

Digital Signing Process

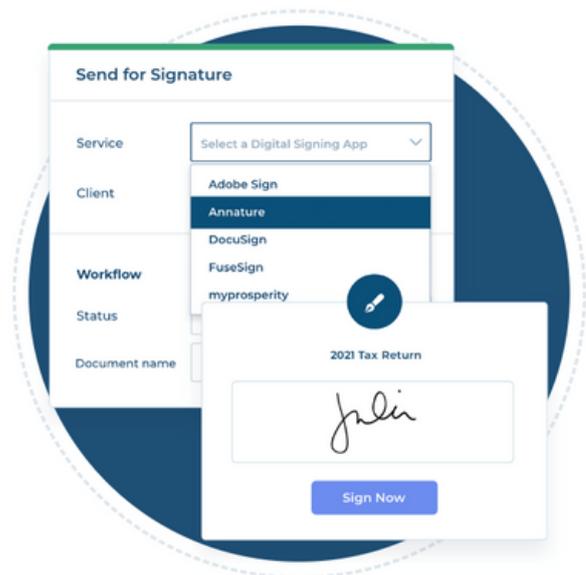
Best Practice Guide



Sending documents for signature made easy with FYI

Connect FYI with your preferred digital signing app to automate the signature process and easily track the workflow of documents out for signing, all within FYI.

- ✓ Getting started with digital signing
- ✓ Finalise document pack for collation
- ✓ Use FYI Productivity Tools to manage the process
- ✓ Sending the documents for signing
- ✓ Tips & Tricks



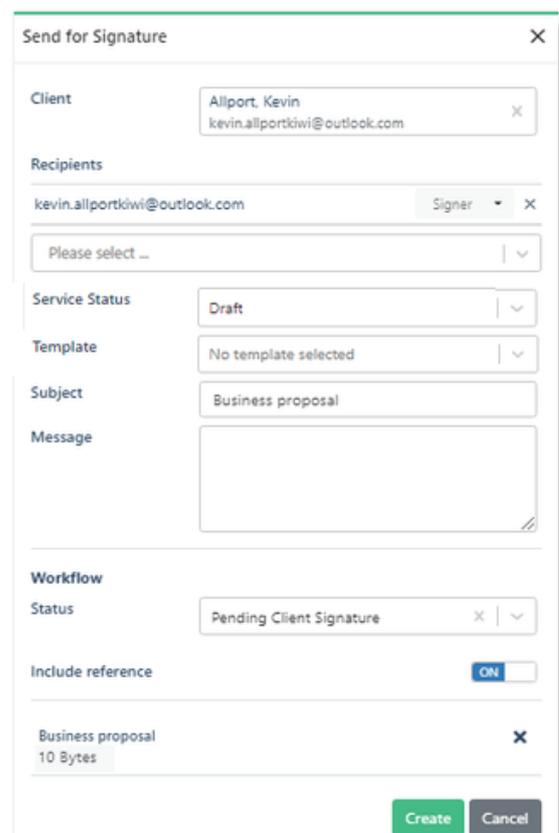
Getting Started with Digital Signing

Ensure that you've integrated your preferred digital signing app with FYI.

You will need to have the correct permissions in FYI and your digital signing app to complete the connection.

To get connected refer to the following guides:

- ▶ [Integration with FuseSign](#)
- ▶ [Integration with Annature](#)
- ▶ [Integration with Adobe Sign](#)
- ▶ [Integration with DocuSign](#)
- ▶ [Integration with myprosperity](#)



End to End Process

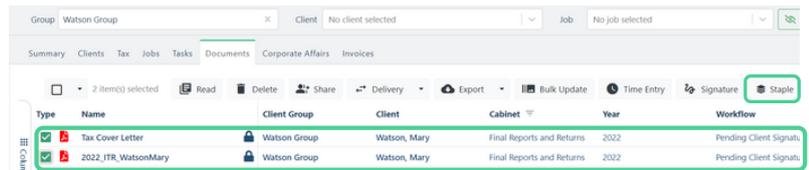
The below are FYI's best practice processes for collating and sending documents out for signature to clients.

Note: This only applies to Practices not using FuseDocs for Collation.

1 Staple final documents saved in FYI to be sent for signing

All documents requiring client signature are saved in PDF format and stapled.

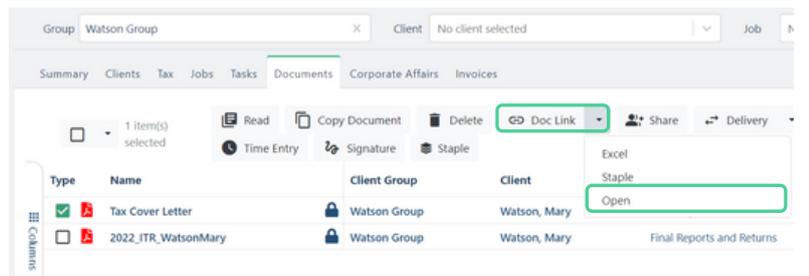
Tip: Use the PDF Convert function to quickly convert any Word or Spreadsheets without leaving FYI.



2 Copy link for stapled documents

Stapling the documents requiring signature creates a quickly accessible view of the final client pack to be sent for signing.

Copy the staple link in preparation for step 3.

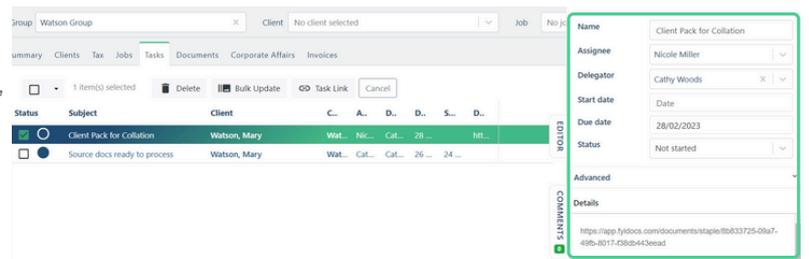


3 Create and delegate the collation task

Create a Task in FYI called "Client Pack for Collation" and assign this to the relevant team member responsible for collations.

