

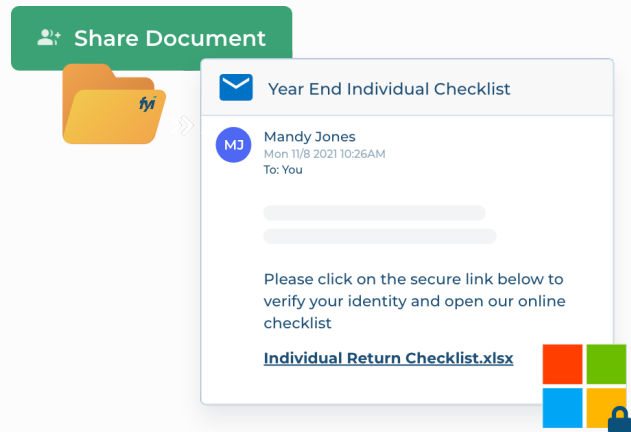
Setting up Collaborate



Discover new ways to work with your clients

Use collaborate to co-edit and share documents and folders securely with your clients.

- ✓ Overview of Collaborate
- ✓ Setting up Collaborate
- ✓ Configuring Collaborate Settings to Co-edit and Share Documents with your Clients
- ✓ Tips and Tricks!



Overview of Collaborate Pro Plan feature

Co-Editing with Client

Share documents with your client as 'Co-edit with Client'.

This gives your client edit access to the document and also allows team members to work on the document at the same time as your client.



Sharing Documents and Folders with Clients Securely

Share documents and folders with clients using FYI's integration with OneDrive – there is no need for your team to send sensitive documents as attachments via email.

Easily manage access to shared documents and folders.

Upload Folders for External Users

The Upload Folder provides an alternate way for clients to send documents to your practice instead of sending documents by email. For example clients can upload documents such as bank statements or tax receipts.

Your client's uploaded documents are automatically filed and your team can be notified when documents are received using a process automation.

Setting up Collaborate

Collaborate refers to Co-editing and sharing documents and folders with clients.

To learn more about co-editing documents internally, refer to [Co-Editing Documents with your Team](#).

Follow the steps to take advantage of all aspects of Collaborating with your clients.

Step 1: Update your OneDrive settings

Select the OneDrive account that will be used as the central location for Collaborate functions such as co-editing documents, sharing documents and folders, and receiving documents from clients.

We recommend setting up a Microsoft 365 account specifically for this with a name to represent your practice, rather than a specific person. Also ensure this account has OneDrive enabled. You can then set up a user directly in FYI that relates to this Microsoft 365 account.

Note: This account must be set up as an FYI user and logged into FYI at least once.

[Learn more about the OneDrive Admin Account](#)

To link your practice's OneDrive admin account:

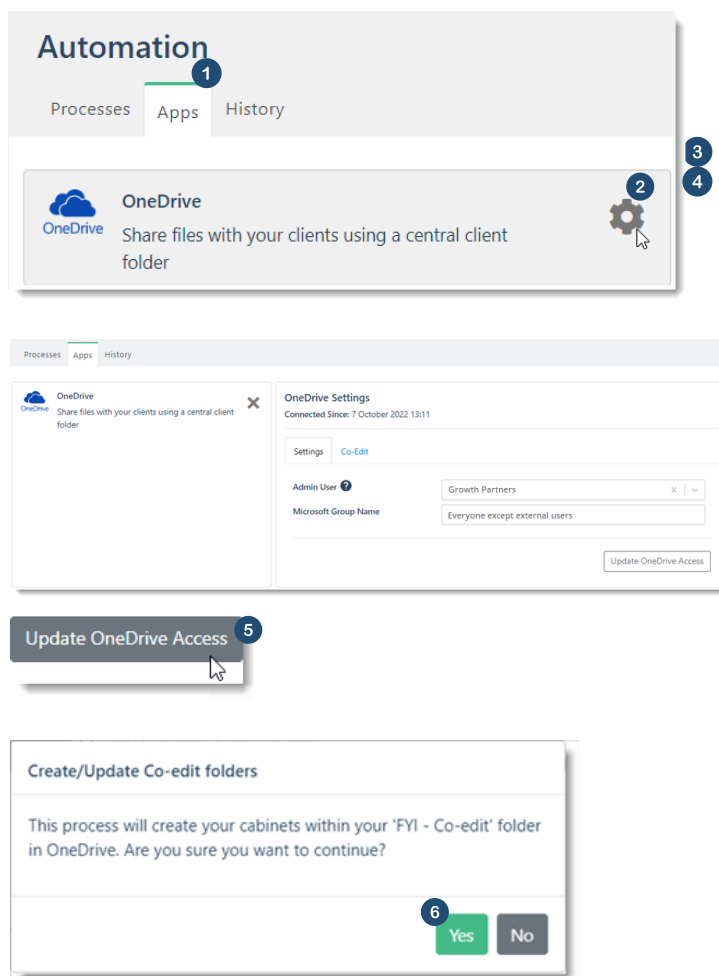
- 1 Select the Automation menu option and go to the Apps tab.
- 2 Locate the OneDrive tile and click the cog icon to edit it.
- 3 In the Settings tab, select the OneDrive Admin User from the drop-down.
- 4 Assign a Microsoft Group Name.

