

Email Integration

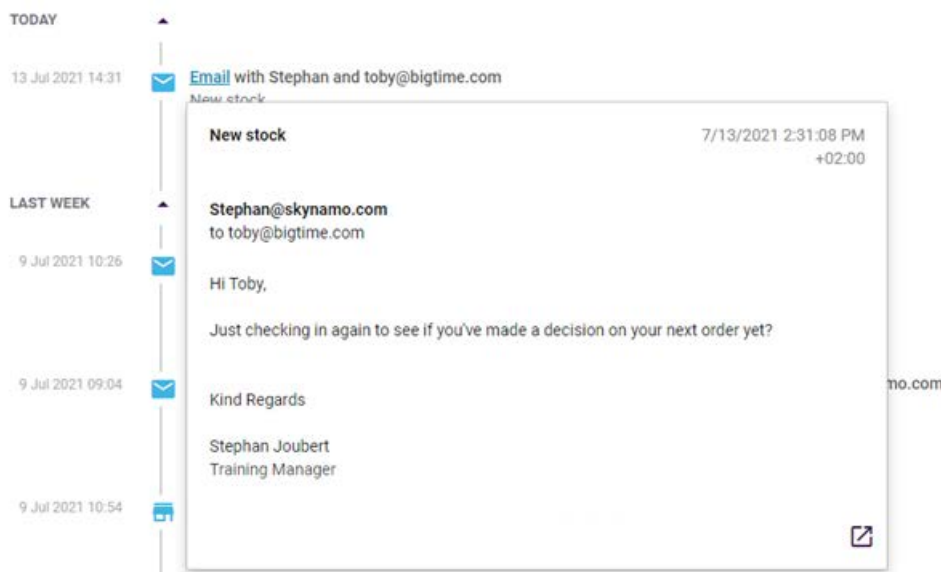
Web Document

How is this feature going to help you?

- No more copying emails into comments
- Better visibility for every customer interaction
- Build a more complete customer history

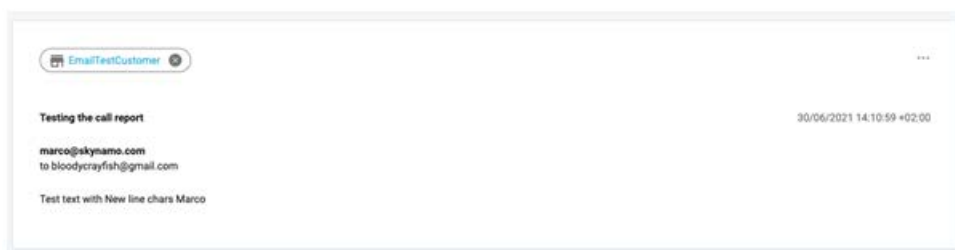
What does it do?

We will display email threads on timelines on the web only (for now) as can be seen below:



There is a timeline entry on the main, customer and user Timelines and the call report with the subject, time, recipients, and mapped customer. If you hover over the email on the timelines, you will see a preview of the body and if you click on it the email opens in full screen so you can read the entire text.

You'll also be able to remove the customers linked to the email or delete the email entirely.

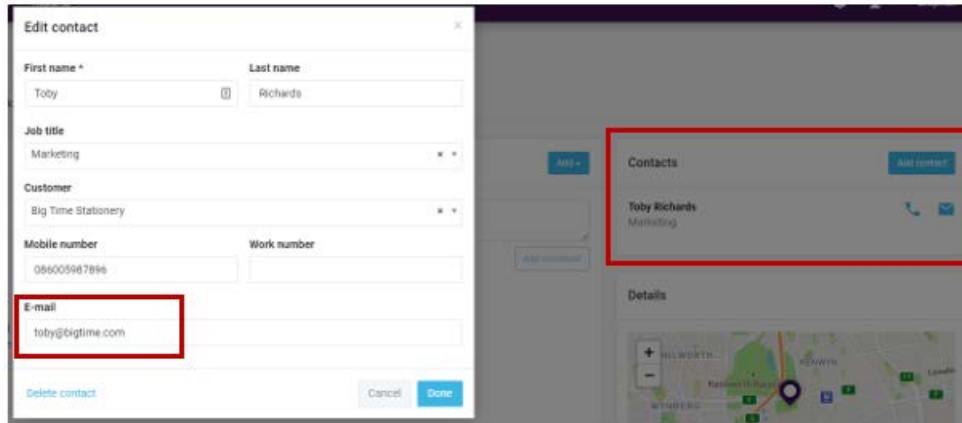


How does it work?

We have a unique email per instance available on the timelines and in your settings.

1. When you include the email address in an email thread (Forward, Bcc), Skynamo:

- receives the email text,
- makes sure you're a verified user and
- tries to match contacts (within your customer profiles) with the email/s in the email thread (see image below).

