

How to Capture, Match and Save Emails


Migration Manager's automated Email Capture allows you to automatically capture, match and save emails from Outlook into the relevant Matters in Migration Manager.

Once [activated](#), Migration Managers Automated Email Capture service is designed to automatically monitor and capture email from the User's Inbox and Sent folders in Outlook and then try to match and save those emails to the relevant matters in Migration Manager. When turned on, whilst the user is logged in to Migration Manager the Automated Email Capture service will operate in the background at the set time intervals performing the following steps:

1. It will capture and copy all emails and attachments from Outlook which have been sent and received since the last capture was performed;
2. It will assess each of the newly captured emails to determine if they can be automatically assigned to a matter in Migration Manager;
3. It will assess each of the emails which have previously been captured over the last 45* days to determine whether there is any new information which has been entered or updated in to Migration Manager which would now allow these emails to be assigned (i.e. a matter might have been updated with Department reference numbers, in which case if there is an email which contains this Department reference number in the subject line it will now be assigned to that Matter).
4. Emails which have been assigned, will now be copied to the tab of the relevant matter.

Your involvement with the capture system will be to check what has been captured and review those items which were not automatically matched to a matter and manual match these items where necessary.

The following article shows you how to use the Email Capture.

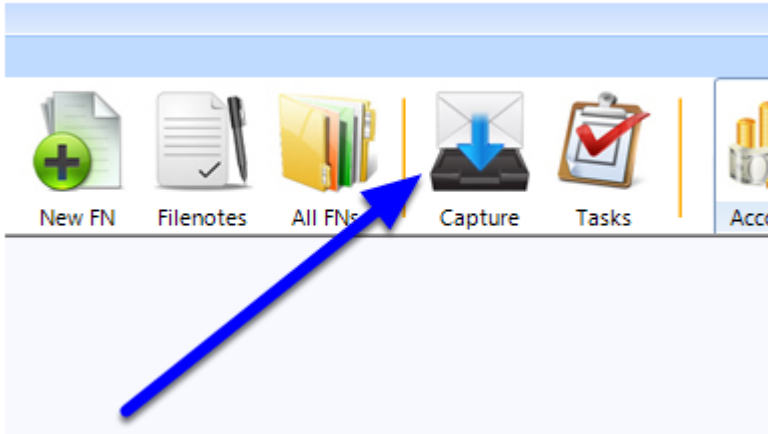
 **Note:** The email capture process will only be operational whilst Outlook is open on the same computer as Migration Manager.

1. View the Captured Emails

To view what emails have been captured and matched automatically and which have not, follow these steps:

