



# QuickFile for Outlook

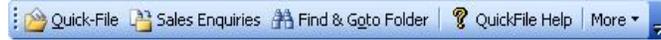
## Filing Electronic Copies of E-mails



### Introduction

QuickFile makes it easy to file incoming and outgoing e-mails.

QuickFile works inside Outlook by adding a new QuickFile toolbar.



There are only 3 things you need to remember to use QuickFile:

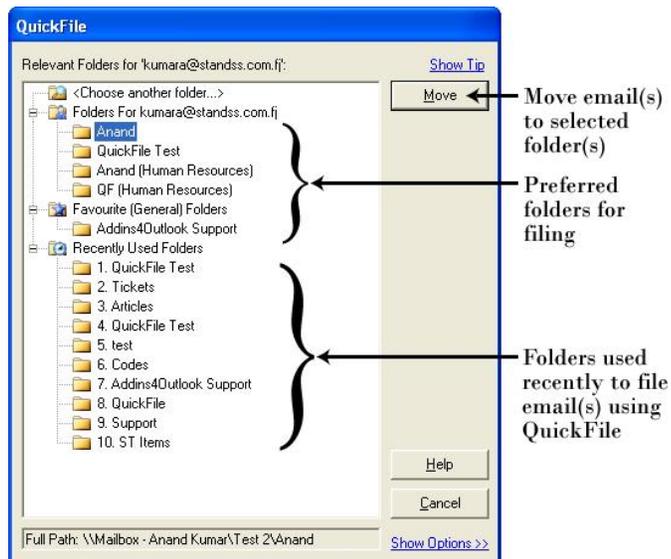
1. To file your incoming emails... click the QuickFile button.
2. To file outgoing emails... click the Send button and QuickFile will prompt you.
3. To quickly view the contents of an email folder... click the Find&Goto Folder button.

The QuickFile screens will display tips to get you started. For those who like printed manuals... the following sections have step-by-step instructions on QuickFile's main features.

### QuickFile: Filing Received Emails

Use QuickFile to file e-mails from your Inbox or any other folder.

1. Select or open the e-mail to be filed.
2. Click the **QuickFile** button to display the *QuickFile* screen



On the screen will be a list of preferred folders (if you had added any) for the specific contact that you want to file the email for.

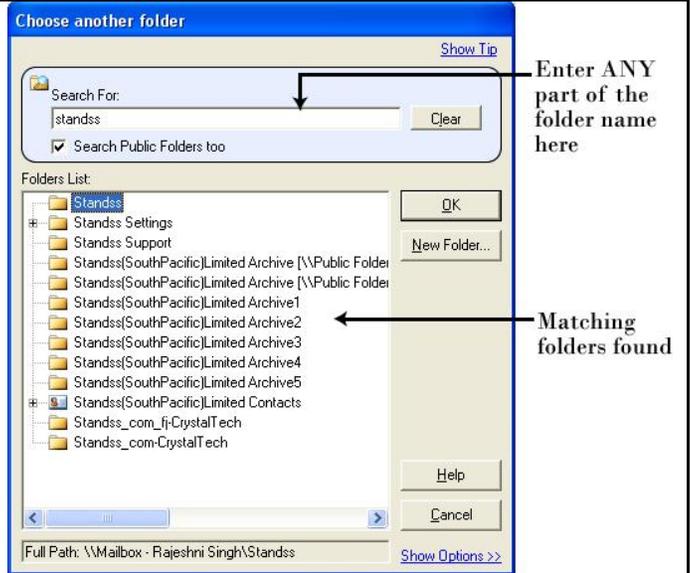
If there were no preferred folders added for this contact then you will only have the <Choose another folder...> option in the list.

3. If the desired folder is not available in the list then go to step 5.
4. If the desired folder is shown in the list then select the folder and click the **Move** button (you can also double-click on the folder on the list).

The e-mail will be closed and moved to the correct folder.

5. If the desired folder is not available in the list then double-click on <Choose another folder...> to select another folder.

(Screen shown in next column)



6. Enter *any part of the folder name* in the **Search For:** box to display a list of matching folders.
7. Select the desired folder and click the **OK** button (you can also double-click on the folder on the list).

### Send&File: File Outgoing Emails

Use QuickFile to create an e-mail and automatically file it to the correct folder after the e-mail is sent.

1. From your Inbox, click the **New** button to compose an e-mail.
2. Write your e-mail (Fill in the address, type the message, attach any files if necessary)
3. Click the **Send** button as you normally do. The *Send & File* screen will be displayed.
4. If the desired folder is not shown in the list then go to step 6
5. If the desired folder is shown in the list then select the folder and then click the **Send & File** button (you can also double-click on the folders on the list).

The e-mail will be sent and filed.

6. If the desired folder does not exist then click <Choose another folder...> to select another folder.  
(The Choose Another Folder screen is shown in the image above)
7. Enter *any part of the folder name* in the **Search For:** box to display a list of matching folders.
8. Select the desired folder and click the **OK** button (you can also double-click on the folder on the list).

### NOTES:

1. If you want to send the email without filing it, click **Send Only** on the Send&File screen.
2. If you want to delete the sent email after it is sent, click **Send&Delete** on the Send&File screen.
3. **Send&File** leaves a copy of the email in your Sent Items folder and files a *copy* into your selected folder. You can change this from the Settings screen.



