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:

- ON AutoFile Else In Tray - Emails & Attachments
- ON Include Client's Contacts
- ON Exclude Email Stationery Images
- ON Exclude Internal Emails
- ON Exclude External Emails

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

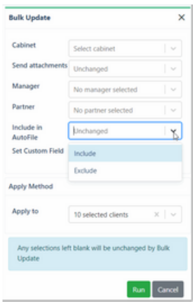
1. Locate your client and select the **Settings** tab.
2. Set the **Cabinet** and **Categories**.

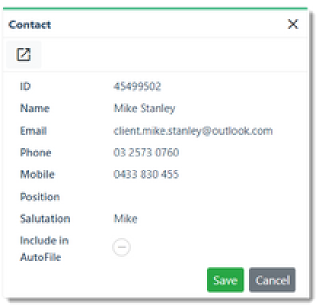
Tip! Select multiple clients and bulk update.

2 Deselect AutoFile for sensitive clients and contacts

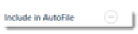
Applicable for spouse, friends, sensitive clients or shared emails that you do not want to include in auto-filing. Ensure the settings for relevant clients and contacts are reviewed and excluded as follows:

1. Filter and select relevant clients from the list and click **Bulk Update**
2. Select **Exclude** from the Include in AutoFile option
3. Click **Run**.
4. To exclude specific contacts, go to the Clients - Contacts tab and deselect **Include in AutoFile**
5. **Save** your changes.

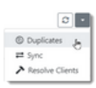




For an individual client go to the **Client** - **Settings** tab and deselect **Include in AutoFile.**



Use the **Duplicates Function** to Nominate clients for auto-filing.



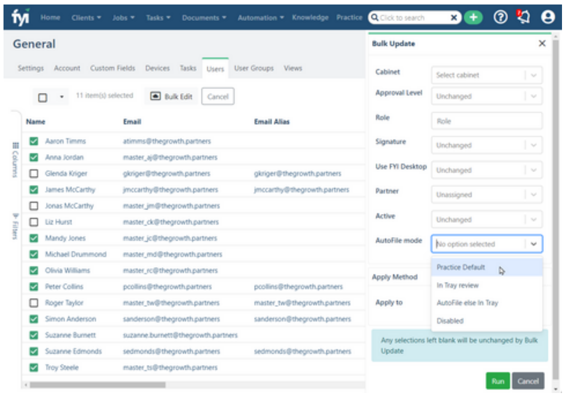
Best Practice Settings for Standard Users

1 AutoFile settings for Standard Users

Defines the AutoFile mode for the majority of users to auto-file client emails.

This will ensure client emails are filed instantly to the client workspace. Standard users can have peace of mind that emails from friends or spouse for sensitive 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*

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.

*optional steps

Note: These best practice settings will maximise auto-filing client emails whilst giving you peace of mind that sensitive emails can be excluded. Refer to the Best Practice Guide for more detail.