Auto-forward emails in Florence

This workflow explains the different ways in which emails interact with Florence eBinders. How to import both emails themselves and their attachments to Florence, best filing methods as well as other tips and tricks to get the most out of emails in Florence.

Contents

1. Importing Email Correspondence

1.1 Sending Emails to a binders/folders email address

i. To import an email (either correspondence, or correspondence and attachments) you need to 'send' it to the location you want the document to be.

NOTE: emails themselves cannot be drag dropped into Florence, they will not import correctly!

ii. On the left-hand side of any binder or folder page there is an 'Import via Email' button
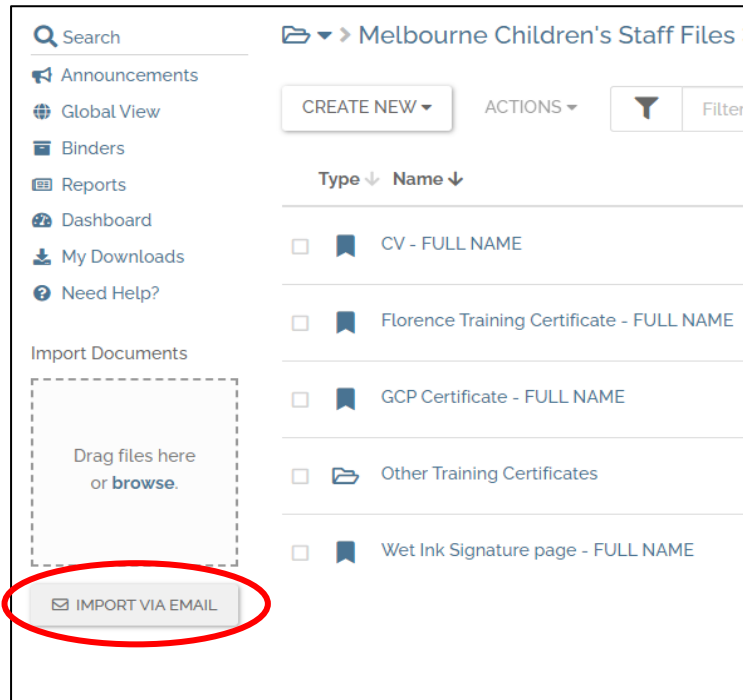
iii. Selecting 'Import via Email' will make a pop-up box with an email address appear. Copy the email by pressing 'Copy to Clipboard'.
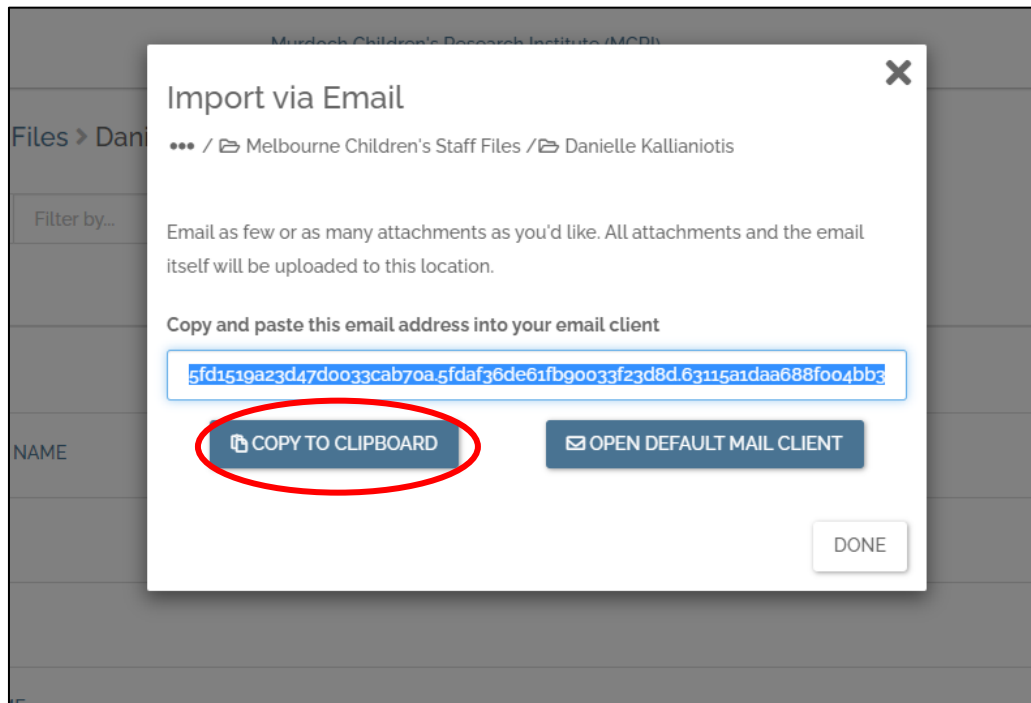
iv.   Paste this email address into an email, edit the subject line to the name you want the documents to appear as and send. This can be sending, CCing or forwarding an email.

