

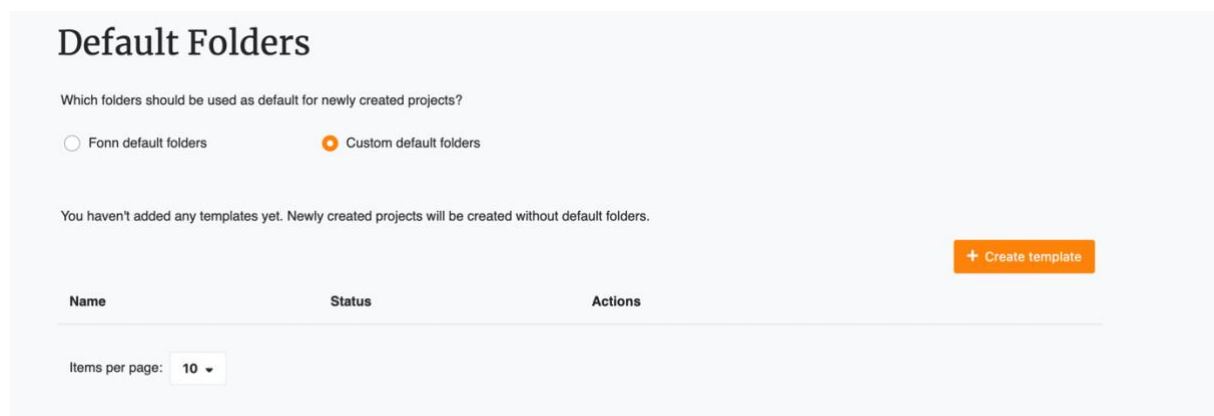
Getting started with Fonn

Creating a Document Structure

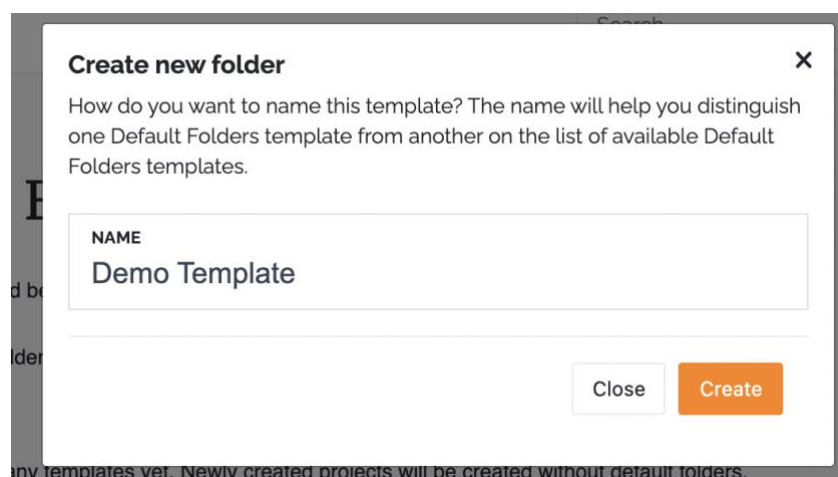
You may already have a folder structure in place that you use daily. You can decide to mimic this on Fonn or start from fresh.

To build your document structure, follow the below steps

1. Go to Organisation Menu
2. From the left-hand menu, select Documents then select Default Folders.
3. Here you will see 2 buttons labelled, Fonn Default Folders & Custom Default Folders
To use the template set out by Fonn, keep Fonn Default Folders ticked (Skip step 4)
To build your own template, tick Custom Default Folders.



4. To build your Custom Folders, click + Create Template.
Give your template a name then click Create



5. A new page will appear like below

Demo Template

Created by: Joe Charles

Here you can define folders that will be created in new projects in this organisation if the template will be activated.

+ Add folder

Nothing here yet

Using the + Add folder button, begin to build your document structure.



TIP: It is recommended that you include numbers at the beginning of your folders names if you would like to keep them in a specific order, otherwise Fonn will automatically sort them alphabetically.

Example

Demo Template

Created by: Joe Charles

Here you can define folders that will be created in new projects in this organisation if the template will be activated.

