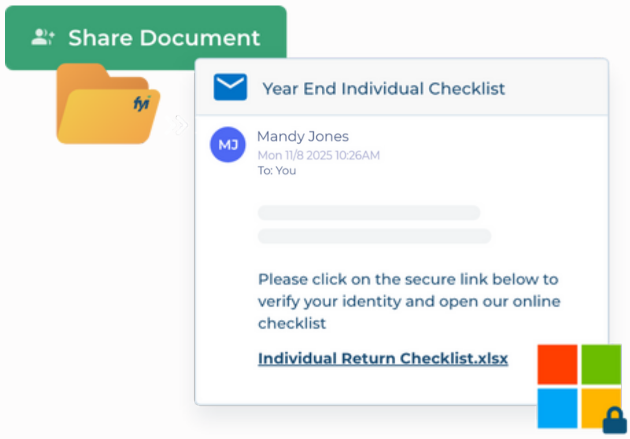
Using New Collaborate

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 and Folders
- Automatic Client Access to Folders
- Co-Editing Documents with Clients
- Default and Client Secured Sites



Overview of New Collaborate

Default 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.

Client Secured Collaborate Sites

For sensitive or high-profile clients, practices can set up an optional locked-down version of Collaborate. Only selected team members can access the site and its documents.

This extra layer of confidentiality is ideal for partner-only work, or projects requiring restricted access, while still allowing seamless file sharing with the client.

Sharing Documents and Folders with Clients

Easily share documents and folders with clients and contacts - no more sending sensitive files as email attachments. Control access for each client, and use the Upload Folder for clients to send documents securely.

Uploaded files are automatically filed in FYI, with optional team notifications via 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.

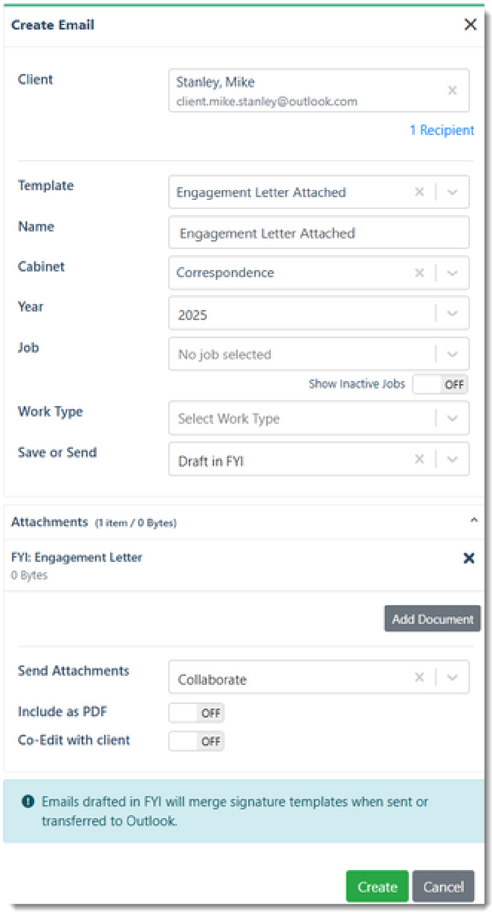
Sharing Documents

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



Sharing Documents via 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.

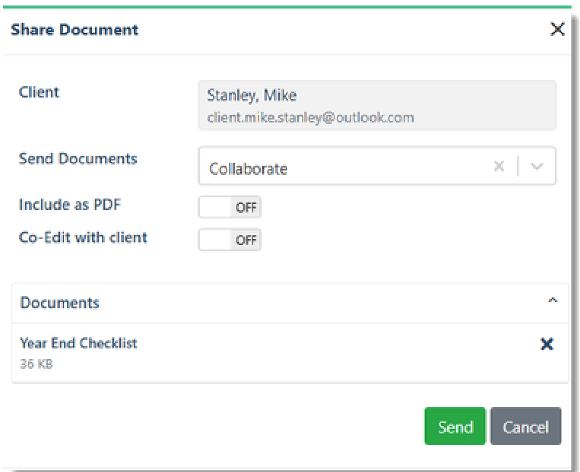
The client, along with any other recipients, will be prompted to log in using Microsoft 365. They will be able to access the document you shared, along with the Collaborate home page.

Important notes

- Clients with access to the Client 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 Client 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

Sharing Documents via Share No 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.**



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 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

Sharing Client 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.** The contact will be added to the Collaborate site.

