Top Tips for Managing Emails Best Practice Guide

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.

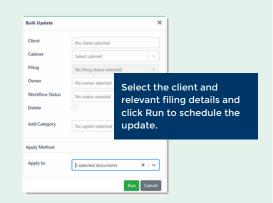
🏹 FYI for Outlook	\$ ×				
Email 🔋 🗹					
Re: Tax Planning Checklist Attached					
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Attachments ×					
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1 Commen	t	Not	COMMENTS Commenser
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Filing		^	
Client	Stanley Construction Ltd client.mike.stanley@out	loc	
Cabinet	Workpapers	FILING	
Year	2024	Complete filing deta	e or update any ails.
Work Type	Advisory X		
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	Show Inactive Jobs O	Ŧ	
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Attachmer	nts	^	1
Filed			ATTACHMENTS Rename the attachment
Tax Plan	ning Information 🖋	x	and update any filing details for the attachme
	onstruction Ltd		
			5
		1	ADD TASKS
Tasks 💌			ADD TASKS
	ina		Once an email is filed,
Tasks 🏲 Outstand	ing		Once an email is filed, create and assign a task. The assignee can preview

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.

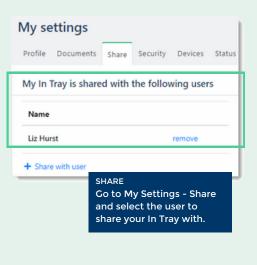
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2	 x 	Marshall, Frank	Marshall Group	Checklist for Quarterl	Correspondence	2022	click Bulk Update.
	 k 	Marshall, Frank	Marshall Group	Checklist for Quarterl	Correspondence	2022	



Share your In Tray

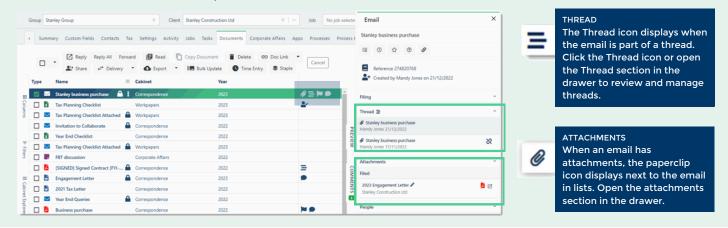
When going on leave or you require assistance to keep on top of your filing emails, consider sharing your In Tray with other team members that have the capacity to monitor and assist.

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		Marshall, Frank	Marshall Group	Quarterly Checkl	the In Tray of other users.
Columns		Marshall, Frank	Marshall Group	Checklist for Qua	You can file emails and
	🗆 📙	Marshall, Frank	Marshall Group	Checklist for Qua	attachments individually c
_		Marshall, Frank	Marshall Group	Collaborate Invit	select multiple and use Bulk Update.



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.



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× **Create Email Create New Emails from Templates** Client Stanley, Mike × Creating emails from templates within FYI means emails can client.mike.stanley@outlook.com already be filed for you. What's more, the body content of 1 Recipient your email is prefilled, complete with merge fields. Template × × Engagement letter attached Name APPLY A TEMPLATE Engagement letter attached Select a Template when Cabinet Correspondence creating a client email and prefill the body content of Year your email.

Save time by creating emails using templates.

For more information on Emails, visit the FYI Help Centre at support.fyi.app_