Email Monitor in Q-LawE

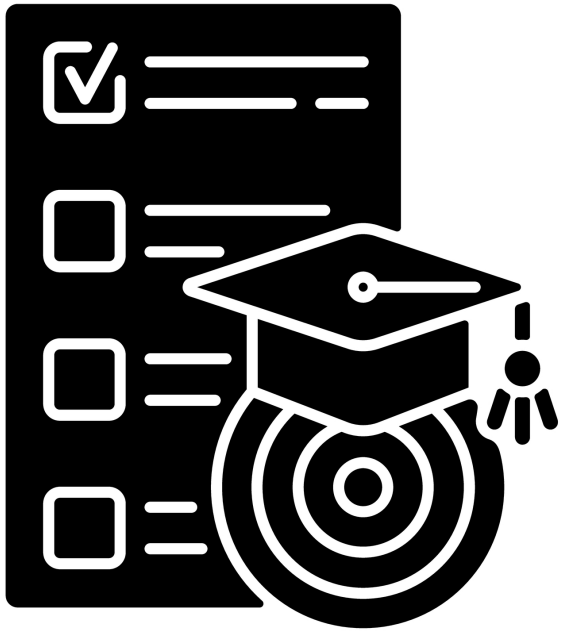
Presented by Will Higginbotham

The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

What We Will Cover

- Why Email Monitor was built
- Adding Tasks based on keywords
- Saving email attachments
- Job Scheduler functionality
- Security level settings



Why use Email Monitor?

- 50% success rate in current deployment at Q-LawE firm
- Email message itself is saved as DocID: CTNOT
- Case number and file date captured
- DDAS Trigger: SYSTEM.EMM_MONITOR

Email Monitor Use

- Maintenance Menu
  - Email Monitor
    - Setup and configuration
    - Firm preferences
    - Map attachment filenames to Q-LawE DocID
    - Map keywords to Task Codes
  - Email Monitor Identify Emails
    - End-user screen to process unidentified emails

Questions & Answers

Please type your questions in the Zoom chat **to everyone** and they will be answered during Q & A.

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