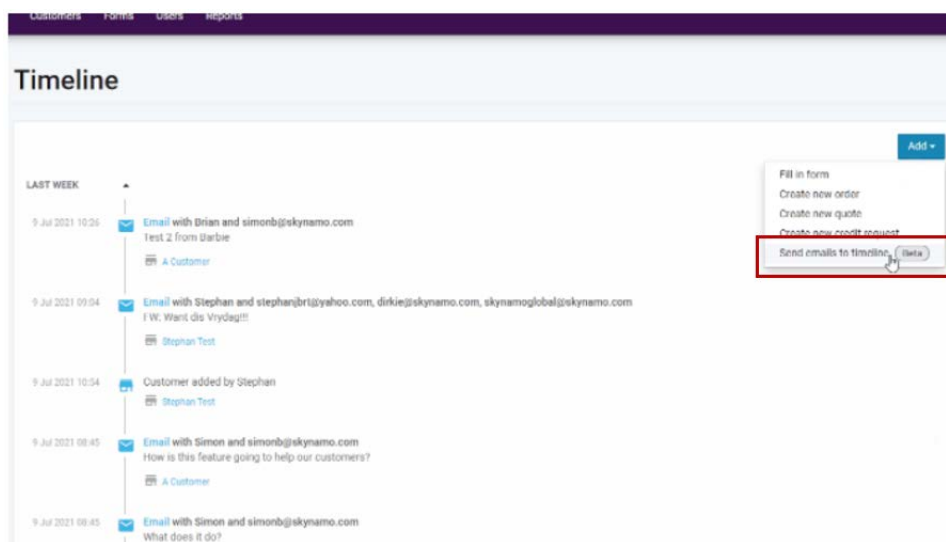


Once we've mapped an email to a contact (and therefore customer/s), the email plain text will be displayed on the main, customer and user timelines. For frequent emailers, it could be best to **either add the unique email address as a contact in their mail provider or set up automatic rules bcc rules:**


Microsoft: <https://support.microsoft.com/en-us/office/automatically-cc-carbon-copy-someone-on-every-email-you-send-0e8e32e9-777f-49fc-878f-41ed7c58677a>

Gmail: <https://chrome.google.com/webstore/detail/auto-bcc-for-gmail-by-clo/bfhaienophdigbdknjamfcbhinmmnbha?hl=en>

2. To find your unique email click on the Add dropdown on your Timeline and select "Send Emails to Timeline". This will then present a box with your unique email address linked to your Skynamo user.



3. So, after finding your unique email to copy in, and ensuring the receiver of your email is added as a contact on one of your Skynamo customers' profile, compile your email in your mail as you would normally, and then ensure that you CC or BCC in your unique code.



Send

From academy@skynamo.com

To 'toby@bigtime.com'

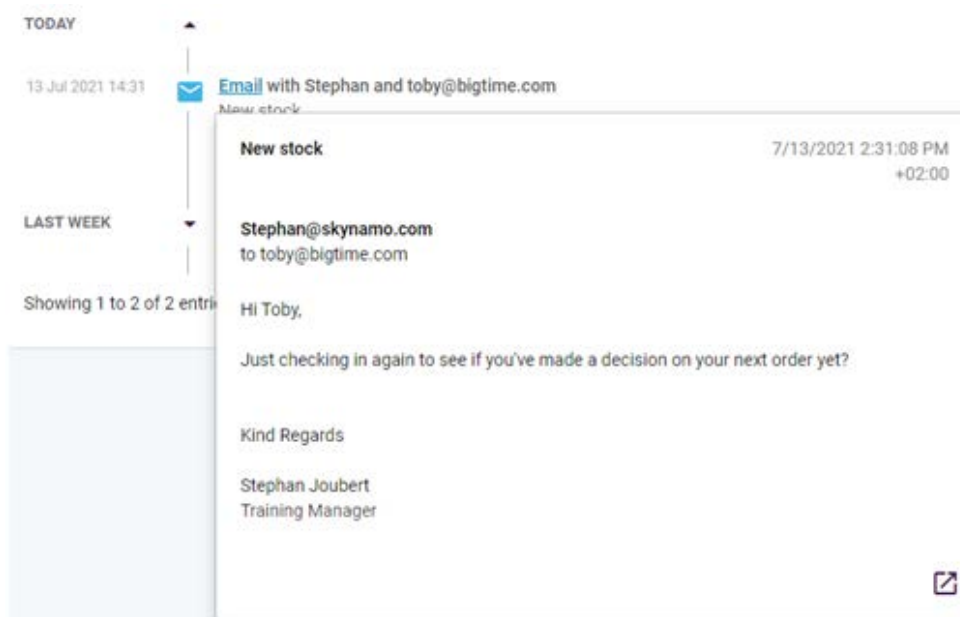
Cc '60e6ca83e86fca16e1412c58@inbound.za.dev.skynamo.me'

Subject New stock

Hi Toby,

Just checking in again to see if you've made a decision on your next order yet?

4. Once your mail has been sent, it will be visible on your Timeline:



TODAY

13 Jul 2021 14:31

Email with Stephan and toby@bigtime.com

New stock

New stock 7/13/2021 2:31:08 PM +02:00

Stephan@skynamo.com
to toby@bigtime.com

Hi Toby,

Just checking in again to see if you've made a decision on your next order yet?

Kind Regards

Stephan Joubert
Training Manager

Showing 1 to 2 of 2 entries

Please note:

- It only shows plain text, so won't show attachments or images.
- You will only be able to see emails sent to people who are listed as a contact in Skynamo.