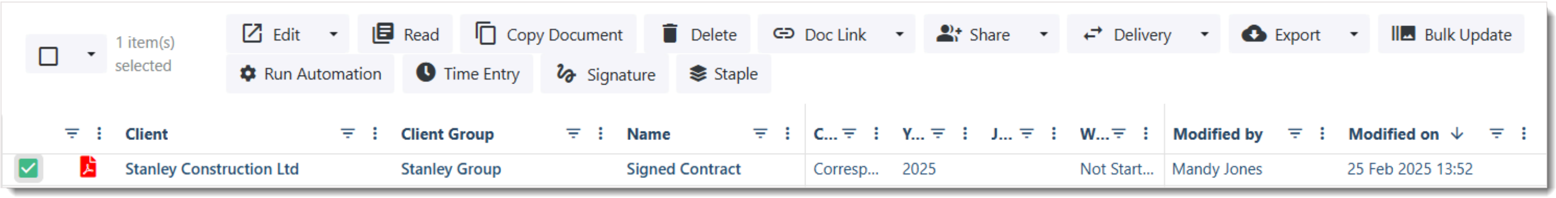
Exploring the Document Action Toolbar



Edit	To open a document for **editing**. Documents can be opened using the desktop or online version of Office, or using the FYI Desktop. Documents can also be opened in Co-edit, which means more than one internal user can work on a document at the same time.
Read	Open one or more documents as **read only**. Select one or more documents and click **Read** to review emails and documents without locking them for editing purposes.
Copy Document	Make a **copy** of an existing document that can be renamed, updated and filed to the relevant client. The copied document displays as selected in the documents list with the FYI drawer open. Copy does not apply to emails.
Delete	**Delete** moves unwanted documents to a deleted view, ready for deletion. The deleted view is where you can restore a document. Permanently deleting a document requires FYI Admin permissions.
Doc Link	**Doc link** creates a hyperlink to the selected document within FYI. The hyperlink is copied to your clipboard and can be used in tasks or emails to internal users for quick access to documents.
Share	**Share** documents with clients using Collaborate or Email. When using Collaborate, you can use **Share No Email** to send documents directly to the client's collaborate site without sending an email notification.
Delivery	The **Delivery** function has three options: Mark Sent - allows you to manually set a document as being sent. Mark received - allows you to set a document as being received. Clear - allows you to clear the delivery status.
Export	The **Export** function allows you to download a document from FYI to your desktop. Edits made to exported documents will not save back to FYI.
Convert	**Convert** a Word Document to PDF. This is useful when converting a letter to a PDF before sending to your client for signing using FYI's Signature function. The PDF is filed as a new document, applying the same filing rules as the original document.
Bulk Update	**Bulk Update** allows you to update the filing details and workflow fields for multiple documents at a time. This is handy if you wish to refile multiple documents to a different client or cabinet.
Run Automation	**Run a manual Automation Process** by selecting one or more documents from the list. Users must have the correct permissions and the relevant Automations must have the **From List** setting enabled. This function is also available in Clients and Jobs lists.
Time Entry	Create a draft **time entry** for the emails and documents that you have selected in the documents list. Time is a Pro and Elite Plan feature.
Signature	Select one or more PDF documents and use the **Signature** function to send the documents to a client using your preferred Digital Signing provider.
Staple	Allows multiple documents to be **stapled** together. This is handy if you want to access a set of documents at the one time, to collate together to send to your client, or for internal review.