BEST PRACTICE GUIDE

Document Approval Process

Sending documents for approval made easy with FYI

Digitalise your document approval process, and easily track the workflow of your documents within FYI.

- Getting started with Workflow
- Creating and reviewing your documents
- Sending your documents for review and approval
- Approving and sending your finalised documents
- Tips & Tricks

Getting Started with Workflow

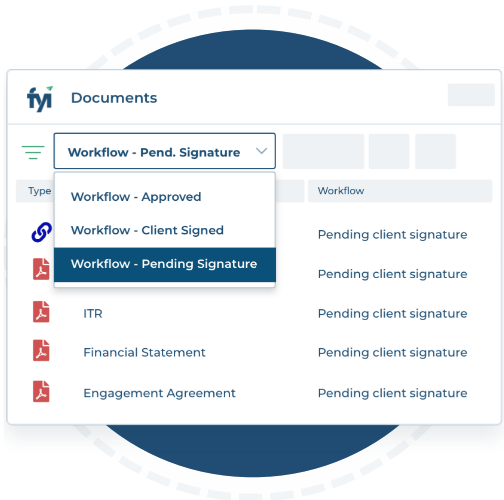
Workflow allows you to complete digital reviews and approvals of documents in FYI.

This feature gives you the ability to track the status of documents and once approved, the document is locked so no further editing can take place.

Document integrity is maintained and activity is recorded throughout the process.

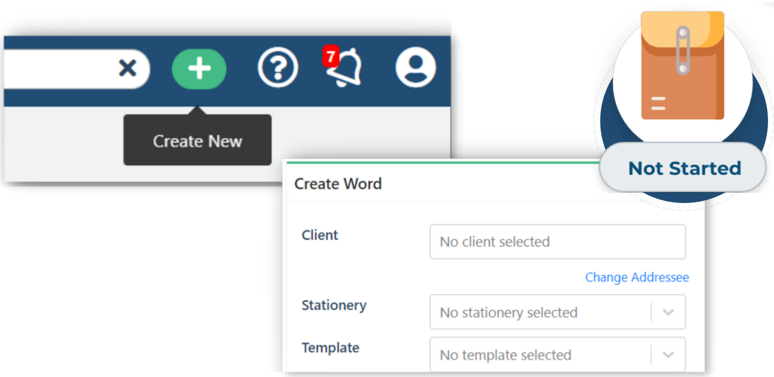
To use this feature Approval Permissions must first be configured, refer to the below resource for a step-by-step guide on how to set this up for your practice.

Setting up Workflow for Emails and Documents for FYI Admins



End to End Process

The below are FYI's best practice process for creating, reviewing and approving documents within FYI.

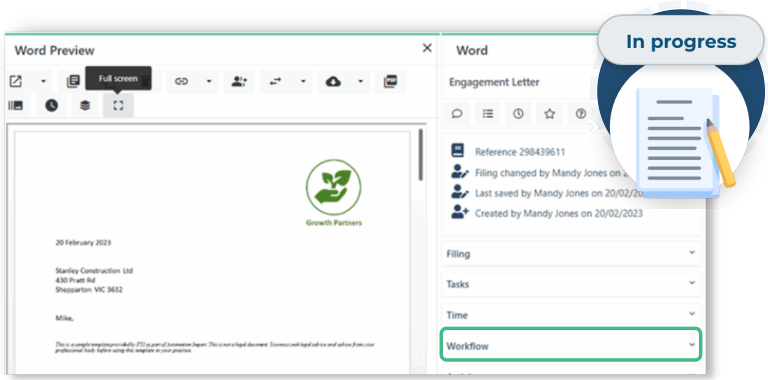


1 Create your document

Create your document in FYI, using either the Create menu or hotkey.

Tip: Use Templates to prepopulate your document with content in just a few clicks.

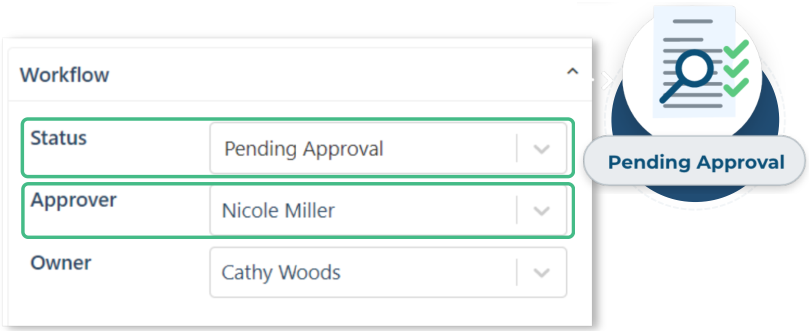
2 Review or update details



Check your document has populated correctly, once happy with your document ensure you save and select "**I am finished editing**" to close the loop and sync your changes back to FYI.

Tip: Update the Workflow state to "In Progress" if you're coming back to make changes later.

