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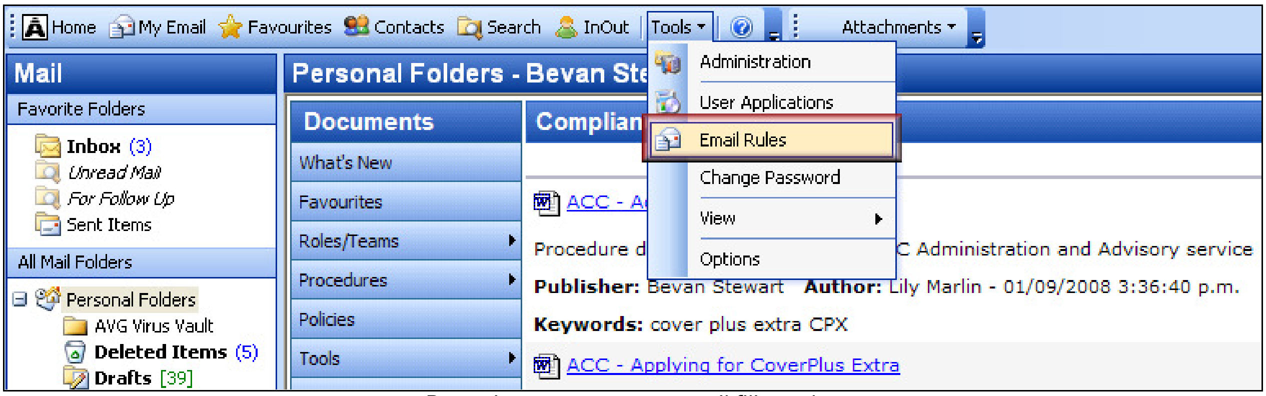
Acclipse Email Manager — Email rules and autofiling

If you are running Acclipse Email Manager and have activated autofiling you can now set up autofiling rules and specify how long the autofile prompt should display for each user.

Set up autofiling rules

You can edit a rule at any time. If you set up several rules, you can order these to make them easier to maintain. It is also useful to order rules if you have more than one rule for an email address. The rule highest up in the list will take precedence.

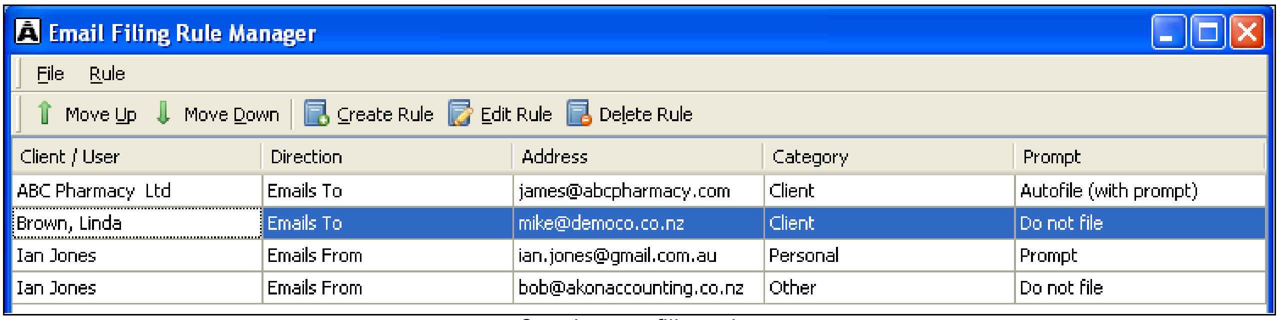
NOTE: When an email is NOT filed, the Autofile will display red.



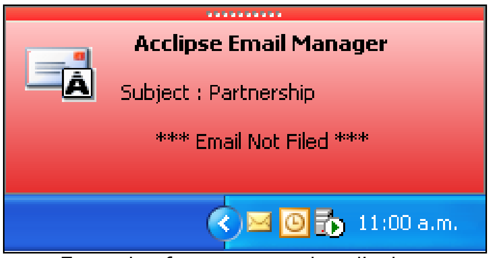
Preparing to set up your email filing rules

To set up autofiling rules:

1. Open the user module of Acclipse Document Manager.
2. Select *Tools* → *Email Rules*.
3. Click ***Create Rule***.
4. Specify whether you want the email sent to or from the person.
5. Enter the email address.
6. Select the required category.
7. Select the required client (if you selected the *Client* option in the previous step).
8. Select the required prompt option:
   - *Autofile (with prompt)* — Email will be filed automatically. You will still get a notification confirming how the email was filed.
   - *Prompt* — Email will NOT be filed automatically. You will be prompted to confirm the client and storage location.
   - *Do not file* — Applicable if you have the option enabled to allow users NOT to file
9. Click *OK* — The autofiling rule you created displays.
10. Order your autofiling rules (if required):
    a. Select the rule you wish to move.
    b. Click *Move Up* or *Move Down* as required.



Creating autofiling rules

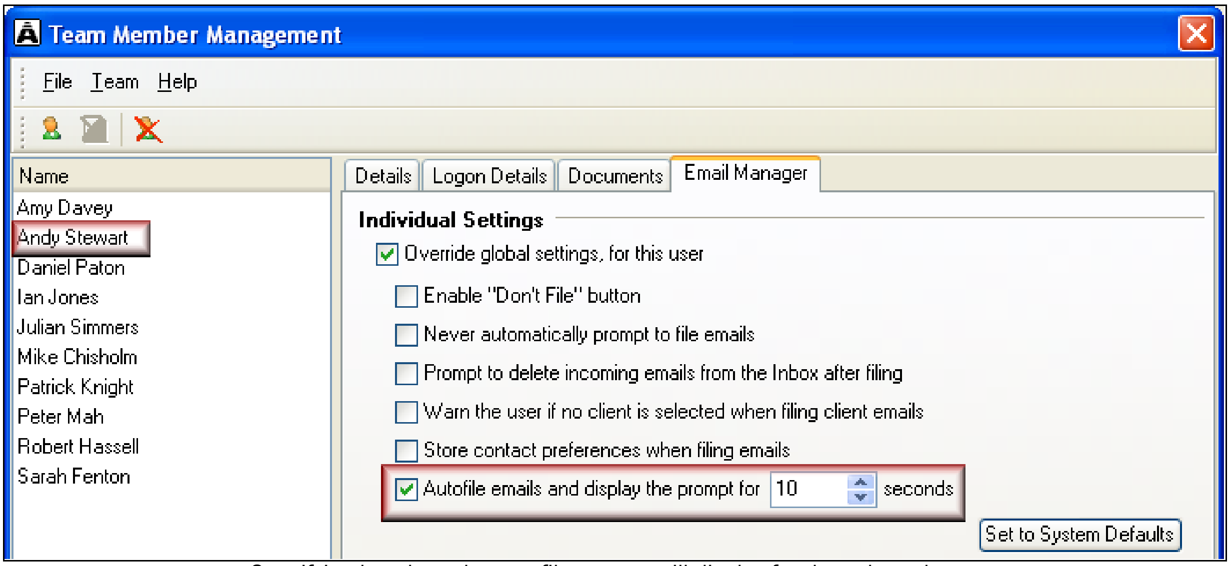


Example of autoprompt that displays when an email is NOT filed

Specify time of autofile prompt for user

If you have activated autofiling, you can override the global setting for how long the autofile prompt displays on a per user basis. To do this:

1. Log into the administration module.
2. Select ***Teams → Team Members***.
3. Select the required team member.
4. Select their ***Email Manager*** tab.
5. Adjust the number of seconds.
6. Click ***Save & Close***.



Specifying how long the autofile prompt will display for the selected user