v.   Mail threads will be uploaded according to the subject line. If there is an attachment in the email, the correspondence will appear as just described – the attachment will upload as the file is labelled.

vi.   Anything imported by CCing, sending or forwarding will be automatically tagged as 'Imported via Email'.

vii.   And any emails sent with attachments will be linked to each other, these can be found by selecting the 'View Related Document' on the left-hand side of either document uploaded. Pressing this will show you either the email or document that were attached to one another.
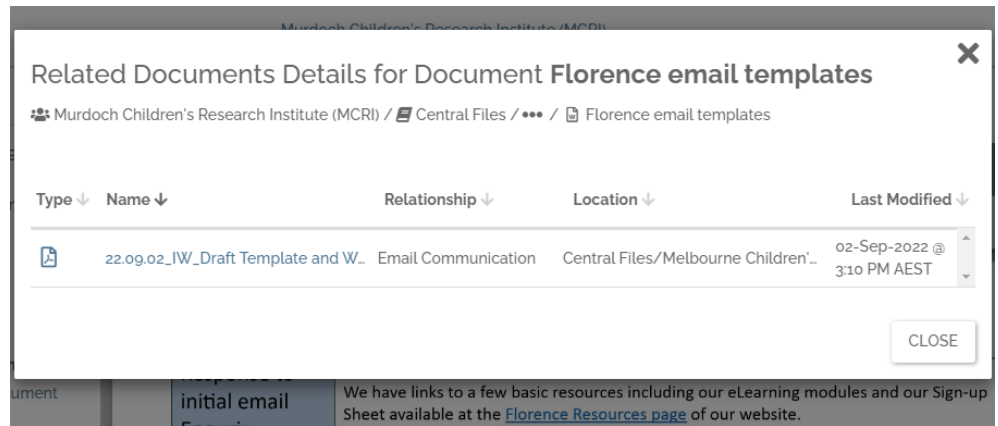

viii.   You will receive a confirmation email from Florence once your email has been successfully imported into your chosen Florence location

1.2 Updating email chain versions

i.   If an email chain that has already been filed grows with notable information/responses that need to be added, these responses can be filed as new versions of the email

ii.   Open the email document and at the top there will be a 'Version' drop down. Select, and press 'Email a New Version'
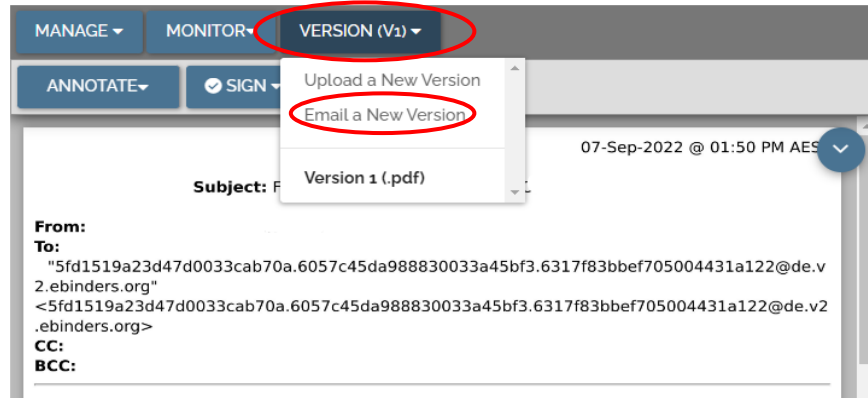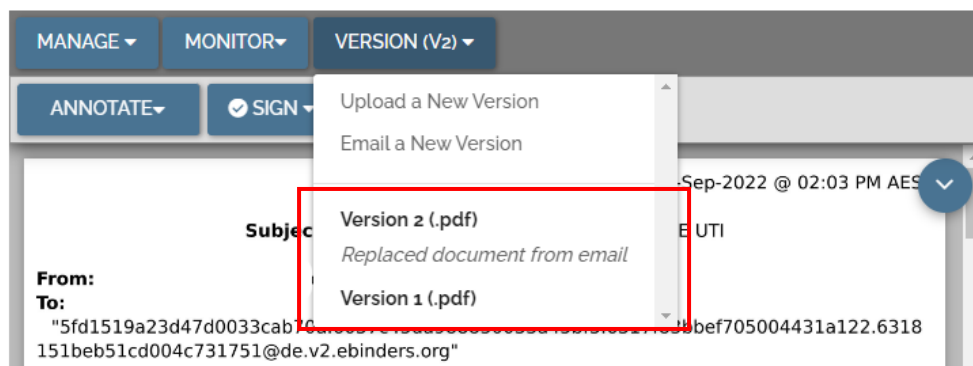