+ Add folder

01. General Correspondence	🔒 ✎ + 🗑
02. Client correspondence	🔒 ✎ + 🗑
03. Plans	🔒 ✎ + 🗑
04. Site Photos	🔒 ✎ + 🗑
05. Quotes and Subcontractor Quotes	🔒 ✎ + 🗑
06. Valuations	🔒 ✎ + 🗑

To build sub folders, click the + icon within the main folder bar, you can then build down as far as you need to



6. Icons explained



Open Padlock = Public Folder (All members inside the project can view the contents)

Closed Padlock = Private Folder (Only Admins, Project Managers & Supervisors will have access straight away. Access to members can be managed manually within the project)

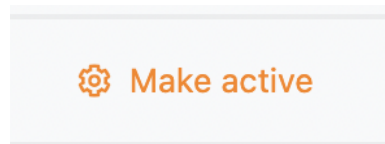
Pencil = Enables you to edit the name of the folder

+ icon = Add a new sub folder

Bin = Remove/Delete a folder

- Once you are happy with the structure you have built, return to the Default Folder screen by clicking Default Folders from the left-hand menu. You will see your template in the list with a status set as 'Not Used' as it is not yet live in any projects.

- To make your template active and pull through to future projects click the 'Make Active' button



- Your template is now live and you are ready to create your projects!

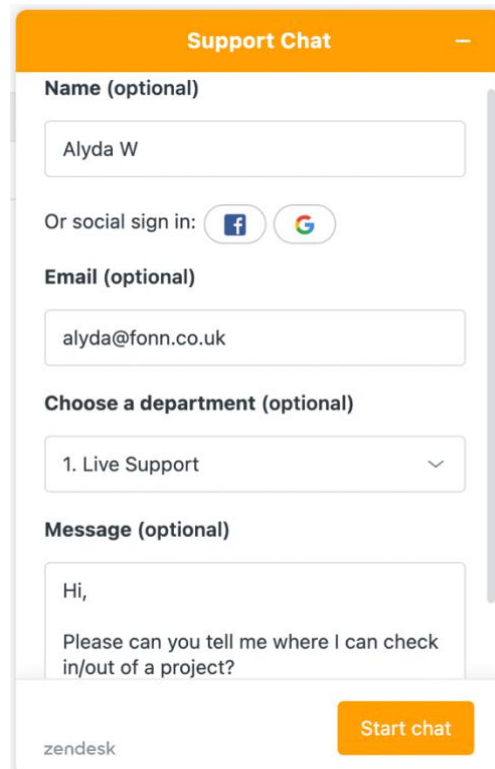
Need Help / Support

If you need help or have a question regarding Fonn, you can get in touch through the following:



1. 24/7 Chat

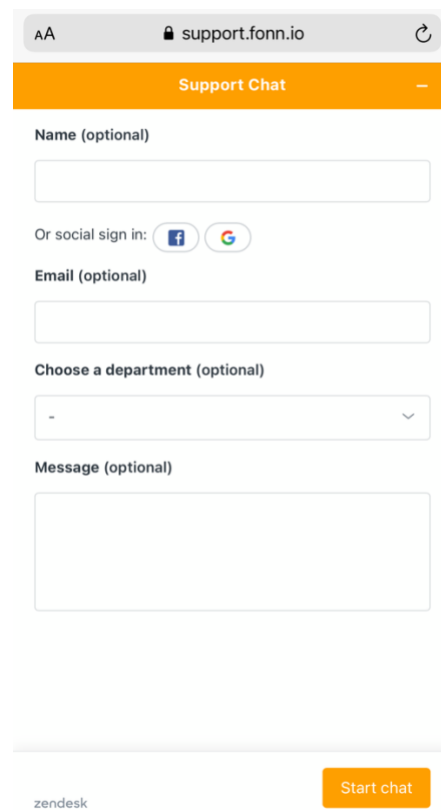


You can click the Chat icon on any screen whilst using Fonn on the web browser. Simply fill out a few details like below > then click 'Start Chat' > a member of support will then assist you as necessary.

A screenshot of a "Support Chat" form. The form has an orange header with the text "Support Chat" and a minus sign. Below the header, there are several sections: "Name (optional)" with a text input field containing "Alyda W"; "Or social sign in:" with Facebook and Google icons; "Email (optional)" with a text input field containing "alyda@fonn.co.uk"; "Choose a department (optional)" with a dropdown menu showing "1. Live Support"; "Message (optional)" with a text area containing "Hi, Please can you tell me where I can check in/out of a project?"; and a "Start chat" button at the bottom right. The Zendesk logo is visible in the bottom left corner of the form.

For help via the app:



1. Click the  icon
2. Select 'Help'
3. Click the  icon
4. Fill out the chat information as above



AA support.fonn.io

Support Chat

Name (optional)

Or social sign in:  

Email (optional)

Choose a department (optional)

Message (optional)

zendesk [Start chat](#)

2. Email

E-mail: support@fonn.io

OR

E-mail: alyda@fonn.co.uk

3. Freephone

Fonn Support UK: +44 (0)800 520 016