

Using New Collaborate

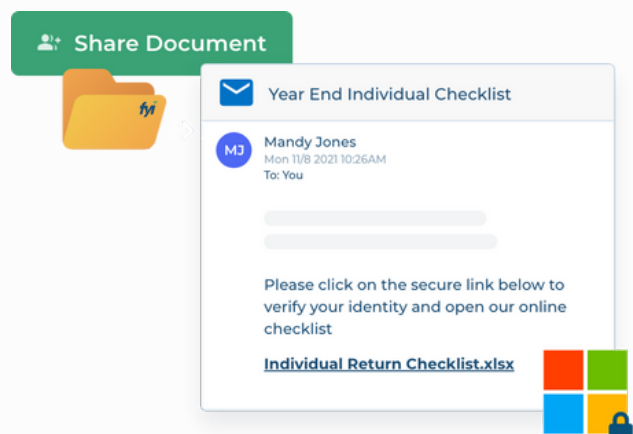
Quick Reference Guide



Discover new ways to work with your clients

Collaborate with your clients and contacts by securely sharing documents and folders in a dedicated client portal. Deliver a branded client experience right from within FYI.

- ✓ Overview of New Collaborate
- ✓ Sharing Documents
- ✓ Automatic Client Access to the Share Folder
- ✓ Sharing Folders
- ✓ Co-Editing Documents with Clients



Overview of New Collaborate Pro Plan feature

Dedicated Collaborate Site for your Practice

Let FYI do the heavy lifting and automatically create a Collaborate site on SharePoint.

Customise your new Collaborate site with your logo, a theme or even take advantage of templates and apps to include a news feed and calendar bookings.

Sharing Documents and Folders with Clients

Share documents and folder with your client and contacts. There is no need to send sensitive documents as attachments via email.

Easily manage access to shared documents and folders for your Collaborate site.

Uploading Documents

The Upload Folder provides an alternate way for clients to send documents to your practice instead of sending attachments by email.

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

Co-Editing Documents with Clients

Share documents as 'Co-Edit with Client' and give your client edit access to required documents.

Co-Edit with Client also allows your team members to work on the document at the same time as your client.



Sharing Documents

Client files are accessed securely via links instead of email attachments

Sharing Documents with Collaborate allows your clients to access files securely, rather than sending documents attached to an email.

Send one or more documents at a time, with the files placed into the client's folder on your Collaborate site. Send your client an email with attachment links, or just share the file directly to the site.

Learn more about Sharing Documents

To email a Document using Collaborate:

- 1 Select your Documents.
- 2 Click the Share button.
- 3 Enter additional Recipients if required.
- 4 Select the Email Template to send to the client.
- 5 Select whether to Save as a Draft or Send.
- 6 Select Collaborate from Send Attachments.
- 7 Click Create.
- 8 A Status window will be displayed while the recipients are added to the Collaborate site.
- 9 Send the email.

The client, along with any other recipients, will be prompted to log in using Microsoft 365. They will be able to access the document you shared, along with the Collaborate home page.

To share documents to the Collaborate site without sending an email:

- 1 Select your Documents.
- 2 Click the arrow on the Share button and select No Email.
- 3 The Client will be automatically selected (where the document will be uploaded).
- 4 Select Collaborate from Send Attachments.
- 5 The list of Documents will be displayed
- 6 Click Create.

Create Email

Client: Innecity Electrical
client.frank.marshall@outlook.com

1 Recipient

Template: Engagement letter attached

Name: Engagement letter attached

Cabinet: Correspondence

Job: No job selected

Show Inactive Jobs: OFF

Year: 2023

Work Type: Engagements

Save or Send: Draft in FYI

Attachments (1 item / 35 KB)

Engagement Letter
35 KB

Add Document

Send Attachments: Collaborate

Include as PDF: OFF

Co-Edit with client: OFF

ⓘ Emails drafted in FYI will merge signature templates when sent or transferred to Outlook.

Create Cancel

Important notes

- Clients with access to the Share Folder will be able to see all files (even if not shared directly with them).
- Sharing a document with an email address matching the client's email will automatically enable that user access to the Share Folder.
- Clients that don't use Microsoft 365 (for example, Gmail) will still be able to log in, but may have a slightly different login experience.
- Documents can be shared via Collaborate automatically using Automation Processes

Share Document

Client: Marshall, Frank
client.frank.marshall@outlook.com

Send Documents: Collaborate

Include as PDF: OFF

Co-Edit with client: OFF

Documents

Engagement Letter
35 KB

Send Cancel

Sharing Folders

Share the Client Folder for easy access to all files, with an Upload folder for clients to send documents to your practice.

