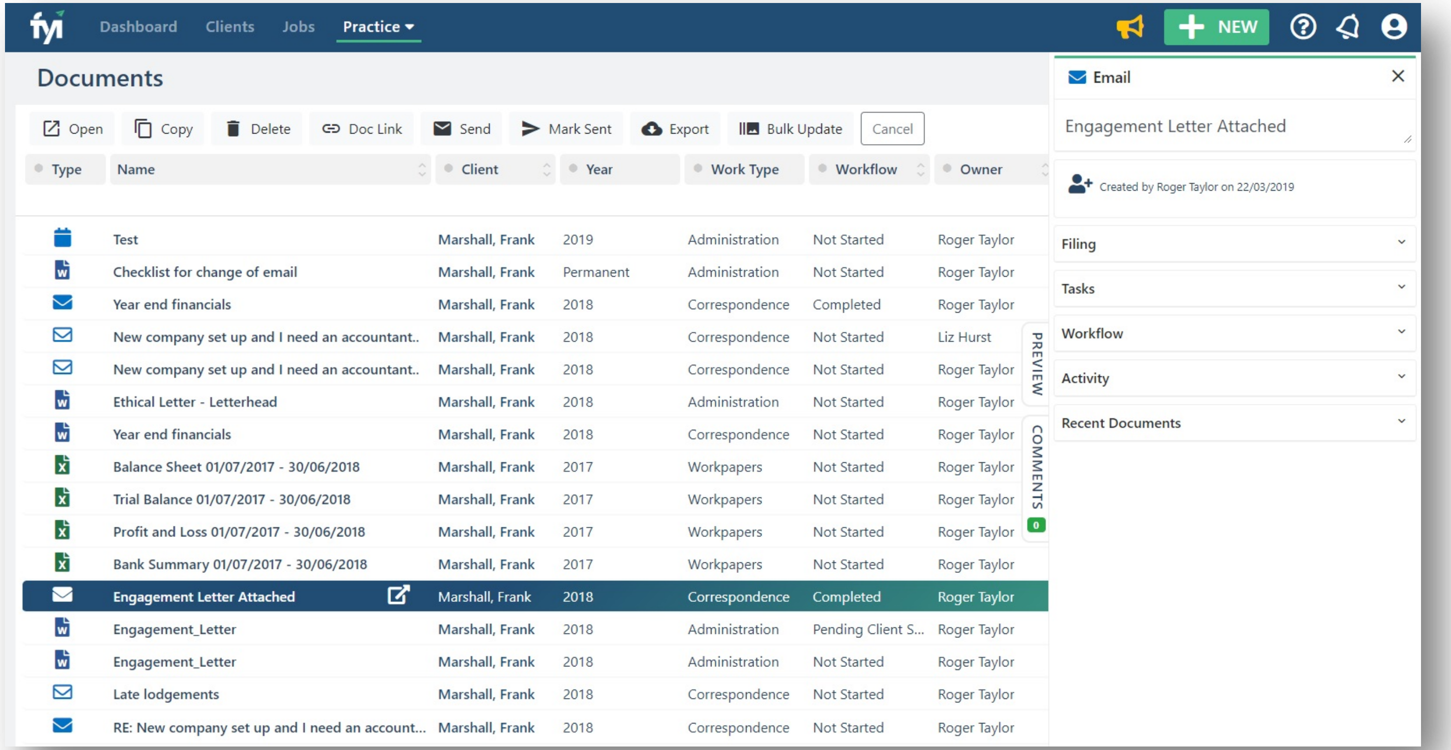
When you select an **Email** in a list, the **FYI Drawer** will display on the right-hand side of the screen.

The Drawer contains details relating to the email, allowing you to change filing details or set up tasks related to the email.

This is where you can:

- Update **Filing** information
- View the Email **Thread**
- Add **Comments** for your team
- Allocate **Tasks**
- Or see recent **Activity** relating to the email

Comments can be used to add notes and allow team members to collaborate on an email.



