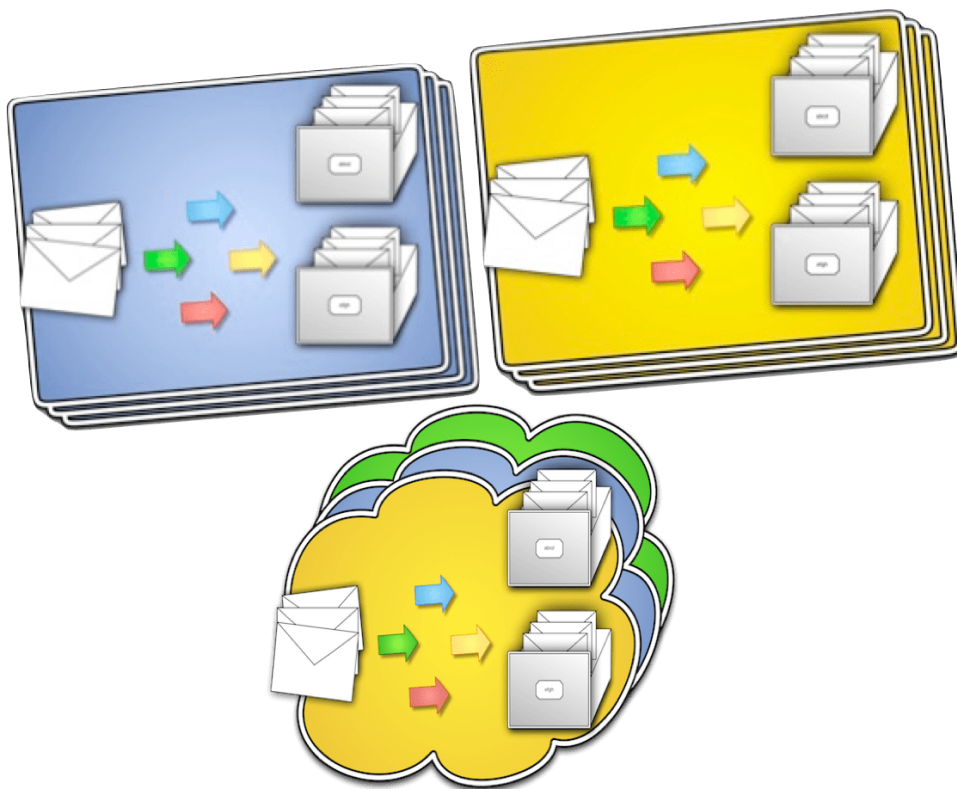


User Guide for Email Filing Assistant Email Filing Assistant Pro Version 5.2

EFA Helper Version 2.1



Schulz Software
Last updated
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Disclaimer

Great care has been taken in creating this document. However, it cannot be warranted that it is error-free or even complete. Schulz Software does not accept liabilities resulting from the usage and application of this document.

Revision History

What is new in EFA and EFA Pro 5.2

- Support for macOS 14.6 and higher, including macOS 15 (Sequoia)
- Status Text Improvements: Added a counter to show the number of remaining emails in the filing queue.
- Single mailbox index now works fully recursive.
- General Enhancements: Includes minor UI updates for a smoother user experience.
- EFA only: Enhanced EFA Mail Extension: Expanded the window width for filing options, allowing longer paths to be displayed more clearly.

What is new in EFA 5.1

This version of EFA and EFA Pro supports macOS Sonoma.

What is new in EFA 5

EFA and EFA Pro have the following new features and improvements:

- Indexing: When using Single Mailbox index, the new 'Include Sub-Mailboxes' checkbox improves the speed of refreshing indexes when the user has tidied up their folder structure manually.
- New preference setting under the 'other' tab: The simplified HUD is more slimline and only shows the mailbox name and the search function.
- Batch Filing: Added context menu to exclude proposed mailbox from filing. This accelerates the creation of a list of excluded mailboxes) that EFA should not automatically file into
- 4) General: Create a hotkey option for opening the main window instead of having to go through the View menu bar: shift-command-0

In addition, EFA for Apple Mail implements the EFA Mail Extension through MailKit to integrate some functionality of EFA directly into Apple Mail: As the user is writing an email, the EFA Mail Extension lets them select the folder into which EFA should file the mail after sending it. This feature eliminates the manual step of filing the email from the Sent Items mailbox. It has been the #1 feature request by EFA users. The EFA Mail Extension requires the main EFA 5 app to run and Object Reference Caching to be active (see EFA preferences -> Other)

EFA 4.1

EFA can be run on

- macOS12 (Monterey)

- macOS13 (Ventura)

New option for the head-up display to disappear/minimise when the Mail window is not active.
See Preferences > Other.

New option to keep showing the most recent list of mailboxes when no email is selected in the mail client. This can help with complex goto mailbox cases. See Preferences > Filing > Other

New: EFA remains active when the user closes the main window.

Keyboard support extended:

- Shift-clicking on a mailbox in EFA copies the email to the mailbox
- Option-clicking on a mailbox briefly activates Goto-mailbox mode

The Filing menu now lists all filing mailboxes, just like the Main Window/Dock/HUD.

Mailbox creation:

- speed has been significantly increased
- Keyboard support for CMD-V to paste mailbox name
- Keyboard support Return/Enter to trigger mailbox creation in popup
- Fix: Mailbox creation into local mailboxes, i.e. without an associated account

Search field: Support for terms separated by spaces

HUD has been slimmed down.

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What is the Email Filing Assistant (EFA)?

EFA is an application that automates and simplifies email management. EFA is built on the premise that your brain needs to conduct a context switch every time you want to file an email. That is, it needs to interrupt a usually high-value cognitive task for a low-value task, which is to think about where an email should be filed and then drag and drop that email into the target mailbox.

EFA addresses this issue by keeping track of the location of emails in your mailboxes. Analysing previous filings suggests the places where an email could be filed. All you need to do is confirm a suggestion, and EFA will take care of the rest.

Based on this premise, EFA presently offers the main key capabilities

- Individual Filing: The filing of a single email or a group of emails
- Batch Filing: The automatic filing of emails from an entire mailbox, such as Sent Items or Inbox
- Email Reply: A workflow that joins the steps of sending a reply email, filing it and co-filing the original email.

EFA functionality can be accessed from

- The main EFA window, both in a full and a minimalistic version
- A Head-up Display, which is always in the foreground
- The Dock
- The Touch Bar on compatible MacBook Pro models.
- The keyboard.

On the Role of the EFA Users

EFA users have a significant input on the features and the design of EFA. EFA would not be what it is today if it weren't for the contributions from its dedicated user base. Users have provided many ideas that we have been able to implement. We also welcome any bug report that helps us to make EFA better.

This document is testimony to a request we received from users that wanted to have a user guide because the growing function set of EFA is not necessarily self-explanatory.

Input and improvements are welcome. We also welcome it if users want to translate this document into their own language and make the translation available to other users.

Scope of this user guide

This document applies to EFA for Apple Mail and EFA Pro for Microsoft Outlook. Only Screenshots of EFA are shown. Where there are significant changes to EFA Pro, they are mentioned in the text.

Getting Started

When EFA gets launched for the first time, a dialogue will ask the user to create and store a local index. The index will contain email metadata about email accounts, mailboxes and their hierarchies, email subject lines, sender and recipient email addresses.

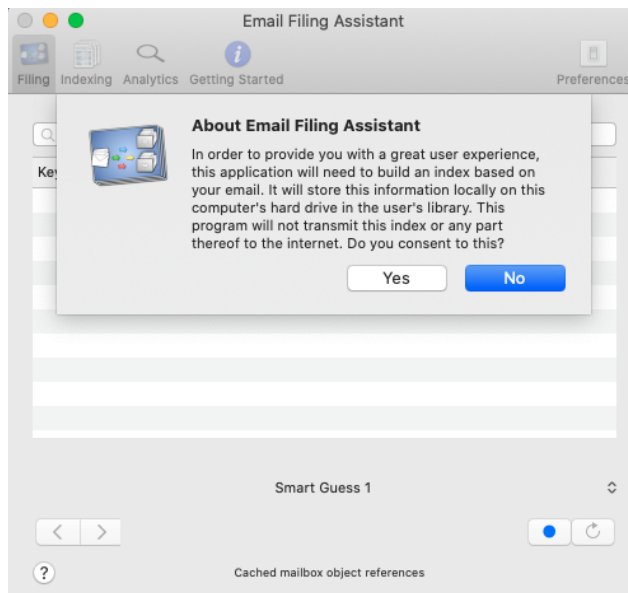


Figure: EFA at launch

This information is stored in an SQLite database file locally in the user's ~library folder. At no point in time does EFA send any of this data over the internet.

If the user consents to the message, EFA will conduct an initialisation by contacting the mail client (Apple Mail for EFA or Microsoft Outlook for EFA Pro) and reads the mail client's account information. This process usually only takes a few seconds. EFA will then prompt the user to start the indexing process:

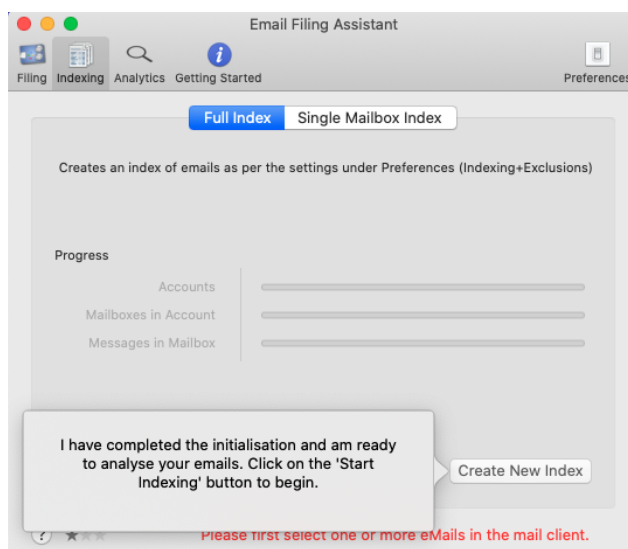


Figure: EFA after initialisation

The function of the indexer

The indexer is required to provide EFA with the required information to make smart filing suggestions. EFA will work with the mail client to analyse mailboxes about their:-

- 1) name and relative location in the mailbox hierarchy,
- 2) the sender email address of the emails they contain,
- 3) the recipient email addresses of the emails they contain,
- 4) the subject lines of the email addresses they contain.

When the user starts the indexing process, a warning message is displayed. As this is the first time an index is created, the old index is not being deleted. However, if the user accidentally opts to create a full index, the warning might save the user from an accidental deletion of the index database.

Attention Gmail users:

GMAIL (via web interface) allows the user to uncheck "present in IMAP" for a number of folders like GMAIL/ALL MAIL, GMAIL/PRIORITY and some others. If you uncheck these, then the time required to index is a lot less, AND you get a better suggestion upon filling e-mails

Note:

The indexing process does NOT alter emails in any way.

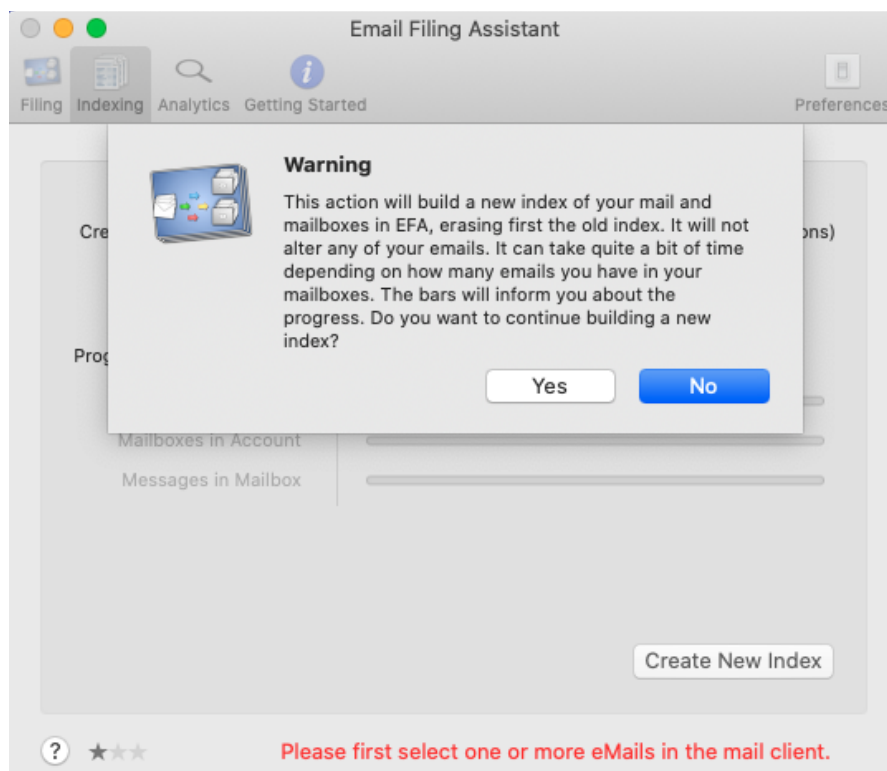


Figure: Commencement of the indexing process

Deleting the index is strictly limited to the EFA index. No emails are being deleted.

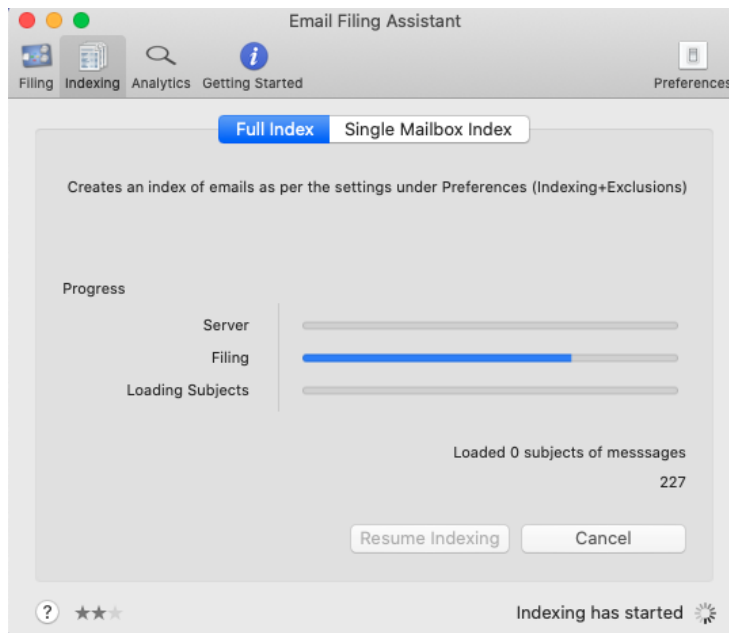


Figure: Indexing progress indicators

The duration of the indexing process depends on the size of the user's mailbox. It can take seconds for small mailboxes and more than a day for large mailboxes. At any time, the process can be cancelled and resumed later. Progress bars keep the user informed about the status of the indexer.

When the indexer has run its course, EFA is ready to file emails.