The group will be the default security group assigned to all sub-folders in the OneDrive FYI - Co-Edits folder and is relevant if you are Co-Editing Documents with your Team.

- 5 Then click the Update OneDrive Access button.
- 6 Click Yes to confirm.


This updates the OneDrive Access and also creates the FYI - Co-Edit folders in OneDrive.

[Learn about Microsoft 365 Groups](#)



Setting up Collaborate

Step 2: Ensure external sharing is turned on

 You may need to ask your IT Specialist to assist with this step.

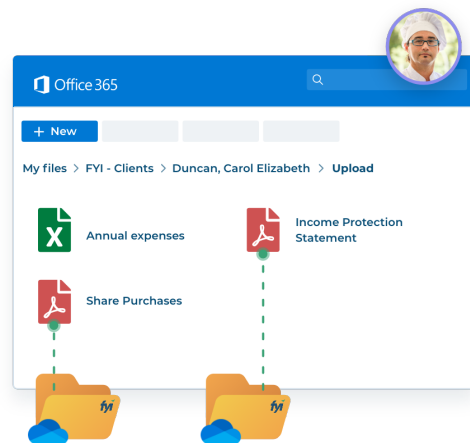
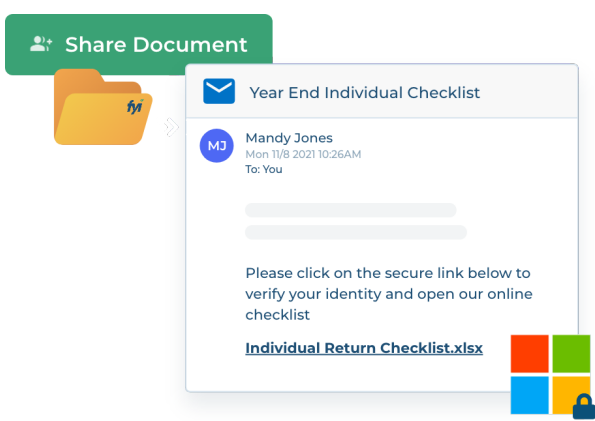
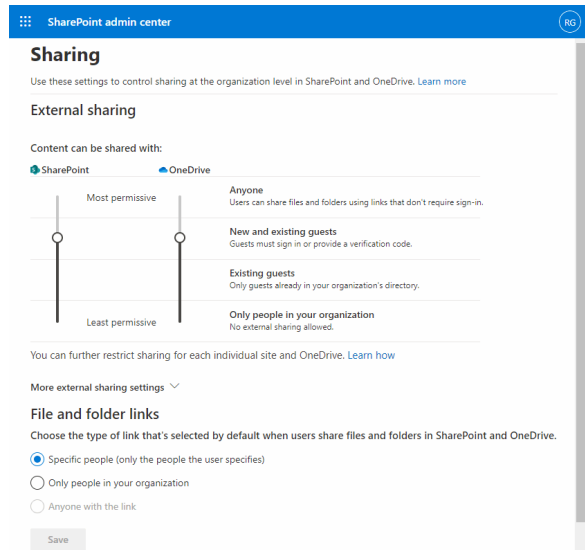
In the SharePoint Admin Center for the Microsoft 365 account for your practice, the External Sharing and File and Folder Links must be reviewed. If not set correctly, this can prevent secure links being created by FYI or existing links to be inactive. The Microsoft 365 account for your practice can only be accessed by a Microsoft 365 administrator.

