

There are 4 methods for importing email into CLW.

Methods 1, 2, and 3 work for any email client. Method 4 works for **Microsoft Outlook** emails when the optional **Cycom Email Exporter Add-In** is installed and configured properly.

Need a reminder? Use the Quick Reference Guides below:

1. [Import Files Button](#)
2. [CyImportFile Desktop Icon](#)
3. [CyImportFile Send To Menu](#)
4. [Cycom Email Exporter Add-In Option](#)

Need more details? Use the Standard Guides below:

1. [Import Files Button](#)
2. [CyImportFile Desktop Icon](#)
3. [CyImportFile Send To Menu](#)
4. [Cycom Email Exporter Add-In Option](#)

Import Files Button Quick Reference Guide

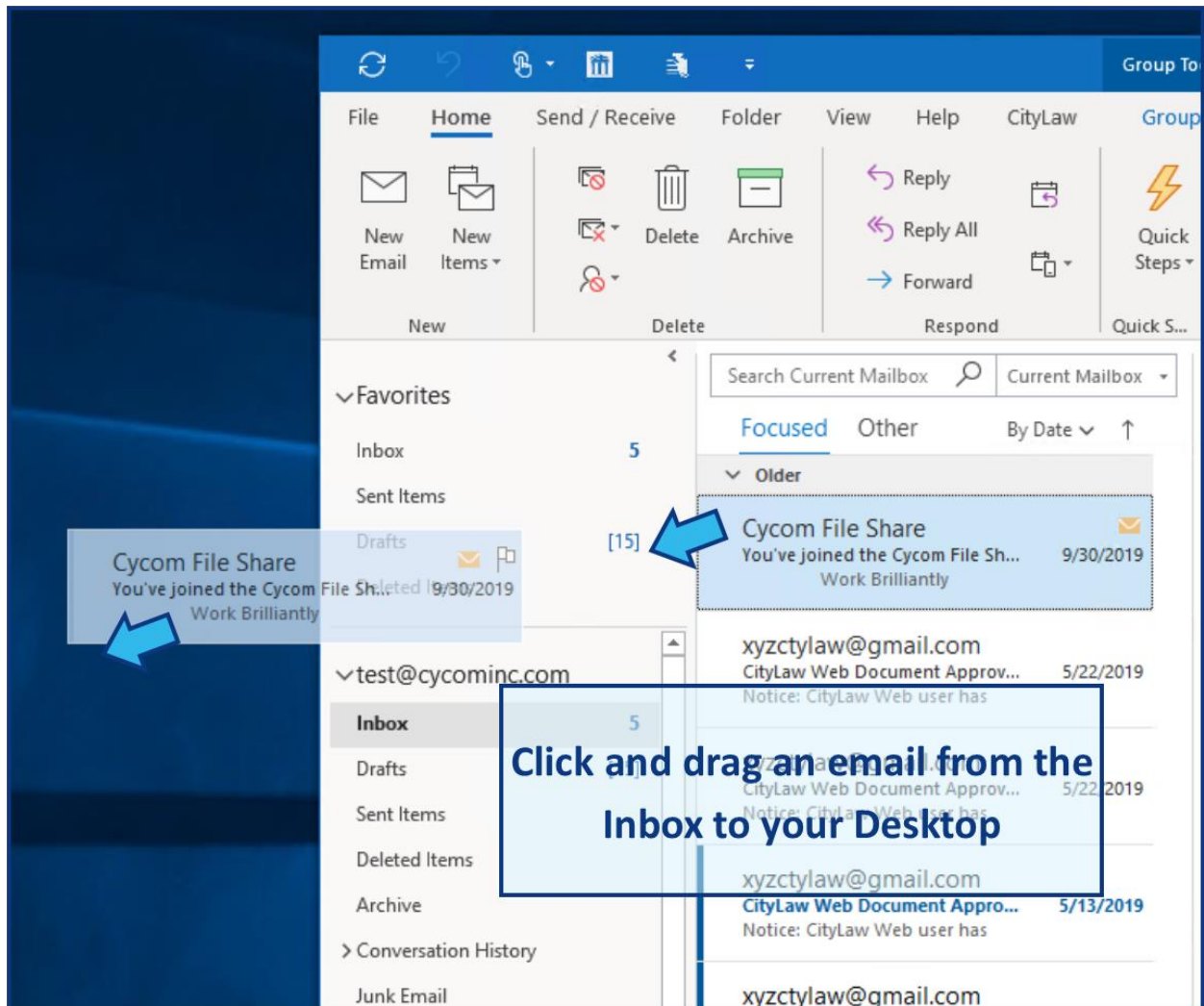
There are 6 steps to complete this task:

1. [Save your email to your PC.](#)
2. [Open the Attachments view of the matter.](#)
3. [Select Import Files.](#)
4. [Select the email file.](#)
5. [Adjust document name and settings as desired.](#)
6. [Select Save.](#)

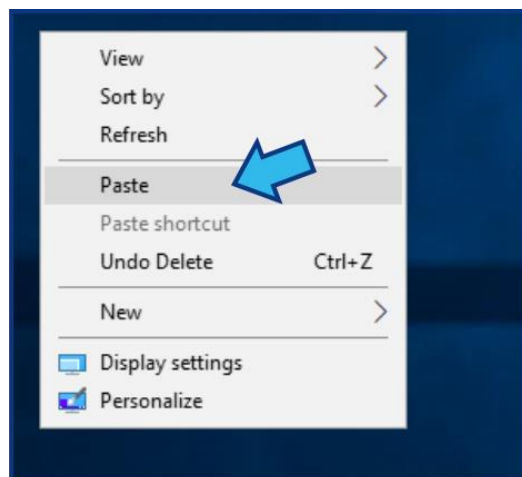
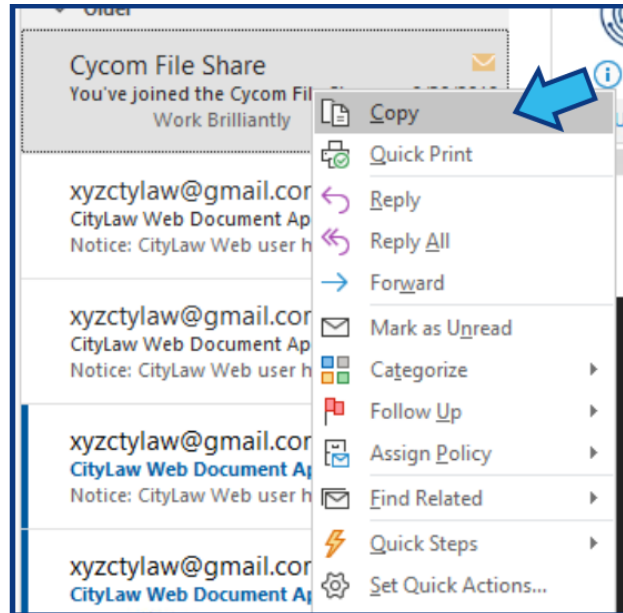
Import Files Button Standard Guide

Step 1. Save your email to your PC.

