MANAGING CLIENT E-MAIL

Are you struggling with how to manage client e-mail? Would you like a hassle-free way to select, print, or save messages relating to particular clients or matters? Here are four simple approaches to keep your e-mail inbox lean and mean:

- The built-in capabilities of Outlook 2007;
- Electronic filing assistants and organizer (Outlook add-ons);
- Adobe Acrobat; and
- Case or document management software.

These approaches will help to ensure that you are incorporating client e-mail into the appropriate client digital or paper file.

BUILT-IN CAPABILITIES OF OUTLOOK 2007

Organizing E-mail Using Folders
Client e-mails in Outlook 2007 (Outlook) can easily be saved to a text file that can be viewed (and searched) in Word or WordPerfect. First, create a folder on your computer for each client. If a client has multiple case matters, use subfolders. Each matter may have a subfolder for correspondence, pleadings, and other documents, as needed. Then set up e-mail folders and subfolders for each of your clients and client matters in your Outlook inbox that mirror the folders and subfolders in the client's computer files. Drag the messages from the inbox into the appropriate client e-mail folder.

Saving Multiple E-Mail Messages as Text Files
To save client e-mails en masse using Outlook, navigate to the e-mail folder containing the messages you want to save, choose "Select All," or select the individual messages you want to place in a text file. With the messages highlighted, choose "File, Save As," and navigate to the folder on your computer where you want to save the messages. Give the file a name, such as "Jones e-mail messages." "Jones e-mail messages" will be saved as a text file that can be opened in Notepad, WordPad, Word, or WordPerfect. If you save multiple messages in one batch, they will automatically be consolidated into one text document. The document can be searched, if necessary; stored with client Jones' other electronic documents; and printed for the client's paper file, if desired. The original e-mail messages can then be deleted from Outlook, freeing up valuable space.

Capturing Attachments
If you want to save the attachments or graphics along with the original e-mail, when you select the "File, Save As" option, change the message type at the bottom of the dialog box from the default (which may be plain text, HTML, or rich text) to Outlook Message Format (.msg). Note that messages saved in the .msg format will have an envelope icon and are opened using Outlook.

Using Earlier Versions of Outlook
The techniques described above should work in earlier versions of Outlook. If the "File, Save As" option is not available, select the messages you want to save, right click, choose "Print," and check the "Print to File" checkbox before clicking OK. Because you are "printing" to a file (a text file on your computer) and not physically printing the messages, this is equivalent to the "Save As" approach.

Best Practices
You can save e-mails one at a time – as you receive them – or all at once at the end of a client matter. Depending on the duration of the matter, save e-mails frequently enough to protect your client's information from loss.

Electronic Filing Assistants

The following electronic filing assistants can greatly speed-up the process of filing your e-mail. All three offer free product evaluations. Visit the company Web sites for more information:

QuickFile4Outlook
QuickFile 4Outlook – Lawyers Edition is an add-in to Outlook that doesn't require users to learn a separate software program. After installing it, two new buttons appear on your Outlook toolbar. You can easily create a filing system for your e-mail that corresponds to the client's paper file and that moves e-mail out of your inbox and sent items to the correct client/case folder. If you prefer to print e-mail and save hard copies to the client file, QuickFile can speed up the sorting, printing, and filing process. (Folder names and other key information, such as case number and description, can be printed on each e-mail message to ensure more accurate filing.) Electronic archives can be created in Word or HTML by case or client, with e-mail attachments stored in a separate folder and accessible from the archived document. http://www.outlook4lawyers.com.

SimplyFile
As the name implies, SimplyFile simplifies the process of filing e-mails in Outlook folders. The program applies an advanced algorithm to learn and adapt to the user's e-mail filing habits. After you "train" SimplyFile for a time, filing e-mail to the right folder takes only one click. Whether you want to file a newly sent e-mail or a reply to an existing message, the program will "guess" which Outlook folder the message belongs in. (The accuracy rate is purported to be 80-90%.) There are no configuration wizards, no set-up, and no rules to maintain. www.techhit.com/SimplyFile/

SpeedFiler
If you send and receive lots of e-mail, like to keep it filed, and have many folders in a hierarchical structure, SpeedFiler promises to save you time.

There are two versions of SpeedFiler – Personal and Professional. Both versions offer accelerated filing of incoming and outgoing messages, prompts for a folder when sending a message, and improved navigation to Outlook folders. The Professional version includes one-click filing, intelligent folder suggestions (comparable to SimplyFile), ability to file the original message automatically when replying (comparable to SimplyFile), support for Microsoft Exchange, ability to redefine the Sent items folder, and background folder scanning to avoid start-up delays. http://www.claritude.com/.

Electronic Inbox Organizer

If you find your Outlook Inbox difficult to work with, you may benefit from using an Inbox organizer like Xobni, voted a "must-have" by www.pcworld.com:

Xobni
Xobni completely reorganizes the look, feel, and function of your Outlook Inbox. E-mail exchanges between you and a contact are displayed as a list of e-mail conversations, threaded together by subject, and shown in the order in which they occurred. Clicking on a conversation reveals all the e-mails contained within the thread. You can instantly see who said what and when. In addition, all the files exchanged between participants to a conversation are listed for your convenience.

