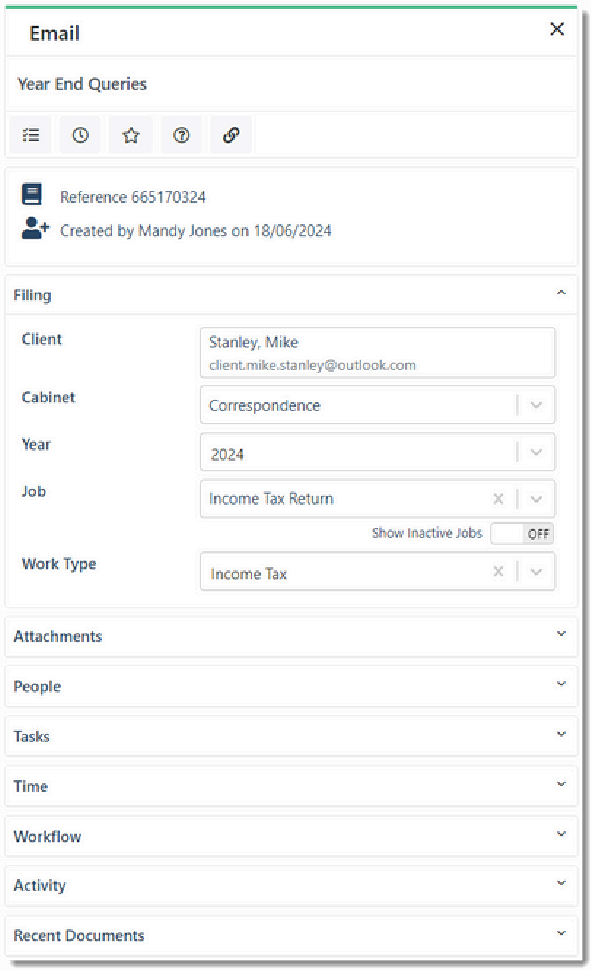
Email AutoFile
Best Practice Guide

Set up FYI to ensure client emails file themselves

Save time every time a client email is sent or received. Emails that match a client in your practice management software can be auto-filed in FYI and immediately available to your team.

- **The Fundamentals**
- **What the Email AutoFile Settings Mean**
- **Filing Defaults**
- **Best Practice Settings**
- **Tips & Tricks**



The Fundamentals

Types of Emails

There are three distinct types of emails that FYI recognises at the highest level:

A Client Email
The recipient or sender is a client or contact of a client.

An Internal Email
The recipient or sender is an internal user of FYI.

An External Email
The recipient or sender is unknown to FYI.

Filing Status of Emails

Confirmation of whether the email has been filed in FYI or requires further interaction:

Filed in FYI
The email has been filed in FYI according to email type, settings and filing defaults. The Filed in FYI label will display in Outlook.

Draft Filed
The email has been 'draft-filed' by FYI's AutoFile engine and sent to your In Tray for review. Filing can be completed via the FYI Drawer in Outlook, or from your In Tray in FYI.

Not Filed
The email has been ignored by FYI's AutoFile engine, however can be filed manually from Outlook.

What the AutoFile Settings Mean

These settings determine the filing rules that are applied to an email, and how.

AutoFile Else In Tray

If mandatory filing rules for the client, cabinet and category can be met, client emails will be auto-filed in FYI. If not, they will be sent to In Trays for review.

Emails & attachments
When this option is selected, the email and attachments are filed to the client workspace. They will display separately in the Documents List.

Emails only (In Tray for attachments)
The email will be filed to the client workspace and any attachments will be sent to Home - In Tray for review and filing.

In Tray Review

Client emails and attachments will be 'draft-filed' for your review – from your Outlook inbox or from your In Tray in FYI, before being filed in FYI and made accessible to your team.

Note: Only <u>one</u> of the above settings can be selected. Once selected, the other options are set to 'Off'.

Include Client's Contacts

Include emails from client contacts in auto-file.

