

## Emails

From the Client tab, click the “Edit” button for a specific client then go to the “Emails” tab. You can view an email submitted directly from Outlook by clicking on the email address, this will open the email from the Outlook program.

If you don’t have Outlook and have copied and pasted your email content into Sentian, you can click the “View” icon to see the message information.

You can add an email by simply clicking the “Add New Email” button. If you enter any existing contact name into the “From Name” field, the related information automatically populates the other fields.

The screenshot shows the 'Add New Email' dialog box in the Sentian software. The dialog is open over the 'Emails' tab for the client 'Laura Flowers'. The form fields are as follows:

- Matter ID: FLO002
- Contact Name: Damian Micheals
- Email Address: d.micheals@bestjob.com
- Subject: Deposition Date
- Message: Are you able to meet soon for the deposition?
- Create a task
- Due Date: 12/01/2017 12:00 PM
- Reminder: 12/01/2017 12:00 AM
- Details: (empty text area)

Buttons at the bottom of the dialog are 'Cancel' and 'Save'. The background shows a list of emails with columns for Date and Matter ID.

### Editing an existing email

You can edit an existing email by clicking the “Edit” button. If you saved an email directly from Outlook and that person is not in your contacts, you will need to create a new contact by clicking the “add” icon by the contact field.

### Delete an existing email

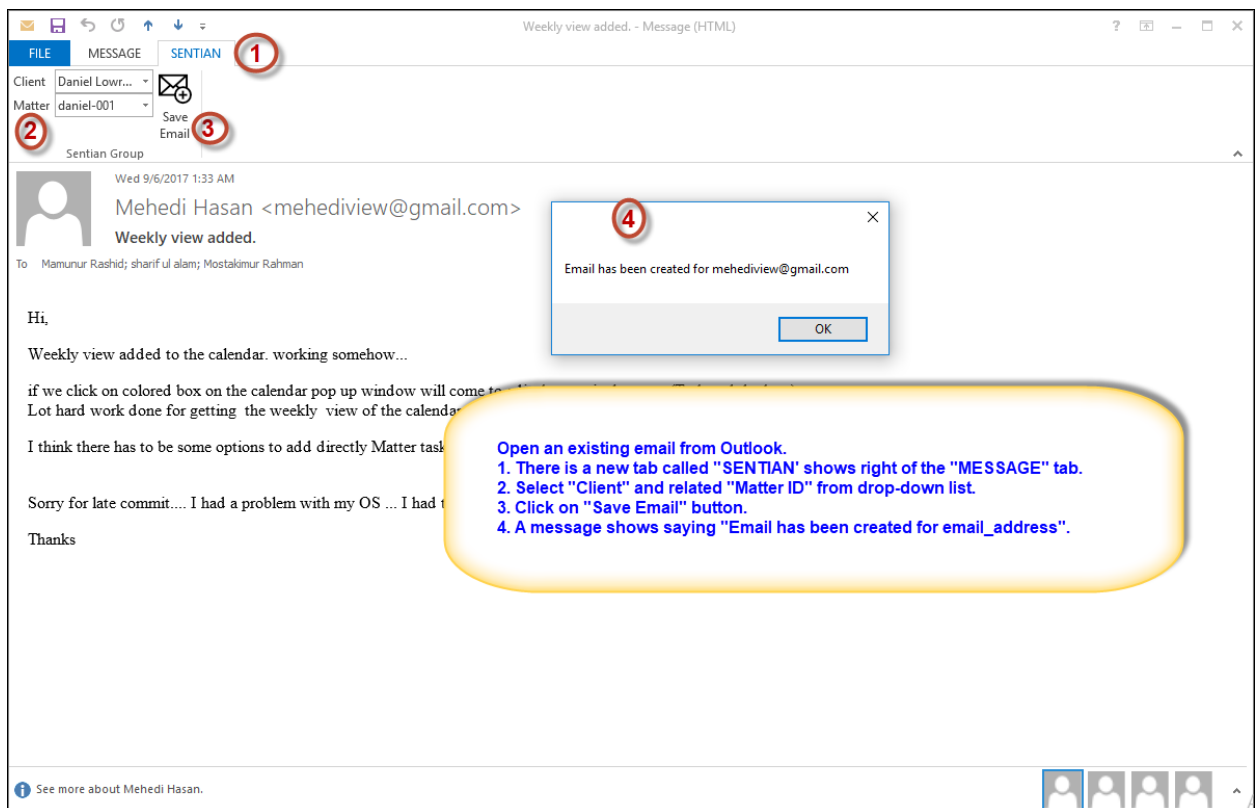
You can delete an existing email by clicking the “Delete” button. Note: Sentian Solutions does not recommend deleting any email from the program.

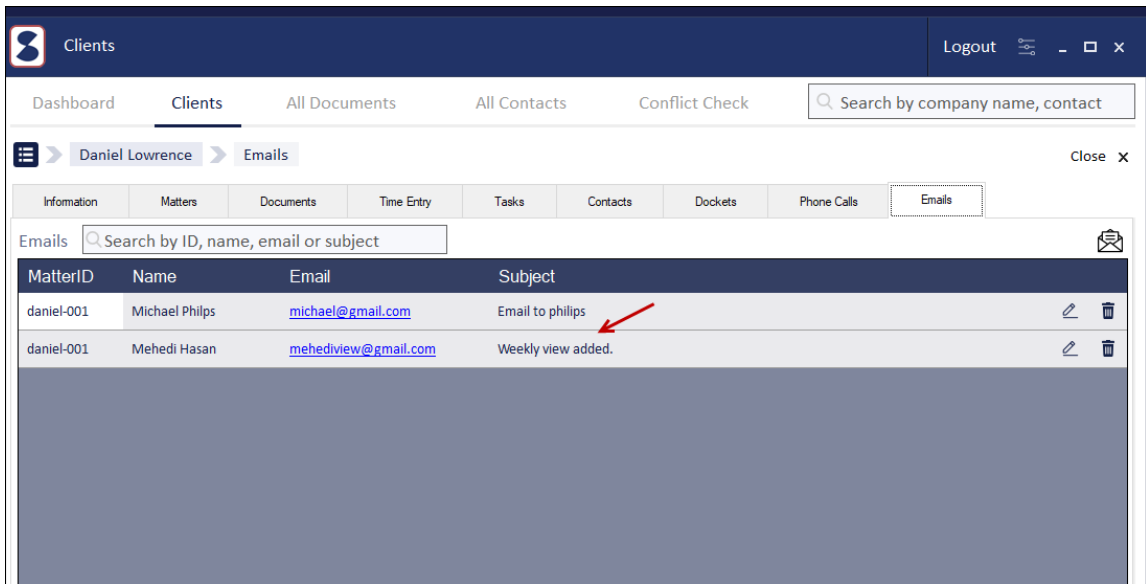
## Searching email

You can search emails by entering search keyword such as: "matter ID, name, email address, subject, etc." into the search field.

## Using your Outlook plugin

1. Open your "Microsoft Outlook".
2. Open an existing email from Outlook.
3. There will be a tab called "SENTIAN."
4. Select your "Client" and related "Matter ID" from the drop-down list.
5. Click the "Save Email" button.
6. A message will show saying, "Email has been created for email address".
7. When you open Sentian Management Software, the email will be saved to the database.





When you click the Email link, it opens in your Outlook program.

