Select Mapping Location
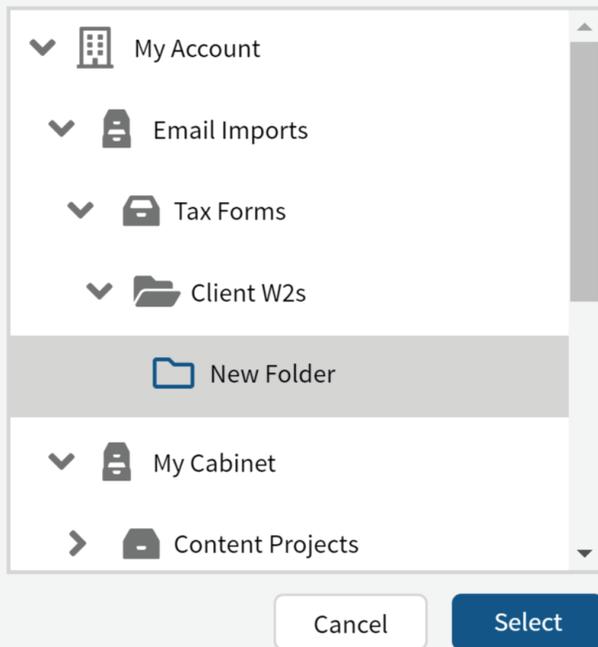
- ⌄ 🏢 My Account
  - ⌄ 🗄 Email Imports
    - ⌄ 🗄 Tax Forms
      - ⌄ 📁 Client W2s
        - 📁 New Folder
  - ⌄ 🗄 My Cabinet
    - › 🗄 Content Projects

Cancel   **Select**

Email Importing

The Email Imports feature in Rubex is a new method that allows users to integrate their email accounts to automatically, and continuously, import emails they've received into Rubex. Users map a location in their Rubex account that will automatically import email messages or attachments from the email account of the user's choosing. This feature is compatible with any online email provider that supports **IMAP**. *It's accessible from both the Rubex web interface and desktop application.*

How It Works

Email Imports are included with Enterprise Plan accounts and is an add-on for Business Plan accounts at the price of $50/year/account.

Users can import all email/attachments that come into their main inbox, or select a specific folder from their account they want Rubex to regularly check and import from.

There are two types of Email Imports that can be set up. A Personal Email Import, or an Account Email Import.

Personal Email Import

This is for users to add a personal email address to set up importing with.

1. To set it up, users go to the Email Imports section of their settings menu.
2. Select 'Add New Mapping.'
3. Choose a location in Rubex where they want their emails and/or attachments to be imported to.
4. Enter their email account information including their username, password, and in some cases, the IMAP server and port information.
5. Select what folder in your email you want Rubex to monitor and import email from. Leaving it blank will indicate that Rubex will import all incoming emails from the inbox.
6. Users must select whether the imported emails will be archived in their original accounts or deleted.

Users can add as many email mappings as they want, with as many email accounts as they want, as long as they have the login credentials.

*Since users are allowing Rubex to use their credentials to access their email account, they may need to adjust the forwarding and security settings in their email, including enabling IMAP.