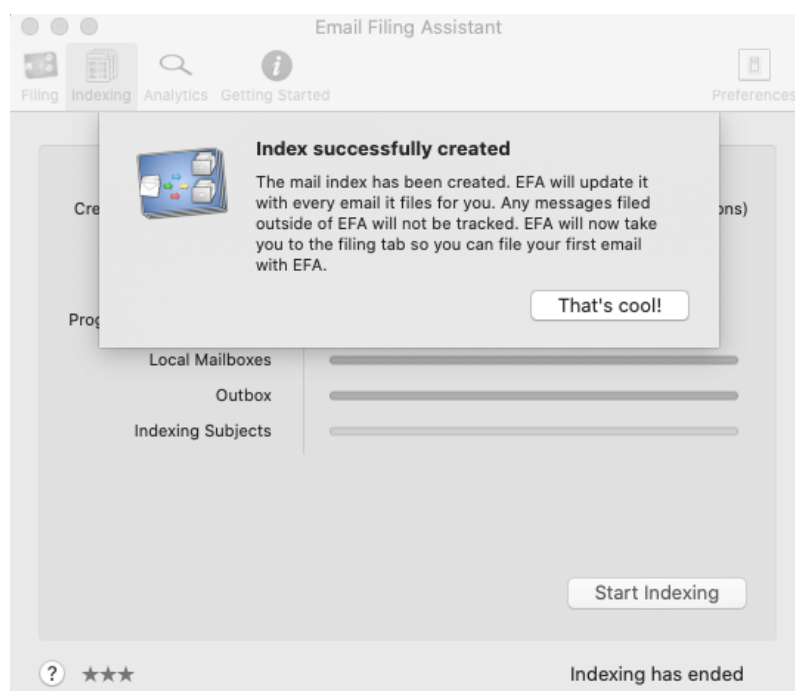


Figure: Indexing completed

The three stars at the bottom-left of the EFA window indicate that the index is complete. EFA will update it when

- 1) it files an email,
- 2) It creates a new mailbox,
- 3) It removes a mailbox from the index at the user's request.

EFA will not pick up any changes the user makes in the mail client itself. For example, EFA will not know if the user deletes or moves a mailbox. However, EFA will notice if a mailbox is missing when it tries to file into it. EFA will then work with the user on a solution.

Filing an email

EFA displays the relevance of a mailbox in the form of a green bar. The longer the bar, the more suitable the mailbox is as a filing location for the selected email(s). This list changes with different filing strategies.

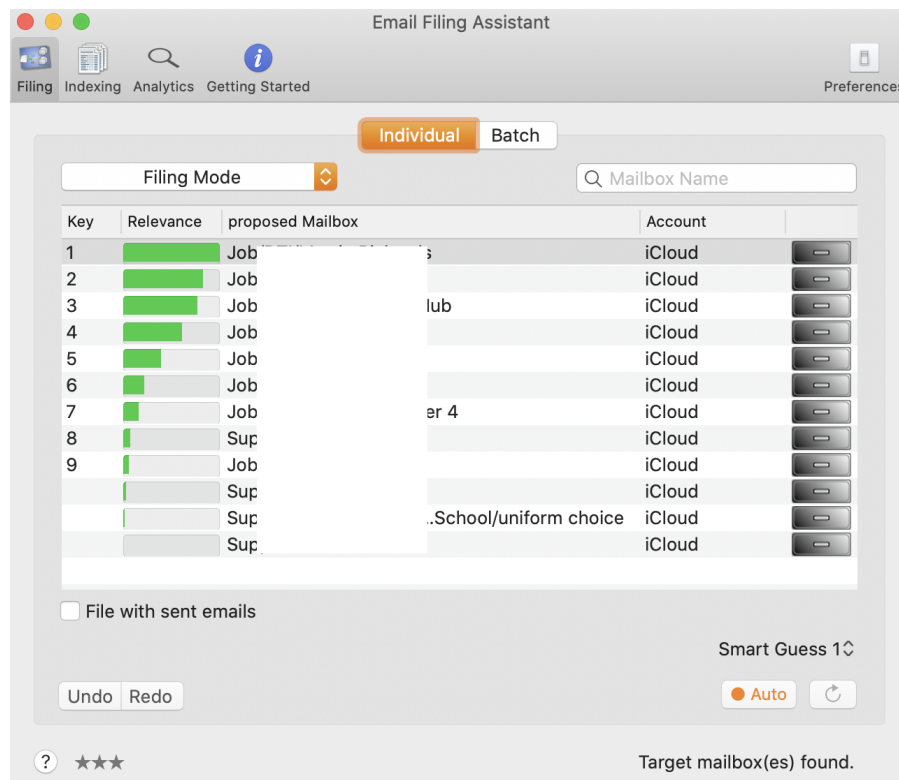


Figure: Prioritised list of mailboxes after analysis

To file an email, select an email in the mail client. EFA will suggest target mailboxes for filing. If the user is happy with the suggestion, it is sufficient to click on a mailbox and EFA will file the email(s) into it.

Instead of a mouse click on the selection it is also possible to use the keyboard. This requires setting the focus on the table in the EFA main window, the EFA Mini view or the HUD:

- The key number selects the message

- The Enter/return key files the message
- Alternatively, ⌘<number> selects and files in one step.

How does filing work?

EFA files emails by instructing the mail client to file the email from the source mailbox into the target mailbox. This is equivalent to the user dragging and dropping the email themselves. Note that EFA does not store emails in a separate repository. So if you are looking for an email, you do so in the usual way in your mail client.

Filing strategies

EFA offers ten filing strategies, which can be selected by the user. Our personal favourite is Smart Guess 1, since it combines several filing strategies and is a good balance between accuracy and computing time.

Smart Guess 1: Is a composite filing strategies

EFA will first carry out a sequence of analyses where it will only apply the next filing strategy if the search result from an earlier strategy was empty.

Sender. If me then everyone else.

Domain

Subject

It will then conduct a search based on all of the following strategies

Popular Mailboxes

Recent Mailboxes

Favourites

Finally, EFA will aggregate and prioritise the search results for a consolidated list of recommendations

Smart Guess 2 applies all of the filing strategies from Smart Guess in sequence. It is more thorough than Smart Guess 1, which comes at the price of slower speed.

Popular Mailboxes is a smart list of past filings. EFA keeps track of past filings, aggregates them and suggests them back to the user. Mailbox Rank is being updated with each new filing.

Recent Mailboxes is a plain list of past filings. Most recent mailboxes are on the top of the list. Unlike popular mailboxes, the list is not aggregated.

Favourites: These are set under favourite mailboxes in preferences -> filing. This setting is great if you want to include particular project folders.

Sender: EFA looks into the FROM field of a selected email and looks up mail folders in which other emails from this sender reside.

Sender. If me then everyone else. as above, but if the user is the sender of the email, then EFA will instead look at the recipients of the email.

Recipients, excluding myself. All recipients of a selected email, excluding myself.

Subject. EFA analyses the subject line of a message and proposes mailboxes that contain messages with similar subject words.

Domain. Same as the **Sender** filing strategy, but with a wider focus, as it looks at email domains, such as @foo.com.

Main Features

Individual Filing

The filing of a single email or group of emails

Individual Filing is EFA's default behaviour and probably the most frequently used feature. Generally, a user would select one or more emails in the mail client, usually from the inbox, and then click on a list entry in EFA. This files the email(s) into the chosen mailbox. The relevance column indicates the relative popularity of the proposed mailboxes in relation to the selected email(s).

Scanning a mailbox

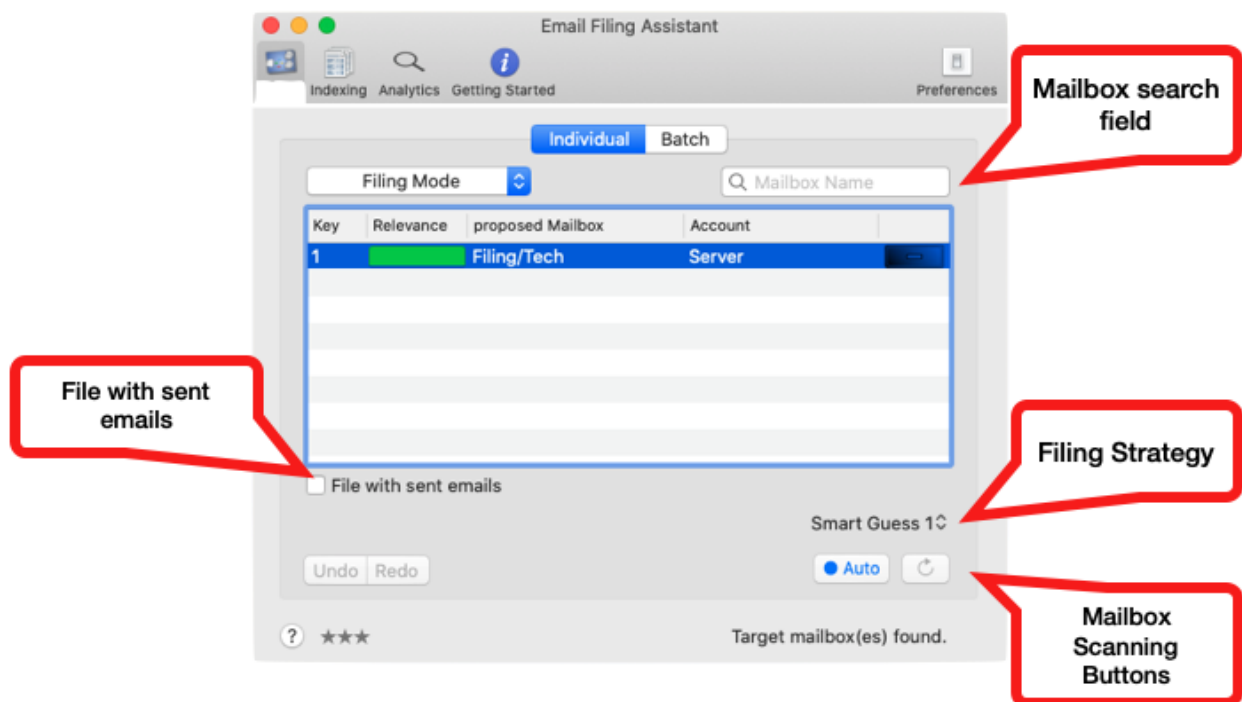


Figure: The main user interface elements for filing

At the bottom right of the window are the two mailbox scanning buttons. 'Auto' regularly scans the mailbox about every two seconds. The user can instead choose to scan a mailbox with the right circle-shaped button manually by deactivating automatic mode.

Selecting a filing strategy

Above the mailbox scanning buttons is the filing strategy selection menu. From here, the user selects the most suitable filing strategy. See also: Filing Strategies.

Manually searching for a mailbox

If EFA does not present a suitable option, the user can manually search for a mailbox by typing into the mailbox search field. EFA will update the filing suggestions in real-time. If automatic mailbox scanning is active, EFA will temporarily disable it until the mailbox search field is cleared.

File with sent emails

By selecting this option, EFA will open a separate window that contains up to 25 of the most recently sent emails. The user can manually choose emails that should be included in the next regular filing transaction.

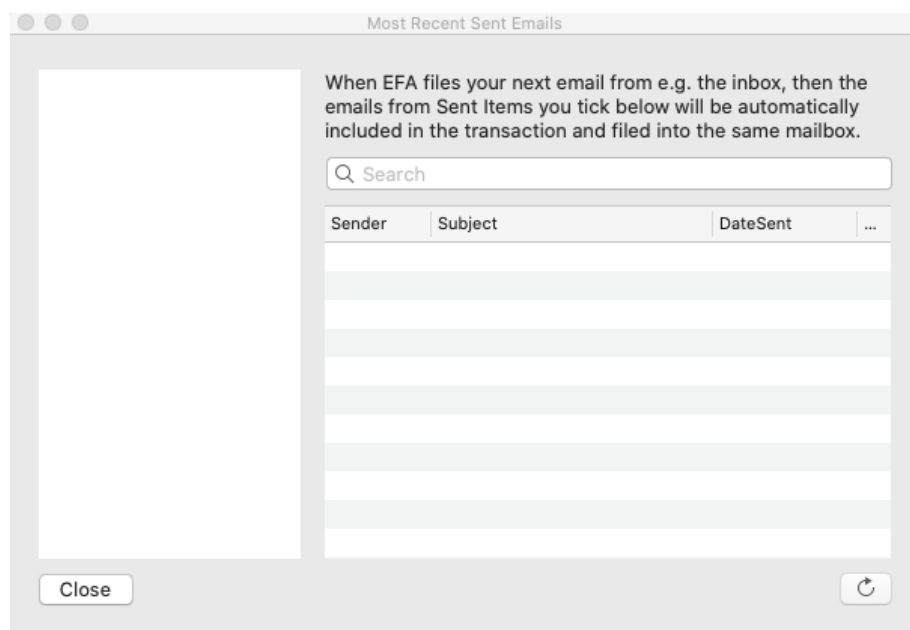


Figure: The most recently sent email window

Batch Filing

Batch filing is the automatic filing of emails from an entire mailbox, such as Sent Items or Inbox. Depending on the options chosen, EFA will move some or all emails away from the selected mailbox. A preview option allows the user to check the likely outcomes of the process before committing to any actual changes.

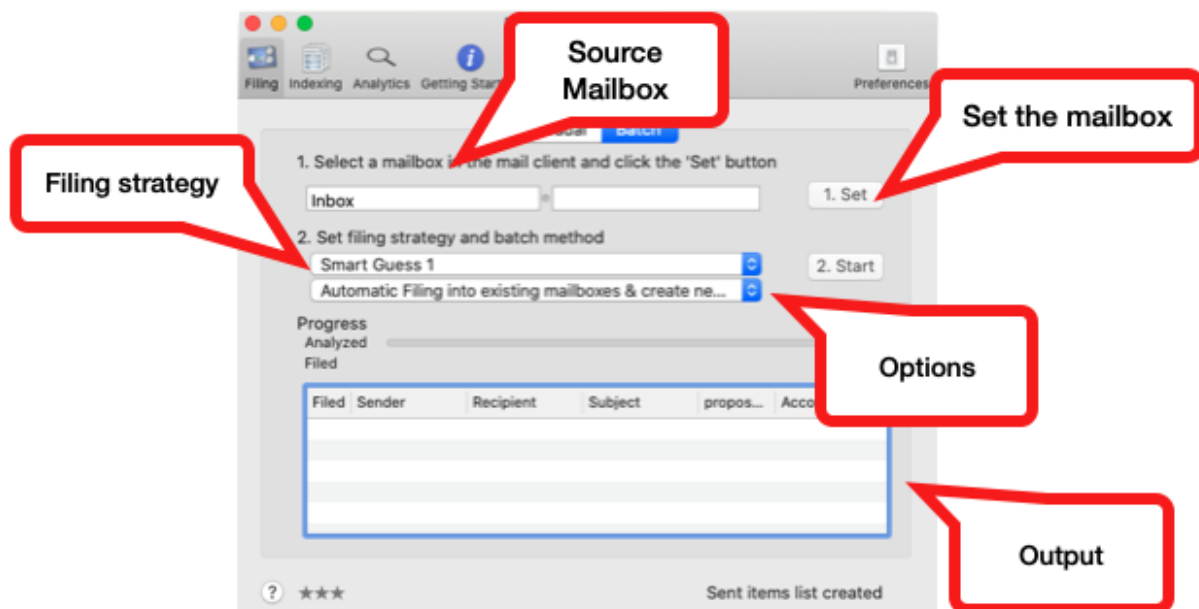


Figure: Main Batch Filing user interface elements

To use batch filing, EFA must be told which mailbox it should batch file from. Click on a mailbox in the mail client and then go back into EFA and click on the '1. Set' button. EFA will copy the name of the mailbox and its account name into the text fields

Options:

Batch filing has 4 options

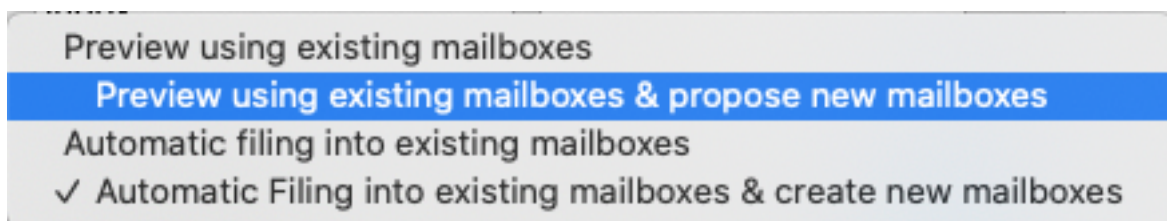


Figure: Batch filing options

Preview using existing mailboxes

EFA will work with the mailboxes that already exist and suggest suitable mailboxes as best as possible. EFA will not file any emails.