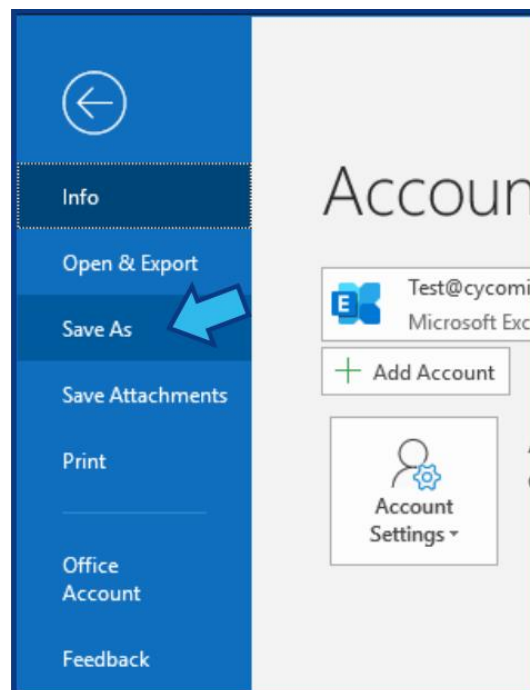
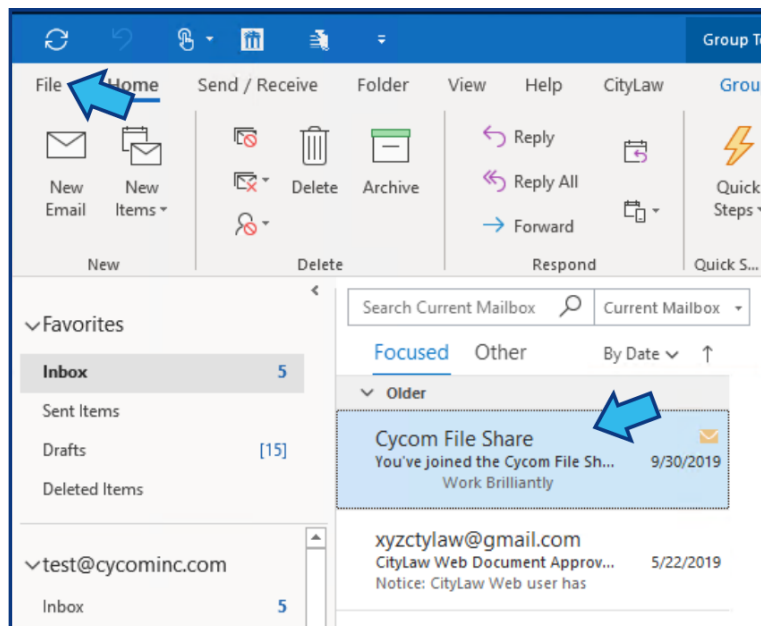
In some email applications, such as **Microsoft Outlook**, you can drag the email from the inbox list directly onto your **Desktop** to save it to your PC.



You can also right-click on an email to create a copy and right-click your **Desktop** or inside any folder in **File Explorer** to paste the email there.

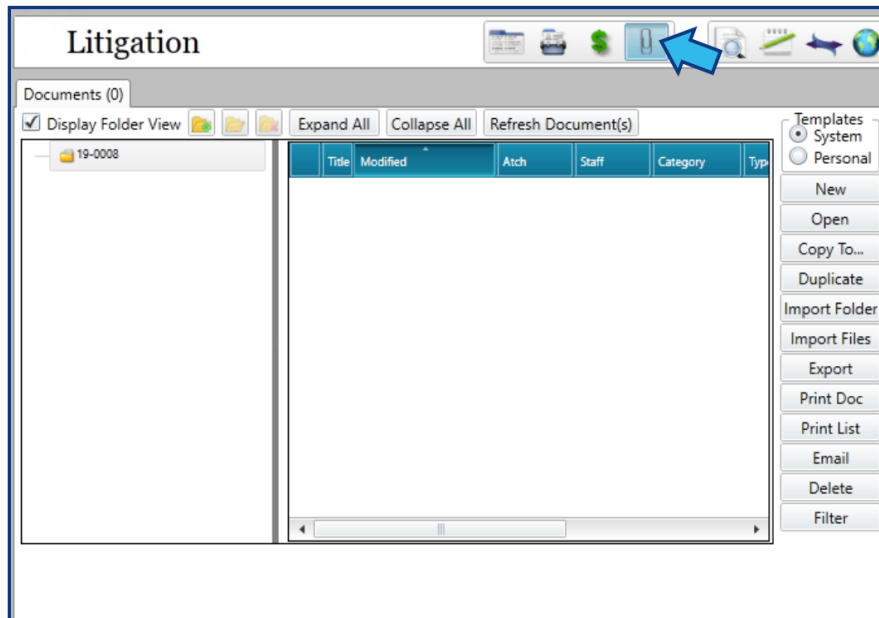


Finally, you can select an email and then select **File** and **Save As** to save the message in the folder you wish. If your email client does not have any of these options, you may need to refer to their documentation to learn how to save a copy of an email to your PC.



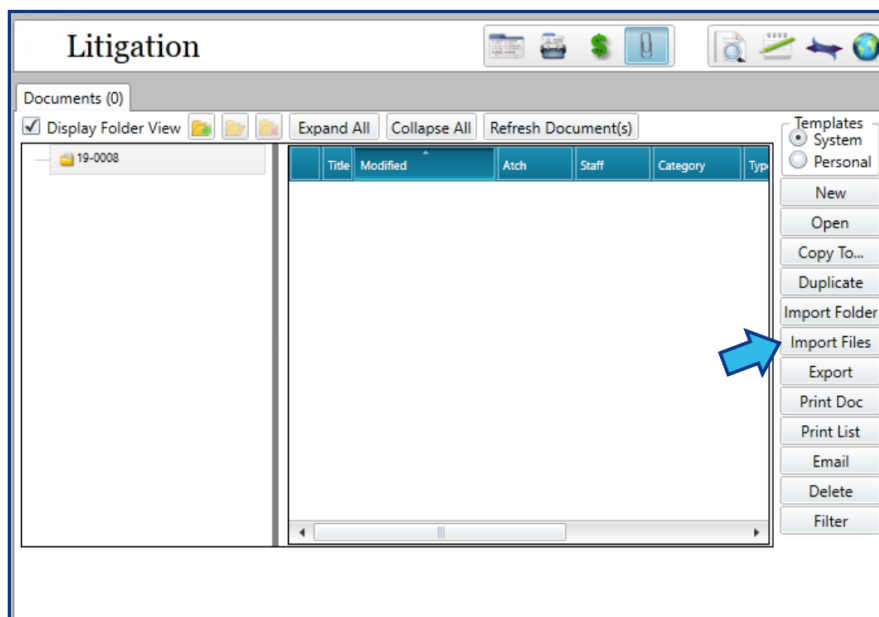
Step 2. Open the Attachments view of the matter.

Open the matter to which you want to import the email. Select the **Attachments** view in the **Module Toolbar** (the paperclip icon).



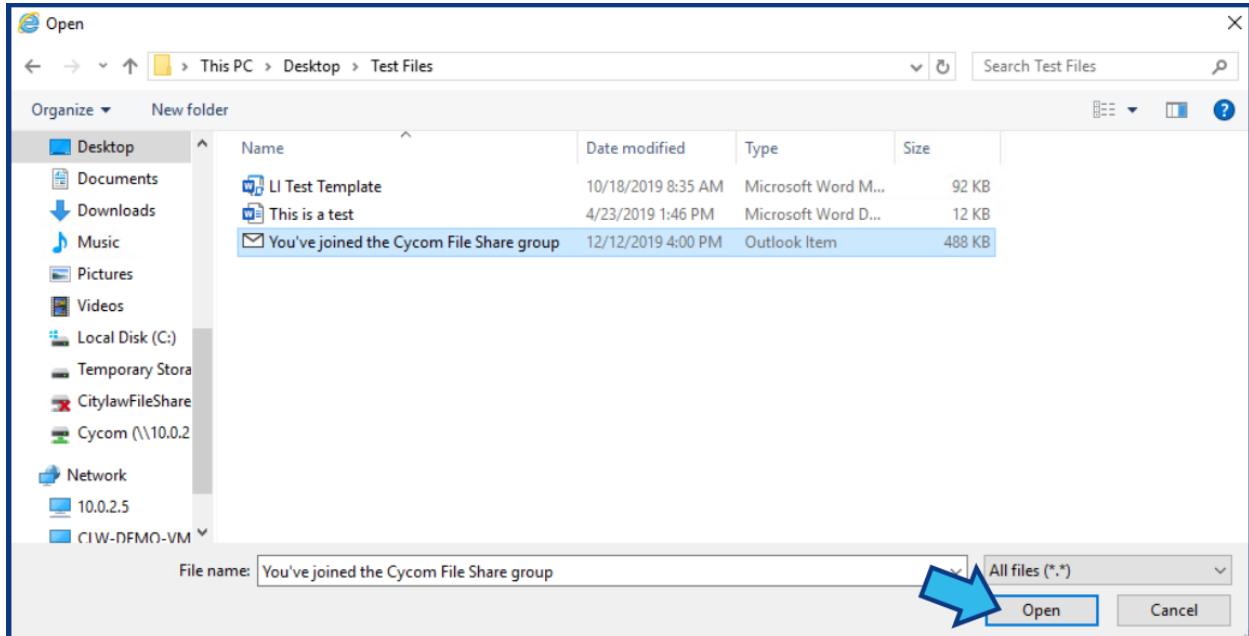
Step 3. Select Import Files.