Go to Microsoft 365 and open your SharePoint Admin Centre. Use this [link](#) to take you directly there.

Review the External Sharing levels. This must be set to 'Anyone' or 'New and existing guests'.

Review the File and Folder Links.

[Refer to the Microsoft help article Manage sharing settings in Microsoft 365](#)



Overview of OneDrive folder structure for Collaborate

OneDrive Folders	Function	Notes
<ul style="list-style-type: none"> <ul style="list-style-type: none"> FYI - Clients <ul style="list-style-type: none"> Client Name Sub-folders as per Share Structure 	Share documents with client Co-edit with client	Must have client name as the first level in share structure
<ul style="list-style-type: none"> <ul style="list-style-type: none"> FYI - Clients <ul style="list-style-type: none"> Client Name Sub-folders as per Share Structure Upload 	Share OneDrive share folder with client Share upload folder with client	Must have client name as the first level in share structure

Configuring Collaborate Settings to Co-Edit and Share Documents with your Clients

Step 1: Setting up your email templates

When documents and folders are initially shared with a client, an email is created for the relevant recipients. The email contains links to the documents or folders, and requires a simple verification process.

Set up your email templates to include the required merge fields to add the correct links when sharing documents or folders.

Sharing Documents Email Template

Must include the Attachments Link merge field.

This merge field is located in the OTHER group of merge fields and looks like this once added to your template:

```
{{ AttachmentLinks }}
```

Sharing Folders Email Template

Must include the Share Folder Link and Upload Folder Link merge fields.

These Merge Fields are located in the OTHER group and look like this once added to your template:

```
{{ ShareFolderLink | web_link }}
{{ UploadFolderLink | web_link }}
```

The email templates can also be used if the links need to be resent.

Important notes

- You can add any additional text to your email template
- If you have a default email signature, this will be added to the email that is sent to your client
- You may decide to send a separate email with instructions on how to use the folders, or you can include this information in your email template. Here are some samples to get you started:

[Introducing shared documents](#)

[Introducing shared folders](#)

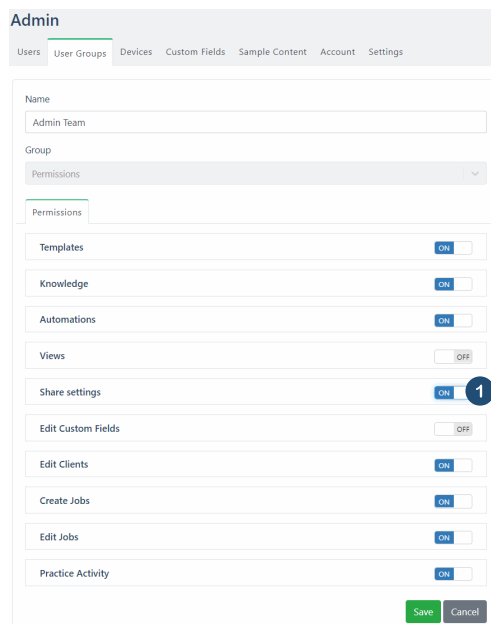
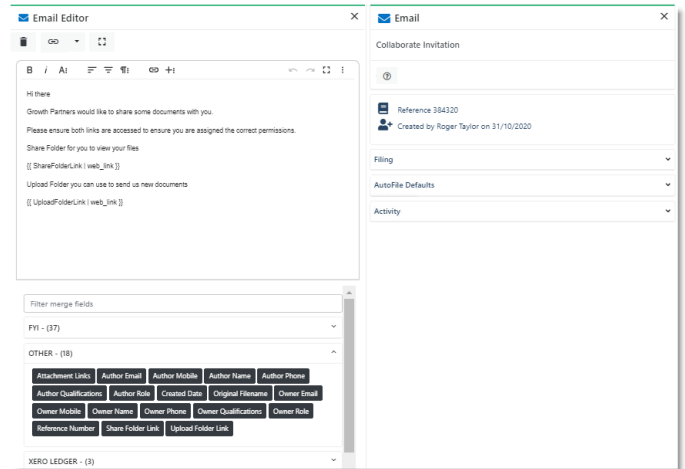
Step 2: Setting up permissions for your team

OneDrive folders can only be shared with a client by an FYI Admin, or a user in a user group that has permissions enabled for Share Settings.

