

Lightspeed Email Management

With FYI



Stay on top of client relationships with every client email automatically captured

FYI's Email AutoFile engine is purpose-built for accountants, to automatically file client emails applying consistent filing rules practice wide and making them immediately accessible to the team so nothing gets lost.

- ✓ **Using FYI for Email Management**
- ✓ **How to transition to FYI for Email Management**
- ✓ **Key benefits of managing Emails with FYI**

FYI's Email Management allows you to stay on top of client relationships with all emails captured and visible in the client workspace.

Removing the manual filing of emails and individual inbox challenges, FYI automatically files client emails and attachments according to your practice's filing rules. Saving the team time every time a client email is sent or received.

New emails can also be created in seconds using templates and merge fields to incorporate data for personalisation without lifting a finger. Allowing you to standardise communication for a great client experience.

The screenshot shows the 'FYI Clients' interface. At the top, there are five circular profile pictures of team members. Below them, the 'Clients' section is active, showing filters for 'Group' (Marshall Group) and 'Client' (Marshall Family Trust). A table lists several emails:

Type	Name	Group	Cabinet
✉	Engagement Letter 2022	Marshall Group	Correspondence
✉	Signed Letter	Marshall Group	Correspondence
✉	Information Request	Marshall Group	Work Papers
📄	Business Purchase Contract	Marshall Group	Permanent
✉	Notice of Assessment	Marshall Group	Final Reports & ...

The screenshot shows the 'Create Email' interface. The 'Client' field is set to 'Marshall, Frank' with the email address 'client.frank.marshall@outlook...'. Below this, a dropdown menu for 'Template' is open, showing options: 'No template selected', 'Engagement Letter', 'Notice of Assessment' (highlighted), 'Quarterly Report Reminder', 'Year End Financials', and 'Year End Queries'. A 'Create' button is visible at the bottom right.

Unlock your inbox with Email AutoFile



Client emails that file themselves

Auto-file client emails and attachments to the client file based on your exact configurations, ensuring consistent filing and nothing is missed.



Every client email captured for quick visibility

Store all client emails centrally for visibility and quick accessibility, not locked out of sight in individual inboxes.



Create standard emails in seconds

Auto-create emails using standardised templates, incorporate merge fields to instantly personalise without lifting a finger.



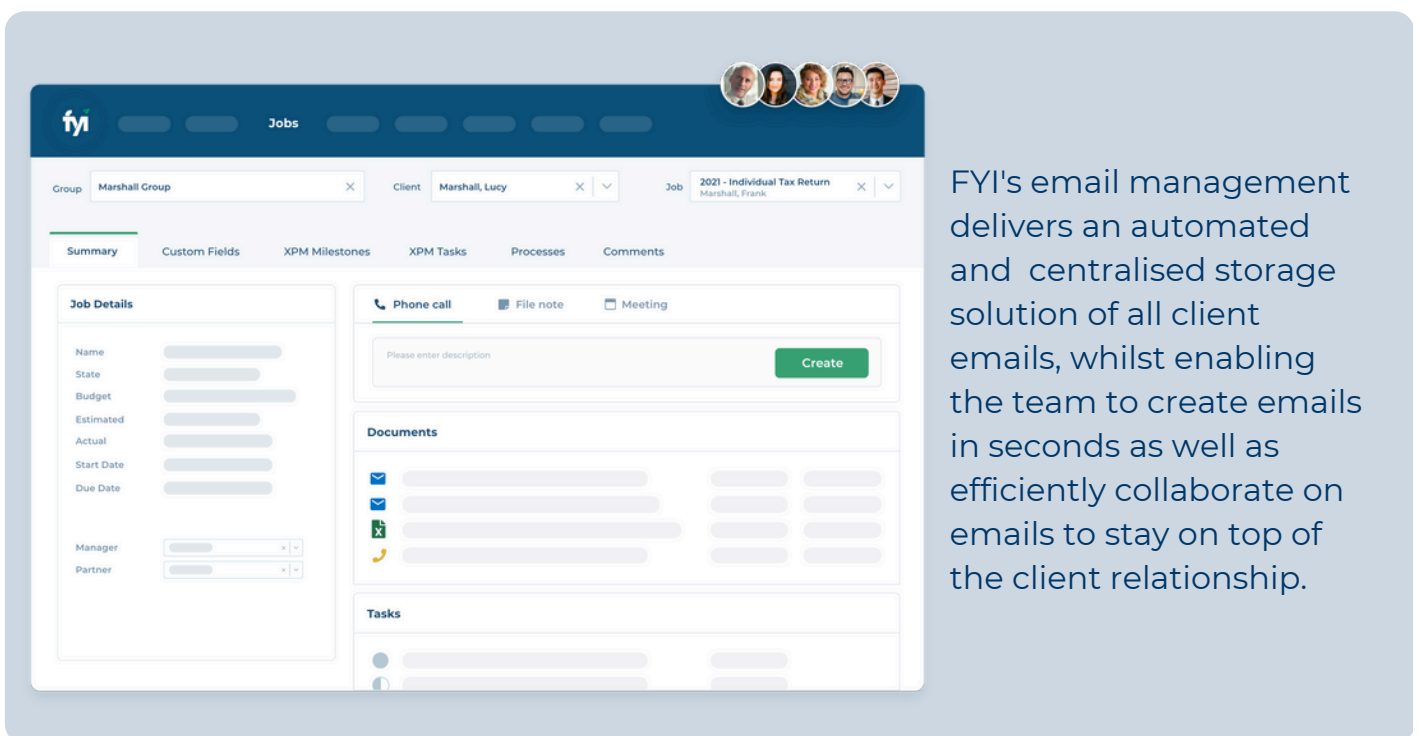
Draft and review emails with built in digital workflows