In the details section of the Task drawer paste the staple link and provide any other relevant information.

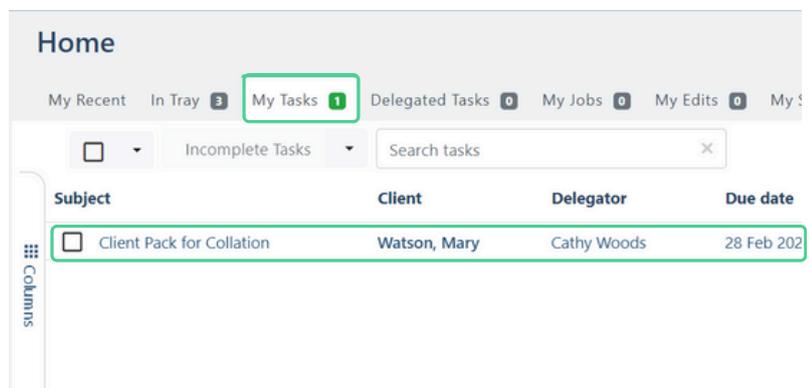
Tip: Use Task Templates to quickly create the Task and populate information, more details here



4 Finalise client pack

Review the Collation Task that has been assigned to you and any relevant information in the Task description or comments. If further clarification is required use the comments and mention the team member using "@" to request further details to complete the task.

Update the Task status to "In Progress" and perform any necessary actions to finalise the client signing pack.



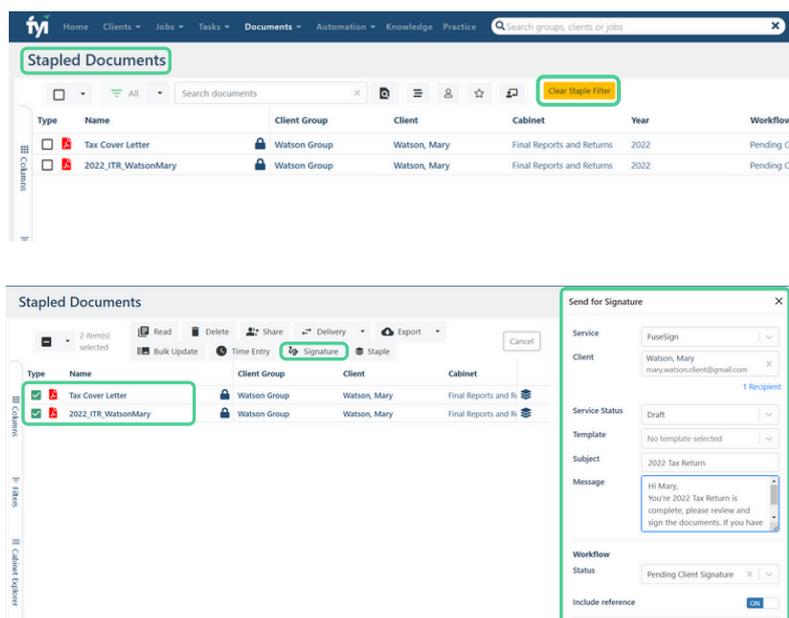
5 Send documents for signing

Navigate to the Stapled View, select the documents to be sent for signing and click **Signature**. This will open the Drawer for you to select your digital signature software (we're using FuseSign in this example), complete relevant details and select **Send** at the bottom of the Drawer.

This will launch your digital signing software in a new window.

Ensure you have connected your digital signing software, you can find integration information [here](#).

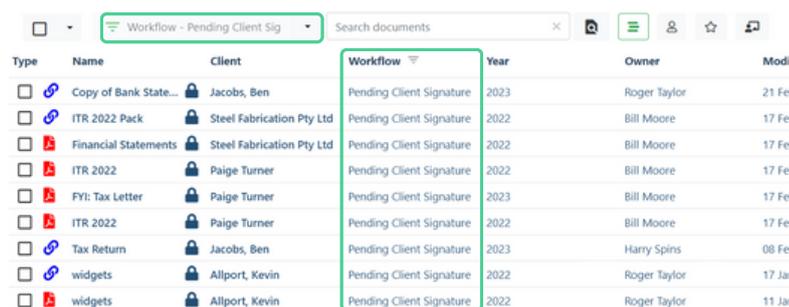
You must be an FYI Admin or have the correct permissions for integrations. You must also have the correct permissions to send documents for signature. Learn more [here](#).



6 Mark up, send and complete FYI Task

Your envelop will be created in your signing software, from here mark up the documents as required and complete final checks. Once happy select send and navigate back to FYI to complete the collation task.

Tip: Use Pending Client Signature Workflow Document View to track documents out for signing.



Tips & Tricks

▶ Automate Reminders

Your signing software will have the ability to automatically remind your client that they have documents outstanding, we strongly recommend setting this up to automate the reminder process.

You can also monitor documents you have out for signing using the Custom View in FYI called **Workflow - Pending Client Signature**.

▶ Automate Filing of Signed Documents

Once documents are signed, they are automatically filed back to FYI for you. 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 signed documents are imported to FYI so you can review and take next steps if required, you can import this process [here](#).

Pro Plan feature

Send for client signature and auto-track the workflow of documents, easily view which documents have been signed and which are still outstanding all without leaving FYI.

For more information on digital signatures, visit the FYI Help Centre at support.fyi.app