myDocs

certified training

myDocs
secure document + file management system

Organise documents by customised category + file type

Easily update document versions or archive files

Add unlimited notes to files to track changes + updates

Three levels of document back-up + disaster recovery

Eliminate confusion over document versions

Integrate documents with MYP's CRM hub

Access your documents anywhere, anytime

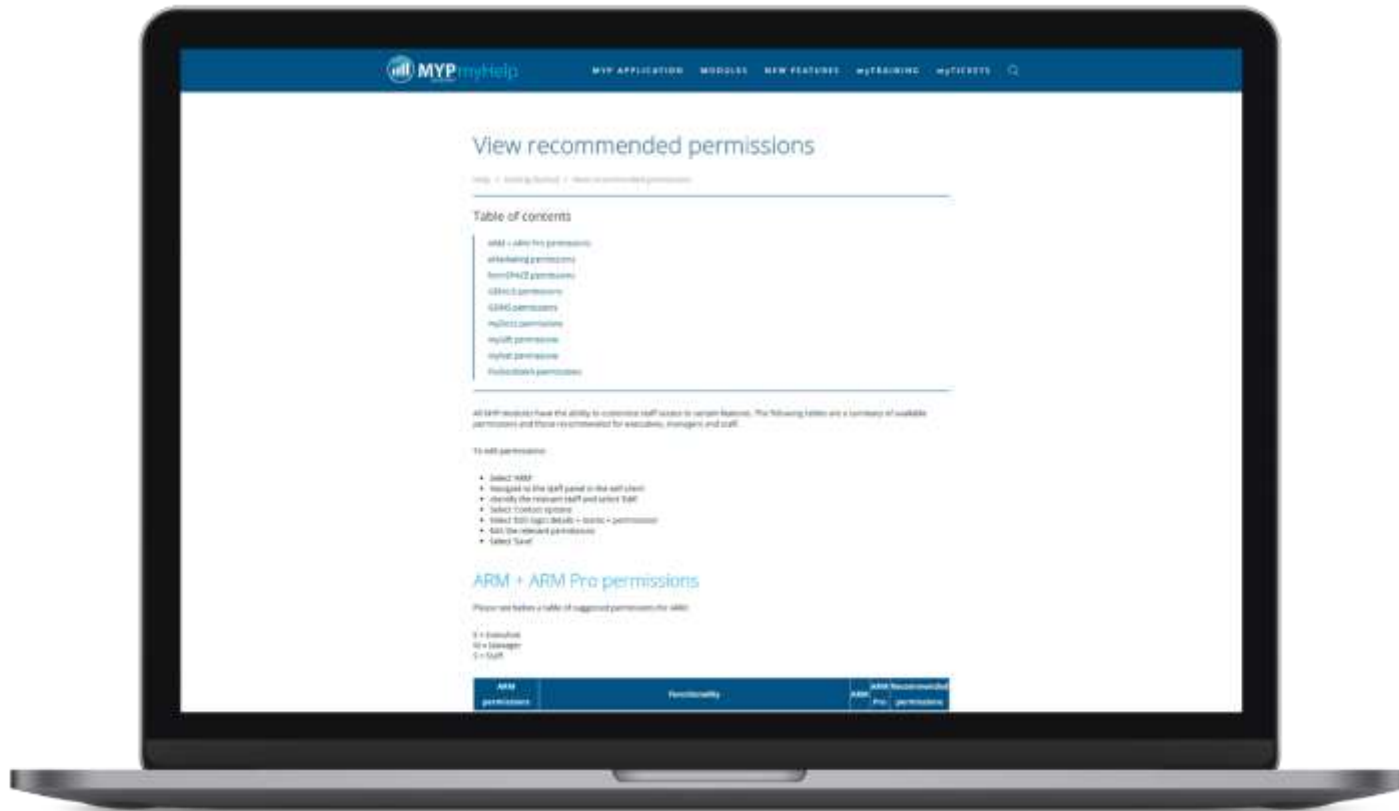Set staff permissions for viewing documents

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what you will learn

- Overview of myDocs features

- Customise + manage settings (myDocs Administrator)

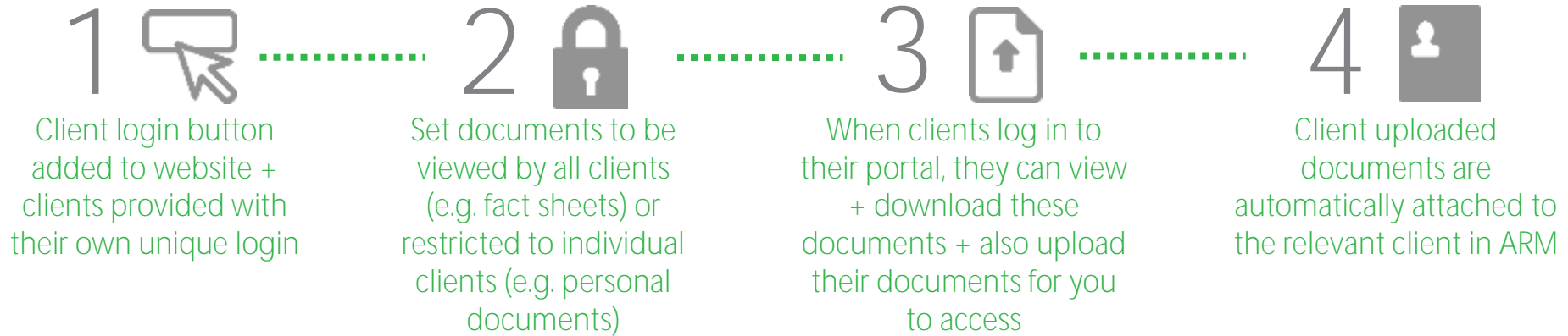- Create + check out/in a document

- Integrations + manuals

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recommended permissions

It is extremely important that staff permissions are assigned correctly.
https://help.mypcorp.com/art/recommended-permissions/

integrate with myDocs

1 Client login button added to website + clients provided with their own unique login

2 Set documents to be viewed by all clients (e.g. fact sheets) or restricted to individual clients (e.g. personal documents)

3 When clients log in to their portal, they can view + download these documents + also upload their documents for you to access

4 Client uploaded documents are automatically attached to the relevant client in ARM

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myDocs next steps

- Review settings

- Set up categories and types

- Upload your relevant documents into myDocs

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learn to use your systems, your way
delivery styles to suit your needs

MYP Training
online group training

MYP Training sessions are run on a regular basis. These online sessions are scheduled regularly and you are welcome to attend as many times as you like. These are a great way to refresh your skills.

Want to attend?
Check out all the details of upcoming MYP Training sessions + book your place via the calendar on your MYP home page.

MYP Tailored Training
custom onsite or online sessions

MYP Tailored Training sessions are available if you require a session specifically for your organisation. These sessions are custom-designed by our trainers and can be run onsite or online for a fee.

Want to know more?
Simply log in to MYP + submit a booking enquiry via the 'Subscription + Training Management' area.

covering everything you need to know
MYP Training, 24/7 myTraining and Tailored Training sessions cover two types of content to ensure you are getting the most from MYP.

CERTIFIED
'Certified' sessions cover specific modules and, upon completion, attendees gain access to Level 2 Support.

PROFESSIONAL DEVELOPMENT
'Professional Development' sessions are designed to further develop skills in specialist areas.

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