Preview using existing mailboxes & propose new mailboxes

EFA will work with the mailboxes that already exist and propose to create new ones as needed. EFA will not file any emails.

Automatic filing into existing mailboxes

EFA will work with the mailboxes that already exist and suggest suitable mailboxes as best as possible. EFA will file emails!

Automatic filing into existing mailboxes & propose new mailboxes

EFA will work with the mailboxes that already exist and create new ones as needed. EFA will file emails !

Note: New mailboxes will be created in the folder the user has set in Preferences > Filing > Mailbox Creation. EFA will prompt the user in case this setting is empty.

The user can open a popup window to file emails manually (if in preview mode) or check on the filings (automatic mode). EFA will present all options it has identified. In preview mode, an email gets filed by clicking on one of the options. This is an efficient way to clean up an entire mailbox whilst being in complete control of the filing process.

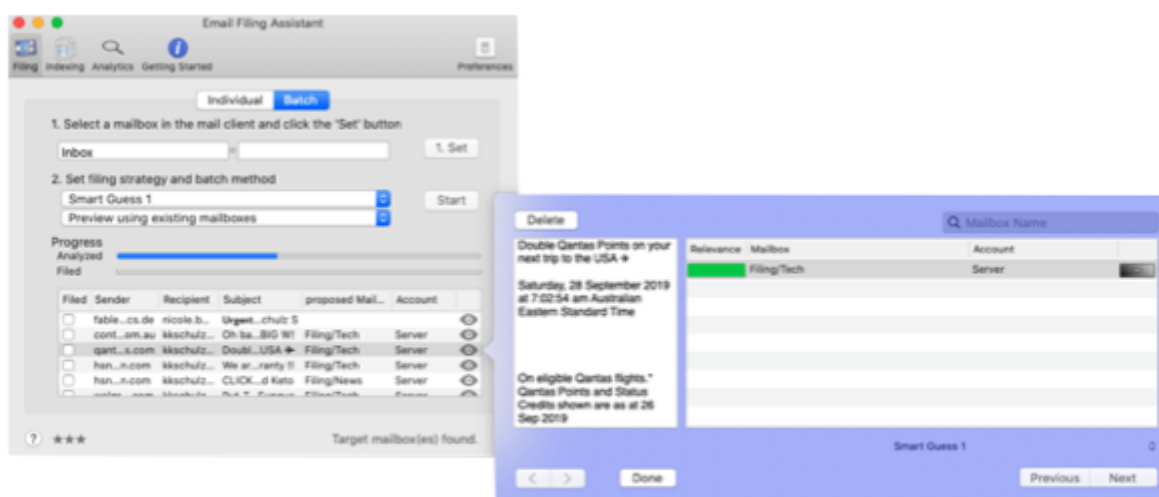


Figure: Batch filing preview mode with open popup window

Email Reply

A workflow that joins the steps of sending a reply email, filing it and the original email.

Replying to an email with EFA

To use Email Reply Mode, select an email in the mail client and then in EFA, click on Email reply mode in the mode selector menu, or use the key combination ⌘⇧R.

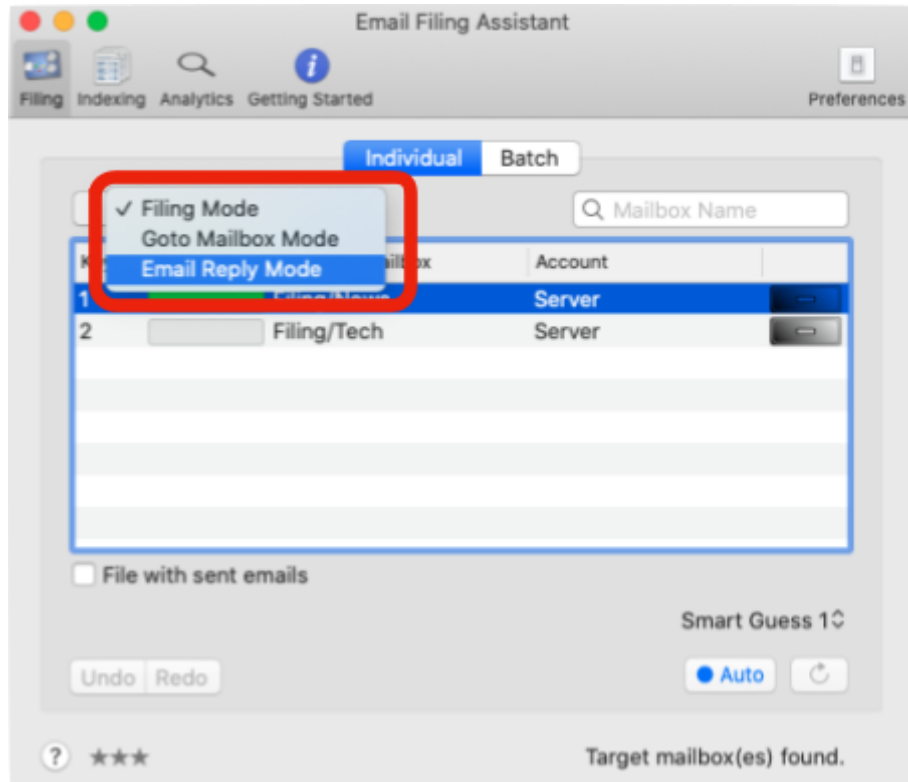


Figure: Entering email reply mode

EFA will open a reply email of the original email. A red border will appear around the EFA window to indicate that EFA has entered into Email Reply Mode.

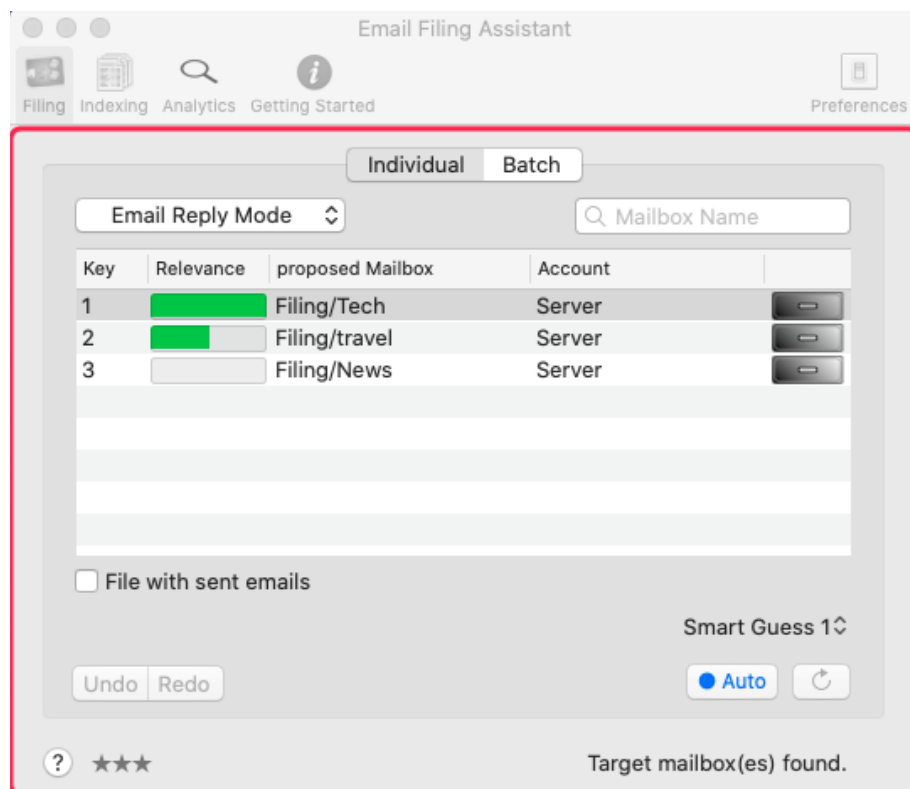


Figure: EFA in email reply mode (red frame)

Edit the email as you would normally do. **But don't send it!**

Sending an Email

To send the email, click on one of the proposed mailboxes in the EFA window (or HUD). EFA will then send the email via the mail client. Once the email is sent, EFA will file it from the Sent Items mailbox into the mailbox that was chosen earlier. If the File related option was chosen, EFA will also file the original email in the same transaction.

Once the email has been sent, EFA will exit Email reply mode.

Notes:

- To exit email replay mode manually, simply choose another mode from the mode selection menu. If EFA has previously created a draft email, it will remain on screen.
- EFA will not notice if the user sends an email in the normal way without EFA
- EFA will not notice if the user closes the draft email
- For very large email (attachments) when the sending process might take more than 1 minute, EFA might not be able to file the email from Sent Items.
- **EFA Pro: The automatic filing of the reply email only works if the subject and the receiver of the email are not manually edited by the user. This is due to a behaviour in Outlook which does not provide updates to the receivers and subject line via the scripting interface.**

Preferences

EFA maintains all settings in one central place: The preferences window. It can be opened via a click on the preferences symbol or via ⌘, on the keyboard. Knowing the preferences can make a significant difference to the efficient use of EFA. Users are strongly encouraged to familiarise themselves with them.

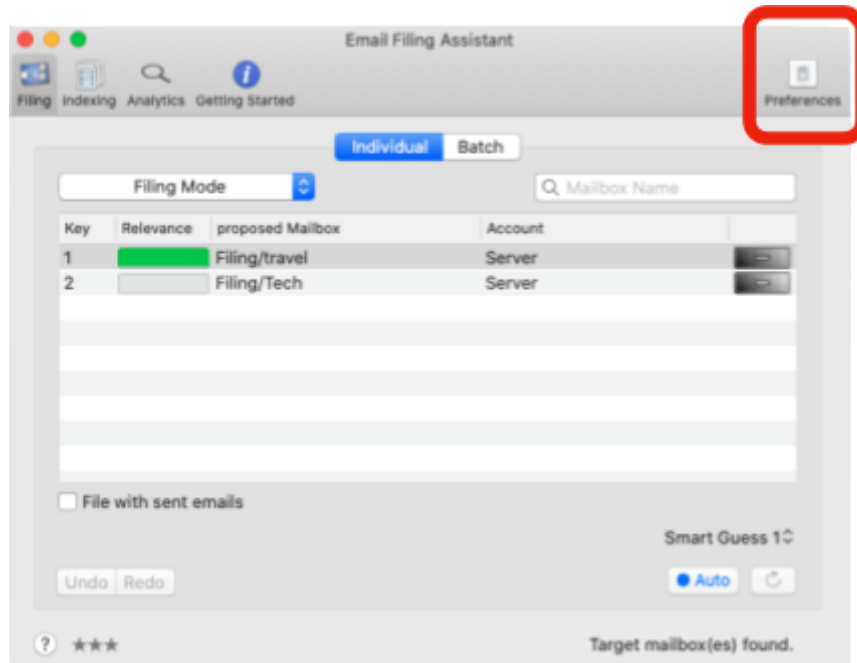


Figure: Opening EFA preferences from the main window

Indexing

The options on this page influence the indexing process

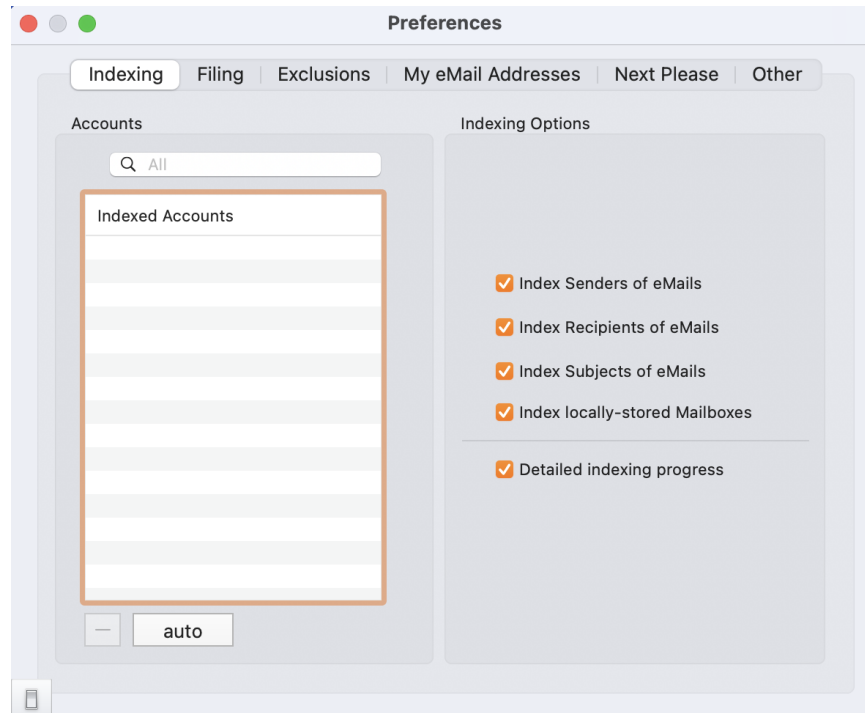


Figure: Indexing preferences

This page lists all mail accounts that EFA has recognised during the initialisation process on the left-hand side. Accounts can be manually removed from EFA by clicking on the - button. The 'auto' button will repeat the automatic account detection process.

On the right-hand side of the window are the indexing settings. You can deselect options. This will exclude them from the next indexing process. For example, you can choose for EFA to not index the subjects of emails. Note that these settings will only take effect next time you run the indexer (fully or partially).

The *Detailed indexing progress* settings influence the displaying of additional information about the indexing process, Deactivating this setting will increase the speed of the indexer.

Filing

File Related

Option relates to Email Reply Mode only

Active: EFA co-files the original email with the reply email

Inactive: EFA only files the reply email, but not the original email

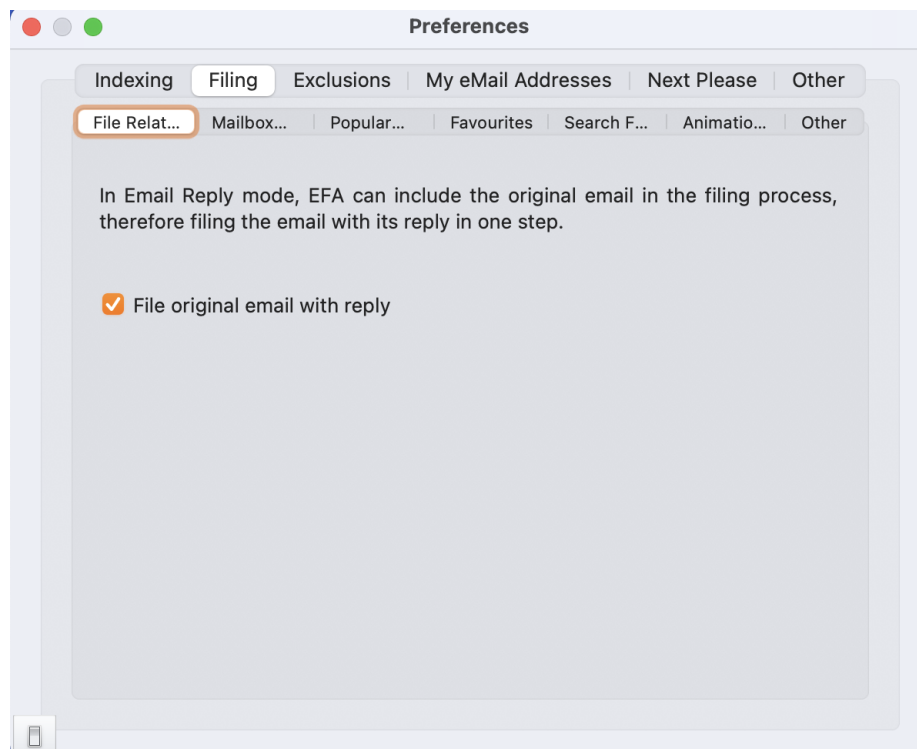


Figure: Preferences: Filing > File related

Mailbox Creation

Option relates to Batch Filing mode only

In Batch filing mode, EFA can automatically create sub mailboxes for emails that have no obvious home yet. In this option, you set the mailbox under which EFA should create sub mailboxes. Click on a mailbox in the mail client (EFA: Apple Mail or EFA Pro: MSFT Outlook) and then click on the 'Set' button in the EFA window. EFA will read the mailbox name and account name and copy them in the text fields. Note that you cannot edit those fields directly. This is to avoid typos to ensure that the mailbox reference is valid.

