BEST PRACTICE GUIDE

Top Tips for Document Efficiencies



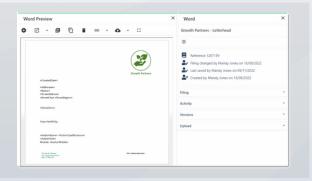
Create document templates for all scenarios

Create document templates with merge fields and ensure consistency across your practice.

	Templates	Knowledge Base Policies & Procedures Task Templates	
		Active Search templates	×
	T ₹	Name	Status \Xi
		Tax Letter	Active
Columns		Year End Checklist	Active
	🗆 🖥	Growth Partners - Postal Address	Active
		Facsimile Notice of Assessment	Active

Create letterhead stationery

Set up stationery for word documents to add your company logo, headers, footers, date, reference number, and also the sign-off and sender details.



Encourage users to create documents from templates

Auto-creating documents using templates save time with writing and formatting content, ensuring consistency across your practice.

Create Word		
Client	Stanley Construction Ltd client.mike.stanley@outlook.com	×
		Change Addressee
Stationery	Growth Partners - Letterhead	× ~
Template	Tax Letter	× ~

Use Workflow to streamline document approval

Send documents for approval using the Workflow feature in the document drawer. This allows you to maintain document version control and a complete audit trail on document review and approval process.

Learn more about document workflows

Workflow		^
Status	Pending Approval	~
Approver	Liz Hurst	~
Owner	Mandy Jones	v

Create templates using practice stationery, rich text and merge fields. For more information on Templates, visit the FYI Help Centre at <u>support.fyidocs.com</u>