 If you are a Facebook or LinkedIn user, Xobni integrates seamlessly with those products to pull in profile data. It boasts "lightning fast" search capabilities for finding e-mail, attachments, contacts, and companies as well as "e-mail analytics" which help you identify the best time of day to e-mail an important client or contact. Xobni is Open Source and completely free. Visit http://www.xobni.com/ for more information.

If your office already owns Adobe Acrobat 9 (Acrobat), you may want to take advantage of this program's powerful e-mail archiving capabilities. When Acrobat is installed, two new buttons appear on the Outlook (or Lotus Notes) toolbar: "Create Adobe PDF from selected messages" and "Create Adobe PDF from folders." These buttons are used to capture messages and attachments together, converting your e-mail into a single PDF with a fully searchable/sortable index. Messages can be archived individually, one folder at a time, or you can set archiving to occur automatically.

To convert selected messages from Outlook to PDF, follow these steps:
1. In Outlook, select the inbox folder with the e-mail message you want to save.
2. Click the button "Create Adobe PDF from selected messages."
3. In the "Save Adobe PDF File As" box, specify a folder on your computer (e.g., client/matter) in which to save the PDF file, type a file name, and click "Save."

To convert a folder of e-mail messages from Outlook to a PDF, do the following:
1. In Outlook, select the relevant inbox folder.
2. Click the button "Create Adobe PDF from folders."
3. Click OK.
4. In the "Save Adobe PDF File As" box, specify a folder on your computer (e.g., client/matter) in which to save the PDF file, type a file name, and click "Save."

To set up automatic e-mail archiving in Outlook:
1. On the Menu bar in (File, Edit, View, Go, Tools, Action, Help, Adobe PDF), click on Adobe PDF, and choose Setup Automatic Archival…
2. On the Automatic Archival tab of the Acrobat PDFMaker dialog box, select Enable Automatic Archival. Then select options for Frequency and the time of day at which automatic archiving occurs.
3. Select other options, according to your needs:
   a. Maintain Log Of Archival Creates a record of each archiving session.
   b. Choose File Specifies the name and location of the archiving log.
   c. Embed Index For Faster Search Creates an index that you can search to find specific words or characters instead of having to search each individual document.
4. Click Add, and select the e-mail folders and subfolders. Then select or deselect the Convert This Folder And All Sub Folders option, as preferred, and click OK.
5. In the Save PDF Archive File As dialog box, select a name and location for the archived e-mail PDF. Then click Open.
6. Review the settings and the archive folder names listed in the Acrobat PDFMaker dialog box, and do any of the following:
   a. To add other e-mail folders to the list, click Add and select the folder.
   b. To remove folders from the list, select the folders and click Delete.
   c. To change an archive file, select any folder name from the list, click Change Archive File, and specify the name and location.
7. To start archiving e-mail immediately, click Run Archival Now.

Acrobat also supports automatic e-mail archiving in Lotus Notes. The steps are essentially the same. Once a PDF e-mail archive has been created, future messages can be easily appended to an existing PDF.

Using Earlier Versions of Acrobat
These basic techniques also work with the Professional versions of Adobe Acrobat 7 and 8.

For those who are looking for solutions beyond mere e-mail management, purchasing case or document management software may make the most sense.

Case management software centralizes all client and matter data into one software program – from calendaring, docketing, conflicts, and billing to e-mail, documents, research, and more. With case management software, e-mail and attachments are stored in the appropriate case or contact file when received or sent. Mail does not remain in the Outlook inbox. Options for case management software include Amicus (www.amicusattorney.com, Practice Master (www.tabs3.com), ProLaw (www.prolaw.com), and Time Matters (www.timematters.com.

Document management software brings together *all* of an organization's sources of knowledge, including e-mail communications, scanned paper documents, word processing documents, and spreadsheets – anything that can be stored as a file. Some of the more popular document management programs are Worldox (www.worldox.com), Interwoven Worksite (formerly imanage) (www.interwoven.com), Open Text eDocs (formerly Hummingbird) (www.opentext.com), and NetDocuments from LexisNexis® (http://law.lexisnexis.com/net-documents). For more options, Google "document management software."

Conclusion

Once a matter is concluded, the client's computer folder or subfolder (including e-mail messages) can be digitally stored. You can then delete the original computer file to free up space on your computer hard drive.

As e-mail communication becomes more prevalent, finding a reliable means of filing client messages is critical. Whether you use one of the approaches described above or simply print all client e-mails, be consistent. Capture all messages, sent and received, as well as attachments, and retain them (electronically or in paper form) just as you would correspondence, pleadings, or other client documents. For help with e-mail management; file opening, organizing, or retention issues; or other office organizational issues, contact the practice management advisors of the PLF. Remember, your inbox is not your filing system.

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