Tagging Outlook Emails and Attachments to Neos

Your Outlook emails can be linked to any Case, Intake, or Provider within Neos when Office 365 is connected in your Staff Profile. Multiple selected emails, including attachments, will be saved as an entry on the Notes and Documents Tabs of the linked Case, Intake, or Provider. A Case, Intake, or Provider can be located by Email, Name, Case #/Intake #, or Phone #. Received emails and drafts or emails in your Sent folder can be tagged in Neos.

NOTE: While emails that are ready to be sent can be tagged just prior to sending, it is best to tag from your Sent folder to ensure Neos captures the final email content and attachments (in case of any last-minute edits).

All tagged emails are saved as an .eml file in a Microsoft Azure storage account for the firm and linked to the created note. Attachments are saved to your firm's SharePoint and Case Documents Tab and linked to the note. Once the email(s) (and attachment(s)) are tagged to Neos, they can be deleted from Outlook, if desired. The tagged email(s) will still be accessible from the Notes Tab in Neos, with the option to download the original email and open using your default mail program.

To tag one or multiple emails to Neos:

1. In Outlook, select the desired email(s). Multiple emails can be selected using Ctrl + click. The Case Info option will be disabled when multiple emails are selected.

2. Click the **Tag Email** button @ from the add-in menu.

NOTE: Make sure your Reading pane is visible on the right or bottom (View menu > Reading pane) to easily access the Neos Outlook Add-in.

3. Neos will automatically search by Email. Matching Cases and Providers will display in the **Matching Email** section with a maximum of 5 results.
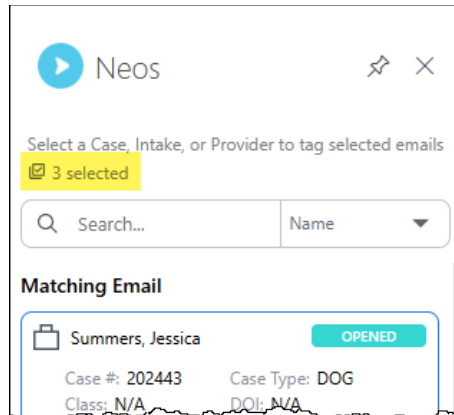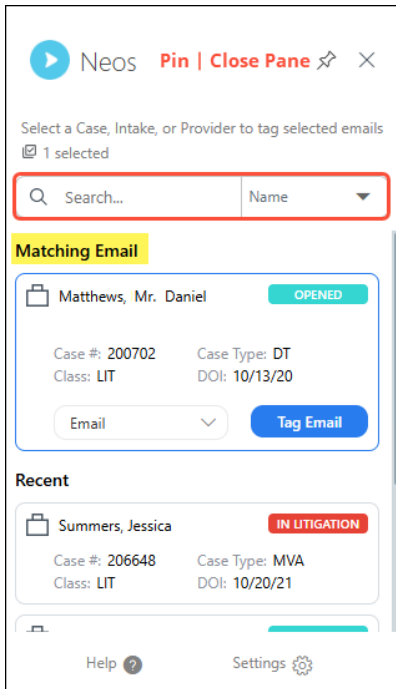
4. If no Cases, Intakes, or Providers are found, your recent search history will display under the **Recent** section.
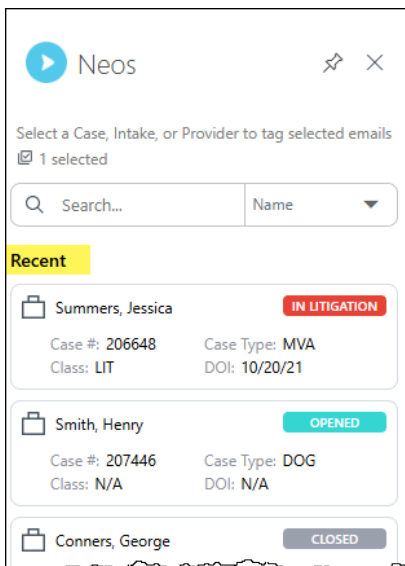
5. Use the search field and criteria dropdown to search by **Name**, **Email**, **Case #/Intake #,** or **Phone #.** Click the magnifying icon or hit the ENTER key to refresh the results list. Parties in a Case will display in your search results, regardless of their position in the Party Tab (i.e., First Party). See the example below.
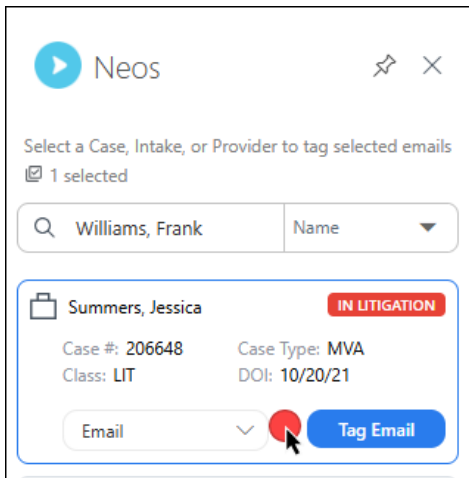
6. Select the Case, Intake, or Provider that matches the searched name, case/intake number, phone number, or email.