- 1 Set the Share settings permission to "On" for the relevant User Group in FYI.

Users in that User Group will have access to the Sharing Settings in the Client - Collaborate tab.

The Collaborate Tab in the Client workspace provides visibility for your team to all documents that have been shared with a specific client via OneDrive.



Configuring Collaborate Settings to Co-Edit and Share Documents with your Clients

Step 3: Configure practice settings

Before using FYI's Collaborate tools, it is important to assign the practice default settings and create the filing structure for the folders that FYI automatically maintains on your practice's OneDrive.

Select the Automation menu option and go to the Apps tab.

1 Locate the Collaborate tile and click the cog icon.

2 Go to the Settings tab.

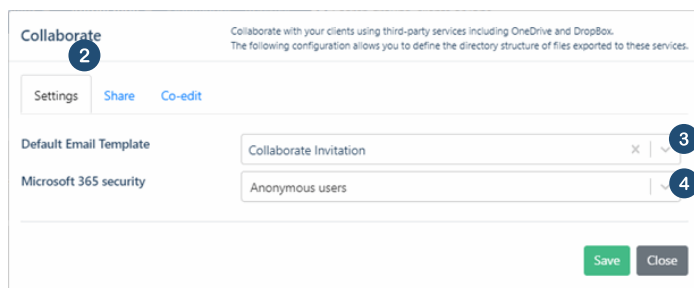
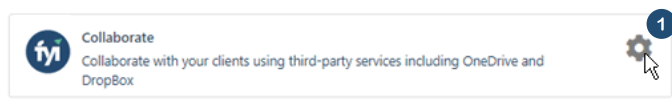
Note: If you see a message "Please select a OneDrive admin from OneDrive app" this indicates that you have not yet set up the account for your practice's OneDrive. Revisit Step 1 in Setting up Collaborate.

3 Select the Default Email Template that you created in the first step of Configuring Collaborate.

4 Set the Microsoft 365 security to 'Anonymous users'. For sites using Azure AD B2B, select 'Guest users'.

[Refer to Setting up and Enabling Azure AD B2B for Collaboration in FYI](#)

Click Save.



Step 4: Set up your share structure for co-editing with clients

Accept the default settings or set up the Share folder structure that FYI will automatically use for all documents that are shared with external users.

The Structure List represents the structure of the folders in your OneDrive FYI - Clients folder.

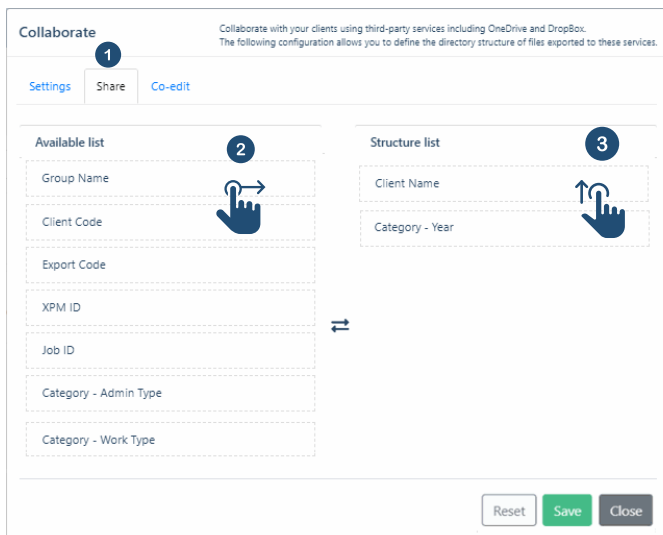
The Client Name must be the first level. This is set as the default.

1 Edit the Collaborate tile and go to the Share tab

2 From the Available List in the left-hand pane, select and drag the relevant list options to the Structure List in the right-hand pane

3 Then order the selections in the Structure List up and down by dragging and dropping the options to match the filing structure you require.