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## Filing Electronic Copies of E-mails



### Find&Goto Folders

Immediately find and jump to any Outlook folder without having to hunt through complicated lists of folders.

1. Go to Inbox (or any Outlook Folder).
2. Click Find & Goto Folders button to display the Find Folders screen.

3. Type any part of the folder name into Search For: box. This does not need to be the start of the folder name. QuickFile will display a list of all folders matching the text you type in.
4. Select a Folder from the list.
5. Click Goto Folder to move to the folder (or click on Open Folder to open the selected folder in a new window).

### One-Click Filing

QuickFile remembers the last used folder for a particular contact.

The one-click button beside the QuickFile button appears with the suggestion for the **last used folder** for a **selected email**.



Click the One Click button to move the selected email to the suggested folder.

Hold the SHIFT button and click the One Click button to copy the selected email to the folder i.e. the email will remain in the current folder but a copy will be filed.

Hold the CTRL button and click the One Click button to move to the folder i.e. the email will not be moved or copied but the contents of that folder will be displayed.

## Advanced Tips... *Once you're comfortable with the basics of QuickFile...*

### Auto-File Original Emails with Outgoing Replies...

If you are replying to an e-mail, QuickFile can automatically file the original email with the outgoing reply.

1. Write the email and click Send as you normally would.
2. Click on the **Show Options >>** link on the *Send & File* screen to expand the screen for more options.

3. Tick the option "File original Received Email with Sent Email".
4. Click Send & File to send the email and file the original email with the sent email.

**Note:** You can use the Settings screen to have the "File original Received Email with Sent Email" ticked by default.

### Settings: Make QuickFile work YOUR WAY!

You can make QuickFile work the way you want by changing its settings.

1. Go to your Inbox.
2. On the QuickFile toolbar, click **More - Settings**.
3. Change the Settings as you want and click OK.

### Clean up your list of preferred folders

Over time, your list of folders may contain folders that no longer exist. Let QuickFile clear your list for you.

1. Go to the Inbox.
2. On the QuickFile toolbar, click **More - Organize QF Shortcuts** button to display the *QuickFile Organize Shortcuts* screen.
3. Click the **Check Shortcuts** button.

### Build the Preferred Folders List from Emails

QuickFile can scan your existing emails to learn your preferred folders.

1. Go to the Inbox.
2. On the QuickFile toolbar, click **More - Organize QF Shortcuts** button to display the *QuickFile Organize Shortcuts* screen.
3. Click the **Scan** button to display the *AutoScan Wizard*.
4. Follow the instructions on the Wizard.

*This wizard will take time to run if there are a lot of emails to scan.*



### Task/Schedule received emails (PRO)

QuickFile allows you to create Tasks and Appointments from emails.



#### Quick-Task/Appointment

1. Select an email in your Inbox.
2. Click **Quick-Task/Appointment** on the QuickFile toolbar.
3. A task/appointment for that email opens up instantly.
4. You can edit your task/appointment as required and save it by clicking the **Save and Close** button on the Task/Appointment.

### Task/Schedule outgoing emails (PRO)

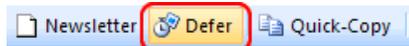
QuickFile allows you to make Tasks and appointments for an outgoing email.

1. From your Inbox, click the **New** button to compose an e-mail as you normally would.
2. Click the **Send** button. The Send & File screen will be displayed.
3. Click the **Show Options >>** link on the screen to expand the form.
4. Click on **Task/Schedule it!** link to open the screen below:

5. Place a tick in the respective checkboxes to make an Appointment and/or Task.
6. Fill in the required fields and click OK.
7. Click Clear to restore settings on this screen to default.
8. Click Close to close screen.
9. Click **Send&File**, **Send Only** or **Send&Delete** to send the email.

### Defer emails (PRO)

Use the Defer button to keep your Inbox clean by moving out non-urgent emails out of your Inbox. They will arrive back automatically in your Inbox when you are ready.



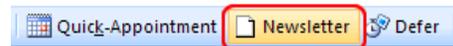
1. Select an email in your Inbox. (You can select multiple emails too)

2. Click **Defer** on the QuickFile toolbar to open screen below:

3. **Select** the option of your choice and set an appropriate time or interval to which you want to defer your email(s) to.
4. Click OK to defer the selected email (s) out of the Inbox
5. Your email(s) will be moved to a folder called **Deferred Emails (QuickFile)**, which resides under your default Inbox folder.
6. Your email (s) will appear back in your Inbox (Marked as unread) at the set time.
7. To go and view all your deferred emails, click on the **Goto Deferred Emails Folder** link on the screen above.

### Newsletter emails (PRO)

De-clutter your Inbox of Newsletters by moving them to a separate folder for later reading.



1. Select an email in your Inbox
2. Click **Newsletter** on the QuickFile toolbar to open this screen:

3. To move the selected newsletter (email) from your Inbox to the newsletter folder, select **Move selected email to Newsletter folder** option and click OK button
4. To move selected newsletter (email) and all other newsletters from that sender, from the Inbox to the newsletter folder, select **Move ALL emails from Sender to Newsletters folder** option and click OK button.
5. To also add the Sender to QuickFile's Newsletter email list, tick the option **Automatically move future emails from this sender to Newsletter folder**. This option will allow QuickFile to automatically move future received emails from that Sender to the Newsletter folder.
6. To go and view all your newsletter emails, click on the **Goto Newsletter Folder to read emails** link.