

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
- ✓ Email AutoFile Settings Defined
- ✓ Filing Defaults
- ✓ Best Practice Settings
- ✓ Tips & Tricks

The screenshot shows the FYI interface for an email titled "FYI: Bookkeeping Queries". The interface includes a header with a close button (X), a title bar, and a toolbar with icons for list, clock, star, person, refresh, and link. Below the toolbar, there is a section for "Reference 1597226914" and "Created by Liz Hurst on 15/03/2026". The main section is titled "Filing" and contains several dropdown menus: "Client" (SJB Plumbing Ltd, seanbutler.fyisample@gmail.com), "Cabinet" (Correspondence), "Year" (2026), "Work Type" (Bookkeeping & Payroll), "Job" (Feb 26 Monthly Bookkeeping), and "Tags" (No tags selected). There is also a "Show Inactive Jobs" toggle set to "OFF". Below the filing section, there are several expandable sections: "Thread", "Attachments", "People", "Tasks", "Time", "Workflow", and "Activity".

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 recognised client or client contact in FYI.
-  **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 and can be manually filed from Outlook.

Defining the AutoFile Settings

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

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 Tray for review.

Emails & attachments

When turned on, the email and attachments are filed to the client workspace. They will display separately in the Documents List.

Emails only (In Tray for attachments)

When turned on, the email will be filed to the client workspace and any attachments will be sent to In Tray for review and filing.

In Tray Review

When turned on, client emails and attachments will be 'draft-filed'. Review and manually file them from your Outlook inbox or FYI In Tray to make them accessible to your team.

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

Include Client's Contacts

Match emails sent to or from contacts associated with a client.

Exclude Email Stationery Images

Exclude small image files embedded in emails from auto-filing, such as logos or banners.

Exclude Internal Emails

Exclude emails sent between internal FYI users from auto-filing.

Exclude External Emails

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

Email Autofile

Automatically import emails and attachments directly into FYI from Outlook.

Settings | Exclusion | Defaults

Client Emails

AutoFile Else In Tray

 Emails & attachments

 Emails only (In Tray for attachments)

In Tray Review

Include Client's Contacts

Exclude Email Stationery Images

Exclude Internal Emails

Exclude External Emails

Close

Filing Defaults

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

1 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.

2 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.

3 Template

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

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.

Activity	
State changed from Internal to Manually Filed	
Mandy Jones	25/03/2026, 9:27:23 am
Client changed from No Client to Stanley Construction Ltd	
Mandy Jones	25/03/2026, 9:27:23 am
Name changed	
Mandy Jones	25/03/2026, 9:27:23 am
show more	

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](#)

Maintain Complete 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 proper configuration, FYI can automate up to 70% of your client email filing. This eliminates manual tasks by instantly directing communications to the client workspace. Email Autofiling according to Best Practice is particularly effective for partners managing large volume of emails everyday, as it ensures immediate team access to vital information.

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

If mandatory filing rules can be met, emails and attachments are auto-filed. If not, emails and attachments are 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)

This option will auto-file emails to the client workspace and send attachments to 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

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

Consider turning In Tray Review ON practice-wide only if high level of control over filing is required, with all emails sent to In Trays for review before releasing to the client workspace.

3 Turn Include Client's Contacts

This means emails to or from your Client's Contacts will be recognized for auto-filing.

4 Turn Exclude Email Stationery Images

This means jpg, jpeg, png, gif, ico, svg or bmp files that are less than 40kB are excluded from being auto-filed.

5 Turn Exclude Internal Emails

This excludes any emails between FYI users from auto-filing. Internal emails can still be filed manually as required.

