

## DOCUMENT MANAGEMENT FOR ACCOUNTANTS

# A digital office - reimaged for the perfect practice

Create standard emails and documents at light speed. Templates make it quick and easy to create standard emails, documents, and files, and to file them consistently.

### Want to create your own templates?

### Looking for some **template assistance**?

Our template service provides you with a helping hand to bring your templates into your platform and optimise them for consistent document creation and filing, ensuring maximum productivity. Our expert team works with you to ensure your templates are configured to your requirements.

**Enhance productivity for your practice with our template expertise - let's build a smarter, more efficient tomorrow together.**

### Our Services:

We have tailored packages, no matter your requirements, to help you **templatise** your documents. We offer the following services:



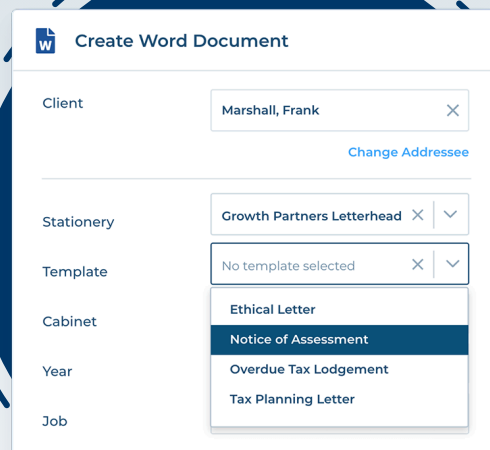
#### Template Blocks

Import and optimise existing document templates for use with FYI.



#### Custom Template Build

For large quantities of pre-existing document templates, outside the defined template block service, a tailored quote will be provided.



**Create Word Document**

Client: Marshall, Frank × [Change Addressee](#)

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Stationery: Growth Partners Letterhead × ▼

Template: No template selected × ▼

Cabinet:

- Ethical Letter
- Notice of Assessment**
- Overdue Tax Lodgement
- Tax Planning Letter

Year:

Job:

**“Practice success means being as efficient as we possibly can - FYI helps us achieve.”**

**Lucy Handley**, Accounts and Advisory Manager | Ammu

## PACKAGE DETAILS

# Template build

Streamline and standardise your document creation and filing with templates in FYI. Auto-create standard and personalised documents in seconds, merging client data in documents with just a click. If you're short on time or need some assistance to configure and optimise your pre-existing templates, let our experts get you started.

### This service is for you if:

- ✓ You understand the fundamentals of templates with FYI
- ✓ You need some extra assistance to configure and optimise templates for use with FYI
- ✓ You don't have the resources to configure and optimise templates in your FYI platform

### Service details:

Scoping	Custom Templates
15 minute call with one of our expert consultants to understand the quantity and complexity of your templates	Your consultant will configure, optimise and activate your defined pre-existing templates, ready for your team to start using.
TOTAL INVESTMENT TAILORED TO YOUR SCOPE*	

If you're interested in this package, complete the form to kick off your project.

[BOOK THIS PACKAGE](#)

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\*this service is scoped by our team, pricing is based on the quantity and complexity of your document templates. Our charge rate is from £30per hour for this service.



More time  
for **more**



**fyi.app**