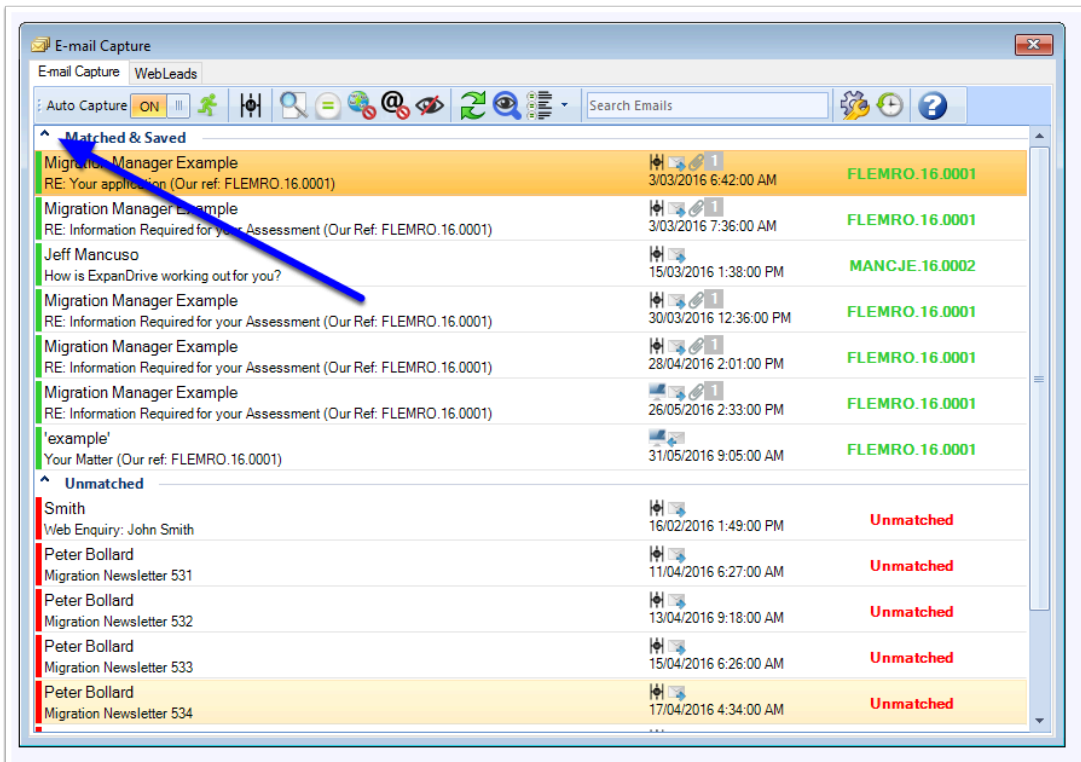
1.1. Click the Capture button

In the main toolbar, click the Capture button.



1.2. View the matched and unmatched Emails

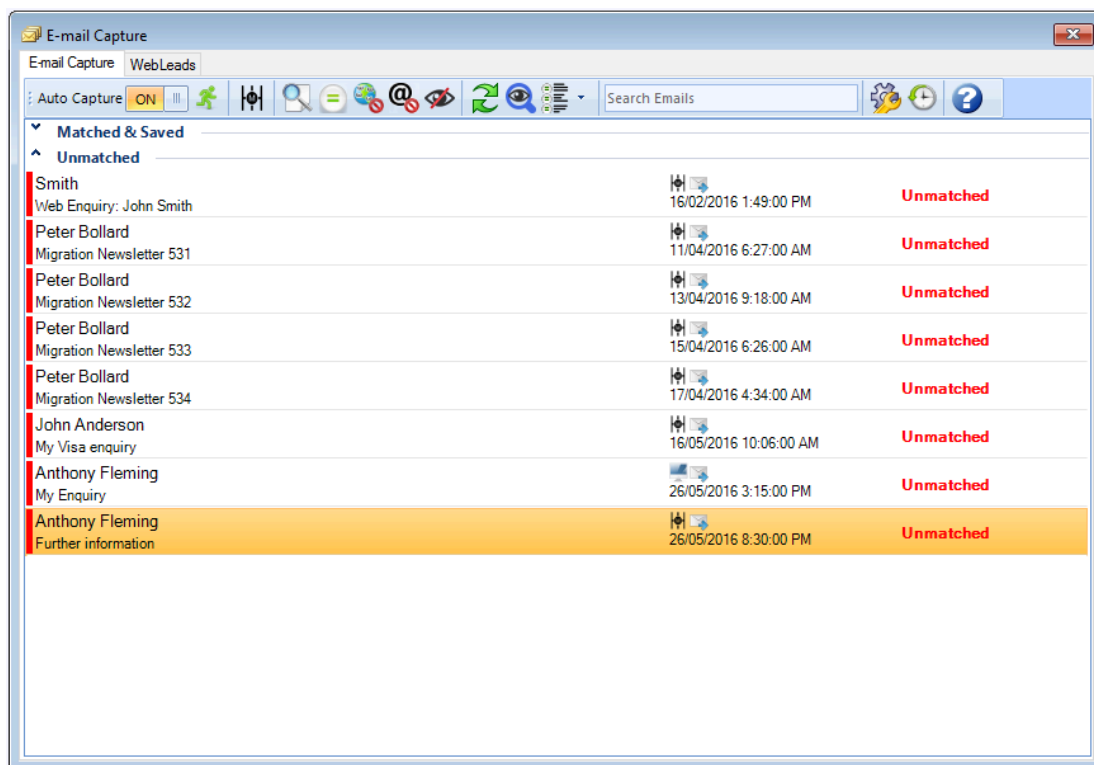
By default the capture window will be groupd in to Matched & Saved and Unmatched emails. To view the emails in either group, you can click the chevron next to 'Matched & Saved' or 'Unmatched' to reveal all the emails.