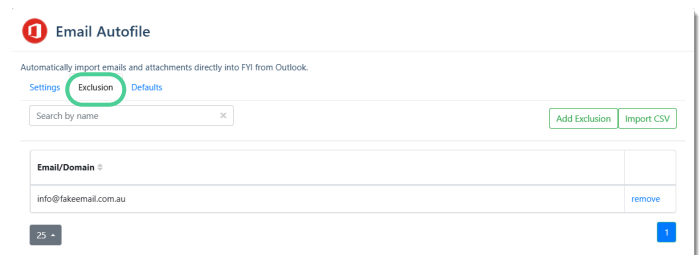
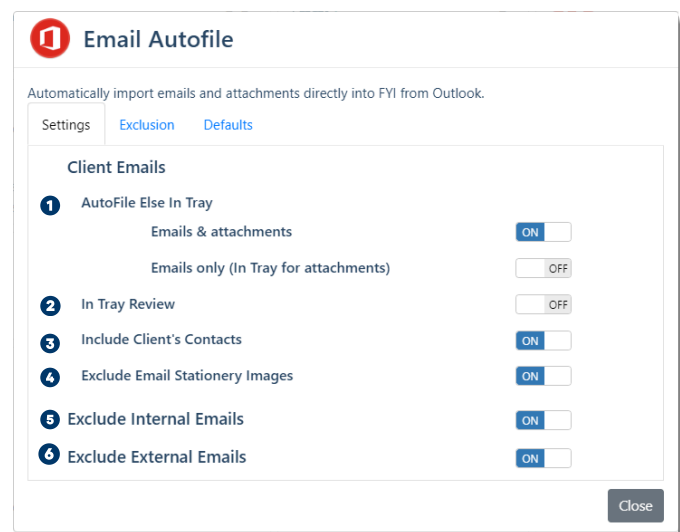
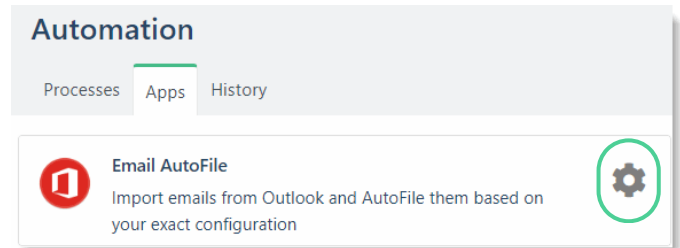
6 Turn Exclude External Emails

This excludes emails from recipients not known to FYI, such as Accountancy publications, from being 'draft filed'. Build your exclusion list before switching this setting OFF.

Notes: Lawyers and Bookkeepers are considered External Emails, therefore it is recommended to build exclusions to reduce the volume of emails in your In Tray. When ready, switch this setting 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](#)



Update Your User Settings

Once the practice wide settings are complete, the AutoFile mode can be configured for each user.

Practice Default is the recommended setting for Standard Users, while In Tray Review is recommended for Partners and Directors.

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

- 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.

Name	Email	Role	Active	Cabinet Group	Permission Group	Autofile Mode	
<input type="checkbox"/>	Anna Jordan	master_aj@thegrowth...	Practice Administrator	Yes	Admin	Admin	AutoFile else In tray
<input type="checkbox"/>	Jonas McCarthy	master_jm@thegrowth...	Manager	Yes	Accountants Admin	Accountants Admin	Practice Default
<input checked="" type="checkbox"/>	Liz Hurst	master_ck@thegrowth...	Partner	Yes	Admin	Admin	In tray review
<input checked="" type="checkbox"/>	Mandy Jones	master_jc@thegrowth...	Accountant	Yes	Admin	Admin	In tray review
<input type="checkbox"/>	Michael Drum...	master_md@thegrow...	Manager	Yes	Standard User	Standard User	Practice Default
<input type="checkbox"/>	Paul Collins	pcollins@thegrowth.pa...	Financial Analyst	Yes	Advisory Team	Advisory Team	Practice Default
<input type="checkbox"/>	Reception	reception@thegrowth...	Reception	Yes	Standard User	Standard User	AutoFile else In tray
<input type="checkbox"/>	Roger Taylor	master_tw@thegrowth...	Partner	Yes	Admin	Admin	Practice Default
<input type="checkbox"/>	Troy Steele	master_ts@thegrowth...	Accountant	Yes	Standard User	Standard User	Practice Default

My settings

Profile Documents Share Security Devices Status

Anna Jordan's Details

Notification Mode: Email

Weekly Stats: ON

Preview Office via OneDrive: ON

Use FYI Desktop: ON

Open Office using: OneDrive Desktop

Open Outlook using: Practice Default

Autofile mode: Practice Default

Email Autofile

Automatically import emails and attachments directly into FYI from Outlook.