For further details, see the batch filing section.

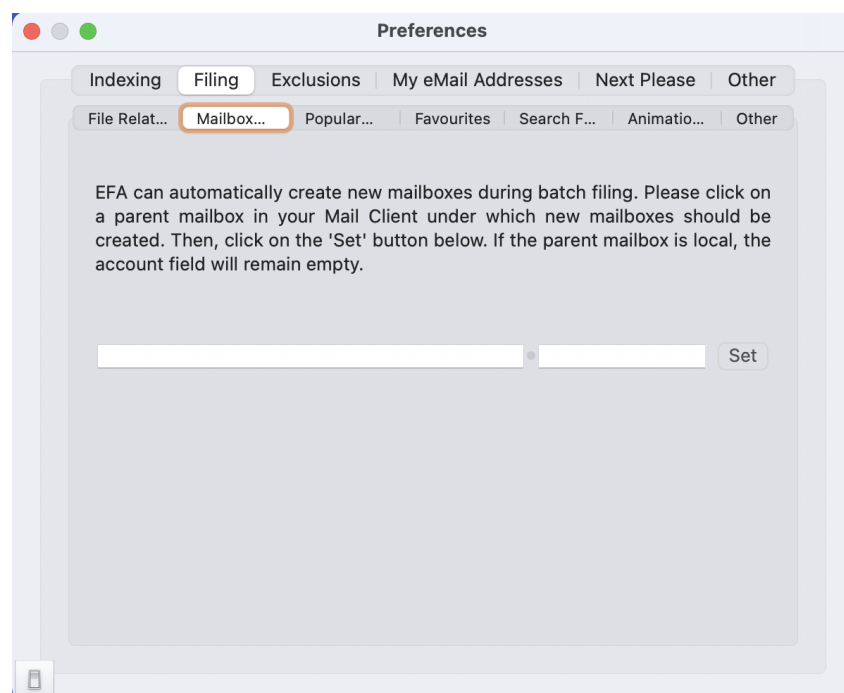


Figure: Preferences: Filing > Mailbox creation

Popular and Recent Mailboxes

Option relates to: Popular, Recent mailboxes, Smart Guess 1& 2 filing strategies, Analytics

EFA remembers every email filing process it conducts. It uses this information to refine its suggestions and to provide useful analytics in the Analytics tab. However, should you want to delete the filing history (akin to a browsing history), you can click the 'Reset' button. Note that resetting this part of the database will limit the function of the above-mentioned functions.

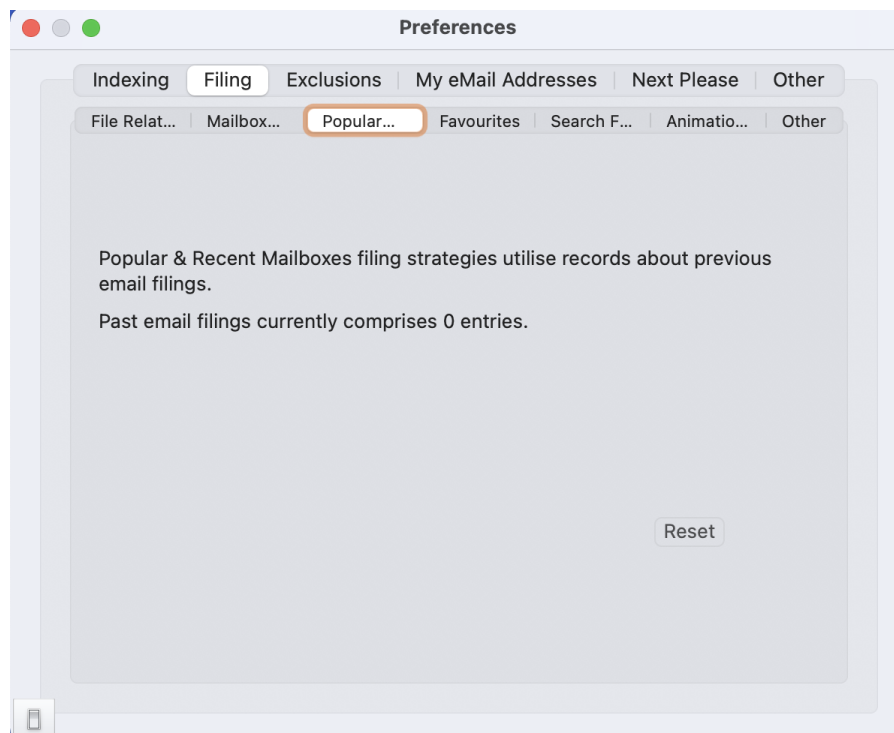


Figure: Preferences: Filing > Popular and recent mailboxes

Favourites

Option relates to: Favourites, Smart Guess 1&2 filing strategies

This is a list of mailboxes that the user is particularly interested in. For example, a project, a company, or a friend. It is useful to add newly created mailboxes to this list as they won't contain emails initially, so EFA won't yet have sufficient data to suggest them. The 'auto' button can add the ten most popular mailboxes to this list automatically. To remove an entry, select it and click '-'. To add a mailbox, select it in the mail client and click '+'

Note that determining the popularity of a mailbox is computationally intense. Using the 'auto' feature can take a couple of minutes when there are many mailboxes to analyze. EFA can't be used for other tasks while the process runs.

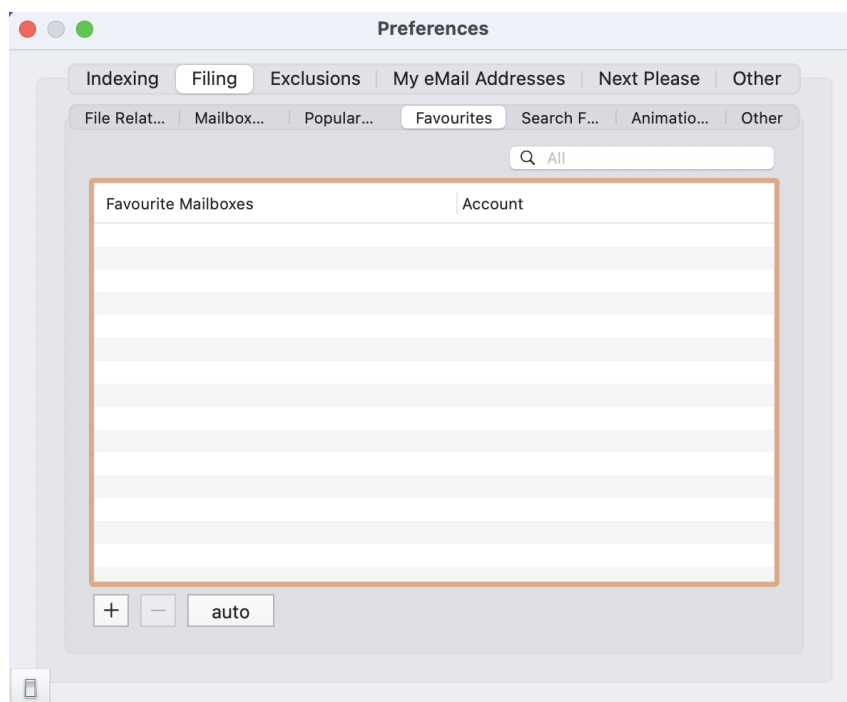


Figure: Preferences: Filing > Favourites

Search Field

Option relates to: The search fields in the Main window and the Head up Display

The purpose of the search field is to manually search for mailboxes in case the selected EFA filing strategy does not list it.

EFA can clear the mailbox search field automatically when

- 1) an email has been filed by EFA,
- 2) the email selection changes in the mail client.

Note that the search fields in the main window and in the HUD mirror each other and will always show the same content

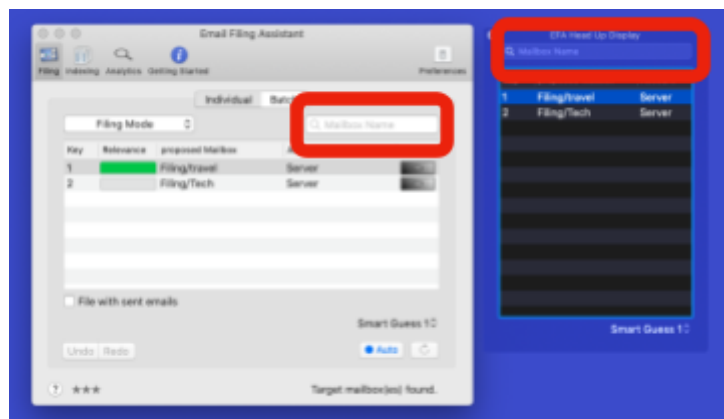


Figure: Mailbox search fields in the main window and in the mini view

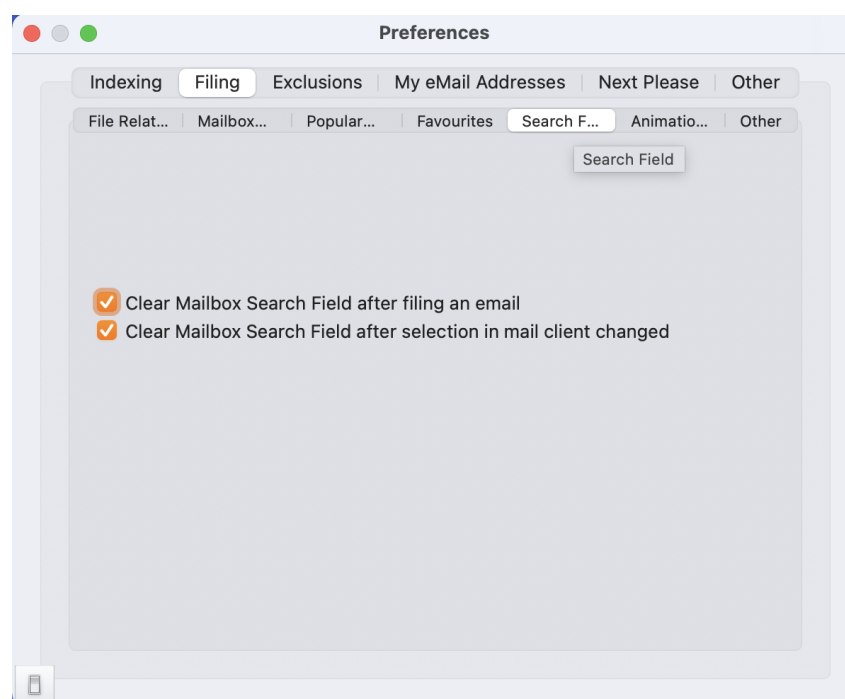


Figure: Preferences: Filing > Search Field

Animations

Option relates to: Individual Filing. All filing strategies, except for Mailbox Creation

The animations provide a visual representation of emails and their filing process. They can be disabled by selecting this option.

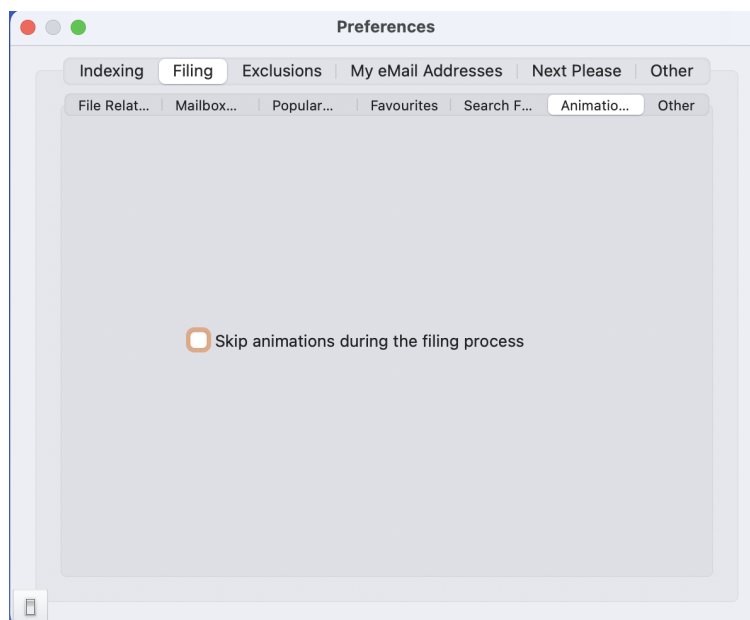


Figure: Preferences: Filing > Animations

Other

Option relates to: Individual Filing. All filing strategies, except for Mailbox Creation

EFA's normal behaviour is to move emails. This can be changed to copying emails.

The 'show most recent mailbox option ' keeps displaying the results of an analysis, even if no email is selected. This feature is useful when the user first moves an email to its main folder (simple click on the folder in EFA), then switches to the folder (option-click in EFA), then copies it to one or more additional filing folders (shift-click in EFA).

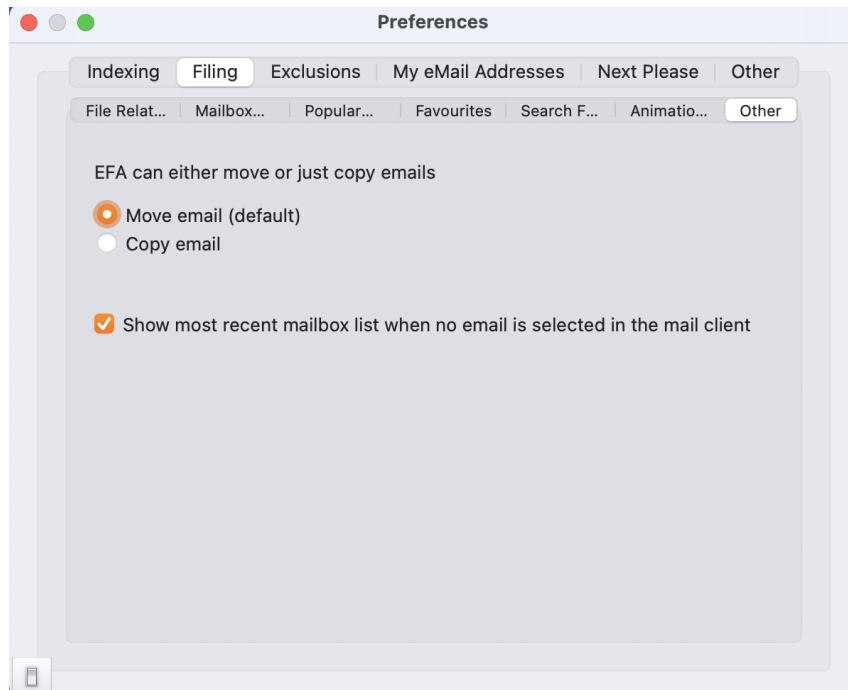


Figure: Preferences: Filing > Other

Exclusions

Excluded Mailboxes: Option relates to: Filing, Indexing

EFA can automatically disregard certain mailboxes. Most users don't file emails in their draft, Junk, Inbox, Outbox. EFA automatically populates this list when it self-initialises. However, should you find that you do want some of these included by EFA, you can remove them with the '-' button. The 'auto' button will repeat the exclusion settings from the initialisation process. To add an arbitrary mailbox from the mail client to this list, select it in the mail client and click the '+' button.