iii.   Selecting this will cause a Florence email address to pop up, copy this address and send/forward/CC the newly updated email chain to it.
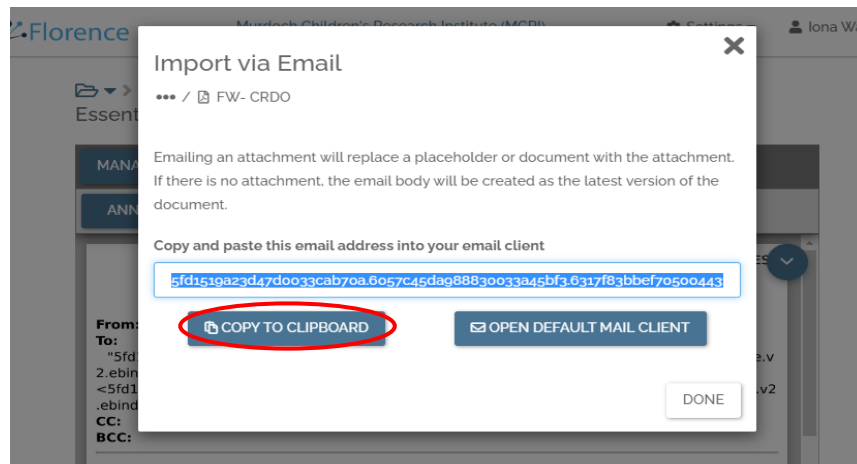

iv.   This will create a new version of the email chain that you can select to see in the 'Version' drop down. It will appear in sequence of 'Version (1)', 'Version (2)', 'Version (3)' etc.

## 1.3 Filing multiple email threads on the same theme/subject

i. If it is expected that many emails and email chains are going to be filed on the same theme/subject, it is best to create a sub-folder for these emails in the folder it is being filed

ii. This can be done by selecting the 'Create New' drop down, and selecting 'Folder'
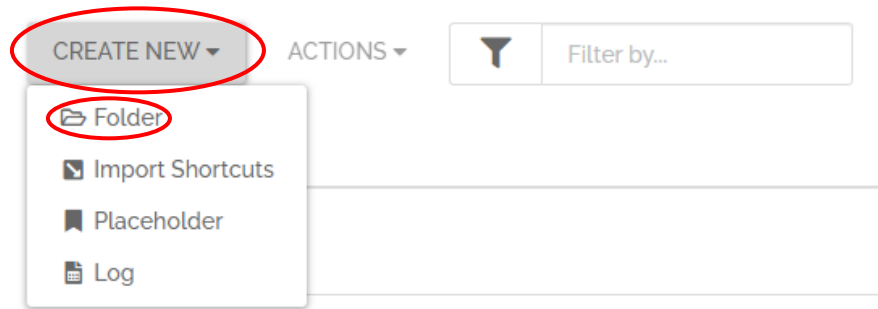
iii. Name this folder the main topic or key words on the subject e.g. 'Patient questions', 'Log entry requests' etc.

iv. Now any time an email comes in pertaining to the specific theme/subject, it can be forwarded straight to the email folders email and found easily through a date-led naming convention

