



interprise suite™

Exchange 365 Email Integration

The Exchange Email integration has a number of advantages:

You can create an "Interprise Sync" folder in your outlook client and any emails you drop into this folder will be synched into your Interprise database, regardless of date, as long as they match an email address of one of your contacts, customers, prospects or suppliers. So when you look at a customer or prospect you will have an email tab that displays these emails.

You can sync all emails in your sent and received folders but we don't recommend it as a lot of emails are not worthy of note. i.e. we seem to have a lot of chat type email conversations with customers which would be a waste of time reading by another user.

If sending emails from Interprise they will also be sent using the Exchange 365 Connector. So any purchase orders or invoices etc. would go using your Exchange 365 email account. This means that you would have a copy of them in exchange and the entity record.

You can see emails in the record like below:

The screenshot displays the Interprise Suite interface for a customer record. The customer name is "A Toy Customer UK Ltd". The "Exchange Email" tab is highlighted with a red border. Below the tab, an "Inbox" is shown with columns for "To", "From", "Subject", "Date Received", "Private", and "Folder". The inbox is currently empty, and a "Reading Pane" is visible on the right. The status bar at the bottom indicates "Ready".



interprise suite™

You can also see emails in the Company pulse plugin tab in the record and overall with everything else that's going on across the company. See: <https://interprise.co.uk/interprise-suite-knowledge-base/company-pulse/>

The screenshot shows the 'Customer - CUST-000001 - A Toy Customer UK Ltd' record. The 'Company Pulse' tab is highlighted in red. Below the tabs, there is a table with columns: Entity Name, Document Code, Contact Name, Date, Due Date, Type, Subject, Value, Stage, Note Pad, Assigned To, Assigned Rep, and Status. Two rows are visible:

Entity Name	Document Code	Contact Name	Date	Due Date	Type	Subject	Value	Stage	Note Pad	Assigned To	Assigned Rep	Status
A Toy Custom...	ACT-000272	Mr A Contact	14/01/2022	17/01/2022	Case	Case	0.00		Problem:	Admin User	Super Sales Ag...	Not Started
A Toy Custom...	CRFND-000003	Mr A Contact	14/01/2022		Refund		222.00			admin		None

The screenshot shows the 'Company Pulse' plugin interface. It features a search bar at the top and a table with columns: Entity Name, Document Code, Contact Name, Date, Due Date, Type, Subject, Value, Stage, Note Pad, Assigned To, Assigned Rep, and Status. The table contains numerous rows of activity data, including cases, quotes, invoices, and meetings, with various icons indicating their status and type.

When setting up we configure the plugin to bring in history of your emails from as far back as you require. i.e. it can start the synch from today or X years ago. The great thing about this is that it puts the history into the record.

You can push meetings and contacts from Interprise to Exchange Outlook if required.