Excluded Subject words: Option relates to: Subject Filing strategy

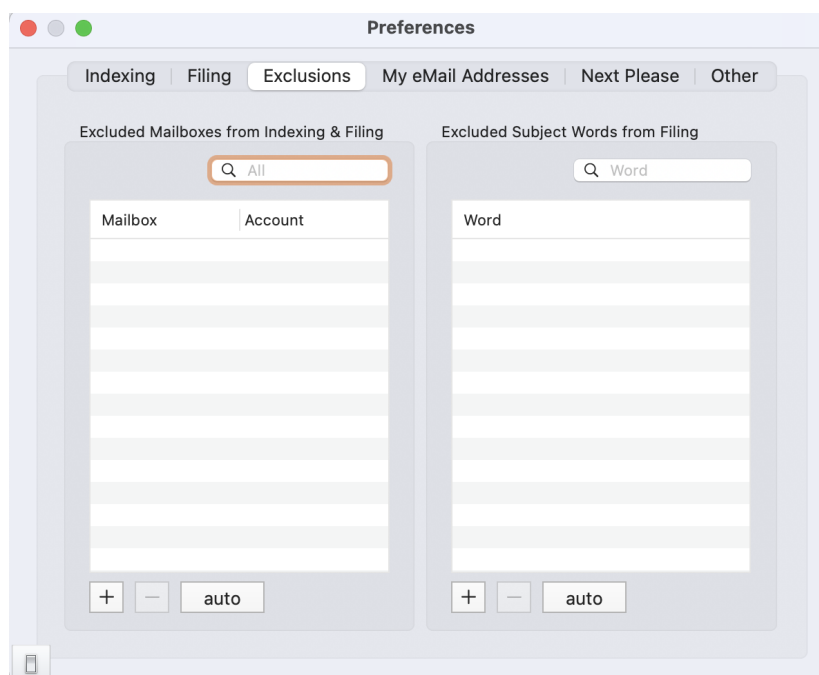


Figure: Preferences: Exclusions

There are a number of common words that don't have any discernible value to the subject filing strategy. These are words, such as a, the, fwd:, re:, ... After the indexing process is complete, click on the 'auto' button to load the 10 most frequent subject words from the EFA index. Every time you click 'auto', the next 10 words are added. Individual words can be removed by selecting them in the list and clicking on the '-' button. To add a specific word, click '+', which creates a new entry at the bottom of the list. Then, edit this entry and confirm with the enter/return key.

My Email Addresses

Option relates to: Sender, if me then everyone else filing strategy

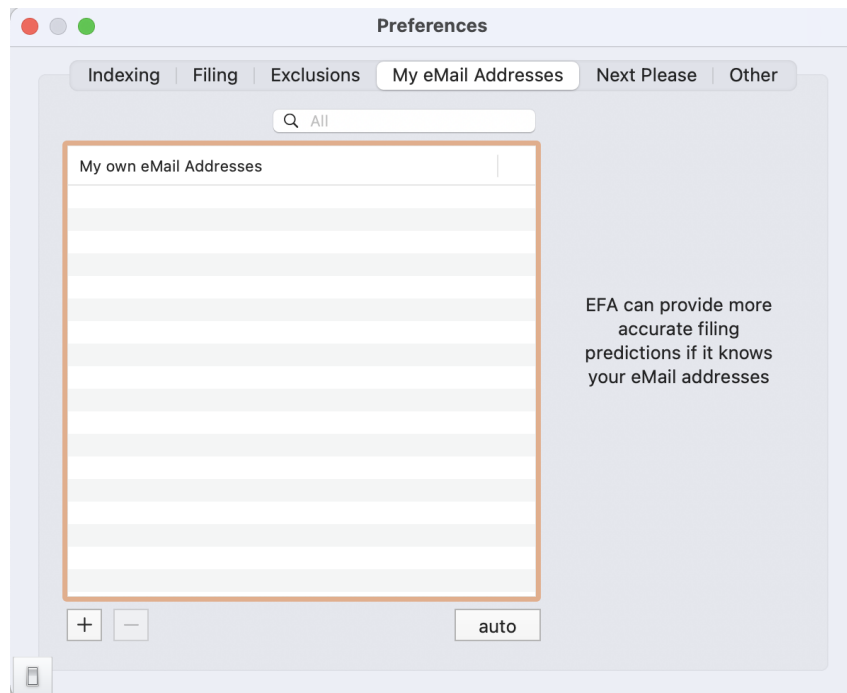


Figure: Preferences: user's email addresses

This is a list of the user's email addresses. The 'auto' button retrieves the user's email addresses from the mail client. An entry can be removed by selecting it from the list and pressing the '-' button. An email address can be added manually by clicking on '+', followed by editing of the new placeholder entry a@b.c.de.

Next please

Option relates to: Individual filing

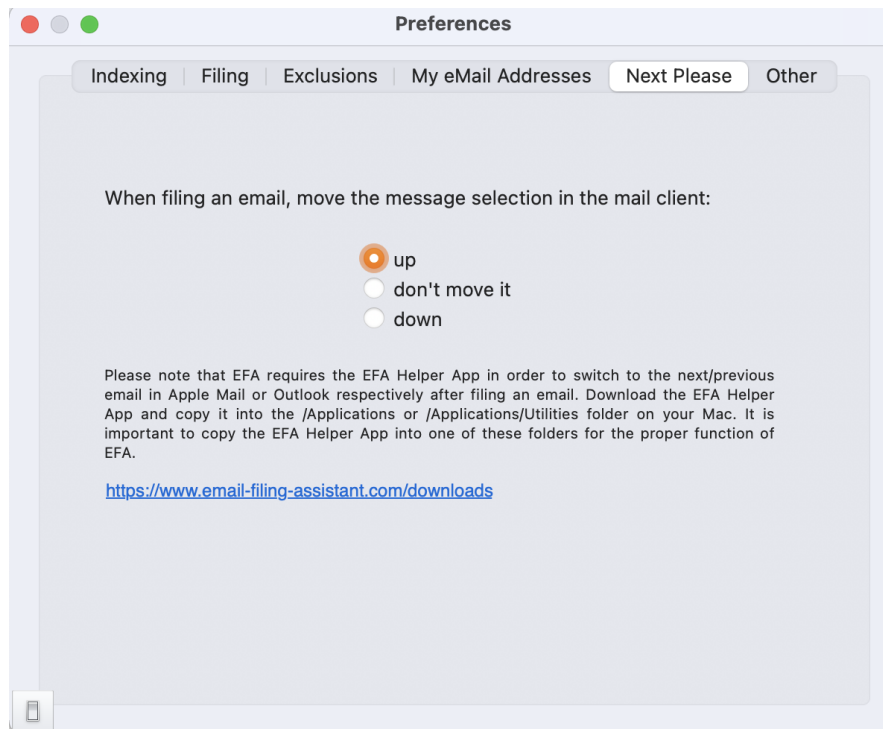


Figure: Preferences: Next please

EFA can automatically switch to the next or previous email in the list when it files an email. This saves the user from another click in the mail client, making email management more fluent. The function requires the installation of a separate helper tool. Please see the instructions in the window. We apologise for the inconvenience that this brings. The function was previously part of EFA but had to be branched out into a separate tool at the request of Apple.

Other

Option relates to: Presenting filing options, filing

Object Reference Caching: EFA uses an internal cache of mailbox object references from the mail client to accelerate its function. Select this option to use this functionality. EFA needs to be restarted for changes to take effect. See also: Object Reference Cache

Hide HUD: EFA monitors the mail client and hides the head up display when the mail client is minimised or hidden. The HUD will automatically reappear when the mail client is displayed.

Simplified HUD: The simplified HUD only shows the search field and the list of mailbox names.

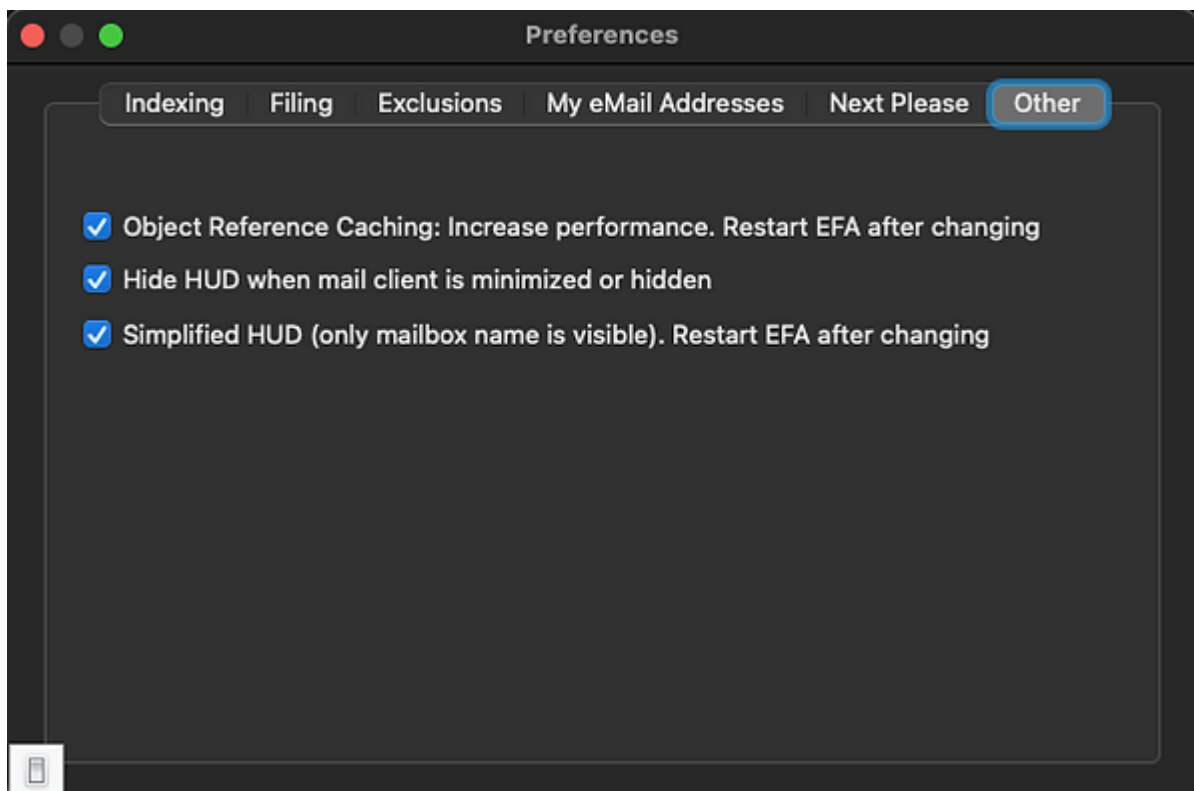


Figure: Preferences: Performance

EFA Mail Extension

This feature is exclusive to EFA for Apple Mail

EFA 5's primary focus is the implementation of the EFA Mail Extension for Apple Mail through MailKit to integrate some functionality of EFA directly into Apple Mail: As the user is writing an email, the EFA Mail Extension lets them select the folder into which EFA should file the mail after sending. This feature eliminates the manual step of filing the email from the Sent Items mailbox. It has been the #1 feature request by EFA users. The

EFA Mail Extension requires the main EFA 5 app to run and Object Reference Caching to be active (see EFA preferences -> Other).

To use the EFA Mail Extension, perform the following steps:

In EFA Preferences > Other, check that Object Reference Caching is enabled (see Figure above)

Open Mail and in Preferences > Extensions, enable the EFA Mail Extension

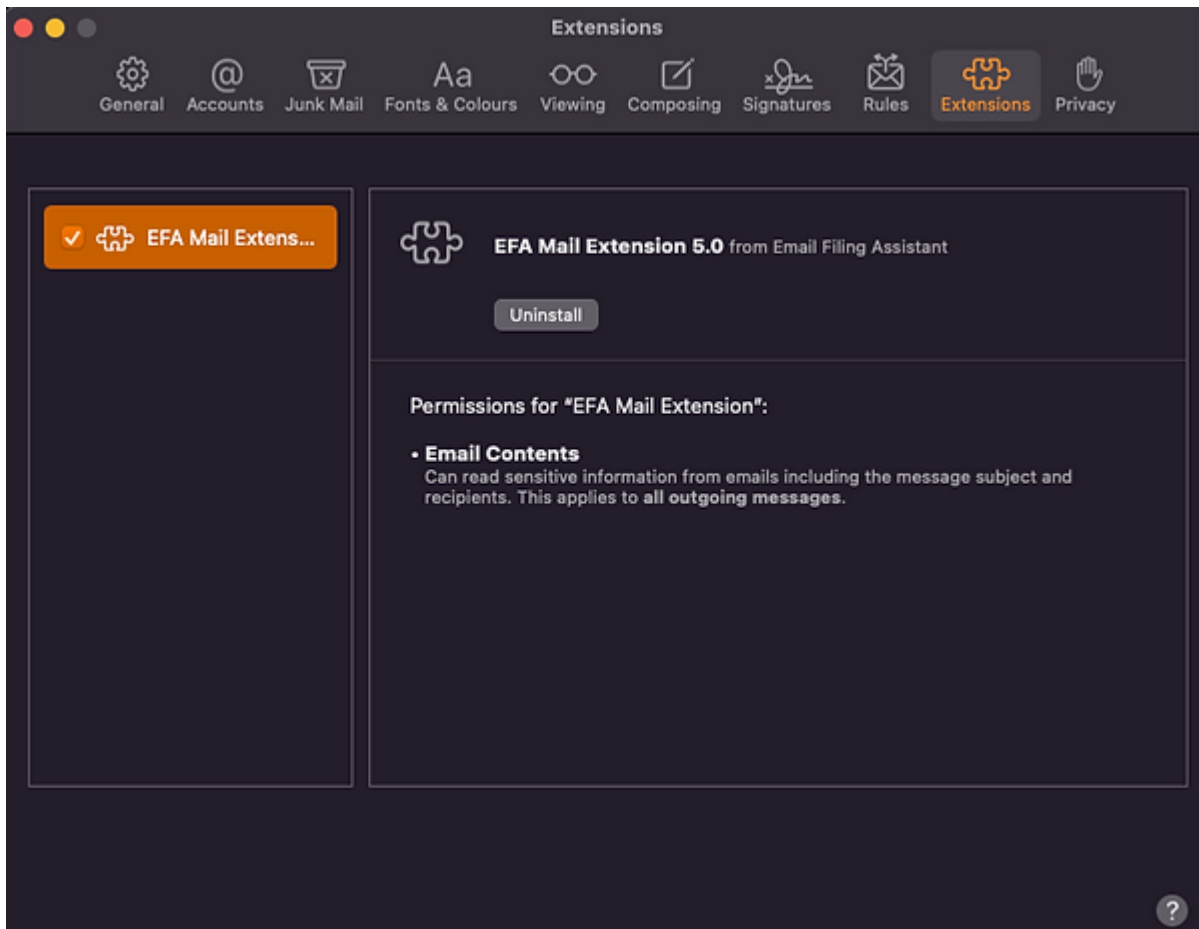


Figure: Mail Preferences: Enable EFA Mail Extension

Close Mail Preferences.

In Apple Mail, create a new email or reply to an existing email.

Fill in the receiver, cc, subject as needed.

Click on the EFA button at the top of your mail editor.