1.4 Saving regular email addresses

i. In cases where email chain folders are regularly being added to, or general folders are often being sent emails/documents you can save these email addresses

ii. This would require adding a new contact to your emails, naming the contact the name of the folder, and copying the 'Import via Email' address to put in the contact
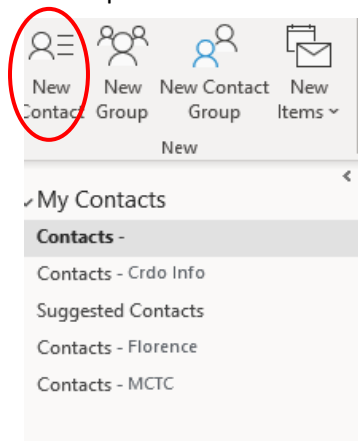

iii. Then fill in the details as described above, you can now type in the name of the file you want to send an email to and it will automatically send to the folder (NOTE: ensure you change subject of email to file name)
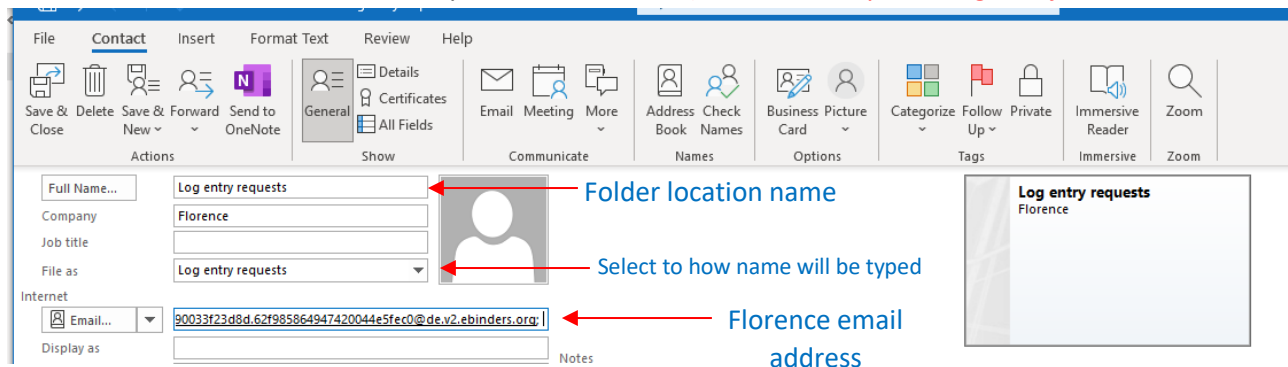
2. Importing Email Attachments (without correspondence)

2.1 Drag and drop attachments of emails

    i.   Another method of importing documents/attachments without filing the source email is 'drag and drop'

    ii.   To do this, you click on and hold down the mouse while dragging it across to the box on the left hand side.
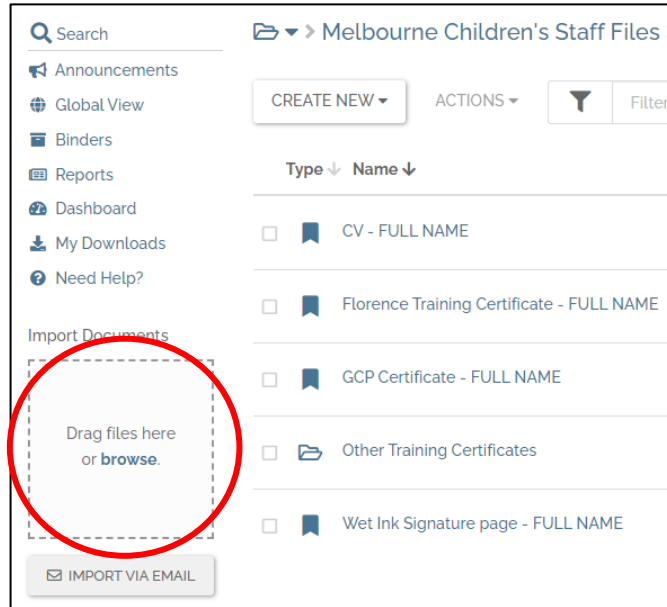

    iii.   NOTE: Files must be dropped in this square or they will not be imported. **Emails themselves cannot be drag dropped into Florence, they will not import correctly!**

    iv.   Once dragged and dropped it will immediately import to the binder/folder

2.2 Delete correspondence import separately

* Only applicable to roles whose permissions allow them to delete documents.