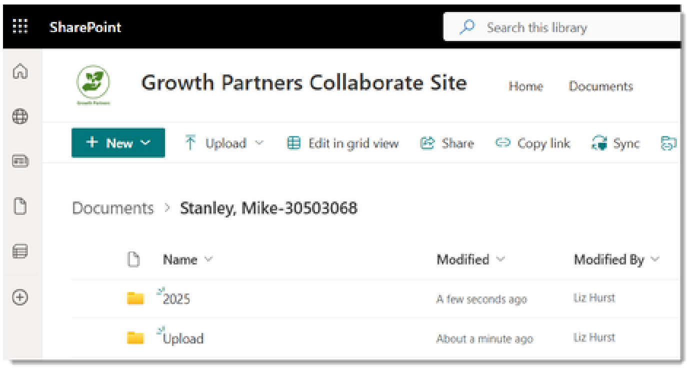
Once the client has been added to the Sharing Settings, they will be able to access the Client Folder, and all underlying content, from the Collaborate site.

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

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

Important notes

- Once the client has Client 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.



Automatic Folder access for Clients

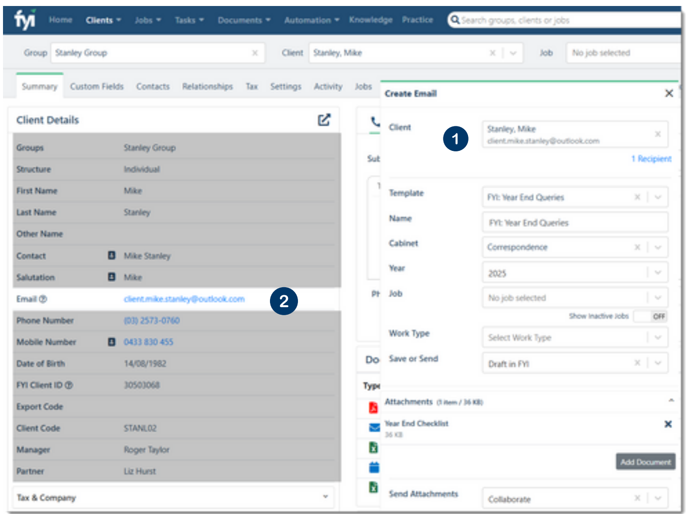
If the recipient email matches the Email in the Client Details, Collaborate will automatically enable access to the Client Folder.

The client will be able to access:

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

In the example on the right, a document was shared with Mike Stanley. 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.**



Receiving Files from the Upload Folder

Documents added to the Upload folder are automatically imported to FYI

Clients with 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, base on the Collaborate app settings in FYI.

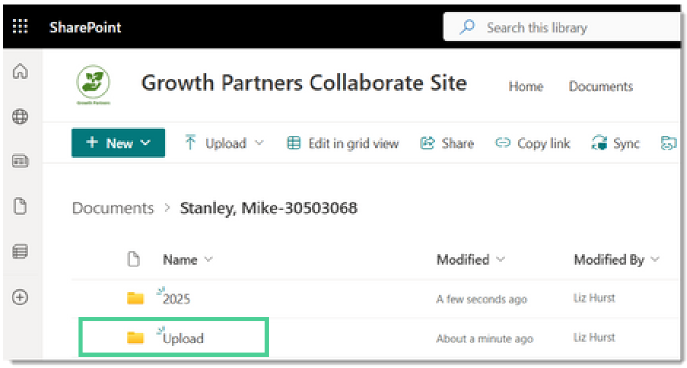
Imported documents are filed based on auto-file settings and filing defaults. Unfiled documents will be displayed in the In Tray of the OneDrive Admin.

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:

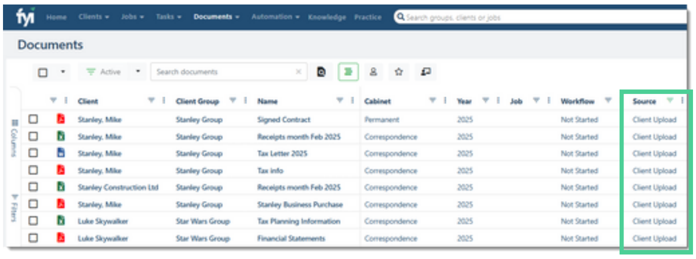
- Notify your team when client documents are Uploaded
- Alter the document, for example, change the filing status to be Unfiled (instead of auto-filing).

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.



Co-Editing Documents with Clients

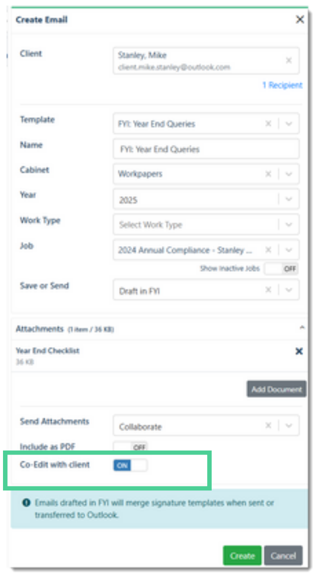
Your team and your clients can work on files at the same time - no need to share files back and forth.

