

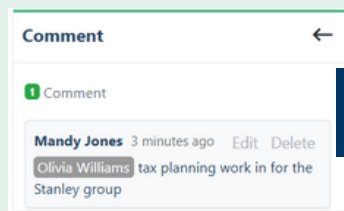
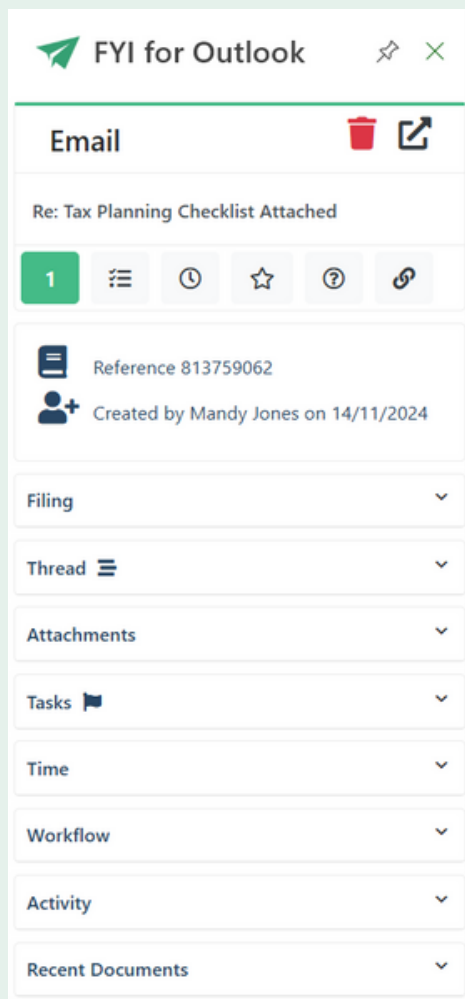
# Top Tips for Managing Emails

## Best Practice Guide

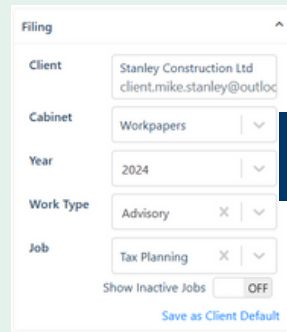


### Use the FYI drawer in Outlook

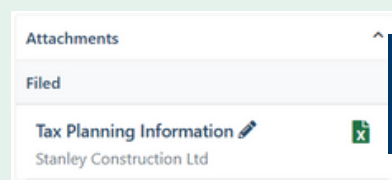
Manage your emails directly from your Inbox using the FYI drawer in Outlook to file, assign tasks or mention team members in comments.



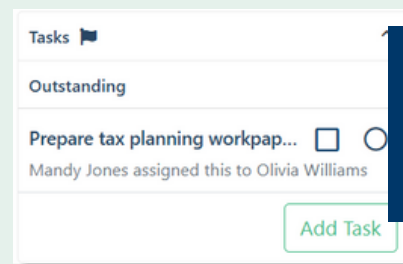
**ADD COMMENTS**  
Notify a team member about an email.



**FILING**  
Complete or update any filing details.



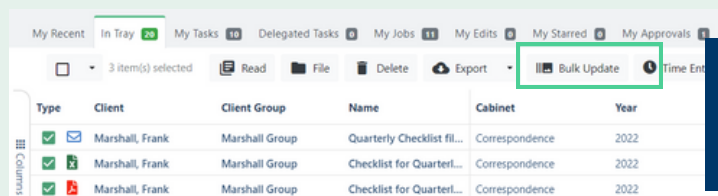
**ATTACHMENTS**  
Rename the attachment and update any filing details for the attachment.



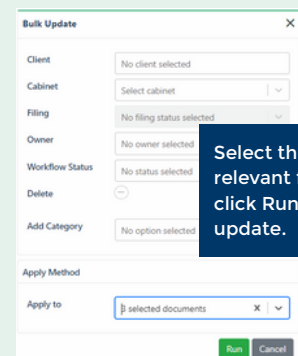
**ADD TASKS**  
Once an email is filed, create and assign a task. The assignee can preview the email from within the task in FYI, to get full context.

### 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.



**BULK UPDATE**  
Select multiple emails and attachments and click Bulk Update.



Select the client and relevant filing details and click Run to schedule the update.

## 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.

## 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 pre-filled, complete with merge fields.

### APPLY A TEMPLATE

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

Save time by creating emails using templates.

For more information on Emails, visit the FYI Help Centre at [support.fyi.app](https://support.fyi.app)