2. Review the unmatched emails

The emails which are grouped in the Unmatched section have not been matched and saved to a matter. These emails will remain in this section for the next 45 days or until they are successfully matched to a Matter or selected to be ignored. You now need to review these and ascertain which emails:

1. Need to be manually matched to a Matter;
2. Which emails need to be converted in to new matters
3. Which emails can be ignored.



3. Manual Match Emails

Emails which belong to Matters which have not been automatically matched and saved to their respective Matters need to be manually matched by you.

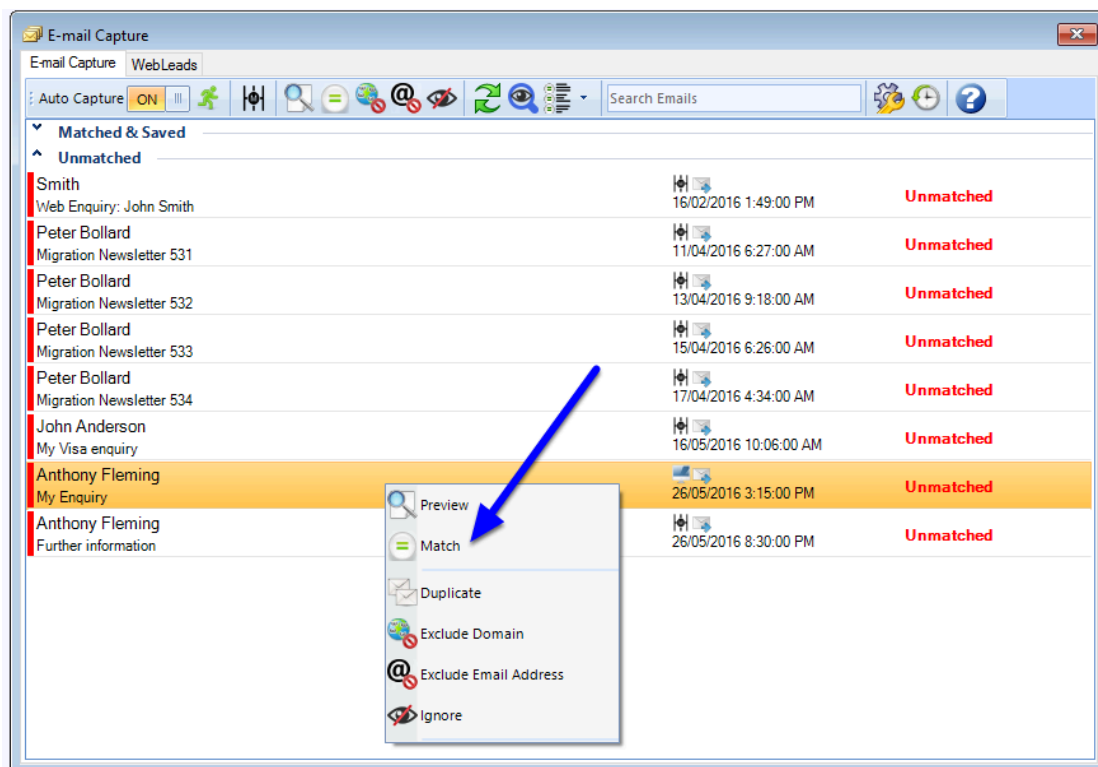
3.1. Select Emails

First, select the emails you wish to assign. To select multiple emails, hold down your Ctrl key on your keyboard and select the various emails/documents with your mouse.

