

# Email AutoFile

## Quick Reference 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 system can be auto-filed in FYI and immediately accessible to your team.

- ✓ Store emails centrally in client files – not locked away in individual inboxes
- ✓ Apply consistent filing rules – practice wide
- ✓ Set filing defaults at the user, client or practice level and save huge amounts of valuable time
- ✓ Assign access rights to cabinets – so that privacy and confidentiality is maintained

The screenshot shows a software interface for an email. At the top, it says "Email" with a close button. Below that is a "Follow up" section with icons for list, clock, and star. The main content area shows a document icon and the text "Reference RT-032746" and "Created by Roger Taylor on 19/08/2020". Below this is a "Filing" section with a dropdown arrow. It contains several fields: "Client" with a text box containing "Marshall, Frank" and "client.frank.marshall@outlook.com"; "Cabinet" with a dropdown menu showing "Correspondence"; "Job" with a dropdown menu showing "2020 Compliance" and a "Show Closed Jobs" toggle set to "OFF"; and "Year" with a dropdown menu showing "2020". At the bottom, there are several expandable sections: "Attachments", "Tasks", "Time", "Workflow", "Activity", and "Recent Documents", each with a dropdown arrow.

## The Fundamentals

### Email Type

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



#### A Client Email

Recipient is a client or contact



#### An Internal Email

Recipients are FYI Users



#### An External Email

At least one recipient is unknown to FYI

### AutoFile Settings

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, and instantly released to the client file. If not, they will be sent to In Trays for review.

#### In Tray Review

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

#### Include Client's Contacts

Include emails from client contacts in auto-file.

#### 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. 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. Client Defaults

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

#### 3. User Defaults

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

#### 4. 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.*

### Filing Status

Confirmation of whether the email has been filed in FYI or not.

#### Filed in FYI

The email has been filed in FYI according to email type, settings and defaults.

#### 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, but can be filed manually.

## Remember – you are in control

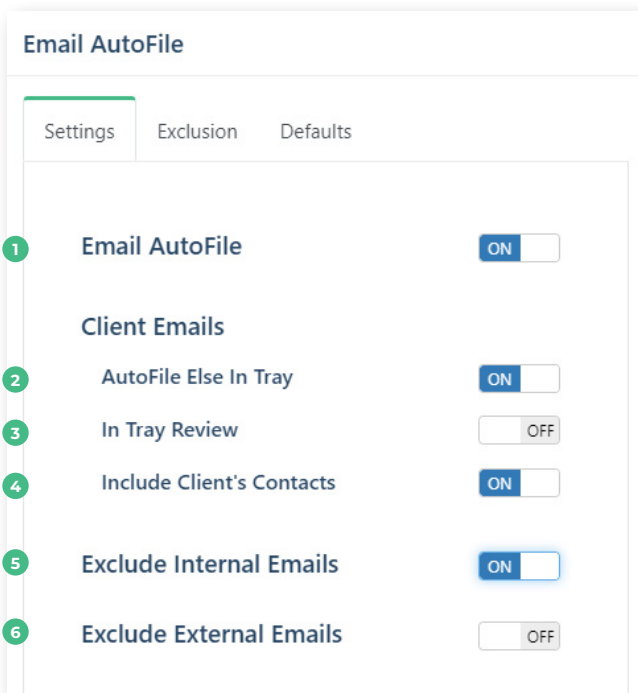
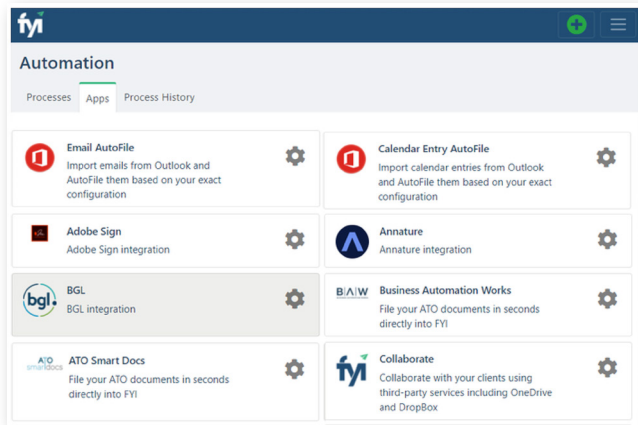
Anything not auto-filed can be filed manually and anything that has been filed can be updated, re-filed or deleted.

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

[Learn how to use the Activity section of the Email Drawer](#)

# Best Practice Settings

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 Administrators can set Email AutoFile Settings by going to **Automation – Apps** and clicking on the **Email AutoFile** cog.

## Choose your Settings

- 1 Turn **Email AutoFile ON** to allow as many emails as possible to be considered for auto-file.
- 2 Turn **AutoFile Else In Tray to ON**. If mandatory filing rules can be met, FYI will auto-file the email. If not, the email will be sent to your In Tray for review. *This setting is best applied practice-wide and ideal for standard users.*

Turning AutoFile Else InTray ON will reduce manual filing and provide instant access to client emails practice-wide, so they are no longer stuck in individual inboxes.

- 3 **In Tray Review** will automatically turn **OFF** when **AutoFile Else In Tray** is **ON**.