You can use the Drawer in FYI to validate or change filing information, and to assign tasks directly from an email.

Need Help?

Visit FYI Help > Email Management for a more information on [Filing Email from FYI]

Using the FYI Drawer in Microsoft Outlook

From the **FYI Drawer in Outlook** you can check or update filing details and click **Create** to make the email available to everyone in the practice.

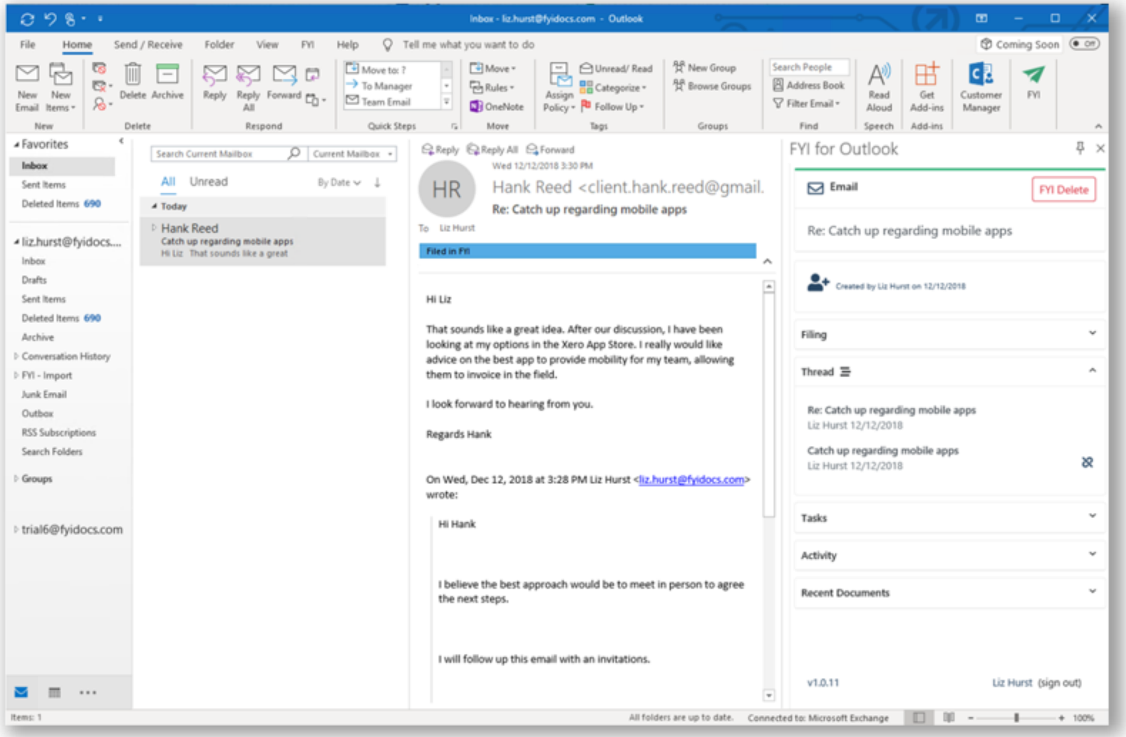
This is where you can;

- Review **Filing** defaults including the Client, Cabinet and Categories that have been selected for this email.
- Allocate **Tasks** directly from the email.
- See recent **Activity** relating to the email.

When sending a new email to a client, open a blank email and click the **FYI Icon**. The **FYI Drawer** will display giving you access to FYI email templates and the ability to file the email before sending it.

Any replies to this email will automatically be saved to FYI.

To keep the FYI Drawer in Outlook open, click the pin at the top of the Drawer



Every email that has been filed in FYI includes the label "Filed in FYI".

Need Help?