    To also post attachments from the email to the Neos Documents Tab, select the **Include Attachments** check box. Each attachment name will be listed with the option to specify the Document **Type** and **Category**. The case folder within the SharePoint > Clouddocs > CaseFiles for the selected Case must already be created (by adding a document from the Case > Documents Tab), otherwise an error could occur when tagging emails and attachments. Attachments of **draft** emails can now be tagged in both Outlook desktop and Outlook Online.

NOTE: Including attachments of multiple selected emails (in bulk) will be a future enhancement.

7. Use the **Topic** dropdown to select the note topic you wish to set for the selected email(s). The single selected topic will be applied to all selected emails. Note topics are configured in the Note Topics Mini Directory. This is a required field and will default to "Email".
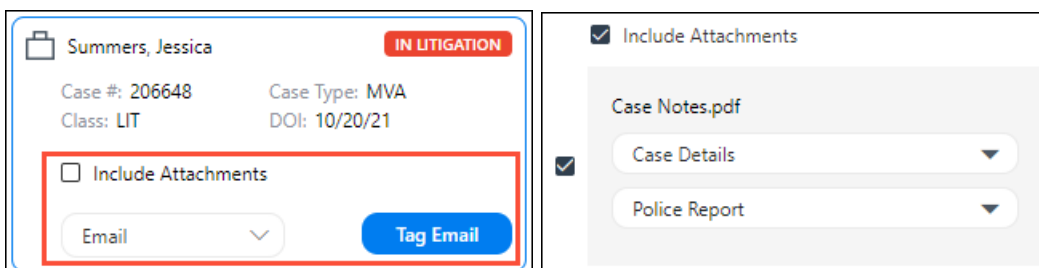
8. Click the **Tag Email** button. All selected emails will be tagged to the selected case.
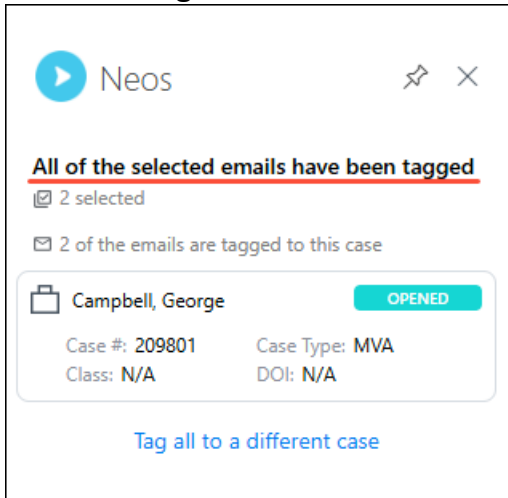

9. The email will contain a tag in Outlook, categorized as "Neos".
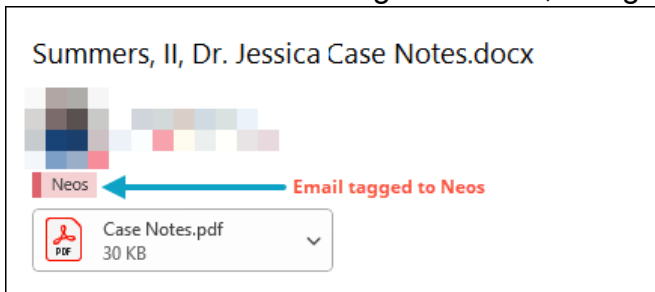
10. Once the email is tagged successfully, it is posted to the Notes Tab of the linked Neos Case or Intake with a Type of "Email". Attachments are listed above the email. Attachments can be previewed by single-clicking or opened by double-clicking.

