Setting up Workflow for Emails and Documents for FYI Admins

Quick Reference Guide

Review and approve documents in a flash

Use workflow to speed up the review and approval of emails and documents for your practice.

- Overview of Workflow Features
- Setting up Approval Levels
- Adding Workflow Columns to Views
- Setting up Notifications for Approvers
- Exploring Additional Approval Levels
- Setting up Digital Signing Apps

Overview of Workflow Features

Control document approvals

Know where an email or document is up to as it travels through your practice's workflow.

Ensure emails and documents cannot be edited or approved by setting up appropriate permissions for your team.

Track progress and identify bottlenecks

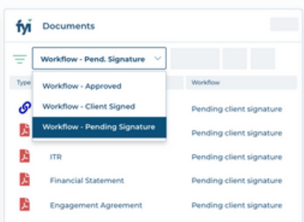
Your team can see the completion status of each email or document.

Workflow Views allow your team to track the status of email and document workflows across your entire practice.

Send for client signature and auto-track the workflow

Integrate with your preferred digital signing app to automate the signature process for client documents.

The Workflow Status automatically updates to 'pending client signature' for easy tracking.



Setting up Approval Levels

Select the approval level for each user

1. The authorisation level is set in the **Approval Level** of the User profile for each user.

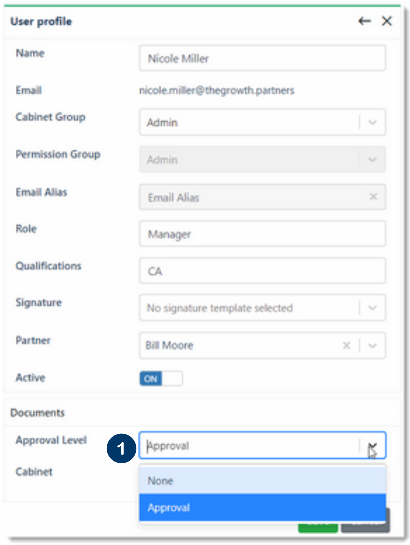
   The Approval Level controls the Status that can be set for a document and who can edit a document.

   Approval Levels:

   None
   All users can select the status of 'Not Started', 'In Progress', 'Changes Requested', 'Waiting Info', 'Pending Approval', or 'Completed'.

   Approval
   Users with Approval Level can select any workflow status including Approved

   The FYI Admin can also select any workflow status of an email or document.

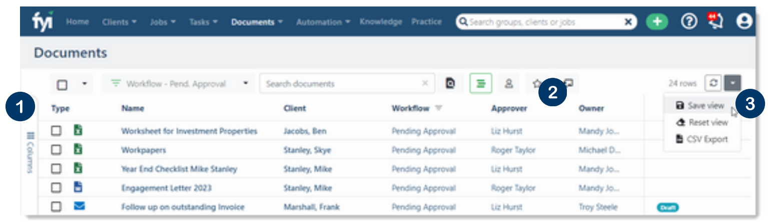


Adding Workflow Columns to Views

Set up views to help monitor workflow

1. To help your team monitor workflow, you can include additional columns in documents lists.
2. Include the Workflow Status, Owner and Approver columns to existing or new views.
3. Practice wide Views can be saved to allow users to filter on the workflow status of any document.

   Note: Common Workflow views are shipped with FYI. Explore those and create additional views as required.



Setting up Notifications for Approvers

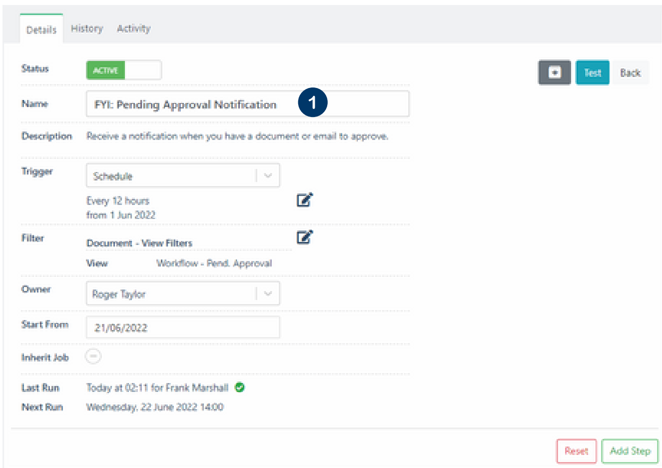
Set up summary notification for approvers

When the status of an email or document is set to 'Pending Approval', it is visible from the approvers **Home - My Approvals**.