E-mail Capture WebLeads		
Auto Capture ON [Icons] Search Emails [Icons]		
Matched & Saved		
Unmatched		
Smith Web Enquiry: John Smith	16/02/2016 1:49:00 PM	Unmatched
Peter Bollard Migration Newsletter 531	11/04/2016 6:27:00 AM	Unmatched
Peter Bollard Migration Newsletter 532	13/04/2016 9:18:00 AM	Unmatched
Peter Bollard Migration Newsletter 533	15/04/2016 6:26:00 AM	Unmatched
Peter Bollard Migration Newsletter 534	17/04/2016 4:34:00 AM	Unmatched
John Anderson My Visa enquiry	16/05/2016 10:06:00 AM	Unmatched
Anthony Fleming My Enquiry	26/05/2016 3:15:00 PM	Unmatched
Anthony Fleming Further information	26/05/2016 8:30:00 PM	Unmatched

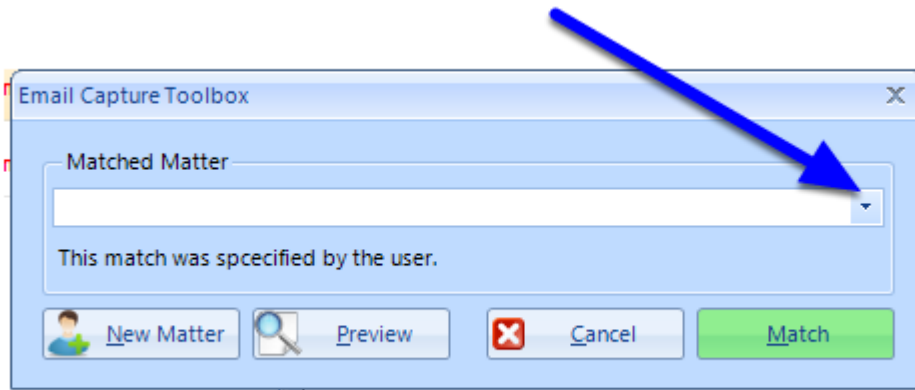
3.2. Right Click and select 'Match'

Next, right click the email(s) you wish to manually match and select 'Match' from the context menu.

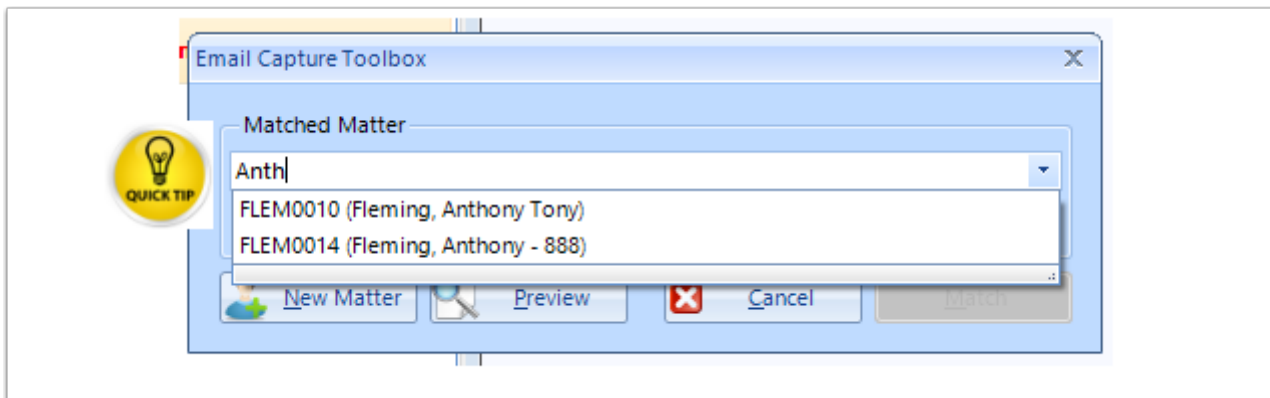


3.3. Search for the relevant Matter

The Match window will now appear. To search for the relevant matter that you want to match the email to, click the drop down to reveal a list of all of your current matters.