Exclude Email Stationery Images

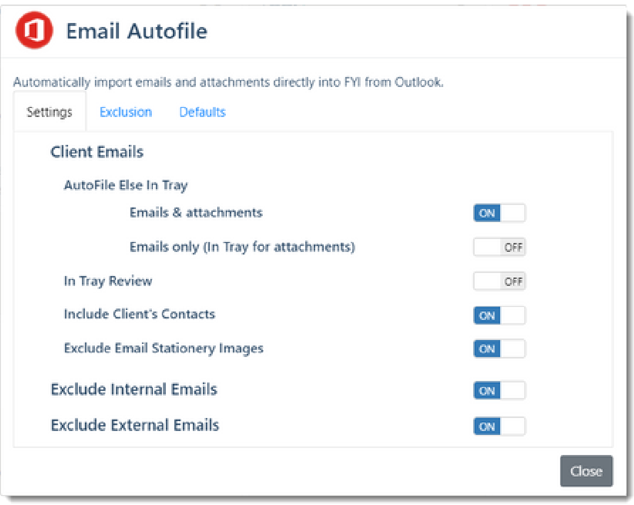
Exclude images from emails from auto-filing, such as logos or banners.

Exclude Internal Emails

Exclude emails to/from FYI users from auto-filing.

Exclude External Emails

Exclude emails from auto-filing if at least one recipient is unknown to FYI.



Filing Defaults

Filing defaults decide exactly how each email type will be auto-filed. They are applied in the following order:

1 Automation Step

If an email or document is being created from an Automation process, a check is made if the Cabinet and Category to apply is set in the Automation step.

2 Template

If an email or document is being created in FYI and a Template is selected, any filing defaults from the Template are used.

3 Existing Email Thread

The same auto-filing rules are applied to all emails in a thread. So, if the first email in a thread is filed, all subsequent emails in that thread will be auto-filed for you.

4 Client Defaults

Auto-filing rules that are applied to all emails sent to or from a specified client.

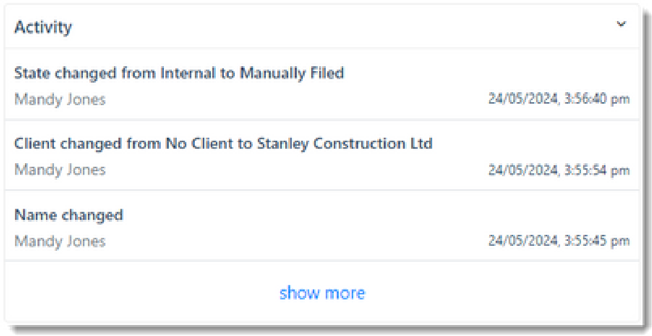
5 User Defaults

Auto-filing rules that are applied to emails sent to or from individual users. This is useful for teams in different divisions within larger practices.

6 Practice Defaults

Auto-filing rules that are applied practice-wide.

Note: With filing defaults applied in hierarchical order, whenever they are set at a client level, any additional user or practice defaults will be ignored.



Use the **Activity** section in the Email Drawer to determine what AutoFile logic has been applied to an email.

Refer to Using the Email Drawer

Remember - you are in control

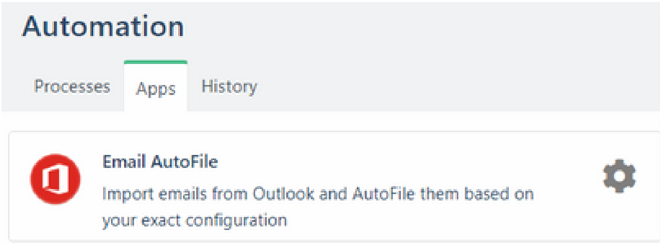
Anything not auto-filed can be filed manually and anything that has been filed can be updated, re-filed or deleted.

Best Practice Settings for Email AutoFile

With the right settings and work practices, FYI could be auto-filing up to 70% of your client emails, immediately releasing them to the client file – without you lifting a finger! This represents a massive time saving, especially for partners receiving 50-100 emails a day. And it means your team can get on with the work!