Leverage FYI's collaboration tools and version control to draft emails on behalf of team members and send for digital review quickly and easily, eliminating unnecessary back and forth.



Next level efficiency inside Outlook

Access the FYI app within Outlook to file emails, delegate tasks and more. Eliminating the need to forward emails and allowing the team to collaborate efficiently and effectively.



FYI's email management delivers an automated and centralised storage solution of all client emails, whilst enabling the team to create emails in seconds as well as efficiently collaborate on emails to stay on top of the client relationship.

How to transition to FYI for Email Management

Consider the following to help prepare for your transition to FYI to manage your emails.

Configure Email AutoFile

Review your Email AutoFile app settings and user defaults. Set up any filing defaults and exclusions as required.

Email ↑	Active	AutoFile Mode
allen.fisher@thegrowth.partners	Yes	Practice Default
amanda.bailey@thegrowth.partn...	Yes	Practice Default
anna.jordan@thegrowth.partners	Yes	Practice Default

Email AutoFile

Settings | Exclusion | Defaults

Client Emails

- AutoFile Else In Tray
 - Emails & attachments: ON
 - Emails only (In Tray for attachments): OFF
- In Tray Review: OFF
- Include Client's Contacts: ON
- Exclude Email Stationery Images: ON
- Exclude Internal Emails: ON
- Exclude External Emails: OFF

Close

Setup Email Templates & Signatures

Create email templates for all scenarios using merge fields to auto-populate key client data, ensuring consistency across your practice as well as saving the team time writing emails.

Email Editor

Send | Draft in FYI

From: Mandy Jones <master_jc@thegrowth.partners>
To: Stanley Construction Ltd <client.mike.stanley@outlook.com>

Tahoma 14 B i A: [Rich Text Editor Icons]

Dear Mike

Please find attached the engagement letter for our services.

{{ AttachmentLinks }}

Confirmation of Terms

If this letter correctly expresses your understanding, please sign and return a scanned to the practice. This letter will be effective for future years unless we advise you of any change.


For More Information

For more information please see our terms or service: www.growthpartners.com/terms

We appreciate the opportunity to work with you and trust that our association will be a long and fruitful.

Regards,

{{ AuthorName }}


 {{ AuthorName }}
 {{ AuthorRole }} {{ AuthorQualifications }}
 Direct {{ AuthorPhone }}
 Email {{ AuthorEmail }}

Knowledge

Templates | Policies & Procedures

Search templates

Type	Name
<input type="checkbox"/>	Reminder compliance paperwork
<input type="checkbox"/>	Engagement Letter Attached
<input type="checkbox"/>	Growth Partners - Email Signature
<input type="checkbox"/>	Happy Birthday from the Growth P...
<input type="checkbox"/>	Collaborate Invitation
<input type="checkbox"/>	Financial Advisory - Email Signature
<input type="checkbox"/>	Year End Queries: FYI Sample Temp...
<input type="checkbox"/>	Tax Letter Attached: FYI Sample Te...
<input type="checkbox"/>	FYI: Tax Letter Attached
<input type="checkbox"/>	Notice of Assessment
<input type="checkbox"/>	FYI: Quarterly Report Reminder
<input type="checkbox"/>	FYI: Year End Queries

Using FYI for Email Management

Keep on top of client communication with auto-filing of all client emails accessible in a single view and jump seamlessly from group to client for quick access to relevant correspondence across the client group.

More benefits of managing emails with FYI

- ✓ **Consistent client experience**
Safeguard the client experience through standardisation of emails, ensuring the team are creating emails from practice approved templates saves time, provides peace of mind, and a great client experience.
- ✓ **Single source of truth**
Client emails and attachments are auto-captured to minimise risk of missing important client correspondence and increase efficiency via visibility for the team.
- ✓ **Collaboration**
Use Tasks and Comments to efficiently collaborate on emails with the team, eliminating internal noise from your inbox and maintaining visibility on what needs to be done.
- ✓ **Draft on behalf of another team member using digital workflows**
Seamlessly draft emails for review and approval on behalf of other team members using built in workflow technology.
- ✓ **Automations**
Utilise the power of automations to auto-create email communications, workpapers and internal tasks.

“Email AutoFile is fantastic in that it actually keeps trail of the emails. When I come in the morning, they're already filed.

SCOTT MURRAY,
PARTNER
TESTER PORTER



Get lightspeed with your email creation and stay on top of client relationships with every client email automatically captured in FYI.

For more information on Emails visit the FYI Help Centre at support.fyi.app