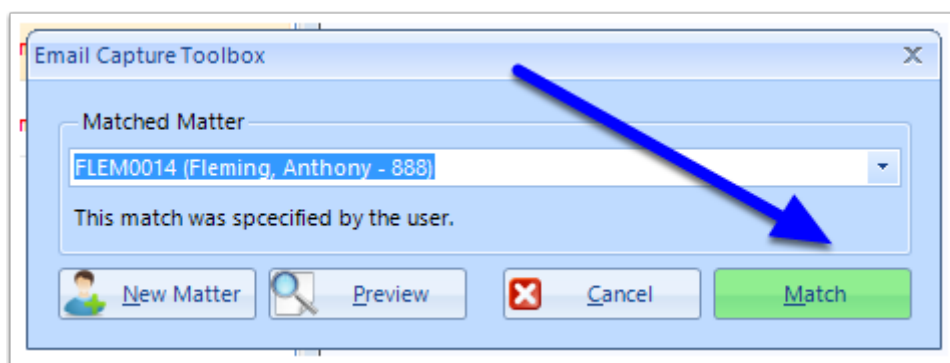


💡 Quick Tip: You can type part of the matter name in the drop down section and it will search for the Matter.



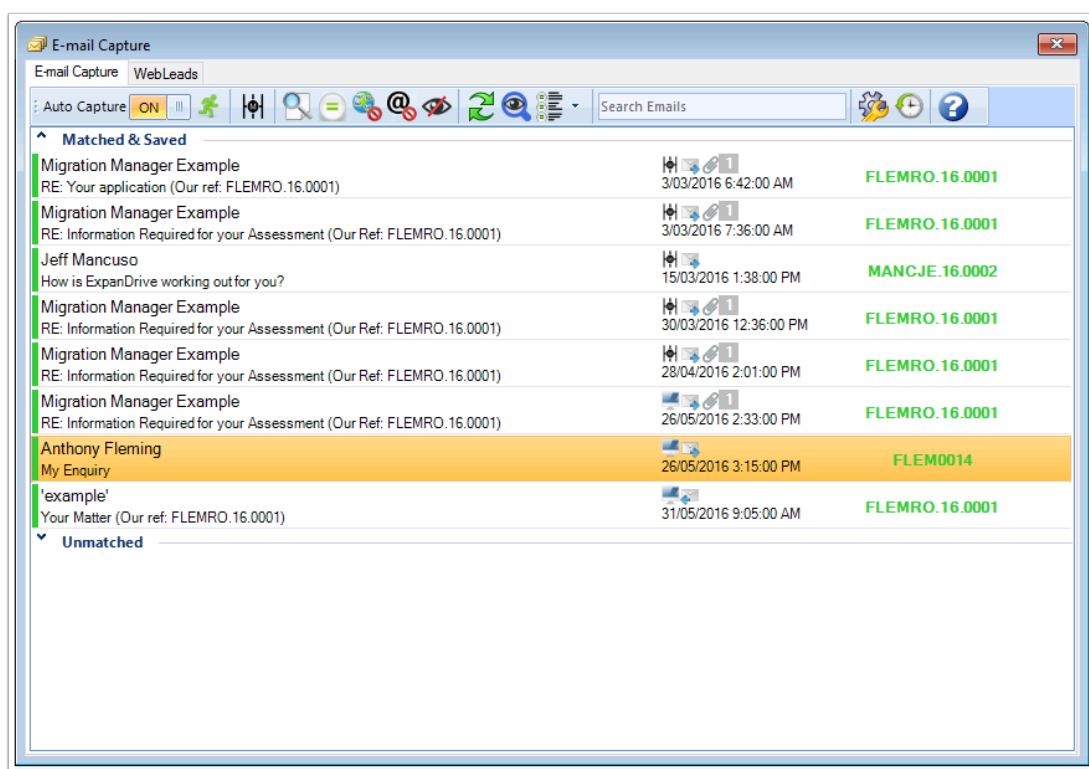
3.4. Click 'Match'

Clicking 'Match' will now assign that email to the selected matter.