Visit FYI Help > Email Management for information on [Filing Email from Outlook]

CREATING EMAILS

Creating emails from FYI or Outlook

Using Templates

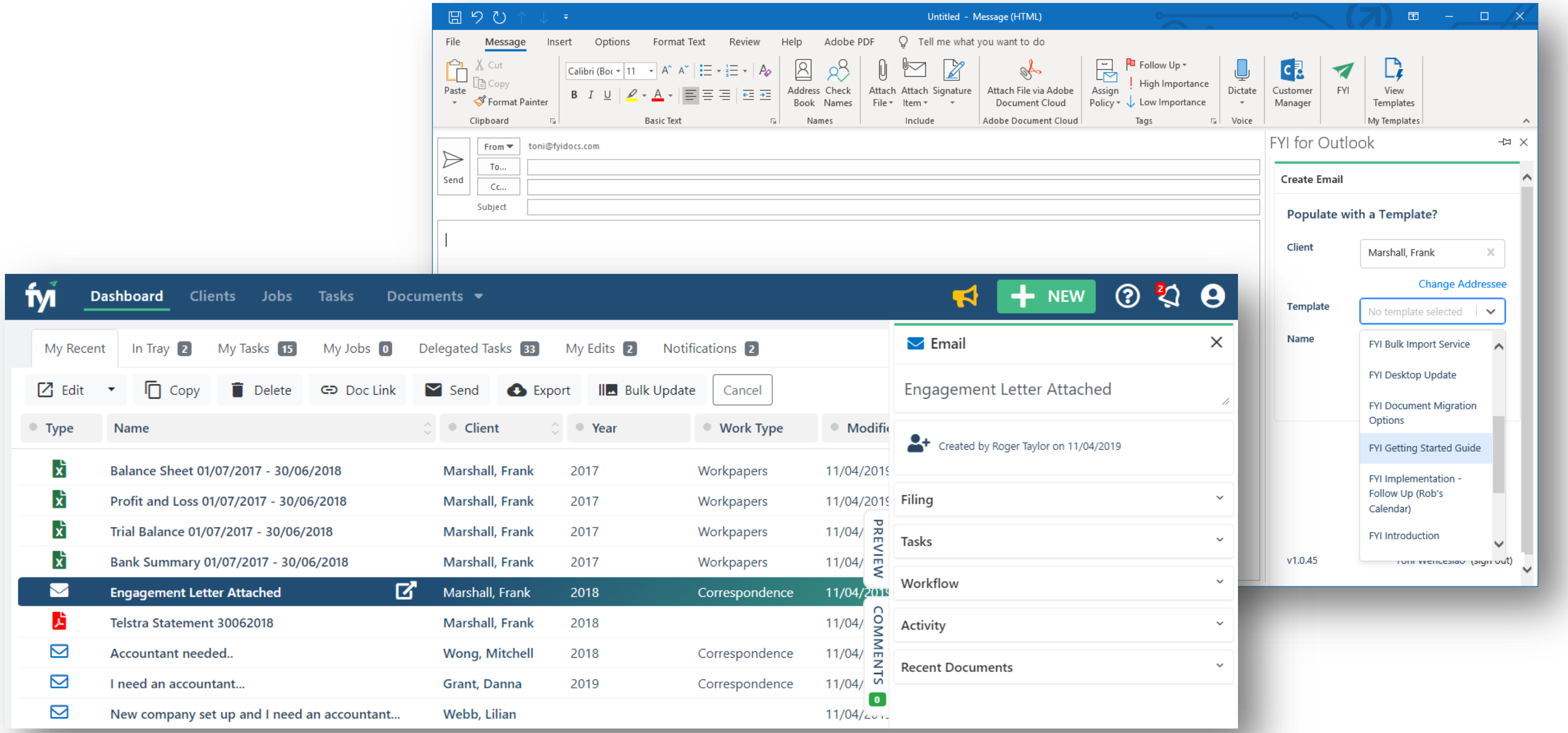
Creating an Email from FYI or Outlook

New emails can be created directly from FYI or from Outlook.

When creating an email in Outlook, you can open the **FYI Drawer** to;

1. Add an **Client** email address from FYI – type at least 3 characters to display and select the Client name.
2. Use an email **Template** – the template text, including merge fields will be added to your email when you click on **Create**
3. Pre-file the email before sending – pre-define auto-filing settings for **Cabinet**, **Work Type** and **Year**. You can also select a relevant XPM **Job** to file the email to.

