Email AutoFile

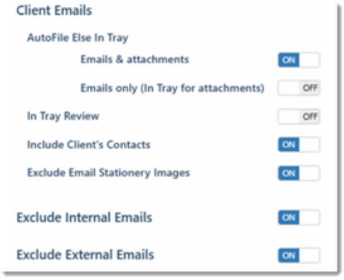
CHEAT SHEET

Settings for your Practice

1 Settings for the Email AutoFile app

Defines how emails and attachments will auto-file.

1. Go to **Automation** - **Apps** and click the **Email AutoFile** cog.
2. From the **Settings** tab, enable the following:



2 Set practice filing defaults

Defines where emails and attachments will auto-file to in the absence of client and user defaults.

1. Go to **Automation** - **Apps** and click the Email AutoFile cog.
2. From the **Defaults** tab, set the Cabinet and Categories.

Settings for Clients and Contacts

1 Set client filing defaults*

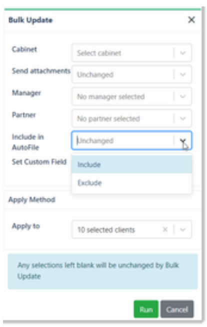
Defines the default Cabinet and Categories for a particular client. Client filing defaults takes precedence over practice and user defaults.

1. Locate your client and select the **Settings** tab.
2. Set the **Cabinet** and **Categories**.

Select multiple clients and **bulk update**.

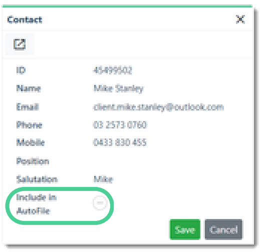
2 Deselect AutoFile for sensitive clients and contacts

Prevent spouse, friends, sensitive clients or shared emails from being auto-filed. Review and exclude relevant clients and contacts as follows:



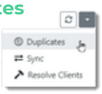
1. Filter and select relevant clients from the list and click **Bulk Update**.
2. Set the Include in AutoFile option to **Exclude**.

3. Click **Run**.
4. To exclude specific contacts, go to the **Clients - Contacts** tab and deselect **Include in AutoFile**
5. **Save** your changes.



For an individual client go to the **Client - Settings** tab and deselect **Include in AutoFile.**

In the Clients list, use the **Duplicates Function** to Nominate clients for auto-filing.



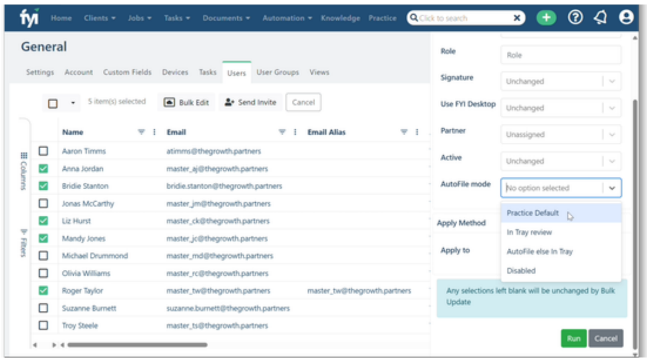
Best Practice Settings for Standard Users

1 AutoFile settings for Standard Users

Defines AutoFiling of client emails for the majority of users.

This will ensure client emails are instantly filed to the client workspace. Standard users can have peace of mind that sensitive personal emails or non-work related matters will not be auto-filed.

1. Go to **Practice Settings** - **General** - **Users**.
2. **Select** standard users from the list and click **Bulk Edit**.
3. Select **the AutoFile mode** as **Practice Default**.
4. Click **Run**.



2 Set user filing defaults*

*optional steps

Defines where emails and attachments will auto-file to. User filing defaults takes precedence over practice level filing.

1. From the **Users** list, select the standard users from the list and click **Bulk Edit**.
2. Set the **Cabinet** and **Categories**.
3. Click **Run**.

Best Practice Settings for Partners/ Directors

1 AutoFile settings for Senior Staff

Defines the AutoFile mode for senior staff to manage client emails.

This sends the emails to their In Tray for review and actioning for those users requiring greater control.

1. Go to **Practice Settings** - **General** - **Users**.
2. **Select** relevant users from the list and click **Bulk Edit**.
3. Select **the AutoFile mode** as **In Tray Review**.
4. Click **Run**.

Consider **sharing the In Tray** of these users with Assistants to ensure relevant client emails are made available to the wider team.

These settings maximize filing speed while ensuring sensitive emails are safely excluded.
Refer to the Best Practice Guide for more detail.