Sharing the client Share Folder provides access to all documents shared with your client. As you add more documents, the client will have immediate access - no link is required.

The Upload folder provides your client with an easy way to send files to your practice. Documents are automatically uploaded into FYI.

Learn more about Sharing Folders

- 1 Open the Client - Collaborate tab for your client.
- 2 Click the Sharing Settings button.
- 3 Click Give user access to add a user.
- 4 Select a contact or enter an email address.
- 5 Click Save.
- 6 The contact will be added to the Collaborate site.

Now that the client has been added to the Sharing Settings, they will be able to access the Share Folder, and all underlying content, from the Collaborate site.

From FYI, you will be able to send an email to the client with the links to the New Collaborate Share Folder and Upload folder.

The client will be prompted to log in and will be able to access the Share Folder, including the Upload folder from their Collaborate site.

Automatic Share Folder access for clients

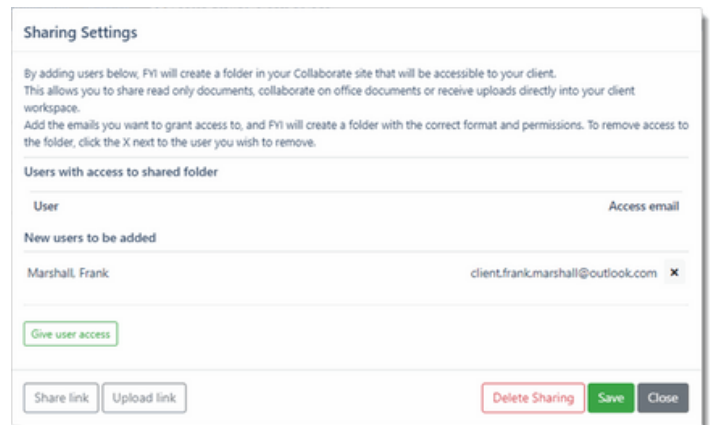
If the recipient email matches the Email in the Client Details, Collaborate will automatically enable access to the Share Folder.

The client will be able to access:

- All files in their Client Share Folder
- The Upload folder
- The Collaborate Site

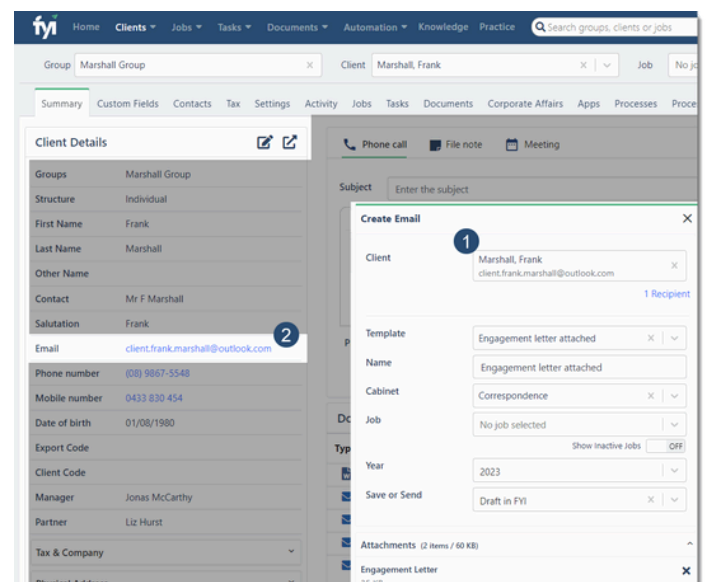
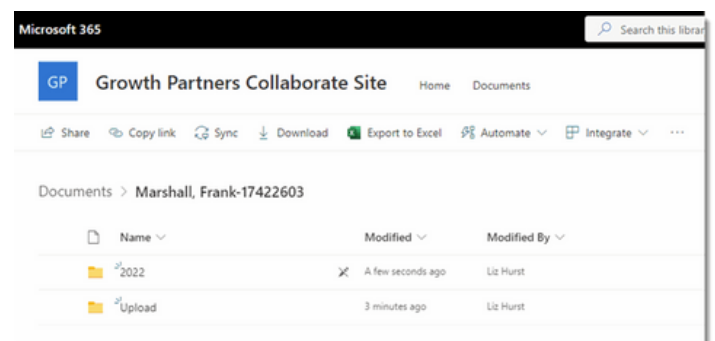
In the example on the right, a document was shared with Frank Marshall. When sharing the document, the client folder was automatically shared:

- 1 The Recipient's email matched
- 2 The client email in the Client Details section in the Client - Summary tab.