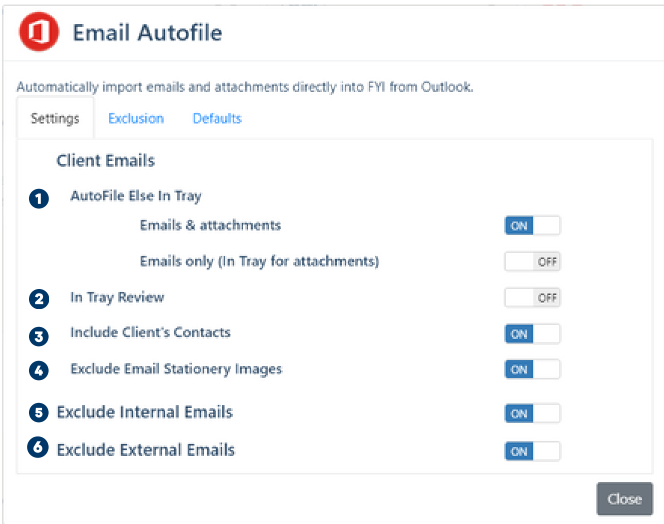
How to Begin

FYI Admins can set Email AutoFile settings by going to Automation – Apps and clicking on the Email AutoFile cog.



Review Your Practice Settings

Default Email AutoFile settings:
• AutoFile Else In Tray (Emails & attachments) is enabled to allow emails to be considered for auto-filing.
• AutoFile Mode is disabled for all users to allow you to complete practice settings first.



1 AutoFile Else In Tray

Emails & attachments ON
If mandatory filing rules can be met, FYI will auto-file the email and attachments. If not, the email and attachments will be sent to your In Tray for review. This setting is best applied practice-wide and ideal for standard users.

Emails only (In Tray for attachments) OFF
This option will auto-file the email to the client workspace and send any attachments to Home - In Tray for review and filing.

AutoFile Else InTray will reduce manual filing and provide instant access to client emails practice-wide.

2 In Tray Review will automatically turn OFF when one of the AutoFile Else In Tray options above are set to ON.

Individual users requiring In Tray Review for all of their emails can turn this on via their Individual Settings (refer to Steps 7-8).

Consider turning In Tray Review ON practice-wide only if you need a high level of control over filing and are comfortable having all emails sent to In Trays for review before releasing to the client file.

3 Turn Include Client's Contacts ON
This means emails to/from your Client's Contacts will be recognized by FYI's AutoFile engine.

4 Turn Exclude Email Stationery Images ON
This means files with a format of jpg, jpeg, png, gif, ico, svg or bmp and are less then 40kb are excluded from being auto-filed.

5 Turn Exclude Internal Emails ON
This will exclude any emails to/from FYI users from auto-filing. Internal emails can still be filed manually, as required.

6 Turn Exclude External Emails ON
This will exclude emails from recipients not known to FYI, such as Accountancy publications from being 'draft filed'. This allows you to build your exclusion list before switching this setting to OFF.

Note:
• Lawyers and Bookkeepers are also considered External Emails, therefore it is recommended to build exclusions to reduce the volume of emails hitting your In Trays and when ready, switch this setting to OFF. A default list of exclusions will pre-populate for new practices.
• Turning Exclude External Emails OFF at the appropriate time will ensure relevant external emails are visible beyond your Outlook Inbox in a more timely manner.
Learn more about Exclusions

> "FYI's email integration is the easiest that I have ever used."
>
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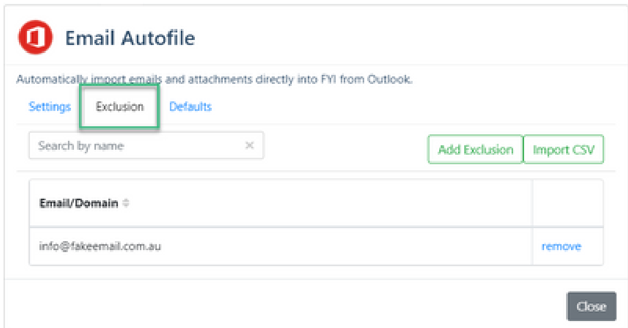


