

File emails from Outlook

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The Outlook add-in puts a button on every email. Press it, pick the matter, and the email and its attachments are filed there, with the time you spent reading it if you like.

Before you start

An admin switches on the **Microsoft 365** pack first, and someone who looks after your Microsoft 365 needs to add the add-in once for everyone.

1 Copy the add-in link

Go to **Settings** > **Outlook**

A Desk admin presses **Copy link** under **Add it to Outlook**.

2 Add it for your organisation

In the Microsoft 365 admin centre, open **Integrated apps**, choose **Upload custom apps** and give it the link.

It can take a few hours for the button to show for everyone.

3 Connect your Outlook

Open an email in Outlook and press **File on a matter**, in the Unforged group. Press **Sign in**, then **Connect**. You only do this once on each computer.

4 Choose where it goes

Pick the **Matter**. If you like, choose a **Folder** and add your **Time reading it** in minutes.

Time reading it is saved only when the **Time** pack is on.

5 File it

Press **File on matter**. The email and its attachments are on the matter in Desk straight away. Next time you open that email, the add-in tells you which matter it's on.

Where you're signed in

Settings, then **Outlook**, lists each Outlook you've connected and when it was last used. Press **Sign out** beside one you no longer use.

If something goes wrong

The add-in says you need a Desk seat.

Only people with a Desk seat can file emails. Ask your Desk admin to give you one.

The add-in asks you to switch on Microsoft 365.

The pack is off for your organisation. Ask your Desk admin to switch it on in **Settings**, under **Packs**.