Account Email Import

These Email Import settings belong to the overall account and can only be added and edited by admins. These are for company email accounts that aren't dependent on a given user still working with the company. These are best used for general, shared email accounts.
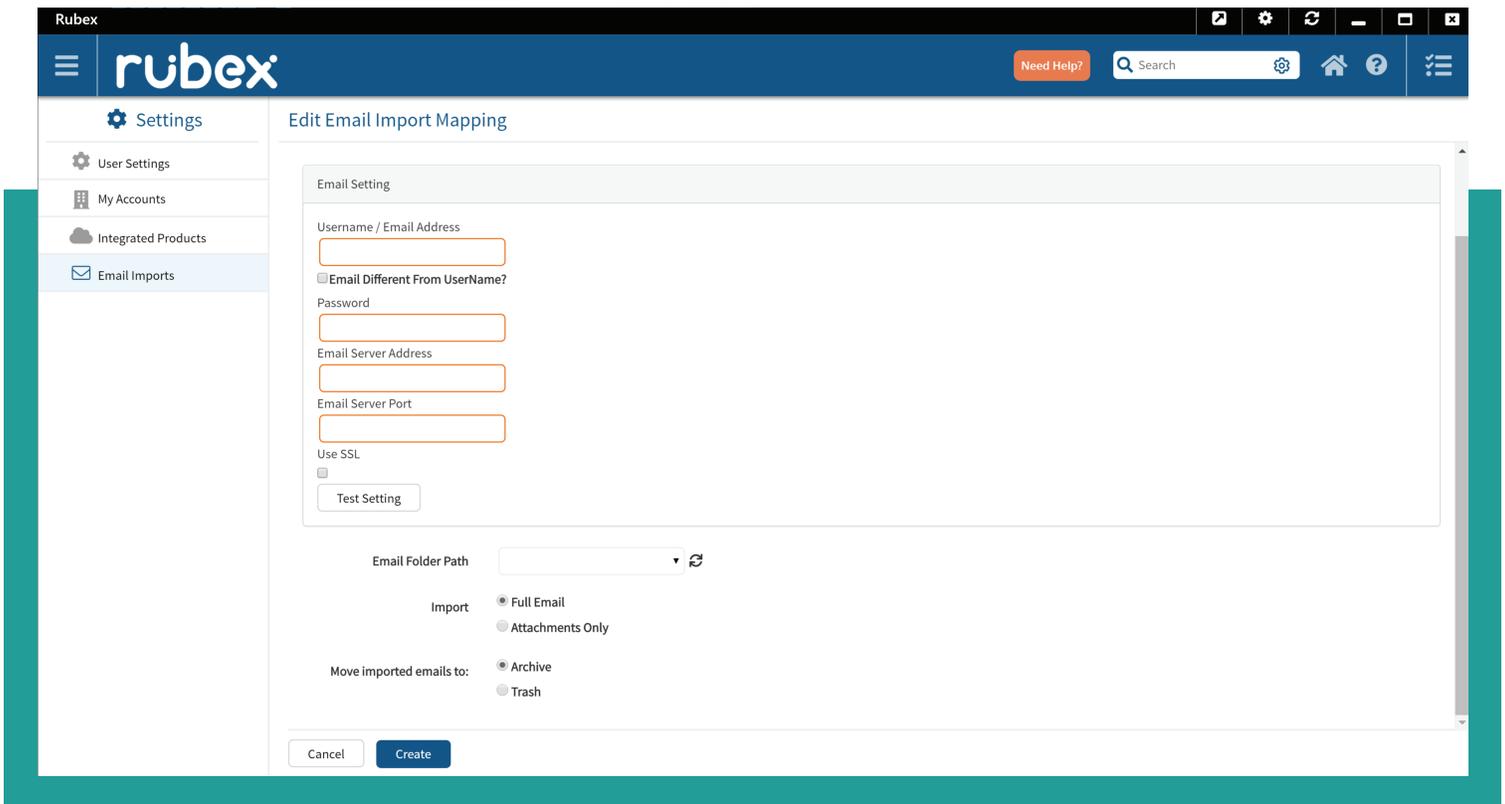
Account Email Imports are set up like Personal, except it must be done through the Admin menu's Email Imports screen.

Email Importing Cont.

Using **email rules/filters,** users can create a system where specified emails that are received by their accounts are automatically transferred to Rubex, whether they're from a specific email address or contain a specific subject line.

A great use for Email Imports is to map a folder for a certain type of document to a folder in Rubex that kicks off an **automated workflow.** For example, emails with invoices attached that are filtered into a folder for invoices can automatically transfer those attachments to a Rubex folder that imme-diately sets it on a workflow to be processed.

There are import options for the system to import full emails or just the attachments. Users MUST select whether the imported emails will be archived in their original accounts or deleted.