On the **Documents** tab, select **Import Files** from the column of buttons on the right.



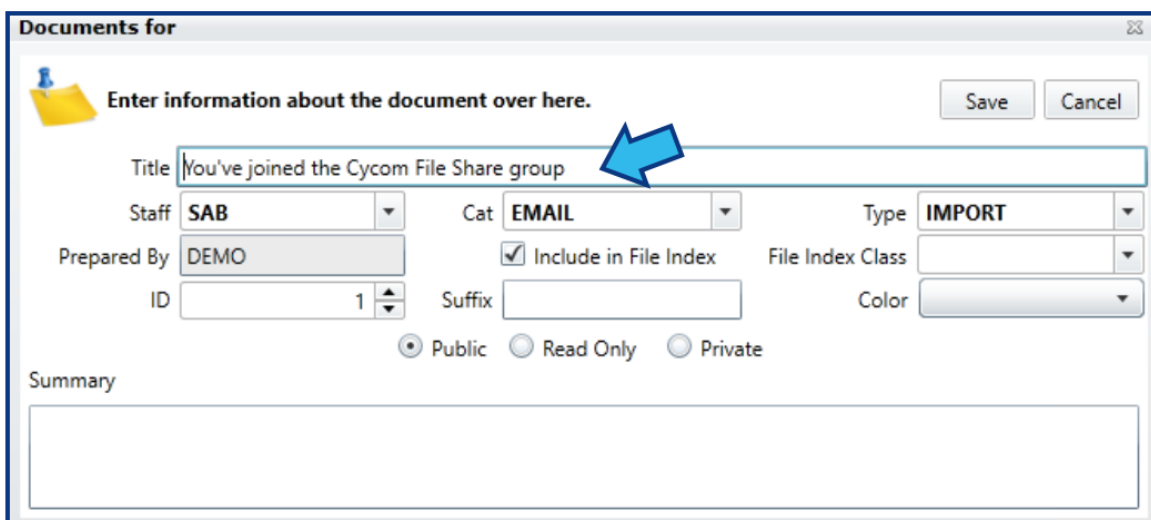
Step 4. Select the email file.

Navigate to the location where the email was saved from **Step 1**. Select **Open**.



Step 5. Adjust document name and settings as desired.

In the **Documents** settings box, enter or adjust the settings for this message. You can provide a more appropriate title, if desired. Fill in the remaining fields as appropriate.

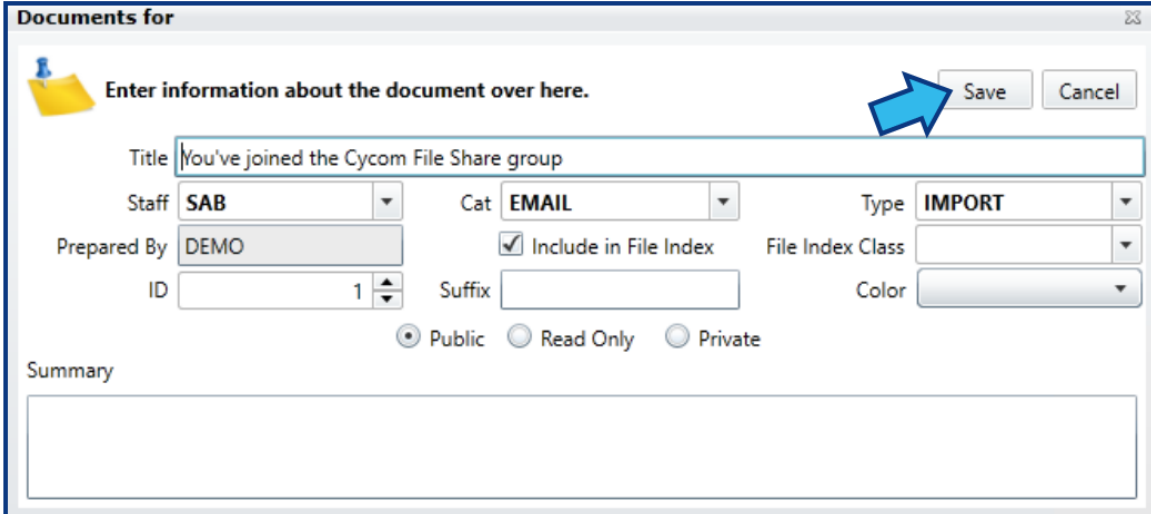


The screenshot shows the 'Documents for' dialog box. The title field is highlighted with a blue arrow. The dialog box contains the following fields and options:

- Title:** You've joined the Cycom File Share group
- Staff:** SAB
- Cat:** EMAIL
- Type:** IMPORT
- Prepared By:** DEMO
- Include in File Index**
- File Index Class:** (empty)
- ID:** 1
- Suffix:** (empty)
- Color:** (empty)
- Public** **Read Only** **Private**
- Summary:** (empty text area)

Step 6. Select Save.

To import the email to **CLW**, press **Save**. A confirmation dialog will appear confirming the message was imported successfully.



The screenshot shows a dialog box titled "Documents for" with a close button in the top right corner. Below the title bar is a yellow folder icon and the text "Enter information about the document over here." To the right of this text are "Save" and "Cancel" buttons, with a blue arrow pointing to the "Save" button. The form contains the following fields and options:

- Title: "You've joined the Cycom File Share group"
- Staff: "SAB" (dropdown)
- Cat: "EMAIL" (dropdown)
- Type: "IMPORT" (dropdown)
- Prepared By: "DEMO" (text field)
- Include in File Index: (checkbox)
- File Index Class: (dropdown)
- ID: "1" (spin box)
- Suffix: (text field)
- Color: (dropdown)
- Public: (radio)
- Read Only: (radio)
- Private: (radio)
- Summary: (empty text area)

CyImportFile Desktop Icon Quick Reference Guide

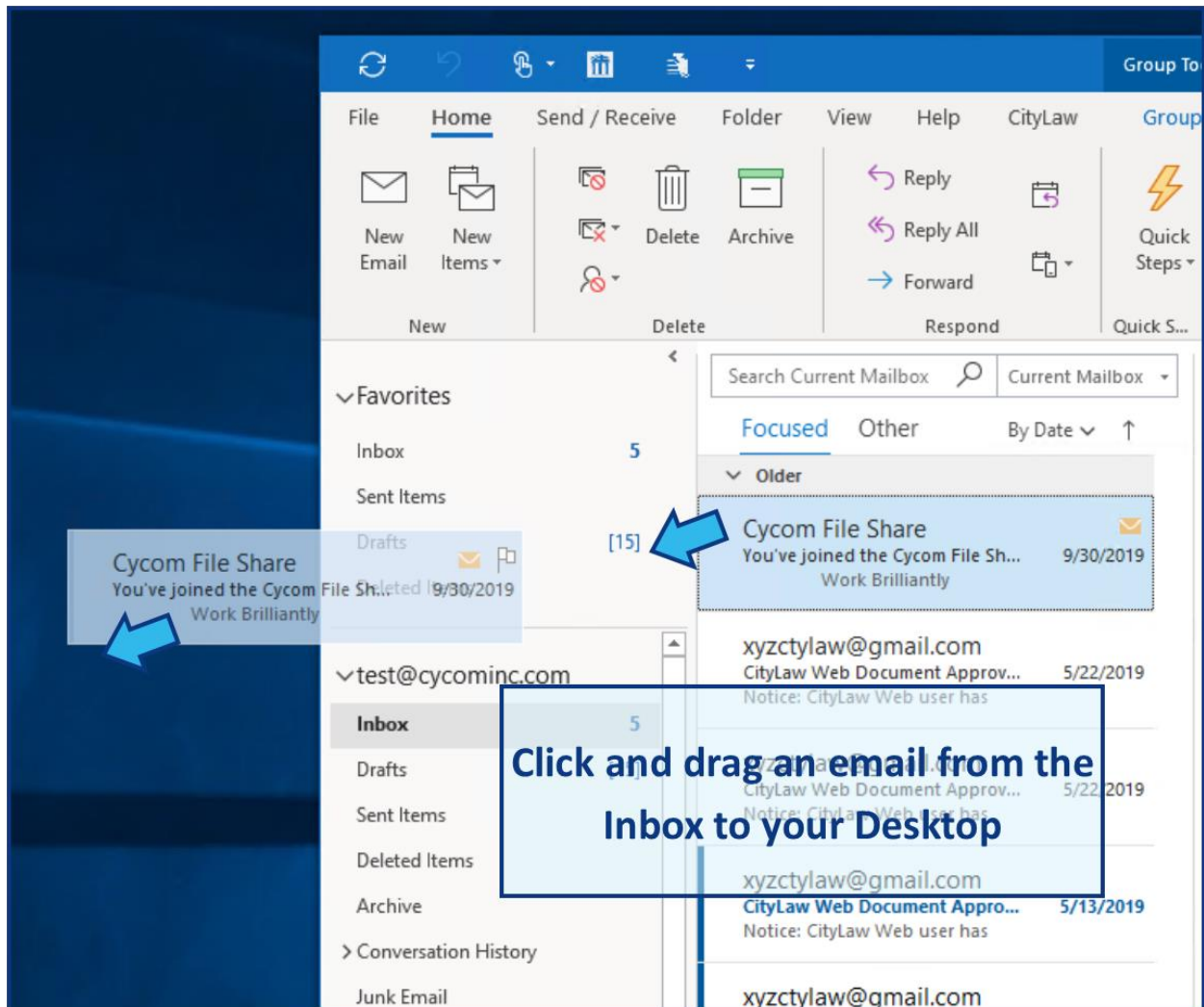
There are 3 steps to complete this task:

1. Save your email to your PC.
2. Drag saved email onto CyImportFile Desktop Icon.
3. Select a matter.

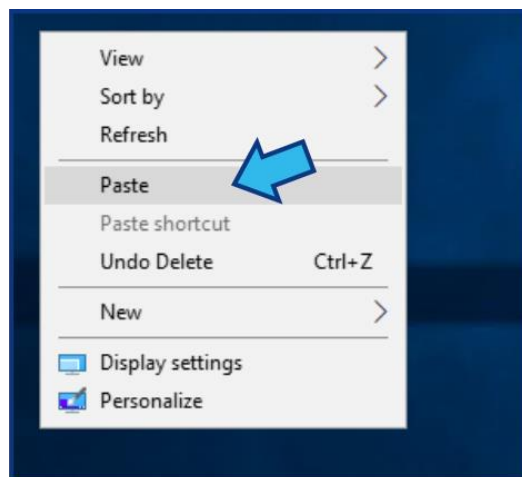
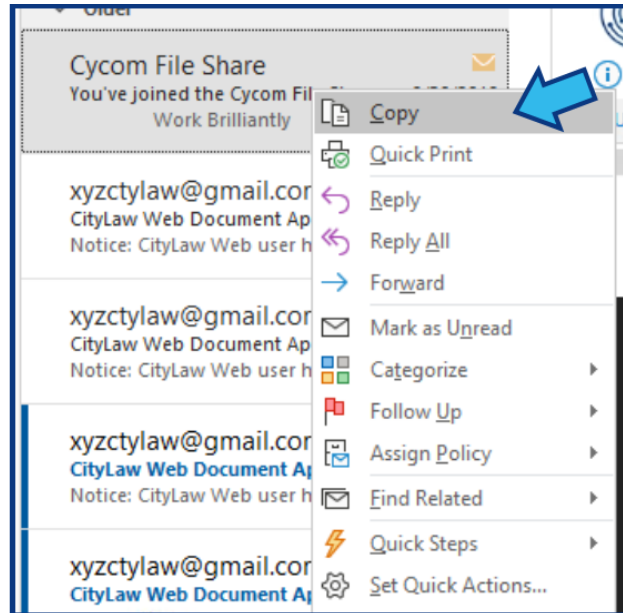
CyImportFile Desktop Icon Standard Guide

Step 1. Save your email to your PC.

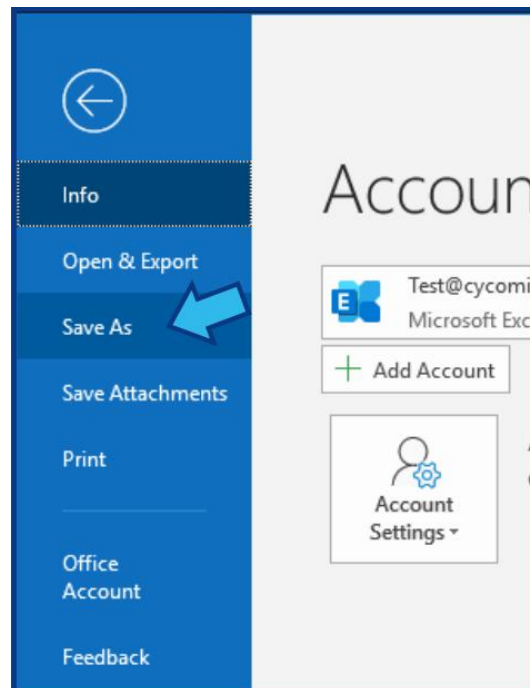
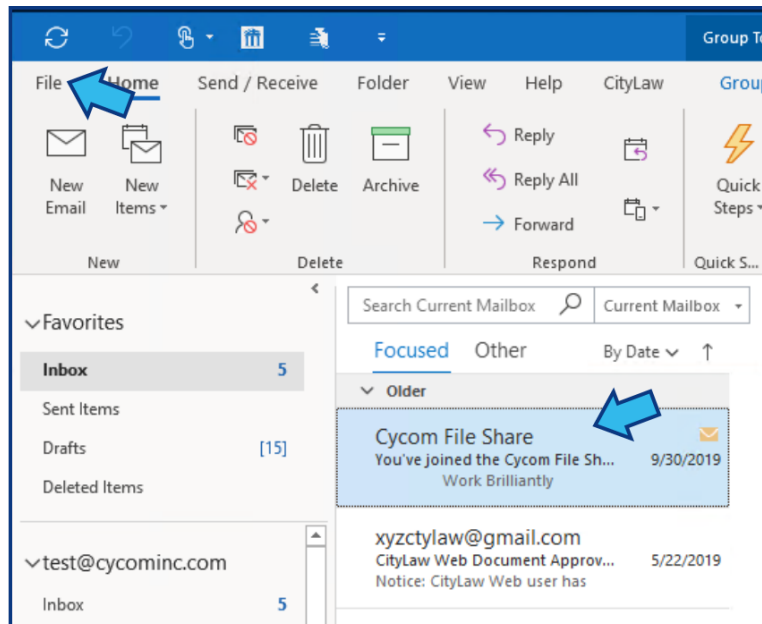
In some email applications, such as **Microsoft Outlook**, you can drag the email from the inbox list directly onto your **Desktop** to save it to your PC.



You can also right-click on an email to create a copy and right-click your **Desktop** or inside any folder in **File Explorer** to paste the email there.

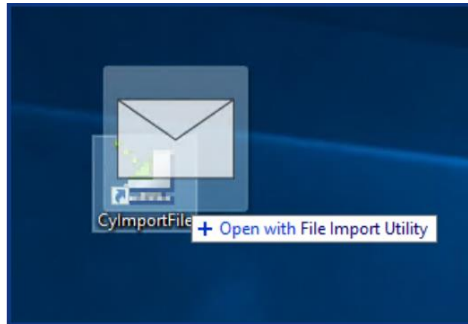


Finally, you can select an email and then select **File** and **Save As** to save the message in the folder you wish. If your email client does not have any of these options you may need to refer to their documentation to learn how to save a copy of an email to your PC.



Step 2. Drag saved email onto CyImportFile Desktop Icon.