Using Client Co-Edit, files are stored securely on your Collaborate Site in the client folder.

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 and** click **Share.**
2. Select the **Email Template** to send to the client.
3. Select whether to **Save as a Draft** or **Send.**
4. Select **Collaborate** from Send Attachments.
5. Click to toggle on **Co-Edit with client.**
6. Click **Create.** A Status window will be displayed while the recipients are added.
7. **Send** the email.



Important notes

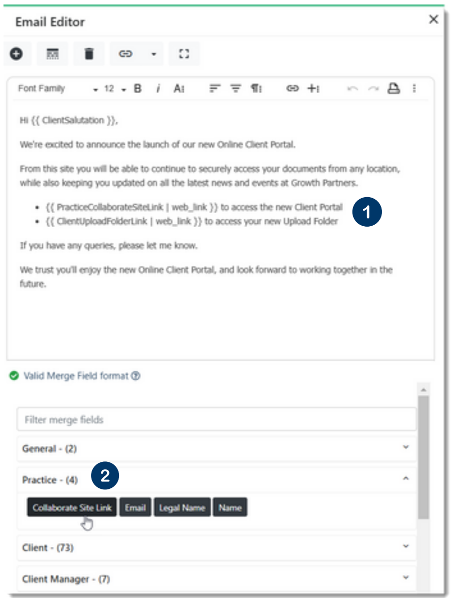
- Client Co-Edit can only be used with Office documents (Word, Excel or Presentation).
- Client Co-Edit files cannot be sent as a PDF.
- Some features of Excel are not recommended for use with Client Co-Edit (linking cells, macros, and other controls).

Collaborate Site Link

The Collaborate Site offers your clients easy access to their documents

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.

1. By sending your client the Collaborate Site Link they have a single URL to access everything they need.
2. The Site Link is available as a merge field to include in your Collaborate Email Templates. Your FYI Admin can include the Collaborate Site Link, Client Folder Link, and Upload Folder Link from the "Other" section of the Email Template Merge Fields.

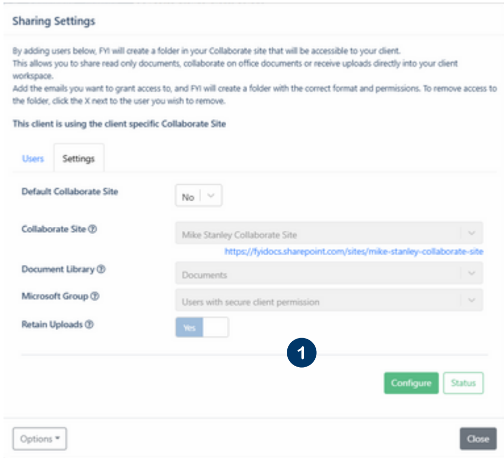


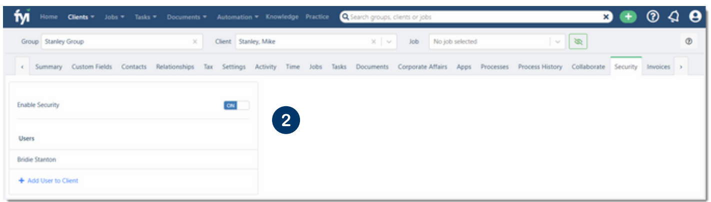
Client Secured Collaborate Sites

Dedicated Collaborate sites for sensitive or high-profile clients

Client-Secured Collaborate Sites can be set up by FYI Admins for individual clients and restricted to selected team members.

1. Once created from the **Sharing Settings** window on the **Client – Collaborate** tab, the secured site functions just like the standard Collaborate site, allowing you to share files, folders, and upload options. Guest users invited to the secured site will only have access to that site, not the default one.
2. Access to a Client Secured Collaborate site is managed with FYI's Client Security feature. Only staff listed on the Client - Security tab can view the site and any related documents in FYI. FYI Admins must be added if they require access. If a team member's name is not on the Security tab, they simply won't be able to see the client, their documents, or the Client-Secured Collaborate site.



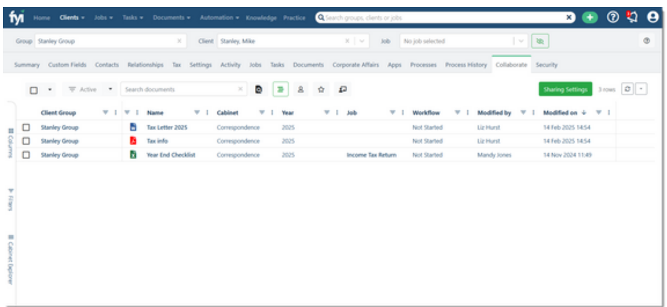


Client - Collaborate Tab

Display and manage shared documents

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 sharing for individual documents.



Discover new efficiencies. Together.

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