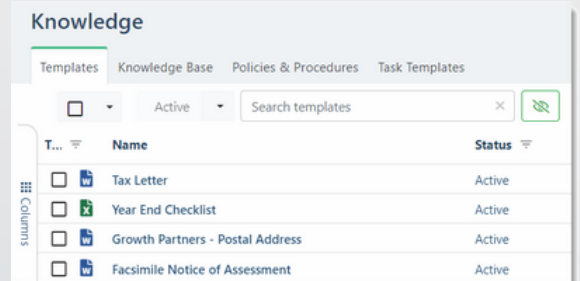# Top Tips for Document Efficiencies
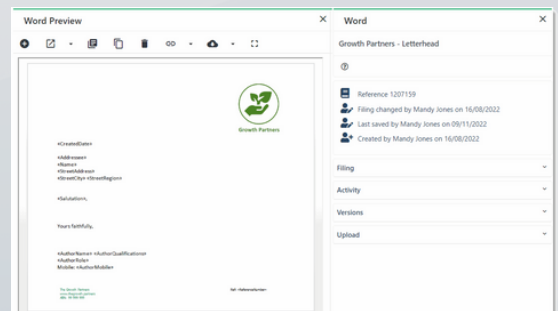
Create document templates for all scenarios

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

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.
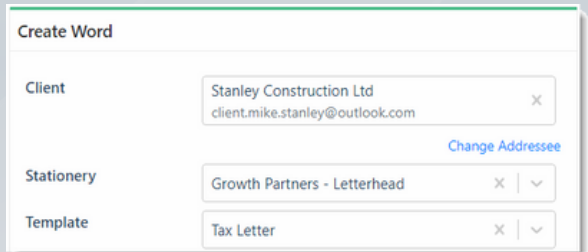
Use Workflow to streamline document approval

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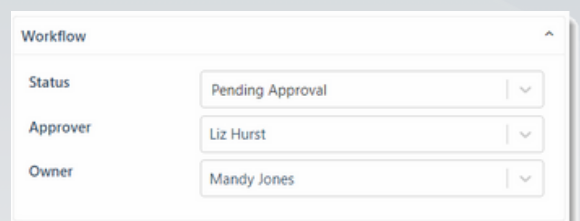
Create templates using practice stationery, rich text and merge fields.
For more information on Templates, visit the FYI Help Centre at support.fyidocs.com