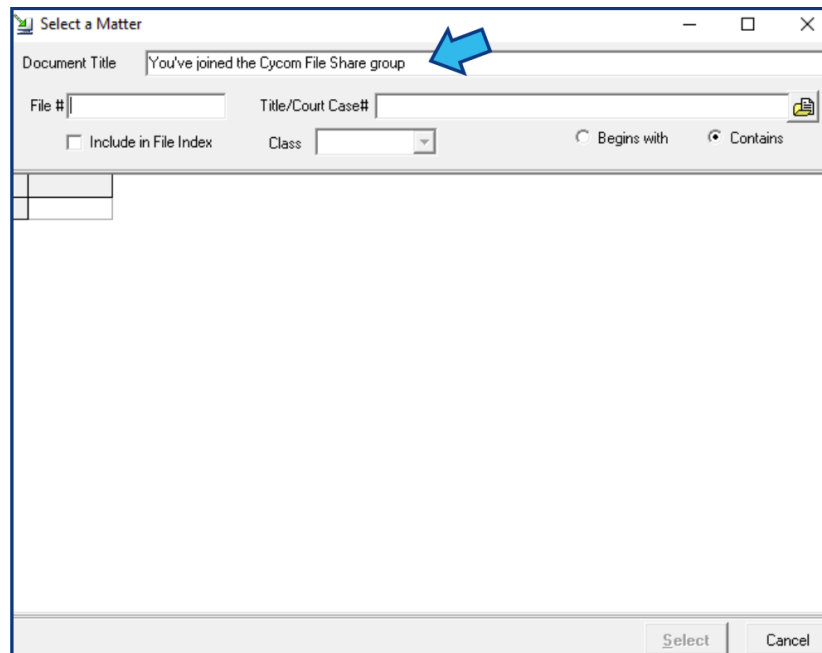
Locate the file on the **Desktop** or in **File Explorer**. Select the file, and while holding down the left mouse button, drag the file over the **CyImportFile Desktop** icon. Release the left mouse button when **" + Open with File Import Utility"** appears when the mouse is hovered over the **CyImportFile Desktop** icon.



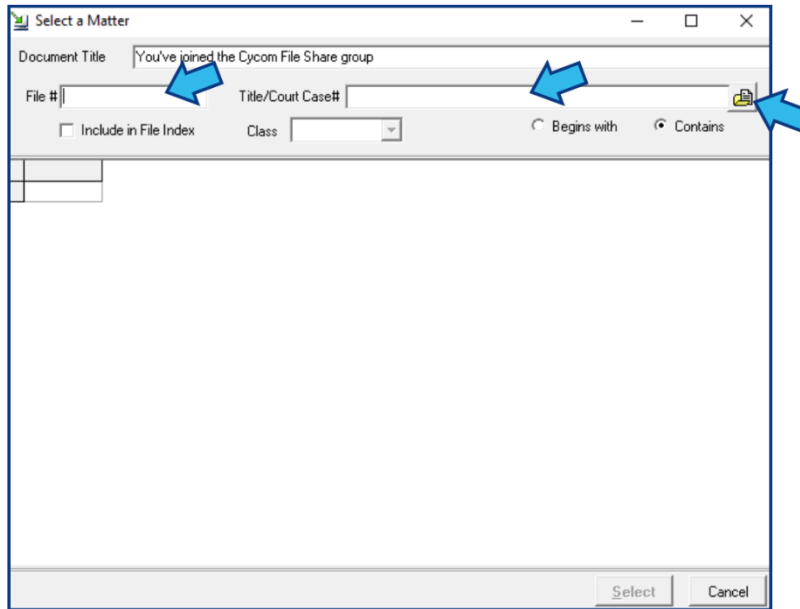
NOTE: If you do not have the **CyImportFile Desktop** icon, refer to this article for instructions for adding it to your **Desktop**: [Add CyImportFile Icon to Desktop](#)

Step 3. Select a matter.

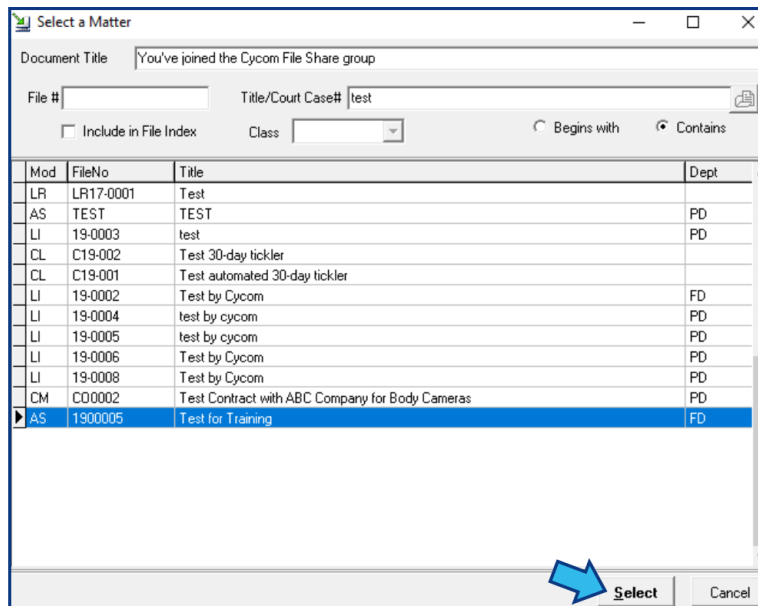
When a file is successfully dragged and released onto the **CyImportFile Desktop** icon, a **Select a Matter** window will appear. You can rename the **Document Title** at this point, if desired.



Enter all or part of the **File Number** or **Title** of the matter to which you wish to import this email in the appropriate field and press **Enter** on the keyboard or select the open file button at the right of the Title field.

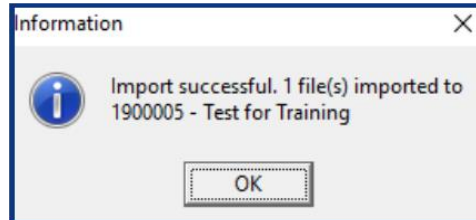


A list of matters with the provided details will appear. Highlight the matter and press **Select**.



NOTE: You can select multiple matters by holding down the **SHIFT** or the **CTRL** button while using the mouse to select the matters. **SHIFT** selects all matters between the first and last selected. **CTRL** selects matters individually.

A confirmation dialog will appear confirming the message was imported successfully.



CyImportFile Send To Menu Quick Reference Guide

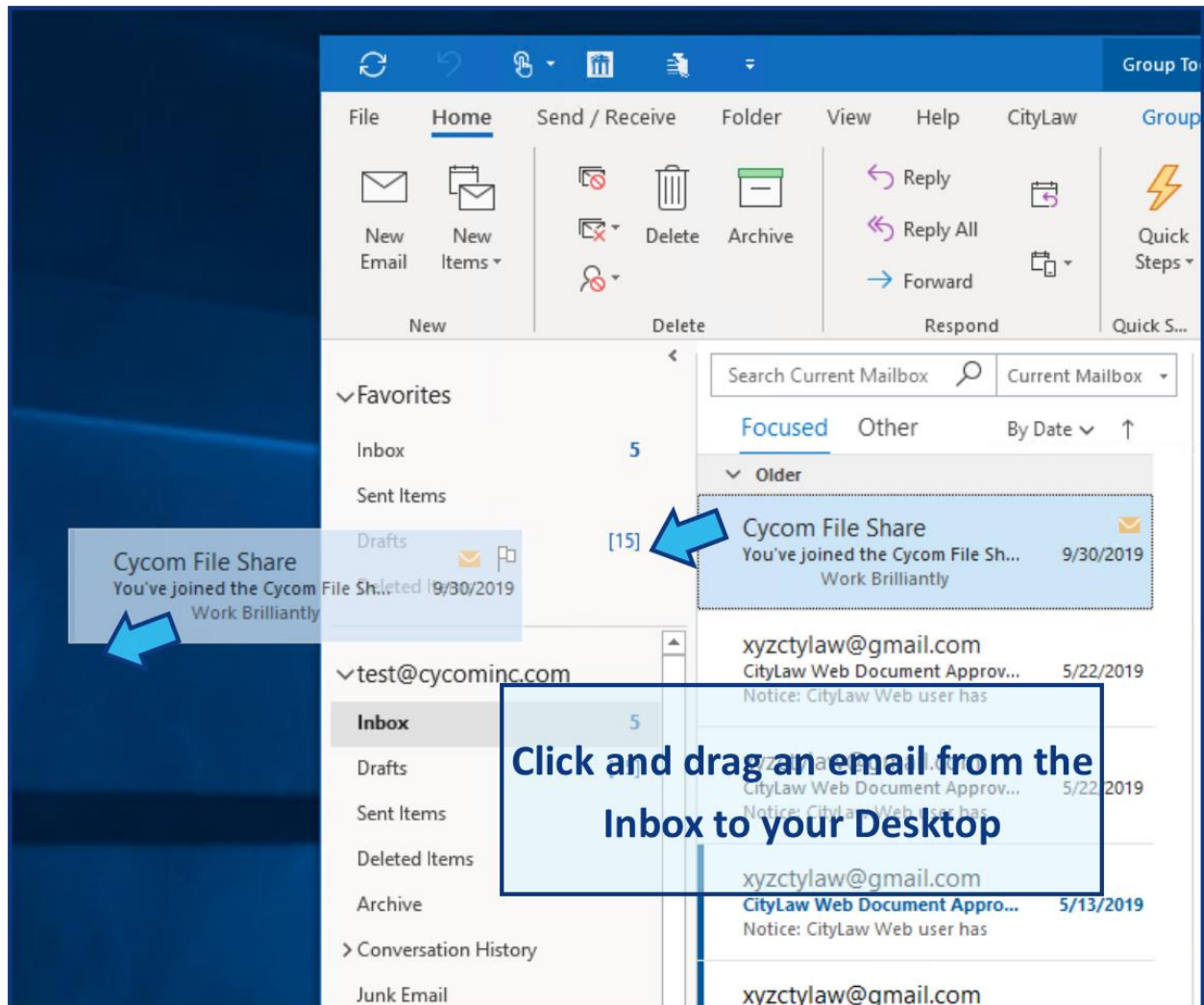
There are 3 steps to complete this task:

1. Save your email to your PC.
2. Select the Send To CyImportFile option.
3. Select a matter.

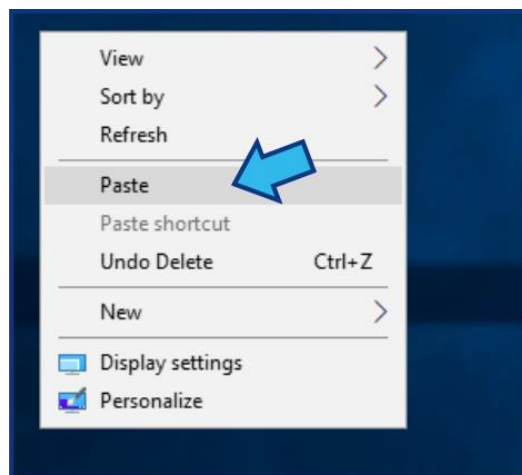
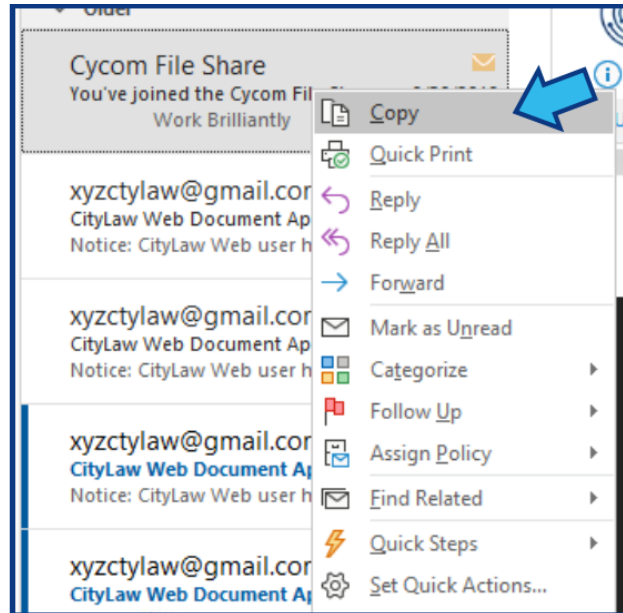
CyImportFile Send To Menu Standard Guide

Step 1. Save your email to your PC.

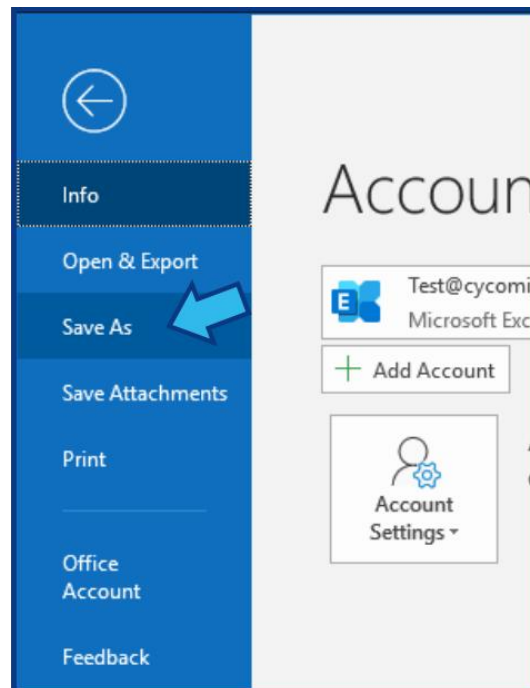
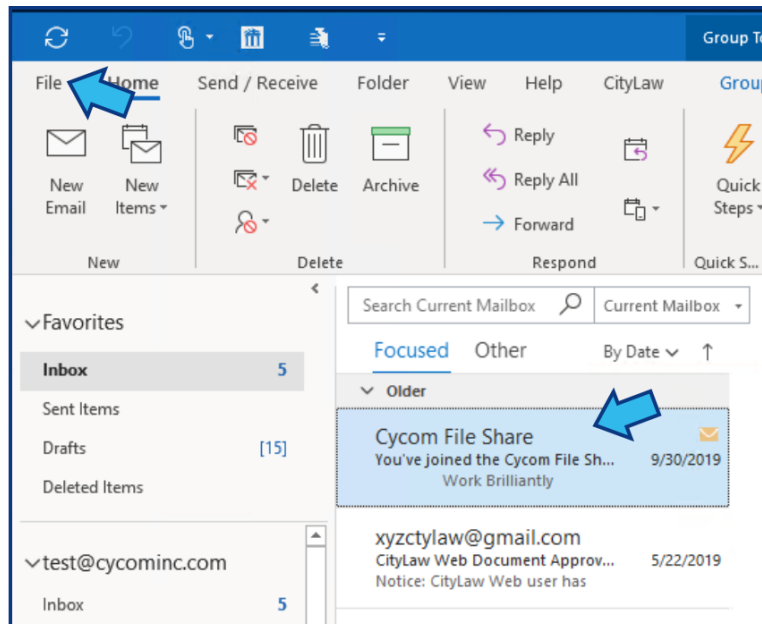
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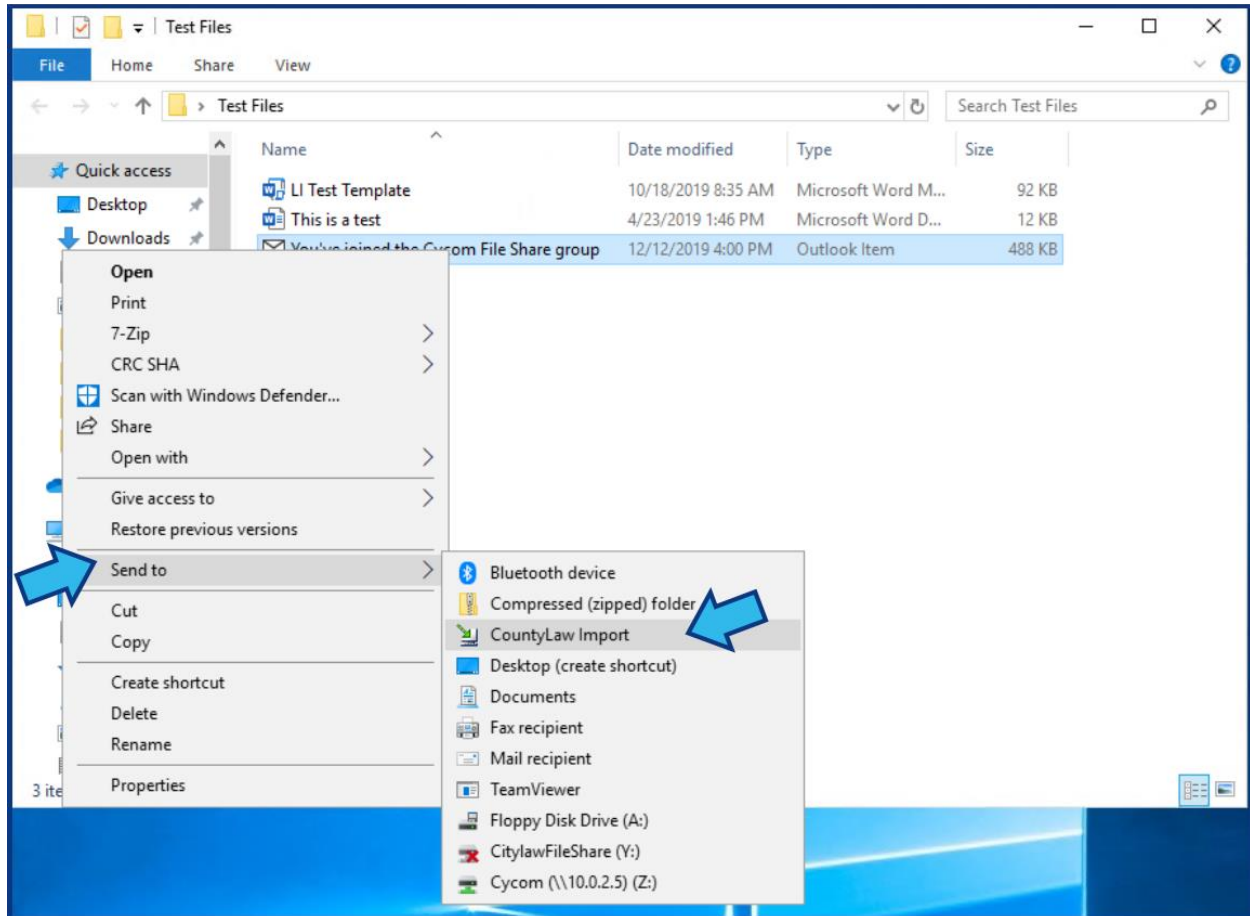