11. The tagged email displays with the **Date/Time**, **From**, **To**, **CC**, **Subject**, and **Body** fields of the email. Only the **Staff** and **Topic** fields of a tagged email can be modified.
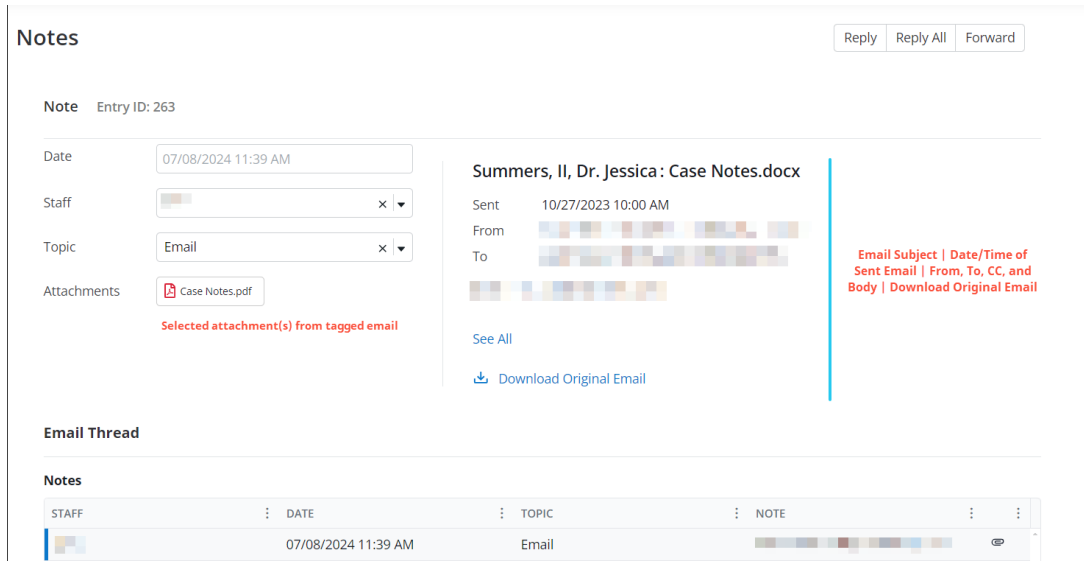
12. All attachments are posted to the Documents Tab of the linked Neos Case, Intake, or Provider.
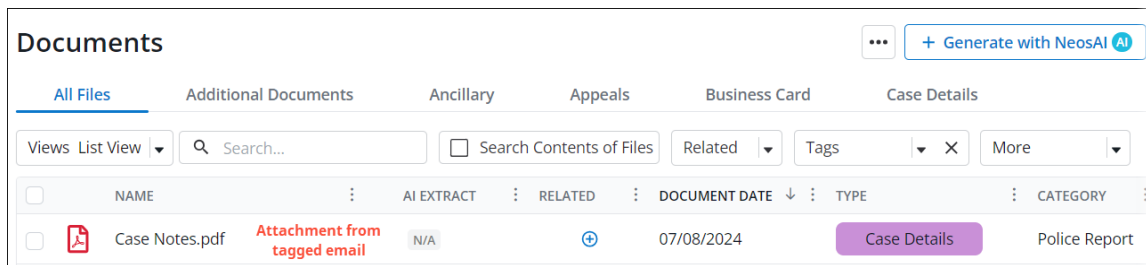
TIP: The **Type** column refers to the Document Type, which is the folder where the document is saved within your firm's SharePoint for the Case. These are defined in the [Document Type Directory](#). Category is used to determine the type of document, such as Photos or Police Report. These are defined in the [Document Categories Mini Directory](#).

With Version 1.2.125.418, the Neos Outlook Add-in now suggests the Case, Intake, or Provider for selected replies or forwarded emails within the same thread of previously tagged emails.

1. Select an email within the same thread.

2. Within the Neos Outlook Add-in, click the Tag Email option.

3. A new **Tagged In Thread** section will display at the top showing the Case/Intake or Provider that the email within this thread was previously tagged. This is helpful to quickly tag email replies to the same location.
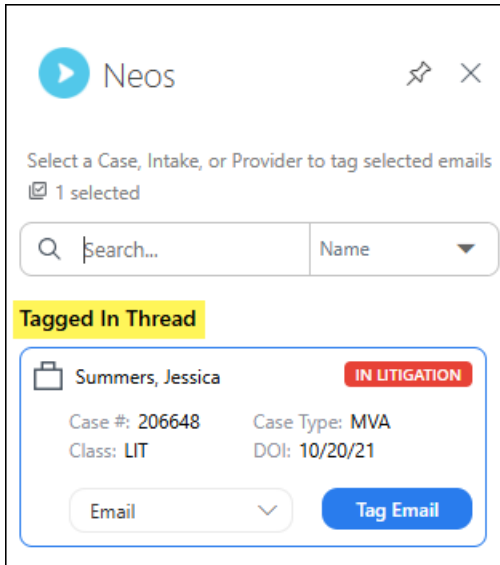
NOTE: To access the **Tagged In Thread** section, you must be using the New Outlook version and ensure that your View > Conversations setting says "Show each message separately".