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

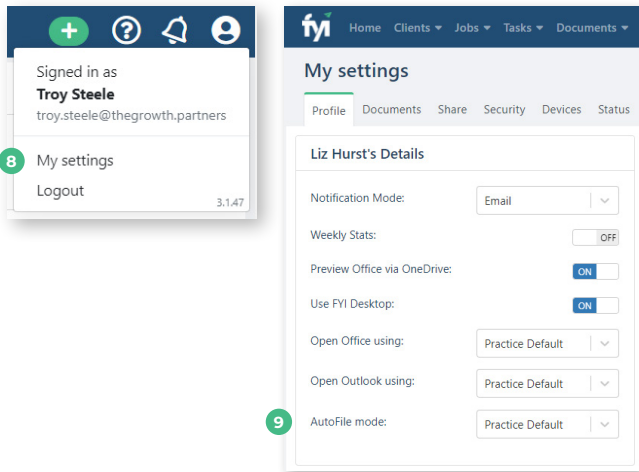
Consider turning In Tray Review ON practice-wide only if you need a high level of control over filing and are comfortable having all emails sent to In Trays for review before releasing to the client file.

- 4 Turn **Include Client Client's Contacts** to **ON**. This means emails to/from your Client's Contacts will be recognized by FYI's AutoFile engine.
- 5 Turn **Exclude Internal Emails** to **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** to **OFF** to ensure emails to/from recipients not known to FYI, such as lawyers or book-keepers, are draft-filed in your In Tray in FYI, ready for you to file them. *This setting is ideal for larger practices.*

Turning Exclude External Emails OFF will ensure external emails are visible beyond your Outlook Inbox in a more timely manner.

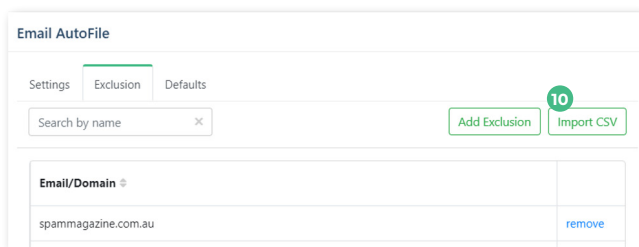
### Note:

- With this setting **OFF**, it's a good idea to use **exclusions** to reduce the volume of emails hitting your In Tray.
- Turning this setting **ON** means that emails will be excluded from auto-filing if at least one recipient is unknown to FYI. They will be sent to In Trays for filing.



## Use My Settings to turn In Tray Review on for Individual Users

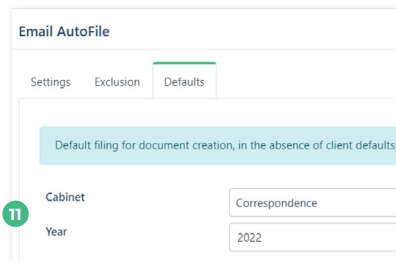
- 8 In Tray Review can be turned on for Partners, Managers and other senior members of your team, via **My Settings** (figure 1) in the top-right hand corner of FYI's main menu bar.
- 9 From the Profile tab, you can over-ride the practice-wide default setting for AutoFile and set your **AutoFile mode** to **In Tray Review**. This will ensure emails from Outlook are 'pre-filed' to your In Tray in FYI for review before filing to the client file and sharing with your team.



## Add Exclusions to Help Keep Intrays Under Control

- 10 Exclusions help you avoid irrelevant emails cluttering your In Tray. Simply use **Import CSV** to bulk import a list of emails and domains to exclude.

[Download an example list](#)

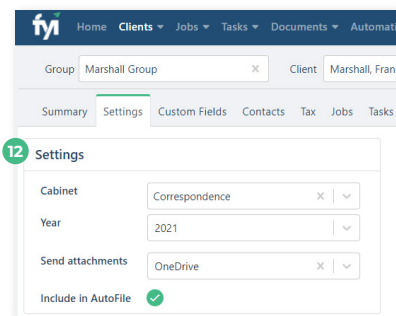


Setting Practice Defaults

## 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.

**Practice Defaults** are set via the Defaults tab in your Email Settings. They are applied in the absence of Client or User Defaults, and work well for smaller firms.

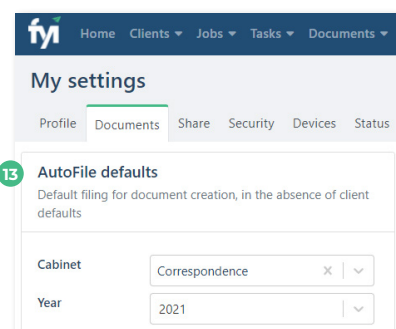


Setting Client Defaults

- 11 Consider starting with a pragmatic approach and set **Cabinet** to **Correspondence** and **Year** to the **Current Year**.

- 12 **Client Defaults** can be set in bulk or from the Settings tab in each individual client's workspace. 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](#)



Setting User Defaults

- 13 **User Defaults** can be set in bulk 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.

[Learn how to update User Defaults in bulk](#)

## Tips and 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 XPM database](#)

### 2 Select a Primary Client to use for AutoFile for shared email addresses

If no Primary Client is set, the email will go to your In Tray for filing.

[Learn how to nominate the Primary Client to include in AutoFile](#)

### 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 to 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 - so you can identify any bottlenecks in outstanding filing.

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

### 4 Ensure your team is sending emails from FYI

- Make sure your practice email signature is up to scratch
- Create a handful of 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 in FYI](#)

### 5 Encourage your team to re-consider before forwarding emails internally

- 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 Comments and Tasks](#)

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.fyidocs.com](https://support.fyidocs.com)**