Finally, you can select an email and then select **File** and **Save As** to save the message in the folder you wish. If your email client does not have any of these options you may need to refer to their documentation to learn how to save a copy of an email to your PC.



Step 2. Select the Send To CyImportFile option.

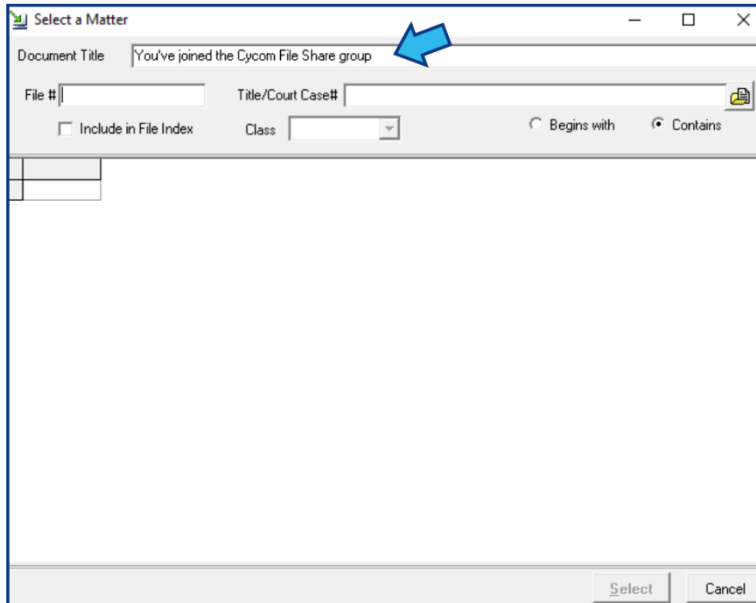
Locate the file on your **Desktop** or inside **File Explorer**. Right-click on the file and select **Send To**. In the list that appears, select the **CyImportFile** option.



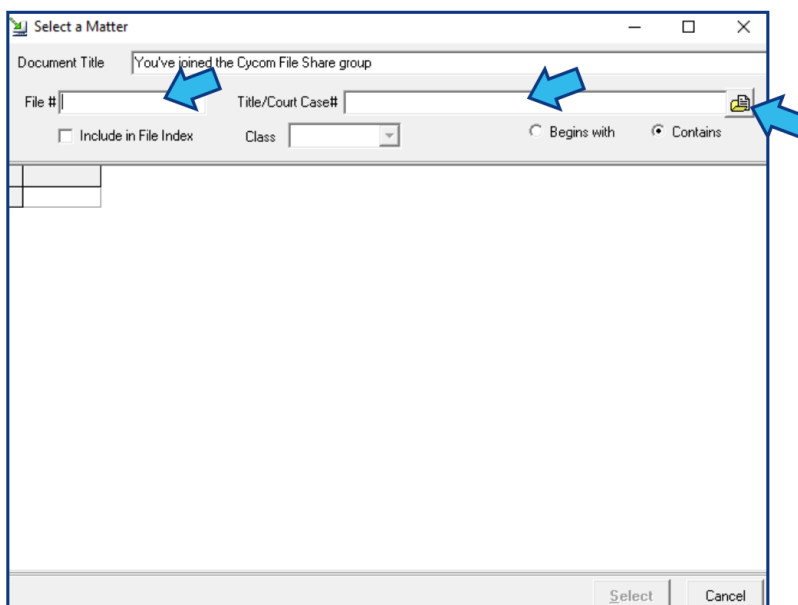
NOTE: Your option may be labeled as **CityLaw / CountyLaw Import** or something similar. If you do not see an option beginning with **CyImport**, **Cycom**, **CityLaw**, or **CountyLaw**, your **Send To Menu** option may not be set up. Refer to the article for instructions to set up the **Send To Menu** option: [Add CityLaw / CountyLaw to Send To Menu](#)

Step 3. Select a matter.

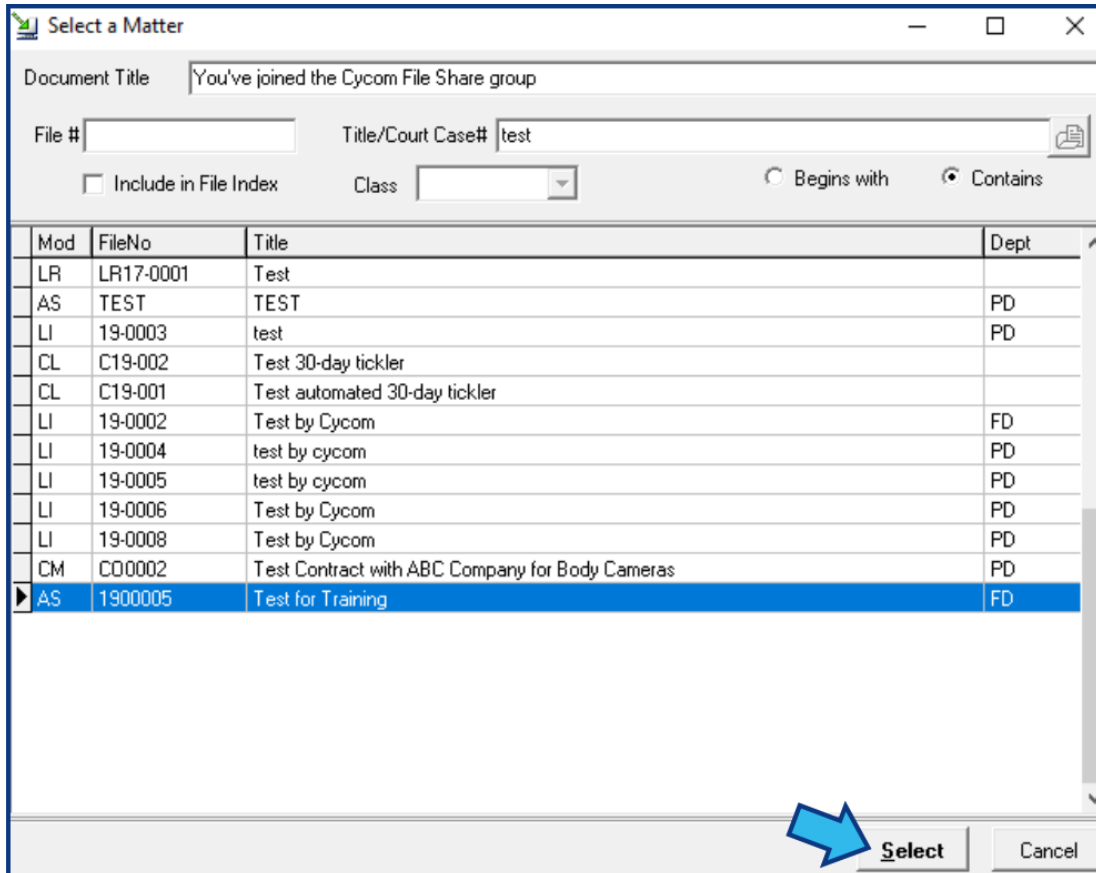
A **Select a Matter** window will appear. You can rename the **Document Title** at this point, if desired.