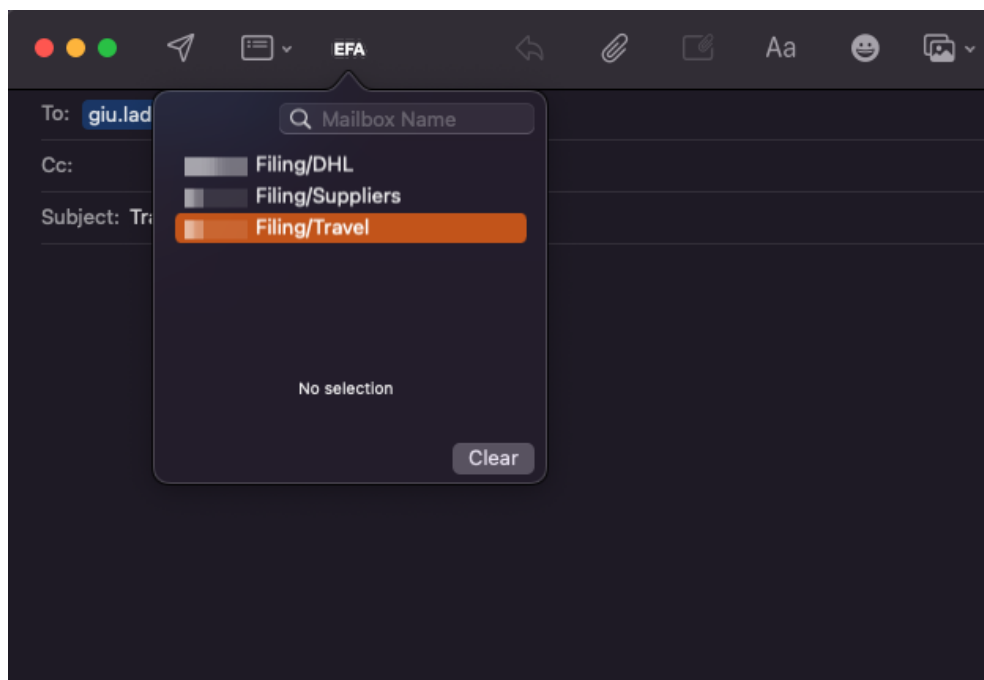


Figure: EFA Extension in a Apple Mail Email whilst drafting.

EFA will suggest potential mailboxes for filing. These suggestions can be influenced by changing the filing strategy in the EFA app.

You can also manually search for a mailbox.

When you are happy with a suggestion, click on it. The EFA plugin will remember it.

When you later send the email, EFA Mail Extension will inform the EFA App to move the email from the Sent Items Folder into the target mailbox. This process runs in the background and can take a couple of minutes until the email is sent and Apple mail has synced back with the mail server, etc. Whilst the EFA App is trying to file the email, you see this indicator in the bottom-right corner of the EFA Window. When it disappears, EFA has successfully filed the message.

Other features

Working with EFA

Main view

The main window is the principal place of user interaction with EFA. It is complemented by two additional views that are slimmer and that fit better next to the mail program, particularly on small screens. In addition, users can use EFA from the macOS Dock, the touch bar and from the keyboard.

Mini view

Keystrokes: $\uparrow$ ⌘T

By clicking on the blue EFA logo in the top left hand of the main window, the mini view is shown in place of the main window. The Mini view has a reduced set of user interface elements, but offers the main functionality required for normal filing operation. By clicking on the blue icon in the mini view, the main view is returned.

Note for EFA Pro users: In EFA Pro, the blue icon is replaced with a yellow icon.

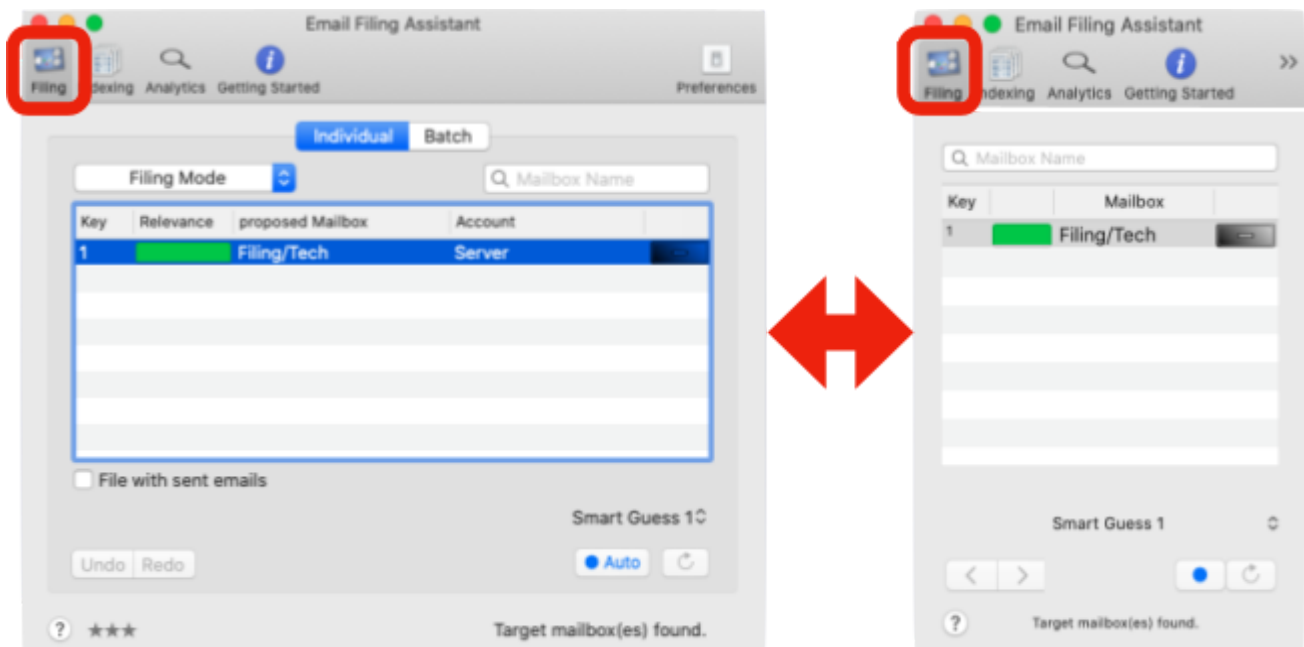


Figure: Switching between the main view and its smaller sibling, the mini view

Head up Display (HUD)

Keystrokes: $\text{⇧} \text{⌘} \text{H}$ (show) $\text{⇧} \text{⌘} \text{TH}$ (hide)

The HUD is akin in size and functionality to the mini view, with two main differences:

- 1) It is further reduced in user interface functionality
- 2) It permanently remains in the foreground of all other windows.

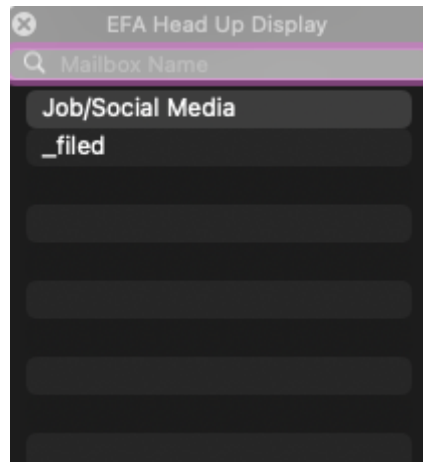


Figure: Head up display

Dock

Emails can also be filed by right-clicking on the EFA icon in the macOS dock. The dock shows the same list of mailboxes as the filing window. In addition, the dock allows the changing of the filing strategy.

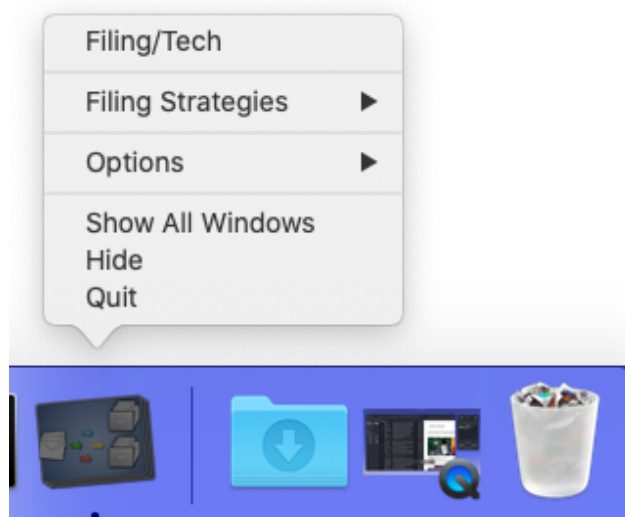


Figure: Preferences: EFA Dock

Goto Mailbox Mode

Keystrokes: ⌘⇧MM

In Goto Mailbox Mode, EFA does not file emails when the user clicks on a proposed mailbox in the window. Instead, EFA opens the mailbox in the mail client. This is a handy shortcut to quickly go to a mailbox to look for an email.

In the user interface, the mode is selected from the mode selector in the main window

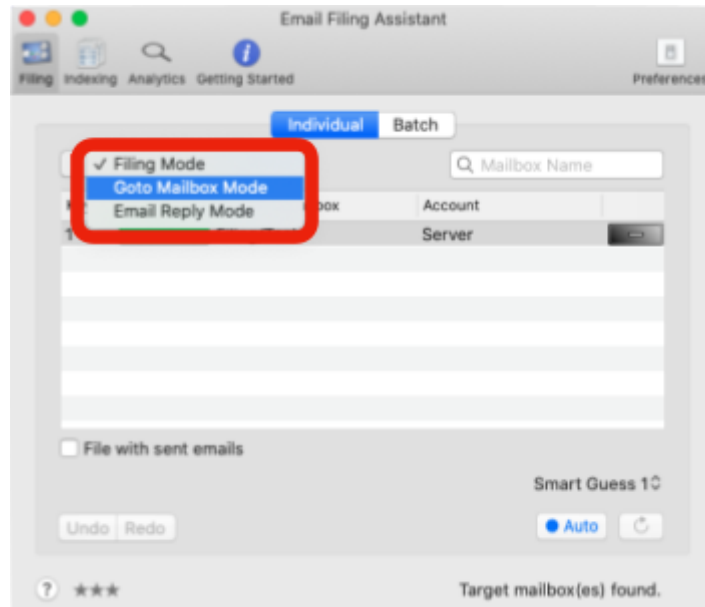


Figure: Entering Goto Mailbox Mode

EFA confirms that it has entered goto mailbox mode by adding a blue frame around its window.

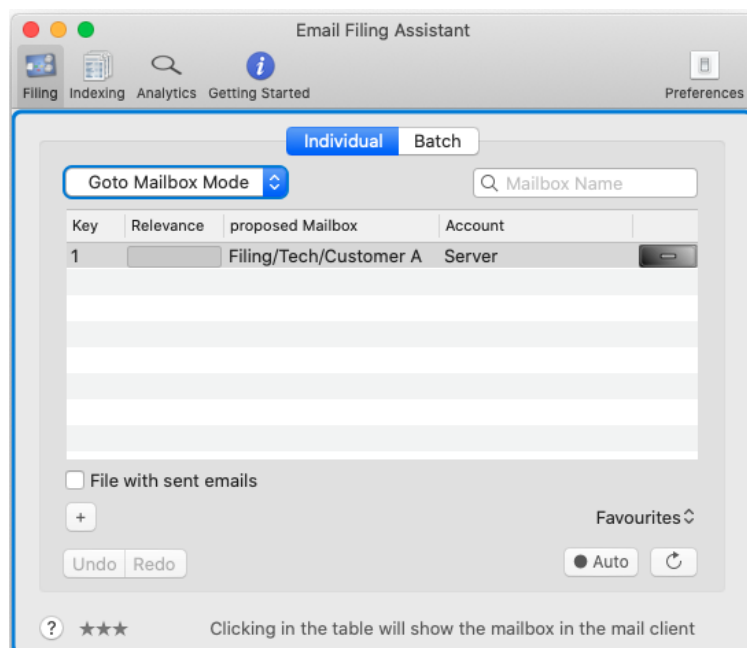


Figure: Goto Mailbox Mode is active

Undo/Redo

EFA can undo the last filing operation, always one email at a time. To use it, click on the Undo button in the main window or the '<' button in the mini view.

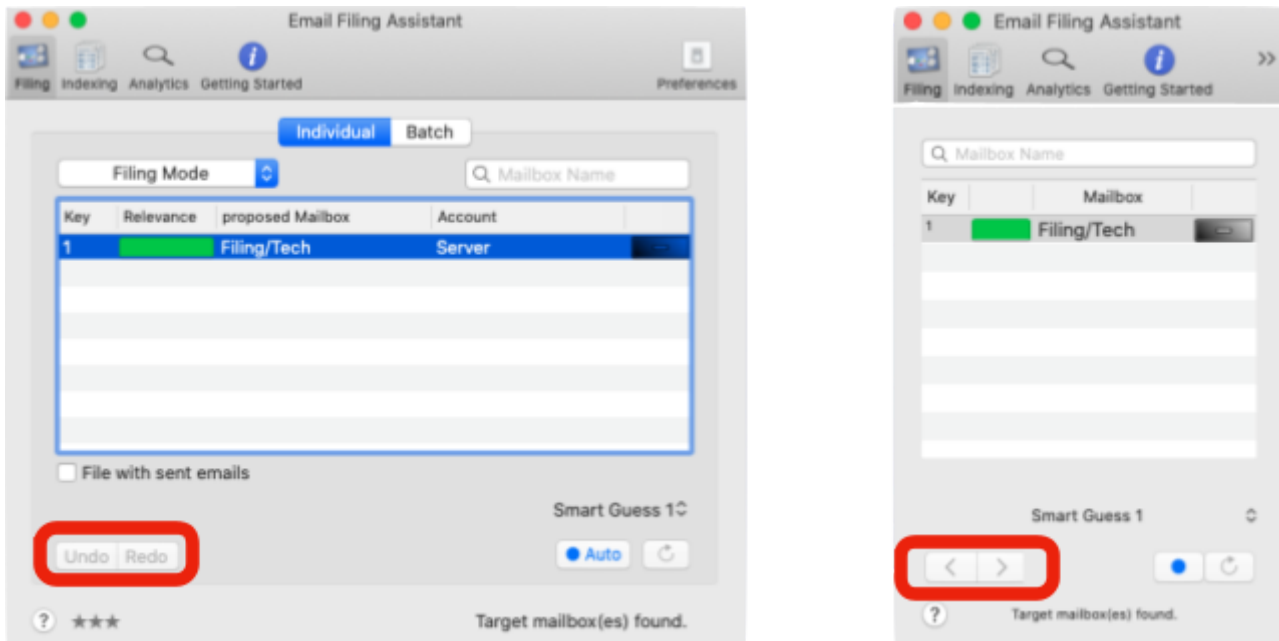


Figure: Undo and redo buttons in the main window and mini view

Redo works differently to what users may be used to in other applications. Re-do literally repeats the filing into the last selected mailbox. This means that if you have just filed an email into a mailbox, then selecting another email and pressing Redo, repeats the filing for the newly selected message.

Context Menu

The Main window, the mini view and the HUD offer a right-click context menu in the individual filing table view.