3.5. The email is now Matched and Saved

The email will now move to the 'Matched & Saved' category and a copy of the email and any attachments will be saved in to the relevant matter.



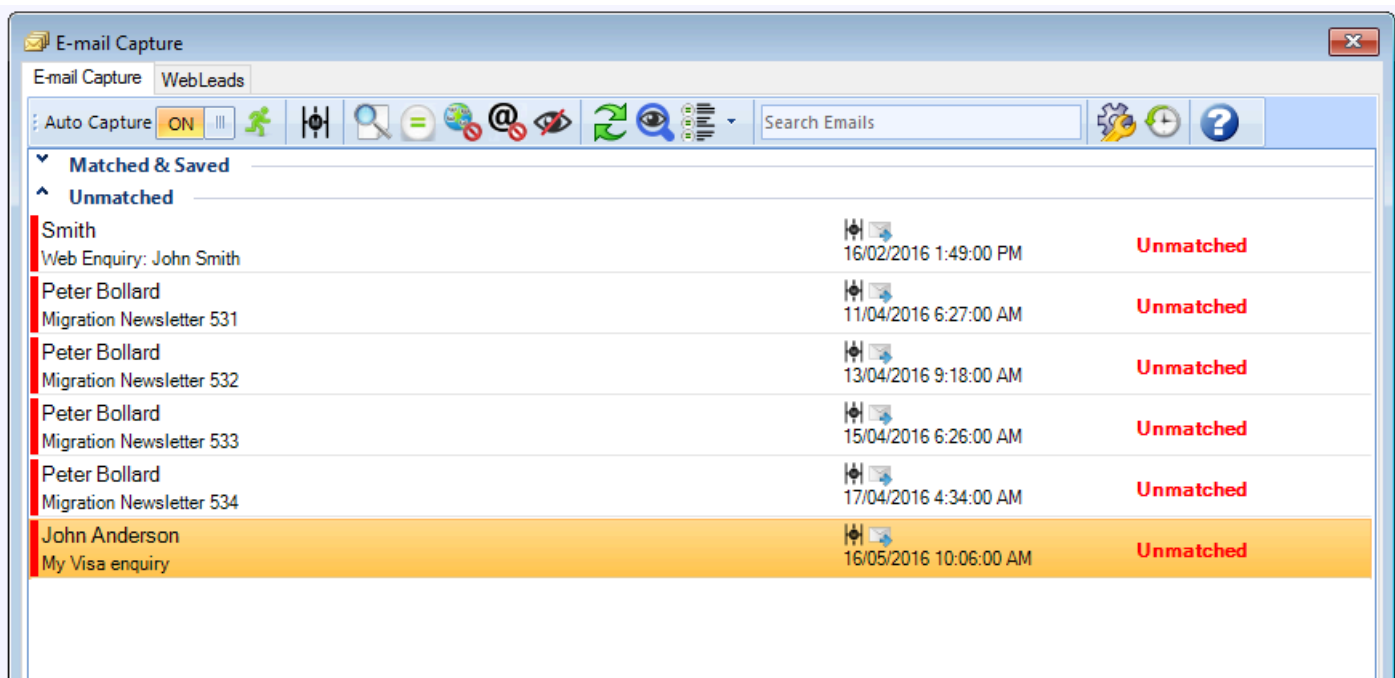
4. Convert emails to New Matters

If there is an email in your email capture list from a potential new matter or existing client who is not yet a Matter in Migration Manager, you can convert that email in to a new matter or mark it as a Lead for review later.