When you send the email it will be automatically filed in FYI.



You can also create new emails directly from FYI by clicking on + New and selecting Email from the document list.

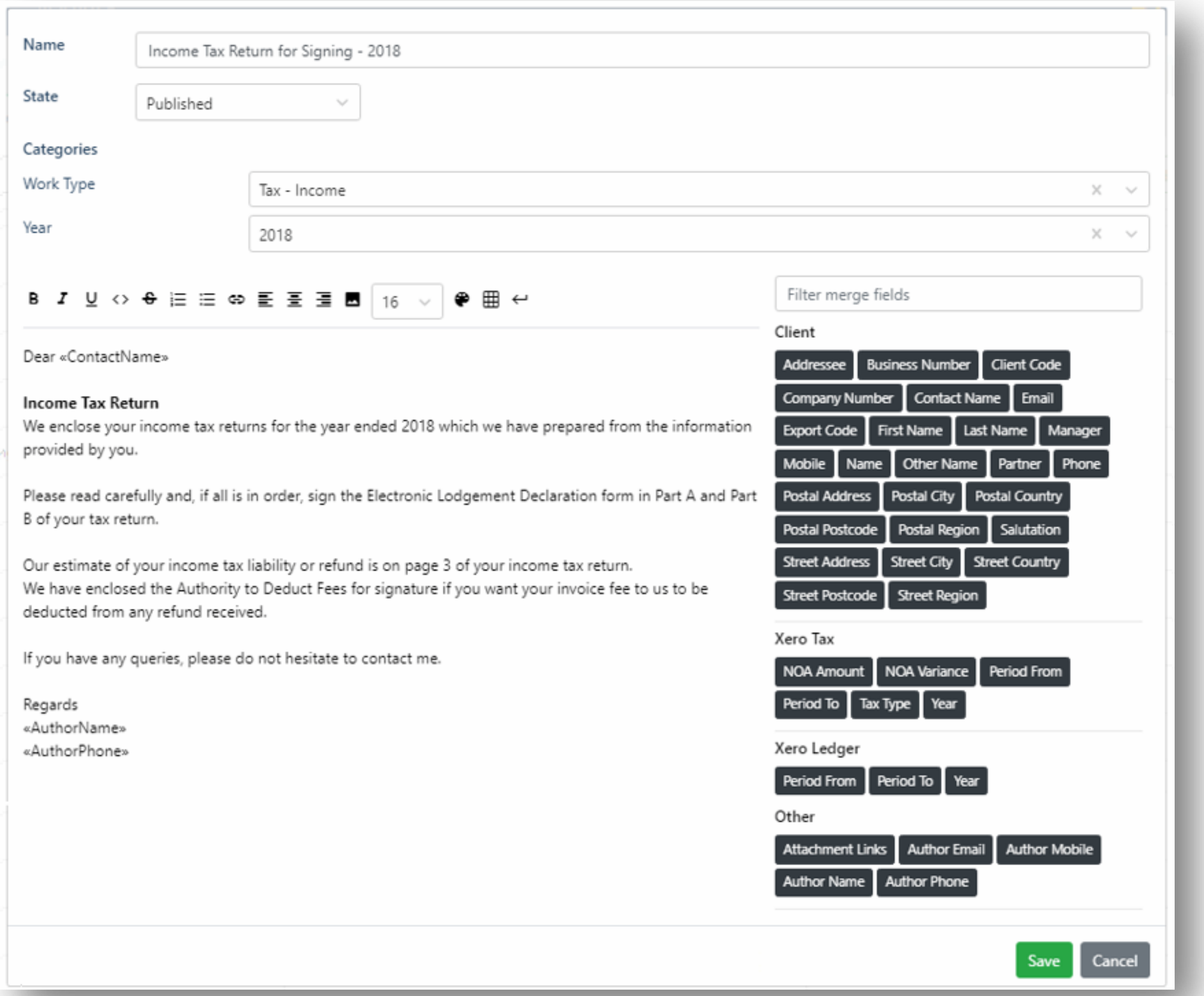
Need Help?