In addition, you can set up summary notification automations that will send a notification to all document approvers based on a specific Workflow Status.

1. To get you started, the **Pending Approval Automation** is available in our help centre to import straight into your FYI platform. Simply import, test and activate.
   Refer to Pending Approval Notification

   This automation can be used as a starting point to create further automations based on key Workflow Status for your practice.



Exploring Additional Approval Levels

Set up workflow for multi-person review

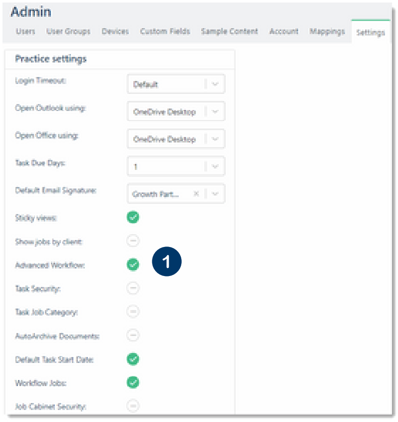
When more than one person is required to review emails and documents, you can use the multi-person review function. This function adds two additional Workflow Status that your team can use:

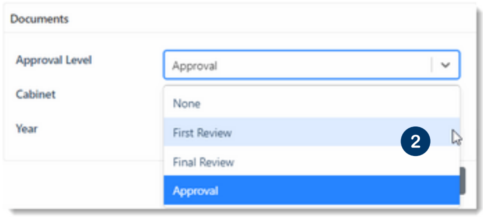
- First Review
- Final Review

1. Enable **Advanced Workflow** in Practice Settings - Admin - Settings

2. The following describes which Status can be selected according to the **Approval Level** assigned to users.

- A user with Approval Level of **First Review** - can additionally select the workflow Status as "First Review".
- A user with Approval Level of **Final Review** - can additionally select "First Review" or "Final Review".
- A user with Approval Level of **Approval** - can additionally select the Status as "First Review" or "Final Review".
- An FYI Admin can select any setting for Status.





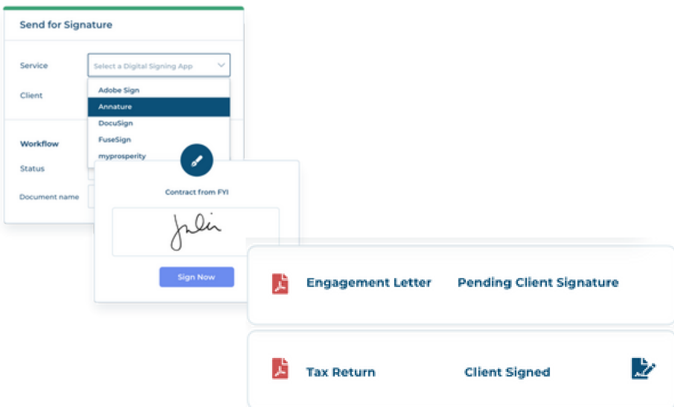
Setting up Digital Signing Apps

FYI can be integrated with a number of digital signature apps to allow your team to send documents to your clients to be digitally signed. When used, the documents automatically use the Workflow Status:

- **Pending Client Signature** - automatically updates to this status when your team send documents for digital signing.
- **Client Signed** - automatically updates to this status when the client has signed a document and it is synced back to FYI.

At a high level, the following set up is required. Our help centre provides detailed steps for each app.

Refer to Digital Signing Apps



Subscribe to your preferred app

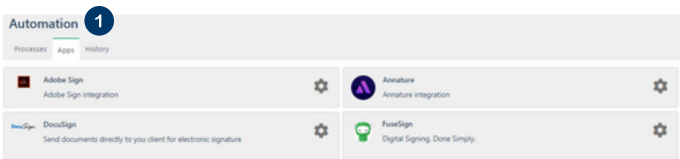
Each signing app has a specific subscription or registration process which must be completed prior to connecting your digital signature account to FYI.

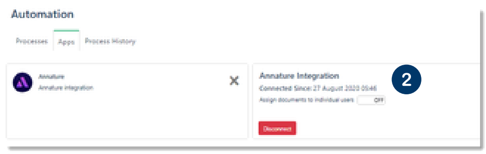
Connect your digital signing app to FYI

Connecting your digital signing service to FYI is a one-off step.

1. From FYI, click the **Automation** menu option and go to the **Apps** tab. Click the **cog icon** alongside your preferred app.

2. When set up, the App settings display the connected date and time.





Make your whole practice more efficient and responsive.

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