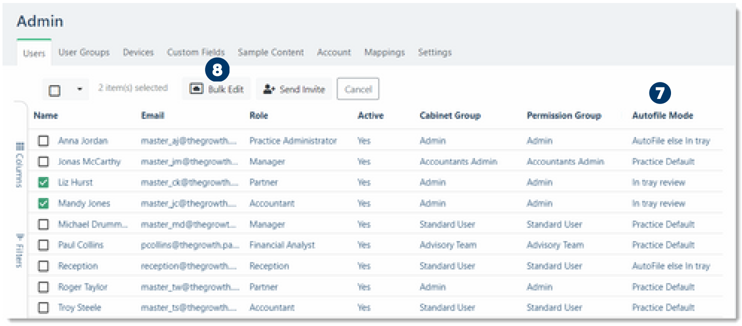
Update Your User Settings

Once the practice wide settings are complete, the next step is to update the Email AutoFile mode for all users. **Practice Default** is the recommended setting.

Where the Practice Default does not apply, it is recommended that In Tray Review is selected for relevant users, to ensure emails are sent to the In Tray in FYI for review before filing to the client file.

7 FYI admins can manage the AutoFile Mode settings for all users in the Users List in Practice Settings - Admin - Users.

8 Bulk update the AutoFile Mode setting by selecting the relevant users and clicking **Bulk Edit**.



The AutoFile mode can also be updated by Users in **My Settings.**

Set Filing Defaults

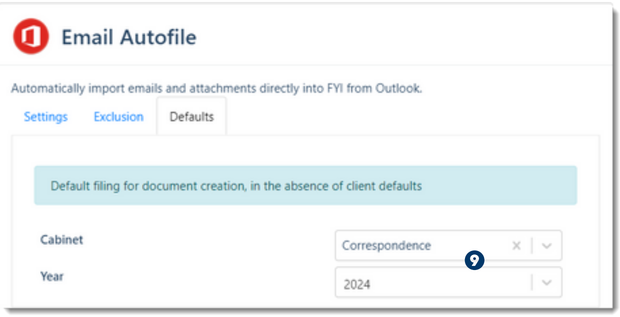
• Apply defaults as broadly as possible and find the approach that works best for your practice.

• Having the majority of client emails auto-filed is a better outcome than leaving them sitting in your In Tray.

• It is easy to re-file any emails not auto-filed correctly.

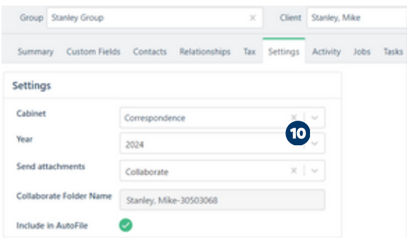
9 Practice Defaults are set via the Defaults tab in the Email AutoFile settings. They are applied in the absence of Client or User Defaults.

Consider starting with a pragmatic approach and set **Cabinet** to **Correspondence** and **Year** to the **current year.**



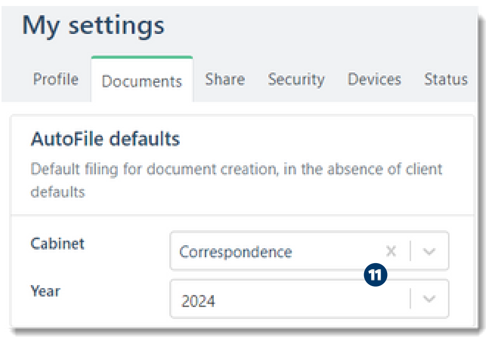
10 Client Defaults are set from the Settings tab in each individual client's workspace, or in bulk from Clients lists. Depending on the Cabinet selected, you can optionally select Categories set up for your practice, such as Year.

Learn how to update Client Defaults in bulk



11 User Defaults can be set in bulk from the Users list by an FYI Admin, or by each user via the Documents tab in their Settings > My Settings.