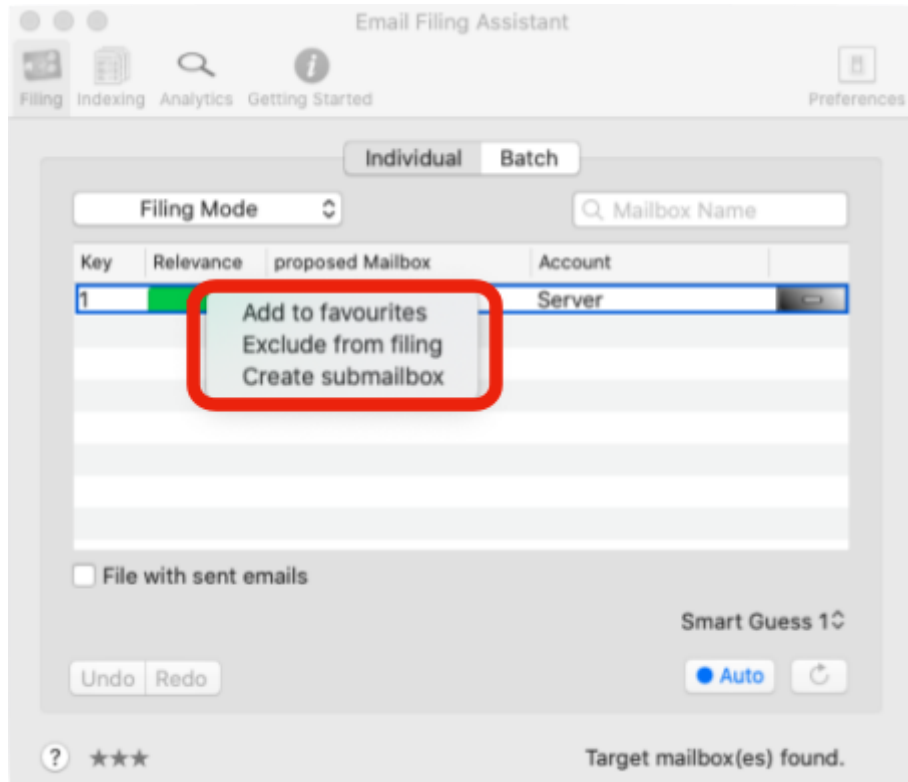


Figure: Filing context menu (also available in mini view and HUD)

Add to favourites

This action adds the selected mailbox to the list of favourite mailboxes. See also EFA preferences > Filing > Favourites

Exclude from filing

This action removes the selected mailbox from future filing proposals by EFA. This is achieved by adding the selected mailbox to the list of excluded mailboxes. See also EFA preferences > Exclusions. If you accidentally excluded a mailbox, you can simply remove it from the list in preferences to include it again for future filing by EFA.

Create submailbox

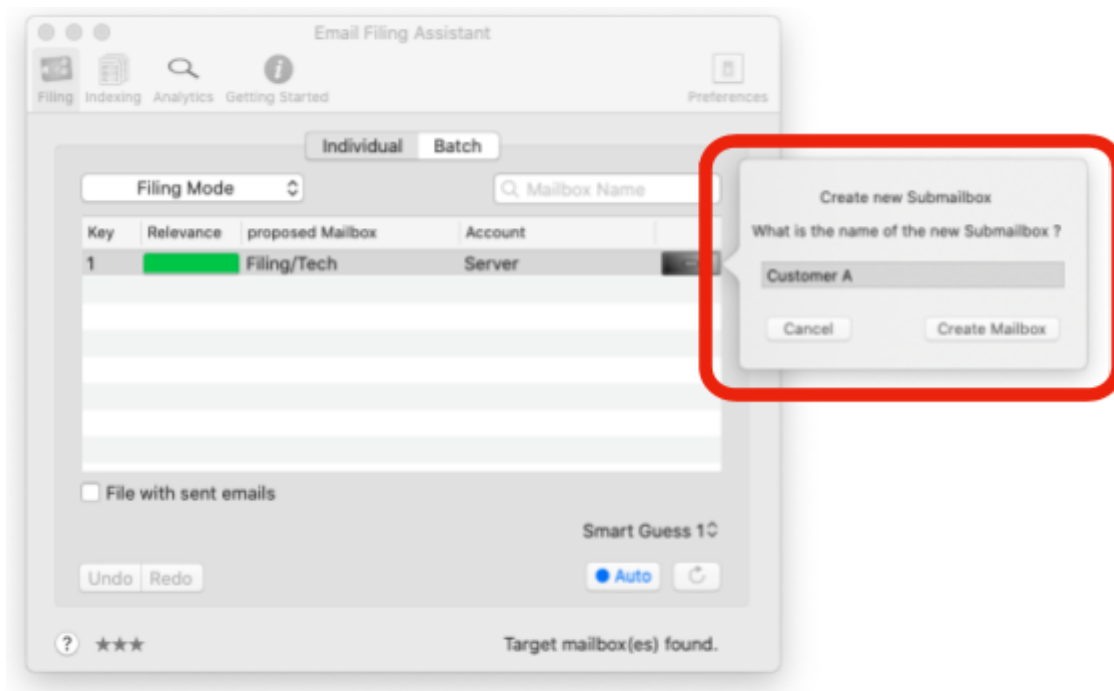


Figure: Creating a sub mailbox

This triggers a workflow to create a sub mailbox under the selected mailbox. EFA will open a popup and ask for the name of the mailbox. The process of creating the sub mailbox can take up to 30 seconds.

Once the sub mailbox has been created, EFA will make it available by adding it to the EFA index, adding it to the list of favourite mailboxes, switching to the Favourites filing strategy and displaying the mailbox.

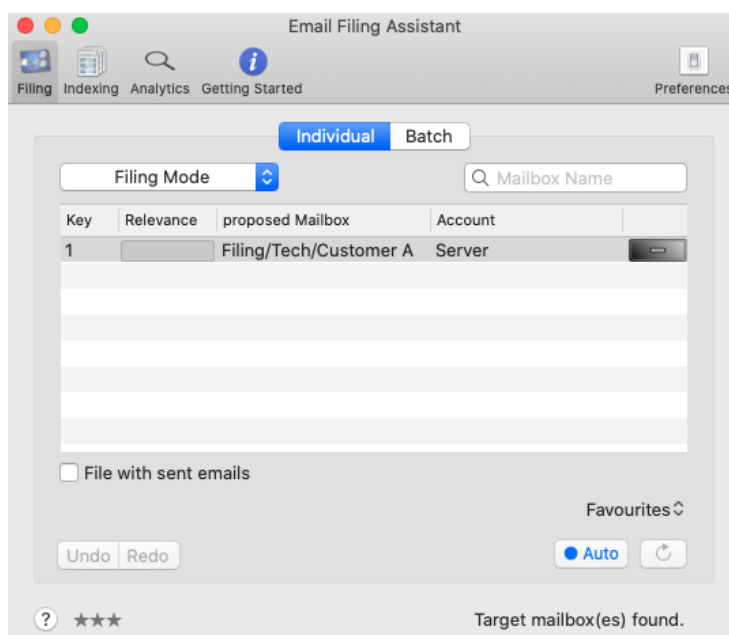


Figure: Sub mailbox created and ready for filing

Adding a manually created mailbox to the EFA Index

EFA has the capability to create mailboxes in the mail client. However, there are situations where the user has created a mailbox manually and wishes to inform EFA about the mailbox, so that EFA can use it for filing. This is called Single Mailbox Indexing.

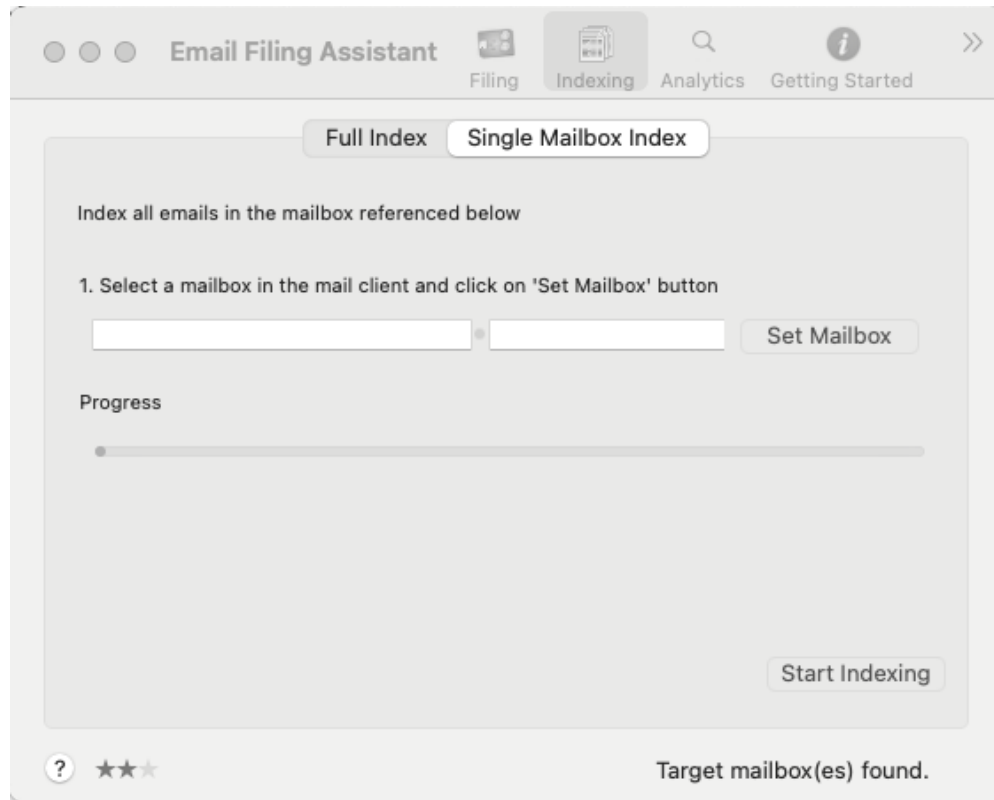


Figure: Single mailbox index

The process is as follows:

1. Click on the mailbox in the mail client that you wish to add to the EFA index and then go back into Indexing > Single Mailbox Index and click on the 'Set Mailbox' button. EFA will copy the name of the mailbox and its account name into the text fields.
2. Click on the 'Start Indexing' button to start the indexing process. EFA will add the mailbox to the index and also index any emails that the user may have already placed in the mailbox.

Analytics

The Analytics window shows information from the EFA index.

Index & Usage Stats

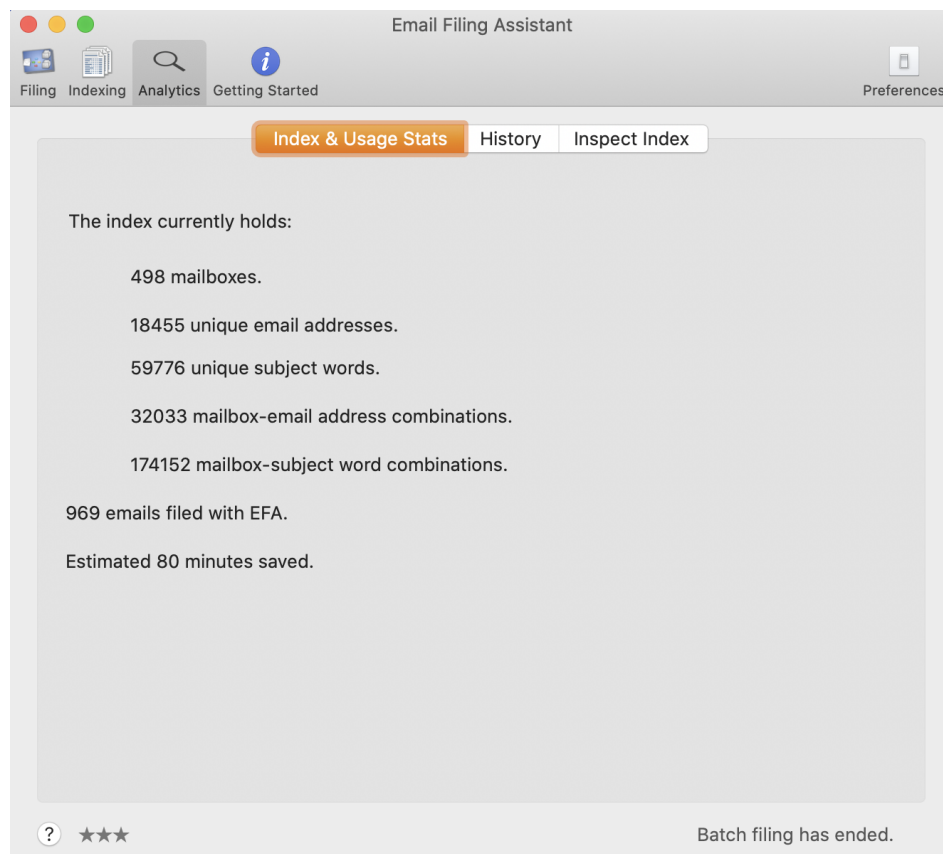


Figure: Analytics > Index and Usage Statistics

This page provides an overview of the number of mailboxes, unique email addresses, etc. in the index database. It also makes an estimate of the time savings achieved through EFA based on the assumption that, on average, the manual filing of an email takes five seconds.

History

This is a list of all the filing transactions EFA has conducted. The list can be reset in EFA Preferences > Filing > Popular and Recent Mailboxes

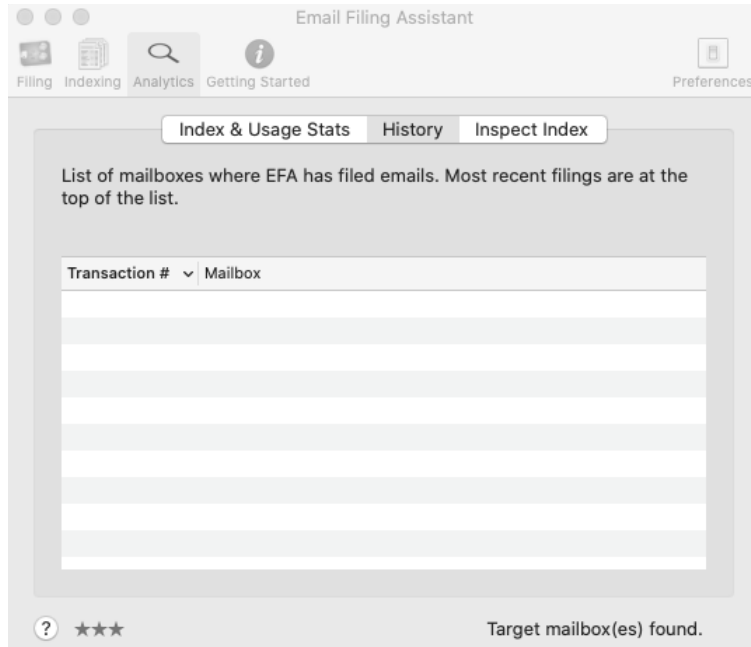
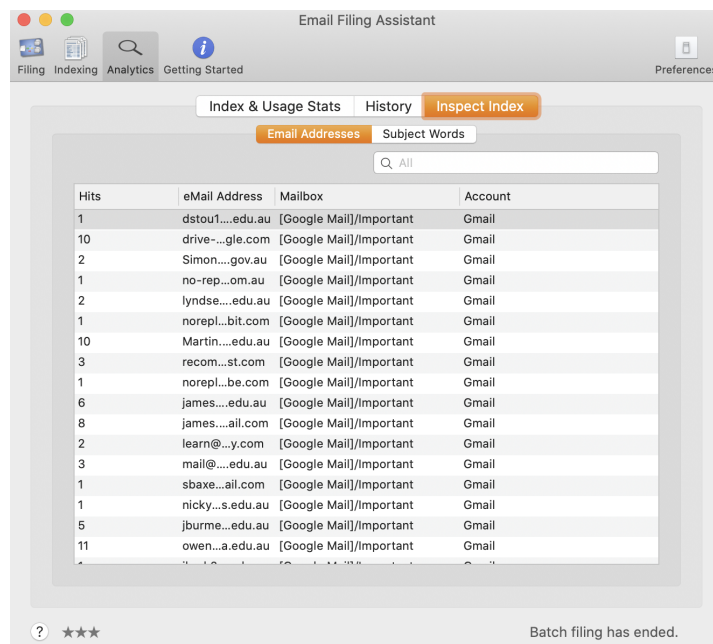


Figure: Analytics > History

Inspect Index

It is possible to search through the index for email addresses and subject words. This is primarily used for diagnostic purposes.



