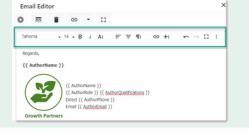
Top Tips for Email Efficiencies Best Practice Guide



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

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1	emplates Policies		
	• • A	II Search templates	
	Туре 👳	Name	Status \Xi
		Engagement Letter Attached	Active
Columns		Growth Partners - Email Signature	Active
3		Happy Birthday from the Growth P	Active

Encourage users to create emails from templates

Auto-create emails using templates and save time writing emails

Create Email		×	
Client	Stanley, Mike client.mike.stanley@outlook.com	×	
		1 Recipient	
Template	Quarterly Report Reminder	× v	

Set your practice default styling

Practice Settings - Admin - Settings Set the Default Font and Size.

Default Font:	Tahoma	
Default Font Size:	14	~

Use Comments and Tasks instead of forwarding emails internally

Delegate tasks or notify users directly from an email

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Financial Statements								
1	#	0	☆	0	ø			
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.fyi.app