4.1. Select Emails

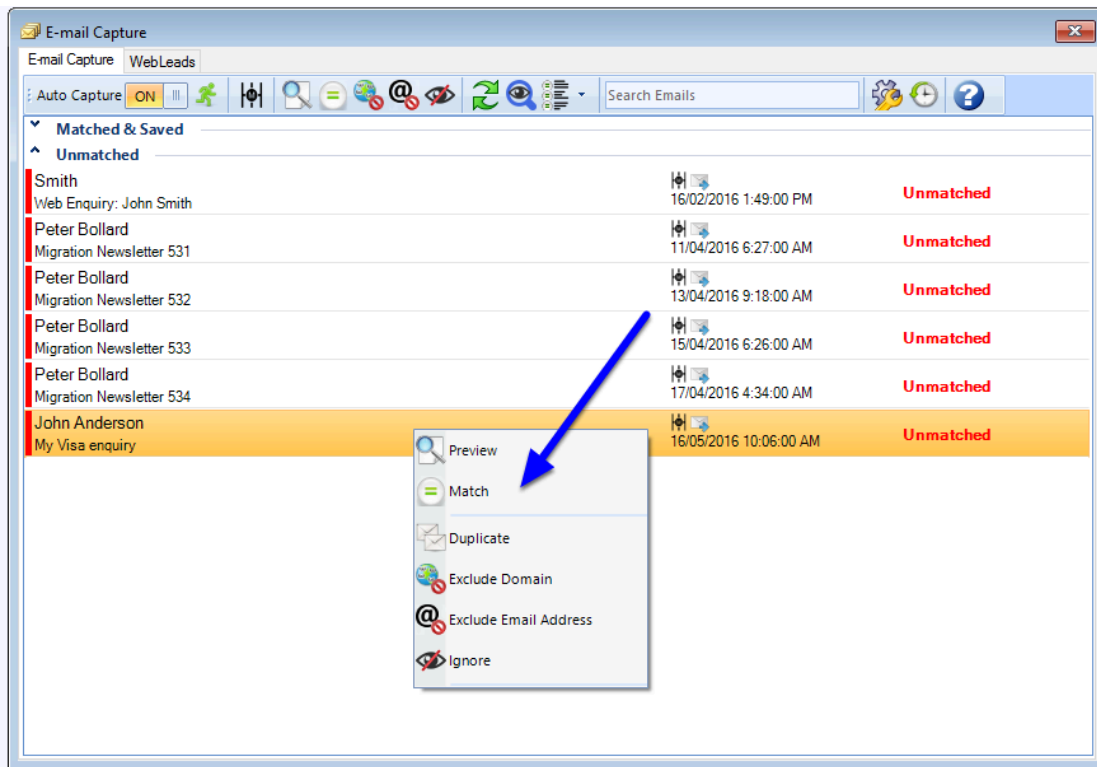
First, select the email you wish to convert in to a new matter.

- i** Important - If there are multiple emails from the same person / entity, you don't need to convert all of them. You only need to convert one and Migration Manager will then try to automatically match all of the other emails.



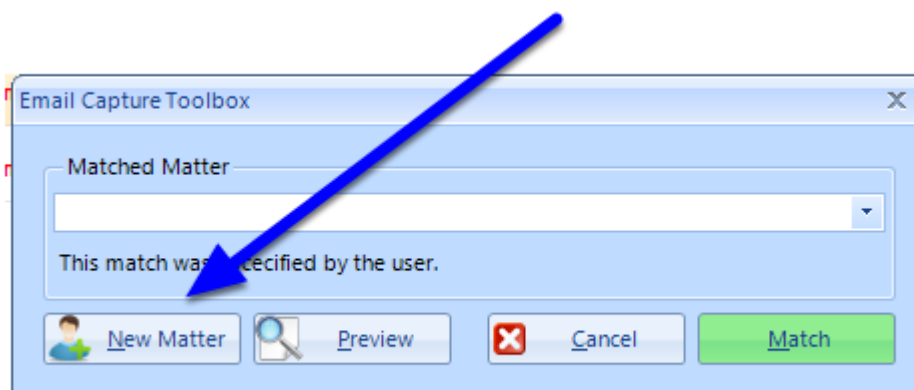
4.2. Right Click and select 'Match'

Next, right click the email and select 'Match' from the context menu.



4.3. Click New Matter

The Match window will now appear. Click the 'New Matter' button



The New Matter window will now appear.

Email Capture Toolbox

Matched Matter
 NEW MATTER
 This match was specified by the user.