Enter all or part of the **File Number** or **Title** of the matter to which you wish to import this email in the appropriate field and press **Enter** on the keyboard or select the open file button at the right of the **Title** field.

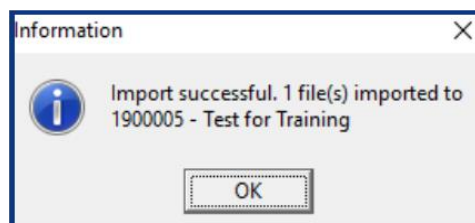


A list of matters with the provided details will appear. Highlight the matter and press **Select**.



NOTE: You can select multiple matters by holding down the **SHIFT** or the **CTRL** button while using the mouse to select the matters. **SHIFT** selects all matters between the first and last selected. **CTRL** selects matters individually.

A confirmation dialog will appear confirming the message was imported successfully.





Cycom Email Exporter Add-In Option Quick Reference Guide

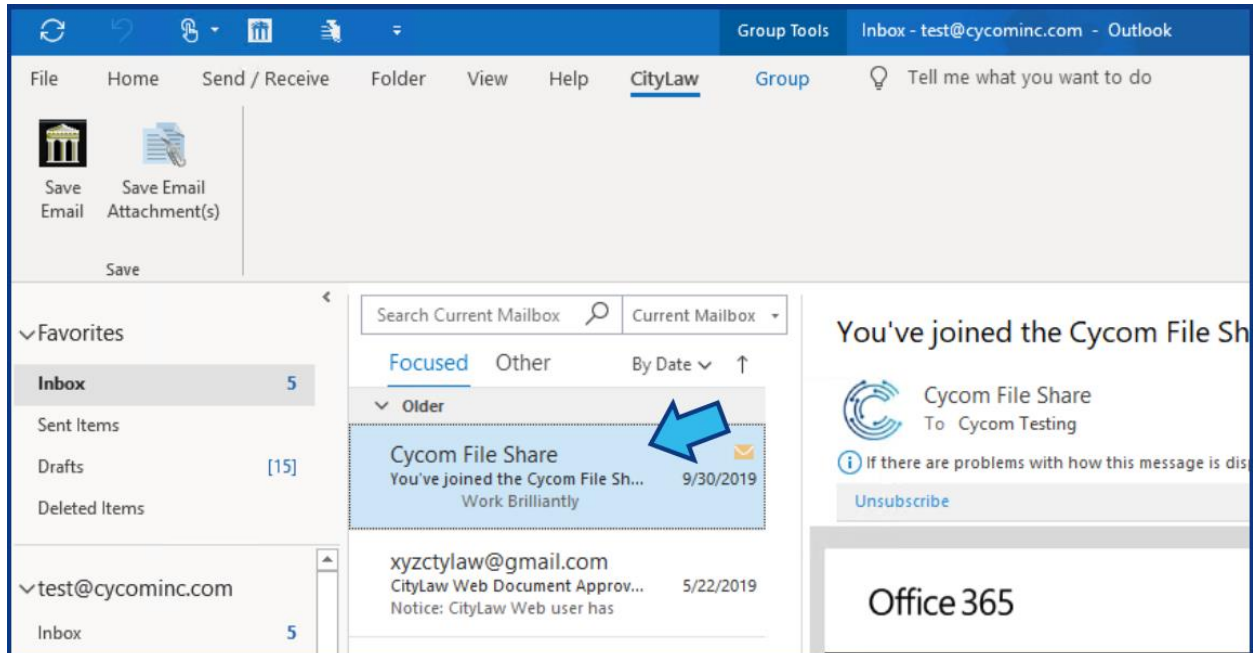
There are 3 steps to complete this task:

1. Select the email in the Outlook inbox.
2. Select the Save Email Option.
3. Select a matter.

Cycom Email Exporter Add-In Option Standard Guide

Step 1. Select the email in the Outlook inbox.

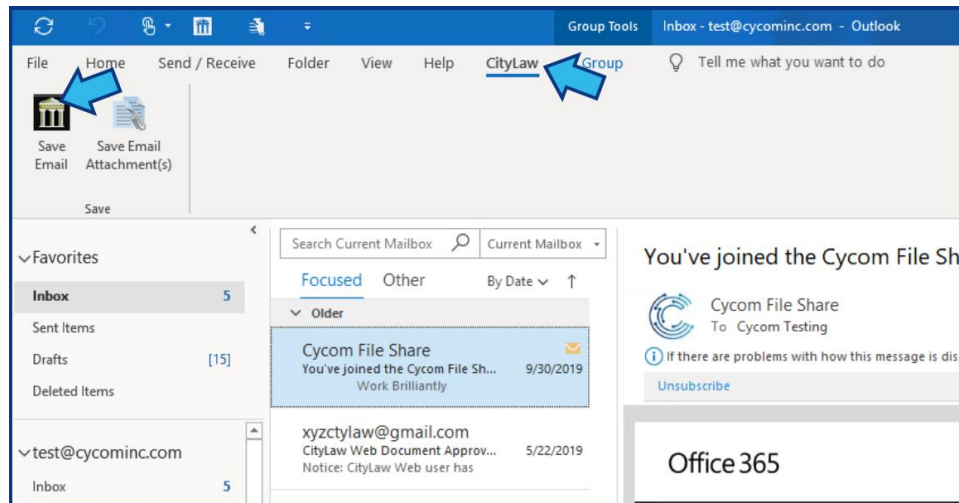
In **Microsoft Outlook**, locate and select the email in the inbox list.



NOTE: You can select multiple emails by holding down the **SHIFT** or the **CTRL** button while using the mouse to select the emails. **SHIFT** selects all emails between the first and last selected. **CTRL** selects emails individually.

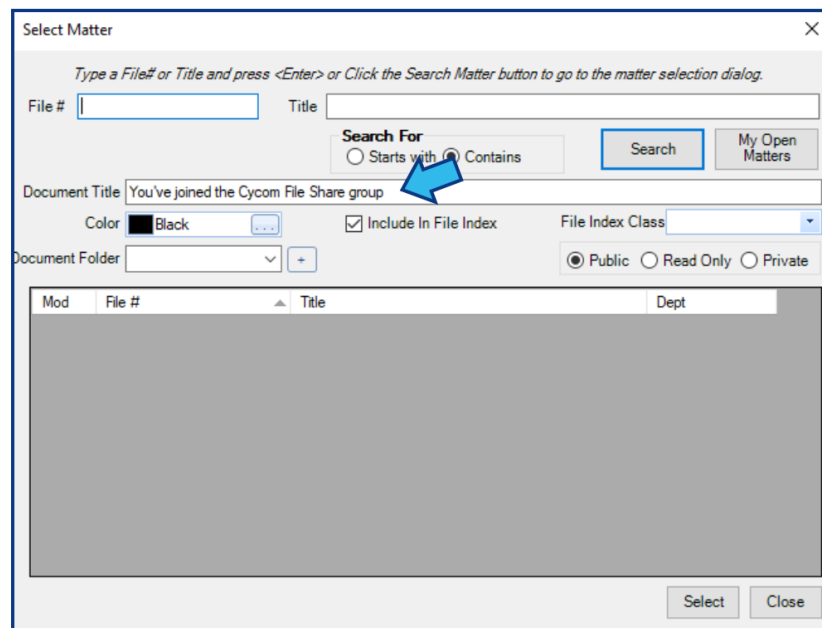
Step 2. Select the Save Email Option.

The **Save Email** option is located on the **CityLaw / CountyLaw** tab on the tab bar at the top of **Outlook**. If you don't see a **CityLaw, CountyLaw, or Cycom** tab in your **Outlook**, you may not have the optional **Cycom Email Exporter Add-In**, or it may be inactive. Refer to the following article if the add-in is inactive: [Enable CityLaw / CountyLaw in Outlook](#)



Step 3. Select a matter.

A **Select a Matter** window will appear. You can rename the **Document Title** at this point, if desired.



NOTE: You can select multiple matters by holding down the **SHIFT** or the **CTRL** button while using the mouse to select the matters. **SHIFT** selects all matters between the first and last selected. **CTRL** selects matters individually.

A confirmation dialog will appear confirming the message was imported successfully.