Select the Cabinet and Categories that you would like to use as your filing defaults if these have not been already set at a client level.

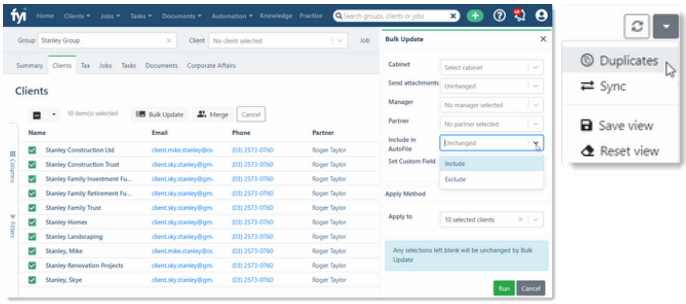


Tips & Tricks

Get the most out of FYI's Email AutoFile functionality with these handy tips:

1 Keep client and contact email addresses up to date in your practice management software

Learn how to update your Practice Management Software



2 Review clients and contacts and deselect 'Include in AutoFile' for sensitive emails

• Applicable for spouse, friends or shared emails.
• For Clients, use Bulk Update or Duplicates from Clients lists.
• For Contacts, go to the Clients - Contacts tab and deselect for individual contacts.

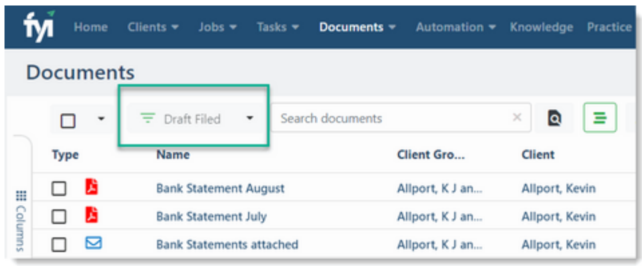
Learn how to use the Duplicates function to nominate clients

3 Keep In Trays Under Control

• Monitor Cabinet and Year columns in your In Tray to see any filing details that may be missing and need to be completed
• Bulk Update Categories as required eg. Year
• Move emails from your In Tray or share your In tray with another user – so they can complete the filing for you!
• Admins can use the practice-wide 'draft-filed' view for visibility over all In Trays - to identify any bottlenecks in outstanding filing.
• Import the 'Draft Filed Reminder ' Automation to remind relevant users when there are draft filed emails in their In Tray.

Learn how to file emails from FYI

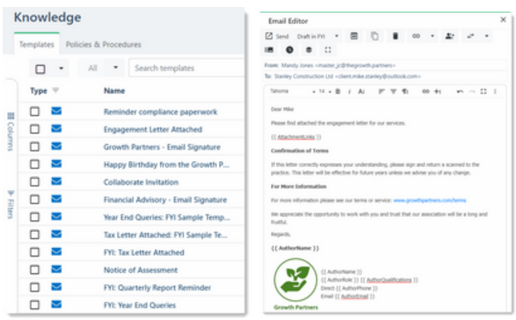
Learn more about the Draft Filed Reminder Automation



4 Ensure your team is sending emails from FYI

• Make sure your practice email signature is up to scratch
• Create email templates to make life easy for your team
• Preview draft emails to see how the merge fields will populate, then Send Immediately - no need to draft in Outlook first.
• Utilise global addressing of recipients.

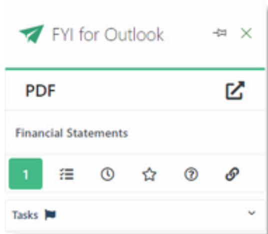
Learn how to create emails from FYI



5 Ensure your team is not forwarding emails internally

• Collaborate on emails from FYI and Outlook
• Use Comments instead to tag a team member and bring their attention to an email
• Use Tasks to delegate from an email – even without leaving Outlook.

Learn how to use Tasks and Comments



Unlock time-saving benefits when sending and receiving client emails. Set user, client and practice filing defaults and auto-file emails across your practice.

For more information on Email AutoFile, visit the FYI Help Centre at support.fyi.app