    i.   If you have forwarded an email with an attachment that needs to be filed, but do not want the email thread to be documented, you may be able to delete the email thread

    ii.   Select the three dots at the end of the correspondence row, and select 'Delete'
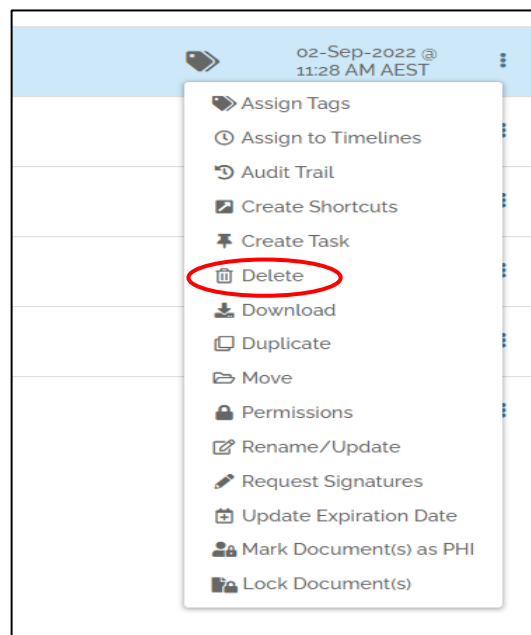
iii.   Provide a reason for deleting the correspondence doc, and press 'Delete' to remove it. You will be left with just the attachment saved.
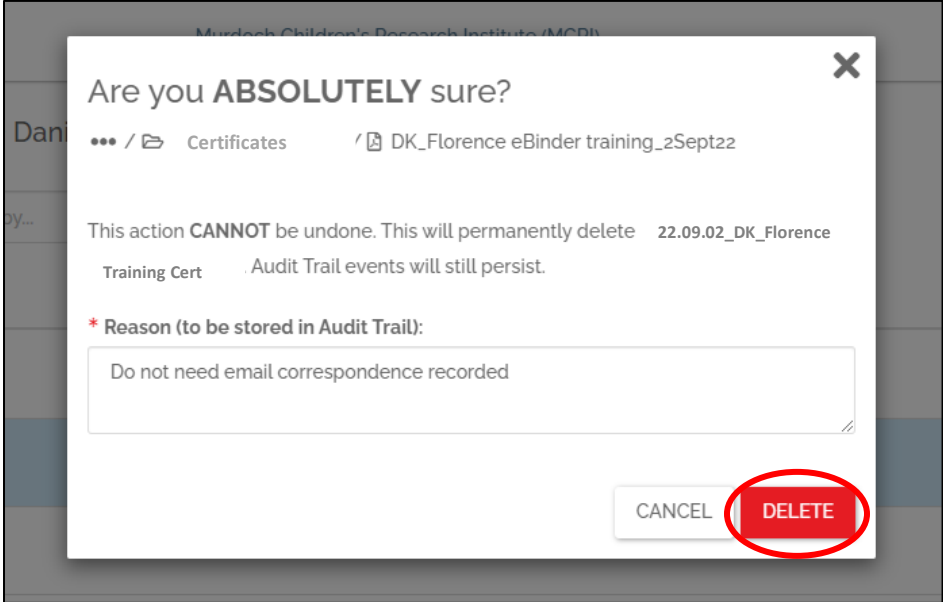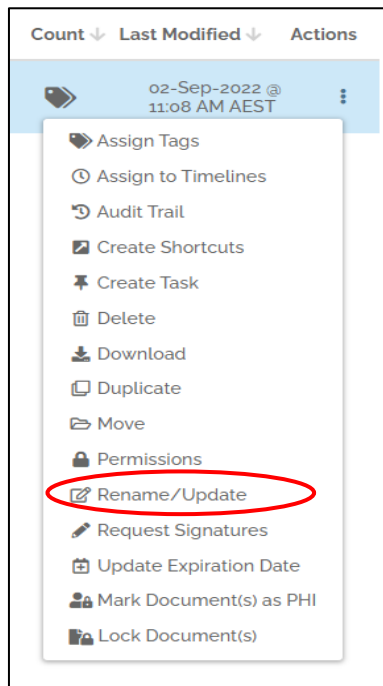
3. Filing/Naming conventions

    i.   Emails will import with the subject of the email being the name of the document

   ii.   To help find emails easily and not lose them after importing it is best to rename them, we recommend using this naming convention; **[YY.MM.DD]_[Sender Initials]_[Content/Subject]** You can either change the name in your email server by editing the subject line:

        or you can rename the document once imported:

NOTE: This naming convention is especially helpful as the Florence search function only exist at a folder and binder level. You cannot search the documents/content itself for the subject or key words of documents. By naming them by date they will automatically be in chronological order, making it easier to track and find emails.

3.1 Assign Tags to imports

i. Attaching tags to imported emails will also make finding and identifying emails and documents easier

ii. This can be done by selecting 'Assign Tags' in the Actions drop down.

iii. You can search for tags and assign them to the document by pressing the 'Assign' button next to them. Select 'Save' once all tags you want assigned have been selected.