

Top Tips for Managing Emails



Use the FYI drawer in Outlook

Manage your emails directly from your Inbox using the FYI drawer in Outlook to file, assign tasks or mention team members in comments.

The screenshot shows the FYI drawer on the left with callouts pointing to specific features:

- Comment:** ADD COMMENTS. Notify a team member about an email. (Callout points to the comment section showing a comment by Mandy Jones and a reply by Liz Hurst.)
- Filing:** FILING. Complete or update any filing details. (Callout points to the filing section with fields for Client, Cabinet, and Year.)
- Attachments:** ATTACHMENTS. Rename the attachment and update any filing details for the attachment. (Callout points to the attachments section showing a 'Signed Contract' attachment.)
- Tasks:** ADD TASKS. Once an email is filed, create and assign a task. The assignee can preview the email from within the task in FYI, to get full context. (Callout points to the tasks section showing an 'Outstanding' task to 'Prepare engagement letter' assigned to Anna Jordan.)

Use the In Tray to Bulk File Emails & Attachments

For Draft Filed emails and attachments, use Bulk Update from your In Tray to file emails and documents in as little as 5 clicks.

The screenshot shows the In Tray with three items selected and the 'Bulk Update' button highlighted. A callout box explains: **BULK UPDATE** Select multiple emails and attachments and click Bulk Update.

The Bulk Update dialog box is shown on the right with a callout: **Select the client and relevant filing details and click Run to schedule the update.**

Type	Client	Client Group	Name	Cabinet	Year
<input checked="" type="checkbox"/>	Marshall, Frank	Marshall Group	Quarterly Checklist fil...	Correspondence	2022
<input checked="" type="checkbox"/>	Marshall, Frank	Marshall Group	Checklist for Quarter...	Correspondence	2022
<input checked="" type="checkbox"/>	Marshall, Frank	Marshall Group	Checklist for Quarter...	Correspondence	2022

Share your In Tray

When going on leave or you require assistance to keep on top of your filing emails, consider sharing your In Tray with other team members that have the capacity to monitor and assist.

FILTER BY OWNER
When another user's In Tray is shared with you, toggle between your In Tray and the In Tray of other users. You can file emails and attachments individually or select multiple and use Bulk Update.

Type	Client	Client Group	Name
✉	Marshall, Frank	Marshall Group	Quarterly Check...
✉	Marshall, Frank	Marshall Group	Checklist for Que...
✉	Marshall, Frank	Marshall Group	Checklist for Que...
✉	Marshall, Frank	Marshall Group	Collaborate Invi...

My settings
Profile Documents **Share** Security Devices Status

My In Tray is shared with the following users

Name	
Liz Hurst	remove

+ Share with user

SHARE
Go to My Settings - Share and select the user to share your In Tray with.

Quickly Locate Attachments and Manage Threads

Never misplace email attachments with FYI's autofiling of attachments, and easily identify those emails with attachments or those that are part of a thread.

THREAD
The Thread icon displays when the email is part of a thread. Click the Thread icon or open the Thread section in the drawer to review and manage threads.

ATTACHMENTS
When an email has attachments, the paperclip icon displays next to the email in lists. Open the attachments section in the drawer.

Create New Emails from Templates

Creating emails from templates within FYI means emails can already be filed for you. What's more, the body content of your email is prefilled, complete with merge fields.

APPLY A TEMPLATE
Select a Template when creating a client email and prefill the body content of your email.

Create Email

Client: Stanley, Mike
client.mike.stanley@outlook.com

1 Recipient

Template: Engagement letter attached

Name: Engagement letter attached

Cabinet: Correspondence

Year: 2023

Save or Send: Draft in FYI

Save time by creating emails using templates.

For more information on Emails, visit the FYI Help Centre at support.fyidocs.com