Top Tips for Email Efficiencies



Review email signatures for styling & formatting Apply practice or user specific styling for all email signatures Create email templates for all scenarios Create emails templates with merge fields and ensure consistency across your practice	Email Editor Tahoma - 14 - B
Encourage users to create emails from templates Auto-create emails using templates and save time writing emails	Growth Partners - Email Signature Active Happy Birthday from the Growth P Active Create Email Client Stanley, Mike client.mike.stanley@outlook.com 1 Recipient Template Quarterly Report Reminder X
Set your practice default styling Practice Settings - Admin - Settings Set the Default Font and Size.	Default Font: Default Font Size: 14
Use Comments and Tasks instead of forwarding emails internally Delegate tasks or notify users directly from an email	FYI for Outlook PDF Financial Statements Tasks

After setting up Email Autofile, follow these time saving tips when managing emails. For more information on Emails, visit the FYI Help Centre at support.fyidocs.com

Best Practice Guide for Emails