Important notes

- Once the client has Share Folder access they can use the Upload folder to send files to the practice.
- Clients that don't use Microsoft 365 (for example, Gmail) will still be able to log in, but may have a slightly different login experience.



Collaborate Site Link

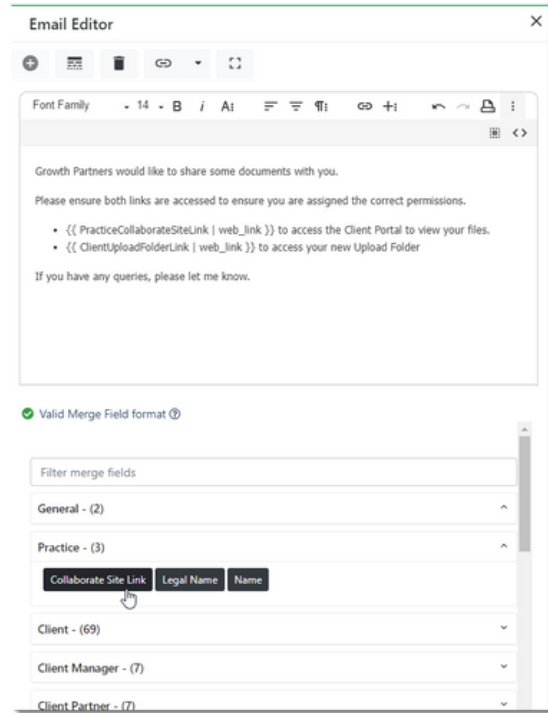
The Collaborate Site offers your client easy access to their documents, and more.

The Collaborate Site can be customised to provide an engaging site for your clients, with branding to match your business, and even add apps to post news and updates, display a booking calendar, and more.

By sending your client the Collaborate Site Link they have a single URL to access everything they need.

The Site Link is available as a merge field to include in your Collaborate Email Templates. You can find the Collaborate Site Link, Share Folder Link, and Upload Folder Link in the "Other" section of the Email Template Merge Fields.

Your FYI Admin can include this merge field to your default Email Templates when sharing documents and folders.



Receiving Files from the Upload Folder

Documents added to the Upload folder are automatically imported to FYI.

Clients with Share Folder access can use the Upload folder to send files to your practice. Files are automatically imported to FYI, and either removed from the Upload folder or moved to a Processed folder, depending on the Collaborate app settings in FYI.

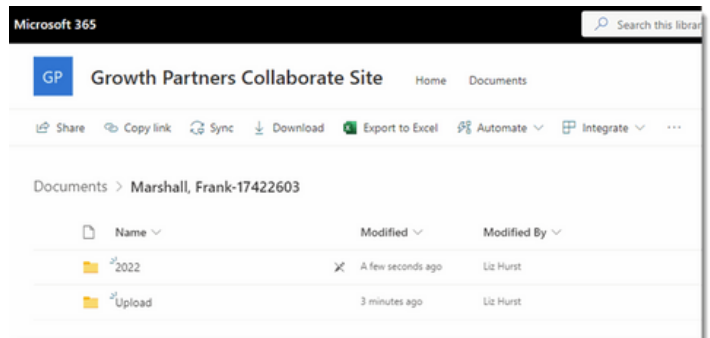
Where possible, imported documents are filed based on auto-file settings and filing defaults. Unfiled documents will be displayed in the In Tray of the OneDrive Admin account.

To identify uploaded documents, the Source column can be added to Documents lists. In this column, "Client Upload" will be displayed to show files sent from the client using Collaborate.

The Source field can also be the basis of some useful automation processes for your team. For example:

- Notify your team when client documents are Uploaded
- Alter the document, for example, change the filing status to be Unfiled (instead of auto-filing).