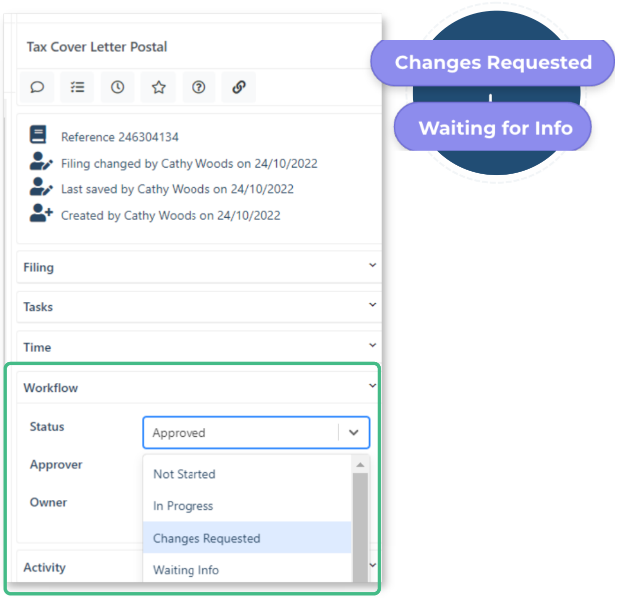
3 Send for review



In the Workflow section of the document Drawer, update the Status to "Pending Approval" and assign the team member who needs to review the document and Approve it.

Tip: Use the Workflow-Pend. Approval View to monitor any documents sent for approval.

4 Review document



All documents that require your Approval will appear in your Home Workspace and My Approvals tab.

Open the document via Read or Edit functions to review the document. Once reviewed if any changes are required to the document simply navigate to the Workflow section of the drawer and update the state to "Changes Required".

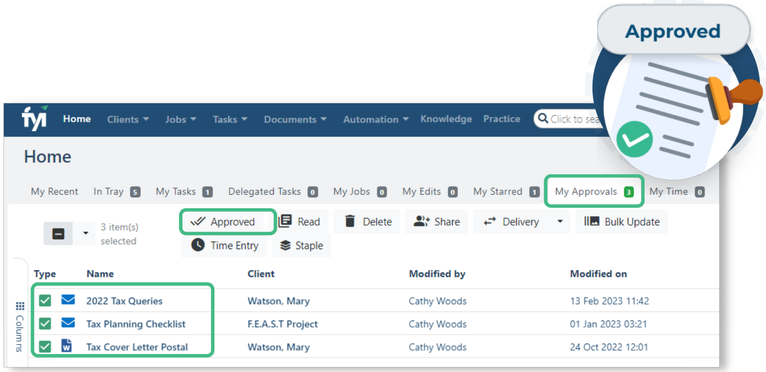
Make notes of changes required in the comments section and post the comment for the Document Owner to be notified that there is action required.

If no changes are required move to step 5.

5 Approve document

Once you have reviewed the document, update the Workflow Status to Approved. This will automatically create a Comment tagging the Document Owner. Post this comment so the team member is notified that the document has been Approved.

This will complete your document and a padlock will appear next to the name of the document in your list. This indicates that no further changes can be made to this document.



Tip: You can complete bulk Approvals in your My Approval space.

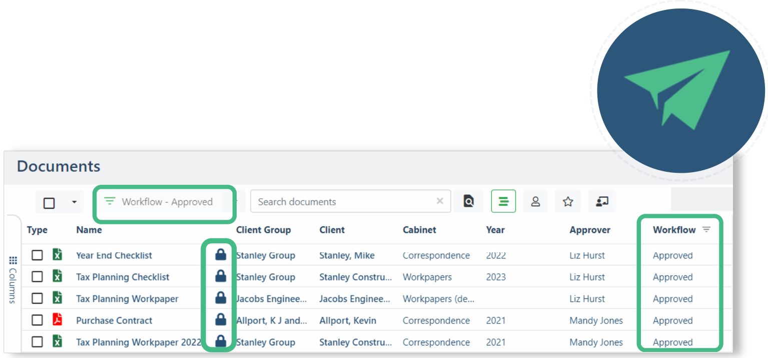
6 Send document

As Document Owner you will be notified by a Comment that the document has been Approved. Your document will have a padlock displaying next to it indicating that no further changes can be made.

If you need to make any further amendments, you will need to notify the Approver of the document to revert the Workflow Status to "In Progress" to allow you to make any further edits.

Once your document has been Approved you can share/send/take next steps as necessary.

Tip: If you're sending the document for signing, follow our best practice guide for that process here.



Tips & Tricks

Multi-Step Review

If you have a more than one person involved for approving documents you can enable Advanced Workflow in your Practice Settings (you will need to be an FYI Admin).

Enabling this feature will include two additional Workflow Statuses of First Review and Final Review that can be used as additional levels of review and approval. Learn more.

For examples on using Workflow for Approvals, check out this article here.

Use Views to track document approvals

Once documents are signed, they are automatically filed in FYI. You can review any signed documents by using the Custom View in FYI called Workflow - Client Signed.

Tip: You can setup notifications in FYI to automatically be alerted when you have documents pending approval and take next steps, you can import this process here.

Digitalise your document approvals and auto-track the workflow of documents. Quickly view the documents that have been approved and those still outstanding, all without leaving FYI.

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