Visit FYI Help > Email Management for instructions on [Creating an Email directly from Outlook]() and [Creating Email directly from FYI]()

Creating Email Templates

Templates can be set up so that standard emails containing rich text and merge fields can be created in seconds for any Client.

FYI comes shipped with a selection of out-of-the-box templates. But more importantly, we've made it easy for you to build your own.



Need Help?

Visit FYI Help > Administration > Practice Templates for instructions on [Creating Email Templates]

Creating Emails Using Templates

You can create an email from a Template directly from FYI, or from Outlook using the FYI Drawer.

From FYI click **+ New** and select **Email** from the list of document types.

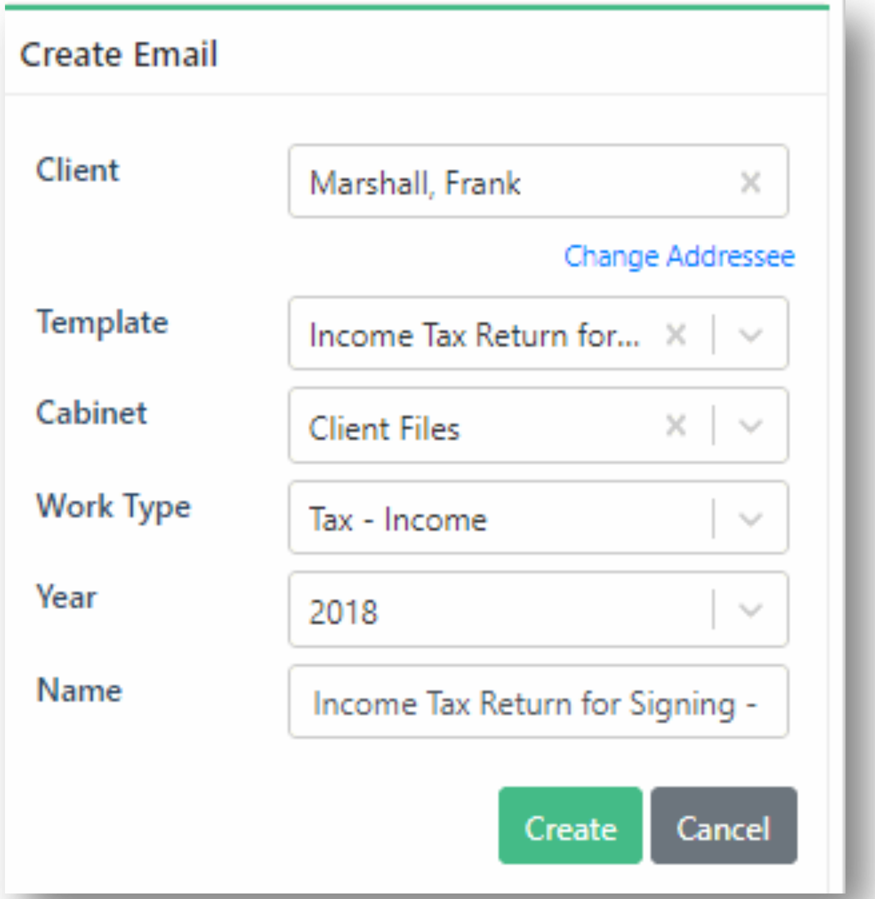
In the **Drawer,** select the **Client** so that any defaults for auto-filing will be displayed.

You can then select the **Template** you want to use and click **Create.**

Click **Preview** to open and edit the email.

- The **Subject** and **Name** of the email in FYI is set as the name of the Template.
- For any **Merge Fields** in the Template, the values are automatically populated with relevant data.
- You can make any changes required and **Send**.

To create an email from a Template in Outlook, simply open the FYI Drawer.



Need Help?