New Matter
 Matter Type: Migrant
 Surname:
 Name:
 Matter ID: .16.0003
 Email: john.anderson.mmcpd@outlook.com
 RMA:
 Manager:
 Clerk:
 Office:

Buttons: New Matter, Preview, Cancel, Match

4.4. Enter the relevant matter details

Enter all of the relevant information to create a new matter. When complete, click 'Match'.

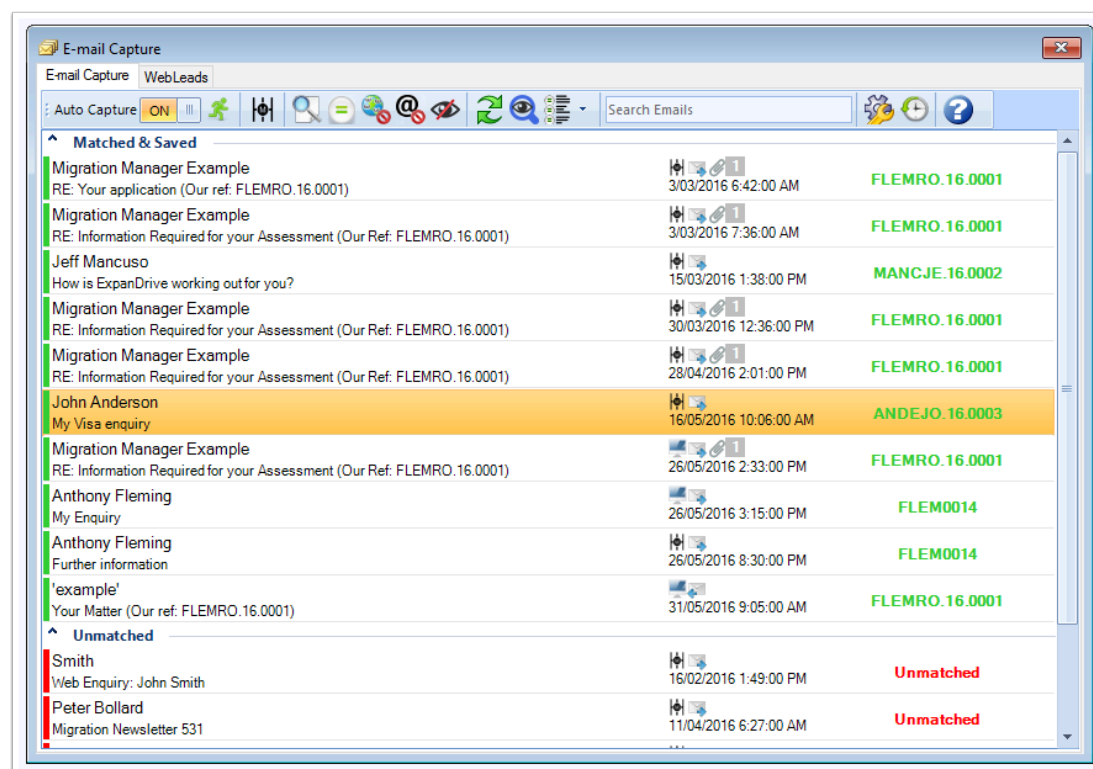
Email Capture Toolbox

Matched Matter
 NEW MATTER
 This match was specified by the user.

New Matter
 Matter Type: Migrant
 Surname: Anderson
 Name: John
 Matter ID: ANDEJO.16.0003
 Email: john.anderson.mmcpd@outlook.com
 RMA: Kelly Smith
 Manager: Amelia Jay
 Clerk: Marcus Wattle
 Office: Perth


Buttons: New Matter, Preview, Cancel, Match

4.5. A new Matter will be created an the email matched to that matter.



5. Complete

You have now finished the Email Capture process. You can now close the Email Capture window.

 **Note:** As well as Auto Capture, you can also manually capture emails from Outlook either selectively or via a date range. For further details on these topics, see:

- [How to perform a manual 'Selected Emails' Capture](#)
- [How to perform a manual All Email Capture](#)