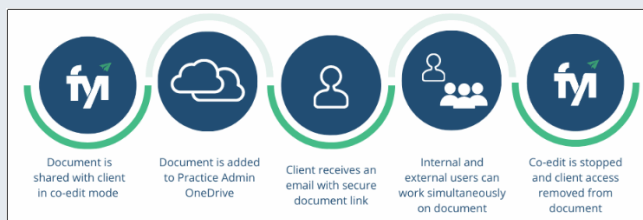
4 Click Save.



Important notes

- If a level in the filing structure does not exist in the filing details of a document, Collaborate will ignore this level and create the next level down.
- The Reset button will reset the structure list back to the default settings. It will not update your settings until you click Save.

Co-editing with clients



Configuring Collaborate Settings to Co-Edit and Share Documents with your Clients

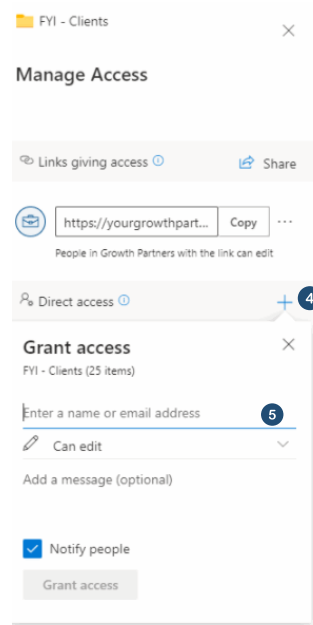
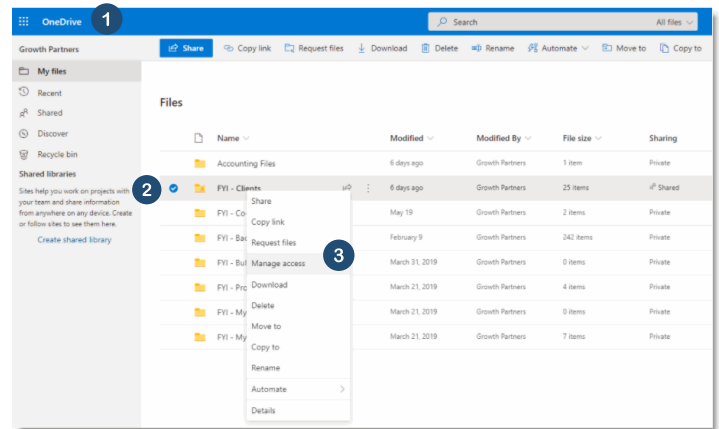
Step 5: Giving access to your team

To ensure that your team members have access to the documents shared with clients including the links that are generated, the OneDrive Admin Account user will need to give Direct Access to your team directly within OneDrive.

- 1 Go to your practice's OneDrive folder
- 2 Right click on the FYI - Clients folder
- 3 Select Manage access

The Manage Access pop-up displays

- 4 Click the + icon beside Direct Access
- 5 Enter the name of the user(s) or group that you are giving access to the folder.



Important notes

- We recommend that practices utilise the functionality of Microsoft groups and create a broad group that includes all team members that require access. New team members can then be added to this group and they will automatically be granted access to the FYI - Clients folder.
- This can be the same Microsoft group that was set up in Step 1 of Setting up Collaborate.
- FYI Client Security settings do not sync to FYI - Clients folder in OneDrive. If you wish to set specific user security for clients we recommend that Direct Access is reviewed for these clients and updated accordingly on a user basis.

[Learn about Client Security.](#)

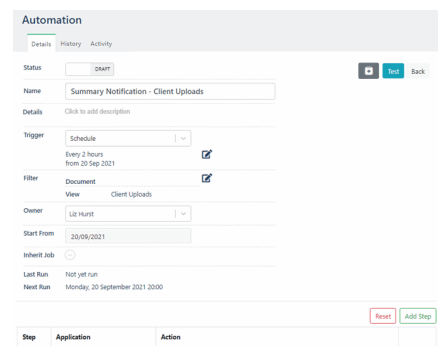
Tips!

Set up a custom process to notify team members that documents have been received from your clients.

[Refer to Client Upload Notification](#)

Is your practice integrated with myprosperity? Leverage your myprosperity integration to send documents to your clients.

[Learn more about Sharing Documents via myprosperity.](#)



Discover new efficiencies. Together.

For more information on Collaborate, visit the FYI Help Centre at support.fyidocs.com