

# 6-Point Plan for Email AutoFile



## Review clients and deselect 'Include in AutoFile' for sensitive emails

Applicable for spouse, friends or shared emails.  
Tip! Bulk update or use Duplicates from Clients lists.

## Add Exclusions to keep In Trays under control

Relevant when External Emails are included in AutoFile.  
Tip! FYI Admins can use the Draft Filed Document view to continue to build the exclusion list.

## Set practice filing defaults

Defines how emails and attachments will autofile.  
The order of filing defaults is client, user then practice. Setting this here defines the practice level.

## Update user specific AutoFile settings

Update autofile settings to 'In Tray Review' for individual users where practice wide autofile settings don't apply.  
Tip! FYI Admins can bulk update relevant users.

## Enable 'Email AutoFile' settings

Turn on 'AutoFile Else In Tray' for Emails & Attachments.  
Turn on 'Include Client's Contacts'.  
Turn on 'Exclude Internal Emails'.  
Decide if external emails will be included or not. If 'Exclude External Emails' will be toggled Off, refer to Step 2.

## Regularly review In Tray and file or discard

Tip! FYI Admins have the Draft Filed view in the Documents list to encourage best practice behaviour.

Follow our 6-point plan and autofile 70% of of client emails without lifting a finger.  
For more information on Email AutoFile, visit the FYI Help Centre at [support.fyidocs.com](https://support.fyidocs.com)