Learn more about receiving documents from the Upload Folder



Important notes

- FYI checks the Upload folder for new files every 10 minutes
- Share the In Tray for the OneDrive Admin Account with other users to access unfiled documents. [Learn more.](#)
- Create an Automation to notify your team when uploaded documents have been received. [Learn more.](#)

The image shows a 'Documents' list in FYI. The table has columns: Type, Client, Client Group, Name, Cabinet, Year, Workflow, and Source. The data rows are as follows:

Type	Client	Client Group	Name	Cabinet	Year	Workflow	Source
📄	Marshall, Frank	Marshall Group	EOY Workpapers	Correspondence	2023	Not Started	Client Upload
📄	Stanley Homes	Stanley Group	Receipts - Stanley	Correspondence	2023	Not Started	Client Upload
📄	Stanley Homes	Stanley Group	Business purchase costs calc Mike...	Correspondence	2023	Not Started	Client Upload
📄	Stanley Homes	Stanley Group	Tax info attached	Correspondence	2023	Not Started	Client Upload
📄	Marshall, Frank	Marshall Group	Year End Checklist F Marshall	Correspondence	2023	Not Started	Client Upload
📄	Marshall, Frank	Marshall Group	Year End Checklist F Marshall	Correspondence	2023	Not Started	Client Upload
📄	Marshall, Frank	Marshall Group	EOY Workpapers	Correspondence	2023	Not Started	Client Upload

Co-Editing Documents with Clients

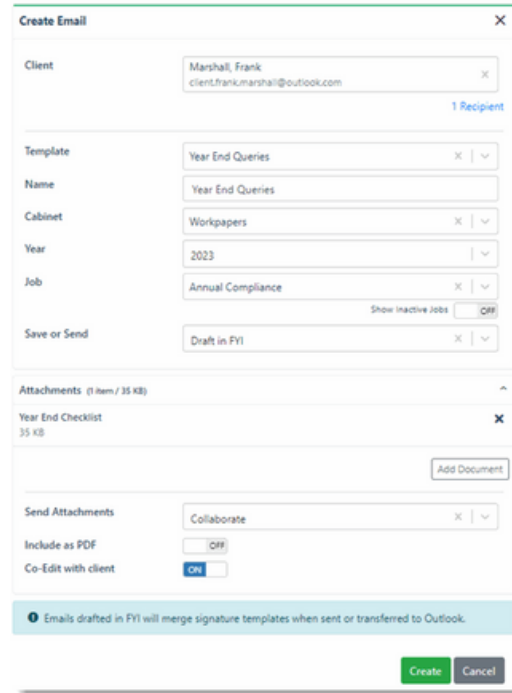
Your team and your clients can work on files at the same time - no need to share files back and forth.

Using Client Co-Edit, files are stored securely on your Collaborate Site in the client folder while your team and clients work on files together.

When your team click Finish Client Co-editing, files are uploaded and filed back in FYI.

Learn more about Co-Editing with Clients

- 1 Select your Documents.
- 2 Click the Share button.
- 3 Select the Email Template to send to the client.
- 4 Select whether to Save as a Draft or Send.
- 5 Select Collaborate from Send Attachments.
- 6 Click to toggle off Include as PDF.
- 7 Click to toggle on Co-Edit with client.
- 8 Click Create.
- 9 A Status window will be displayed while the recipients are added to the Collaborate site.
- 10 Send the email.



Important notes

- Client Co-Edit can only be used with Office documents (Word, Excel or Presentation).
- Client Co-Edit files cannot be sent as a PDF.
- Some features of Excel are not recommended for use with Client Co-Edit (linking cells, macros, and other controls).

Client - Collaborate Tab

The Collaborate tab in the Client Workspace displays all documents that have been shared with the client using Collaborate.

You can also use this tab to manage your Sharing Settings for the client, including removing users or deleting sharing altogether.

However, you won't see the following documents on the Client - Collaborate tab:

- Documents sent via email.
- Documents sent via Signing services using the Signature button.

Type	Client Group	Name	Cabinet	Year	Job	Workflow	Modified by	Modified on
Document	Marshall Group	FYI Engagement Letter	Correspondence	2023	Individual Tax Return	Not Started	Liz Hunt	21 Jan 2024 16:22
Document	Marshall Group	2022 Year End Checklist	Correspondence	2022	Annual Compliance	Not Started	Liz Hunt	19 Aug 2023 14:15
Document	Marshall Group	Engagement Letter	Correspondence	2022	Annual Compliance	Not Started	Amya Jordan	19 Jan 2023 14:15
Document	Marshall Group	Year End Checklist F Marshall	Correspondence	2022	Annual Compliance	Not Started	Mandy Jones	15 Aug 2022 14:36
Document	Marshall Group	Tax Planning Workpaper	Workpapers	2023	Annual Compliance	Pending Approval	Mandy Jones	15 Aug 2022 14:33
Document	Marshall Group	Engagement Letter 2022	Correspondence	2022	Annual Compliance	Not Started	Mandy Jones	13 Jul 2022 07:35

Discover new efficiencies. Together.

For more information on New Collaborate, visit the FYI Help Centre at support.fyi.app