Settings Exclusion Defaults

Default filing for document creation, in the absence of client defaults

Cabinet: Correspondence

Year: 2026

Settings

Cabinet: Correspondence

Year: 2026

Work Type: Select Work Type

Job: No job selected

Show Inactive Jobs: OFF

Send attachments: Collaborate

Include in AutoFile:

My settings

Profile Documents Share Security Devices Status

AutoFile defaults

Default filing for document creation, in the absence of client defaults

Cabinet: Correspondence

Year: 2026

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 (eg. Year) as required.

- 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 without drafting in Outlook.

- Utilise global addressing of recipients.

[Learn how to create emails from FYI](#)

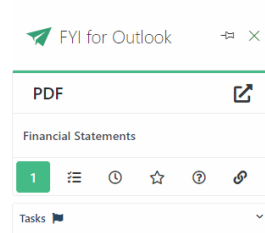
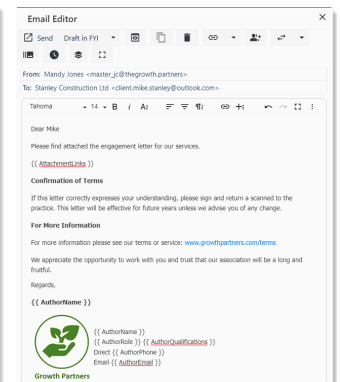
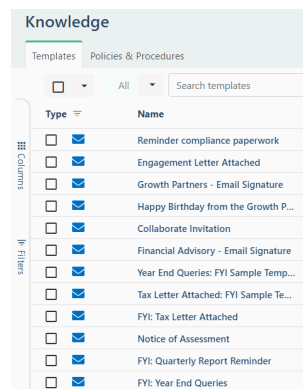
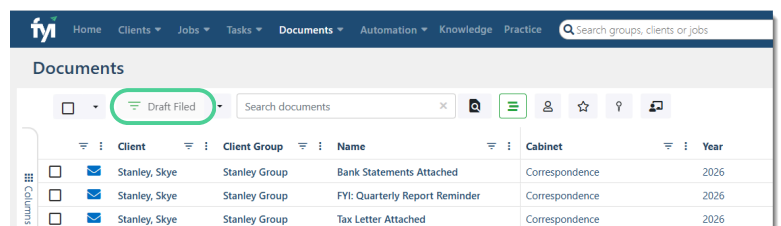
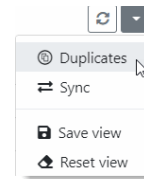
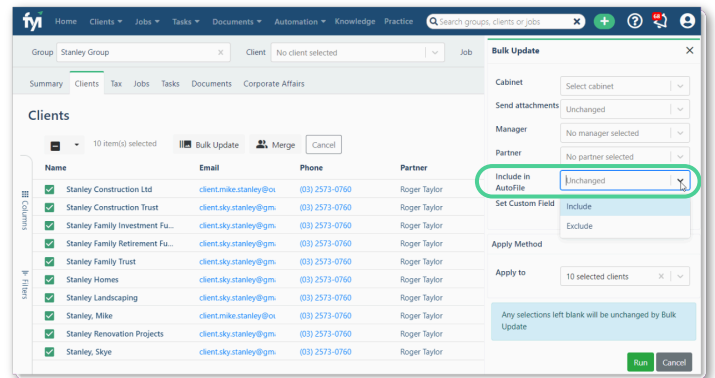
- 5 Ensure your team is not forwarding emails internally

- Collaborate on emails from FYI and Outlook.

- Use Comments to tag a team member and bring their attention to an email.

- Use Tasks to delegate from an email without leaving Outlook.

[Learn how to use Tasks and Comments](#)



Streamline your workflow by setting auto-filing defaults for client email across your practice.

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