Performance Considerations

Mailbox Object Cache

The slowest part in the chain of operations is the communication link between EFA and the mail clients. To minimise delays, EFA caches the object references of mail client mailboxes when it starts. The mailbox cache can be turned off in the EFA preferences > Performance

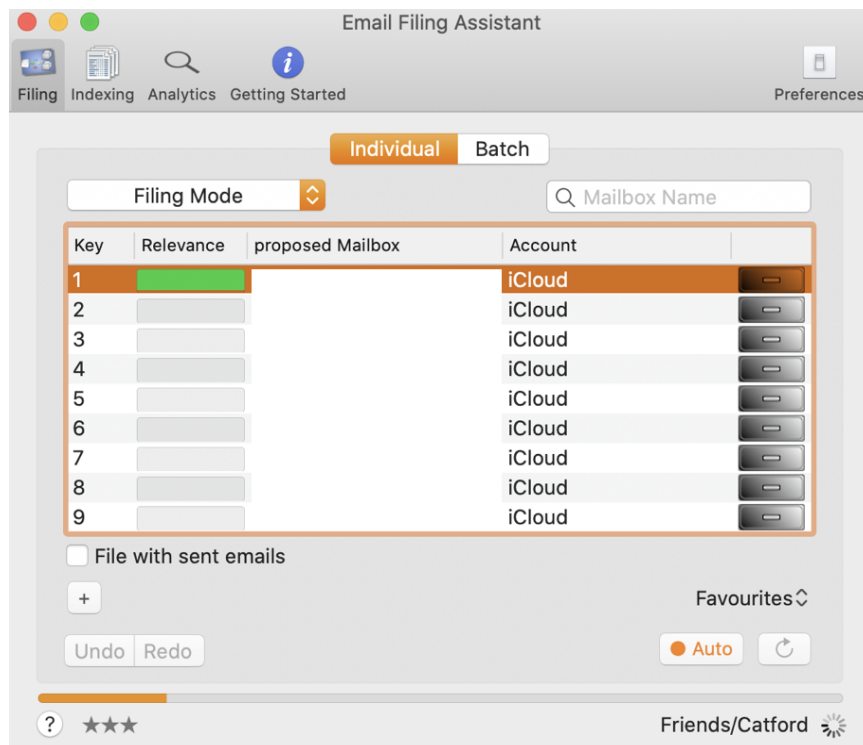


Figure: Mailbox object cache creation at startup

Filing - Animations

The animations provide a visual representation of emails and their filing process. They are nice to look at, but some users might find them distracting or they want that extra bit of speed that can be saved by turning the animations off. See EFA preferences > Filing> Animations.

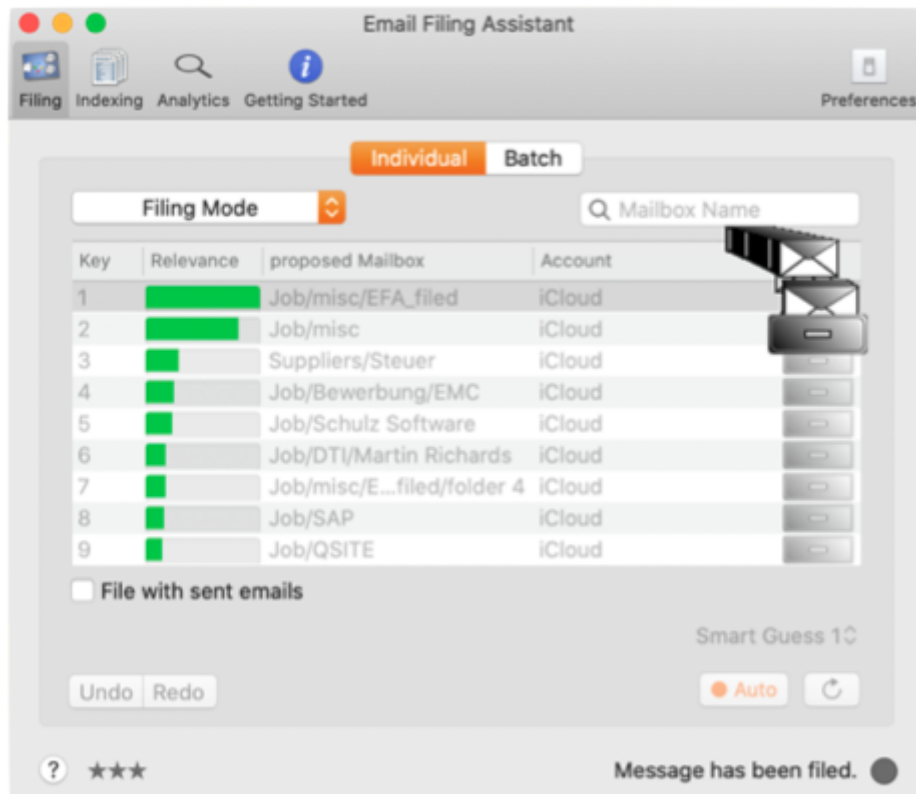


Figure: EFA with filing animations

Indexing

The speed of the indexer can be increased by deactivating the 'Detailed Indexing Progress' setting in EFA Preferences > Indexing > Indexing Options

Summary of Keyboard Shortcuts

Keyboard shortcut	Function
<number>	selects a target mailbox
⇧⌘<number>	selects a target mailbox and files emails in one step
⇧	Files an email
⇧-clicking on a mailbox	copies the email to the mailbox
⌘-clicking on a mailbox	briefly activates goto-mailbox mode
⇧⌘F	Enter Email Filing Mode (Default)
⇧⌘G	Enter Mailbox Mode
⇧⌘R	Enter Email Reply Mode
⇧⌘O	Open the main window
⇧⌘H	Show HUD
⌘H	Hide HUD
⇧⌘S	Shows or hides the Sent Email window
⇧⌘T	Toggles between the Full Window and Mini View
⌘,	Open preferences

EFA Helper

EFA Helper is a utility for EFA and EFA Pro. Its purpose is to change the message selection in Apple Mail and Microsoft Outlook, moving it up or down. This saves the user from performing another click in the mail client, making email management more fluent.

The function was previously part of EFA but had to be branched out into a separate tool at the request of Apple. To install it, follow these steps:

1. EFA Helper can be downloaded from <https://www.email-filing-assistant.com/downloads> (production version)
2. Copy EFAHelper into the /Applications or /Applications/Utilities folders on your Mac.
3. Double click EFA Helper.app

It starts silently and will appear as a little Icon in the Status Bar at the top of your Mac Desktop.  When you click on it, a popup window will open:

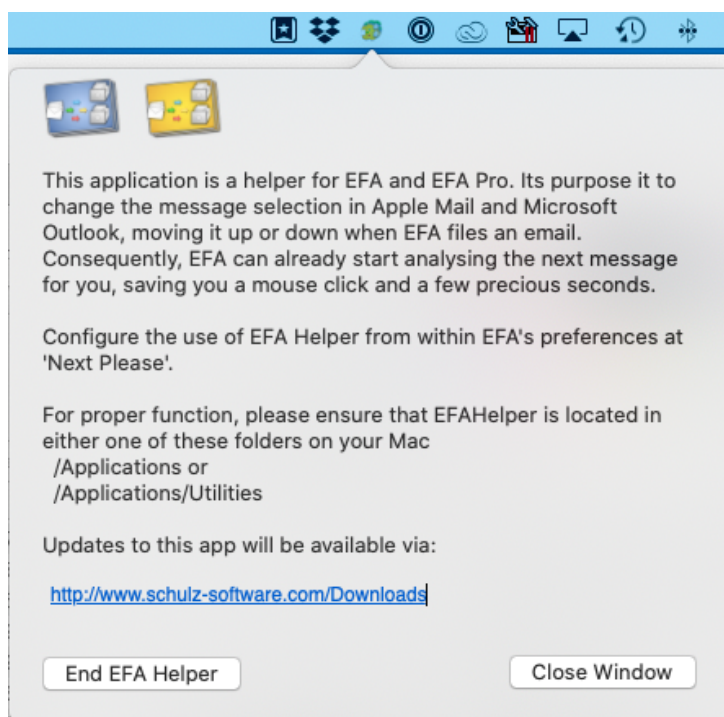


Figure: EFA Helper in the macOS Status Bar

To make use of EFA Helper, please visit the EFA Preferences *Next Please* and set the selection to either up or down.

Next time you file an email in Individual Filing Mode, EFA will instruct EFA Helper to change the selection in the mail client to the next or previous message.

The first time EFA invokes EFA Helper the user will be asked to accept and configure the Accessibility features. EFA Helper will need to be configured in macOS's System Preferences -> Security & Privacy -> Accessibility

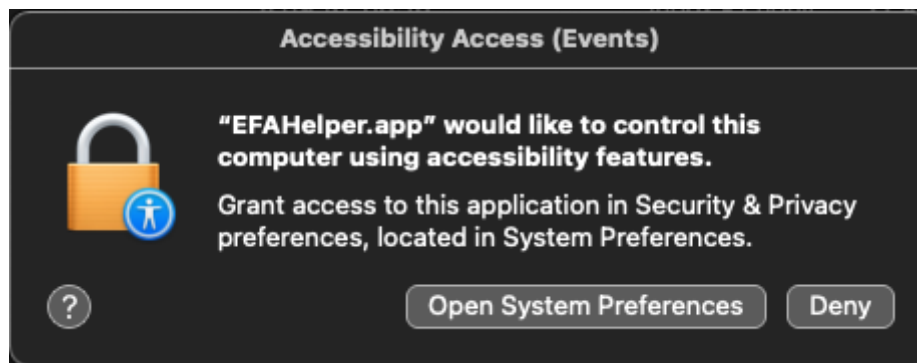


Figure: First use of EFA Helper by EFA.

Follow the prompts by macOS. This will eventually lead to EFA Helper being added into the Accessibility list. If needed, set the tick mark next to EFA Helper manually. If you don't get prompted, add EFA Helper manually to the list.

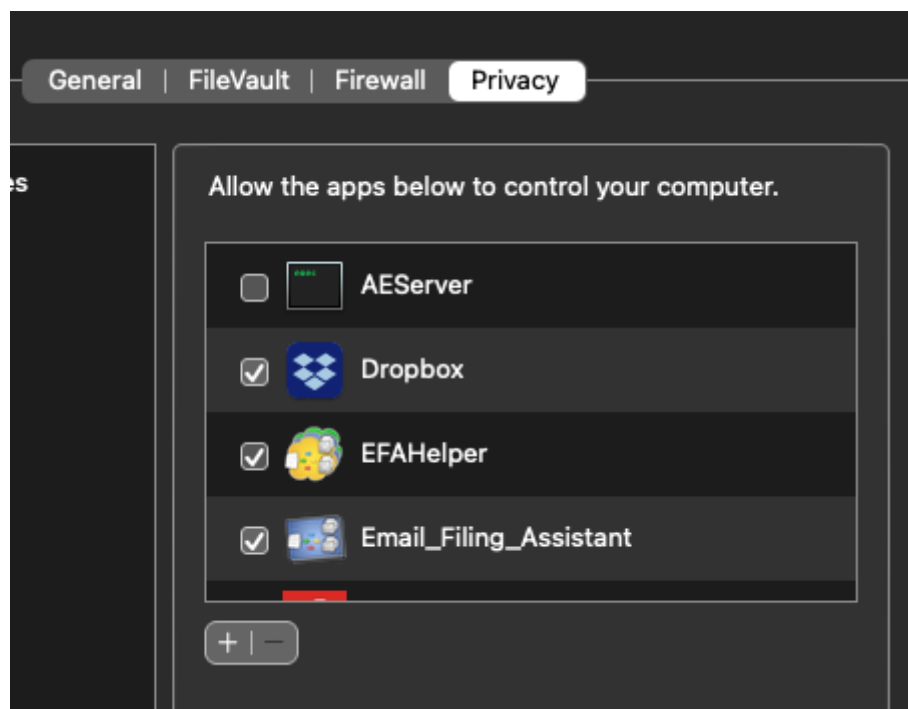


Figure: EFA Helper properly configured in macOS' Accessibility settings

File another email in EFA to test if EFA Helper changes the mail selection in the mail client. If the message selection does not change, please check the message at the bottom of the EFA Helper window (available EFA Helper 2.1 and above)

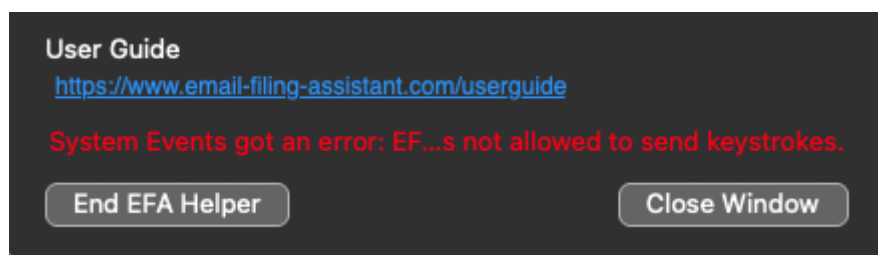


Figure: EFA Helper error message (EFA Helper Version 2.1)

A red message will indicate that an error has occurred. The most common error is depicted above and means that EFA Helper is not properly configured in macOS' Accessibility settings.

Known limitations of EFA Helper:

We noticed a peculiarity of macOS' implementation of multiple screens. In a nutshell, Apple Mail will only allow for its message selection to be changed programmatically if there is no draft email open, or, if one is open, then the window of that email has to be on the same physical screen as Apple Mail.

Storage Location Details for EFA

If you encounter issues that require a complete reset of the Email Filing Assistant (EFA), you can manually delete the EFA index and preference files. Warning: This action will permanently remove essential settings and indexed data. If you're not familiar with the macOS Terminal, we strongly recommend not proceeding, as incorrect deletions may affect system stability or data integrity.

All EFA-related files are located in the user-specific Library folder (i.e. ~/Library/), not in the system-wide /Library/directory.

Important: Always quit the EFA application before deleting any of its files.

Since file paths differ slightly between EFA and EFA Pro, instructions are provided separately below.

EFA

EFA database

This folder contains the EFA index—its internal record of how emails are categorised and filed:

~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant/Data/Library/Application\ Support/Email_Filing_Assistant

To delete the index via Terminal, run:

```
rm  
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant/Data/Library/Application\ Support/Email_Filing_Assistant
```

EFA Preferences

The preferences store information about indexed mailboxes and your interface settings. Deleting this folder forces EFA to reinitialise on next launch, which may resolve persistent configuration issues:

~/Library/Containers/[au.com](#).schulz-software.Email-Filing-Assistant/Data/Library/Preferences/

To delete it, open macOS Terminal and run:

```
rm  
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant/Data/Library/Preferences/
```

Delete All EFA Data

To completely reset EFA, including both the index and preferences, delete the entire data container.

```
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant/Data
```

We do this in Terminal with the following command:

Caution: This command permanently deletes all EFA-related data for the current user. Double-check the path before executing.

```
rm -r ~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant/Data
```

EFA Pro

EFA Pro database

This folder contains the EFA Pro index—its internal record of how emails are categorised and filed:

```
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant-Pro/Data/Library/Application\ Support/Email_Filing_Assistant
```

To delete the index via Terminal, run:

```
rm  
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant-Pro/Data/Library/Application\ Support/Email_Filing_Assistant
```

EFA Pro Preferences

The preferences store information about indexed mailboxes and your interface settings. Deleting this folder forces EFA Pro to reinitialise on next launch, which may resolve persistent configuration issues:

```
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant-Pro/Data/Library/Preferences/
```

To delete it, open macOS Terminal and run:

```
rm  
~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant-Pro/Data/Library/Preferences/
```

Delete All EFA Pro Data

To completely reset EFAPro , including both the index and preferences, delete the entire data container.

~/Library/Containers/[au.com](#).schulz-software.Email-Filing-Assistant-Pro/Data

We do this in Terminal with the following command:

Caution: This command permanently deletes all EFA-related data for the current user.
Double-check the path before executing.

```
rm -r ~/Library/Containers/au.com.schulz-software.Email-Filing-Assistant-Pro/Data
```