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

ADDING TASKS TO AN EMAIL

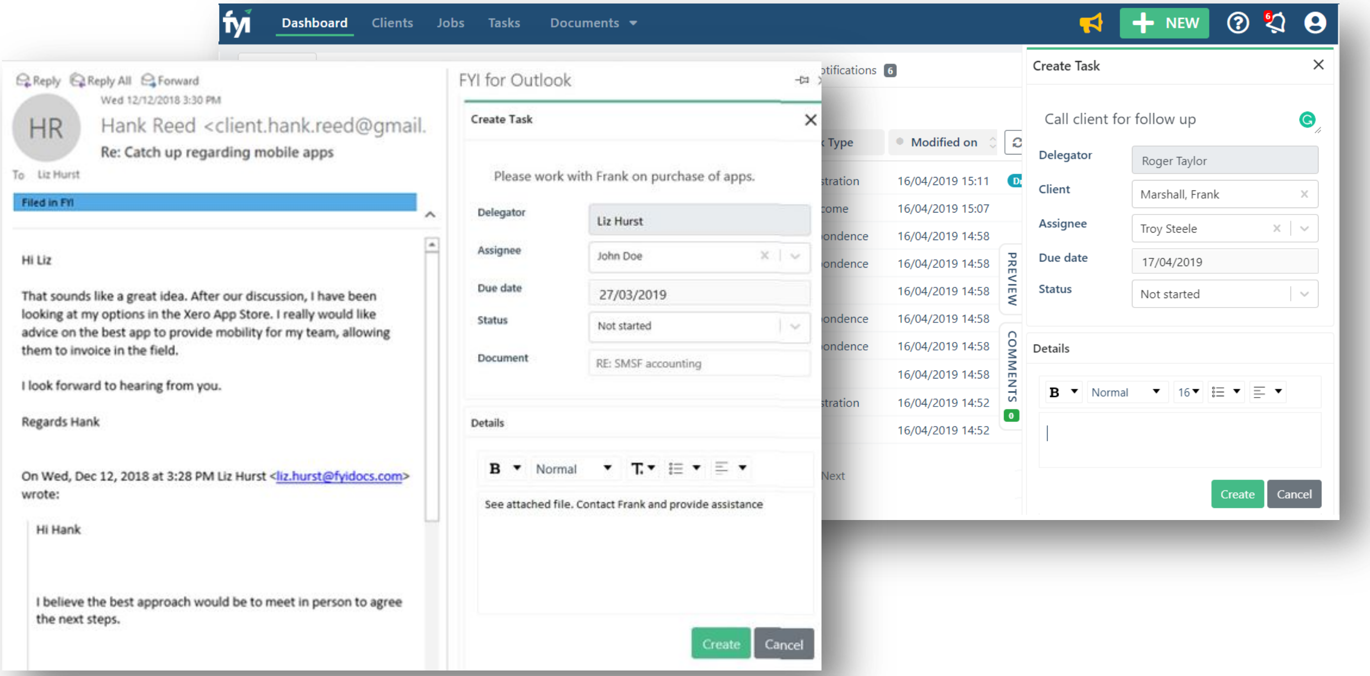
Use the FYI Drawer as your task engine

Using the FYI Drawer as Your Task Engine

FYI makes delegating tasks simple and effective, directly from a filed email in FYI or Outlook.

Simply open the **FYI Drawer** to define your requirements, including;

- **Subject** – this is the task name that will display in Lists in FYI
- **Assignee** – the name of the User assigned to the task
- **Due Date** – can be selected from the calendar
- **Status** – defaults to In Progress when the task is created
- **Details** – allows you to describe the task.



Using the task engine in your FYI Drawer means you can create and delegate tasks that are automatically linked to the email you are working on.

Remember that when a task is created off the back of an email, you can easily display the original email to provide context for the task.

Need Help?

Visit FYI Help > Email Management for instructions on [Adding a Task to a Filed Email in FYI](#) and [Adding a Task to a Filed Email in Outlook](#)

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