Exchange 365 Email Integration

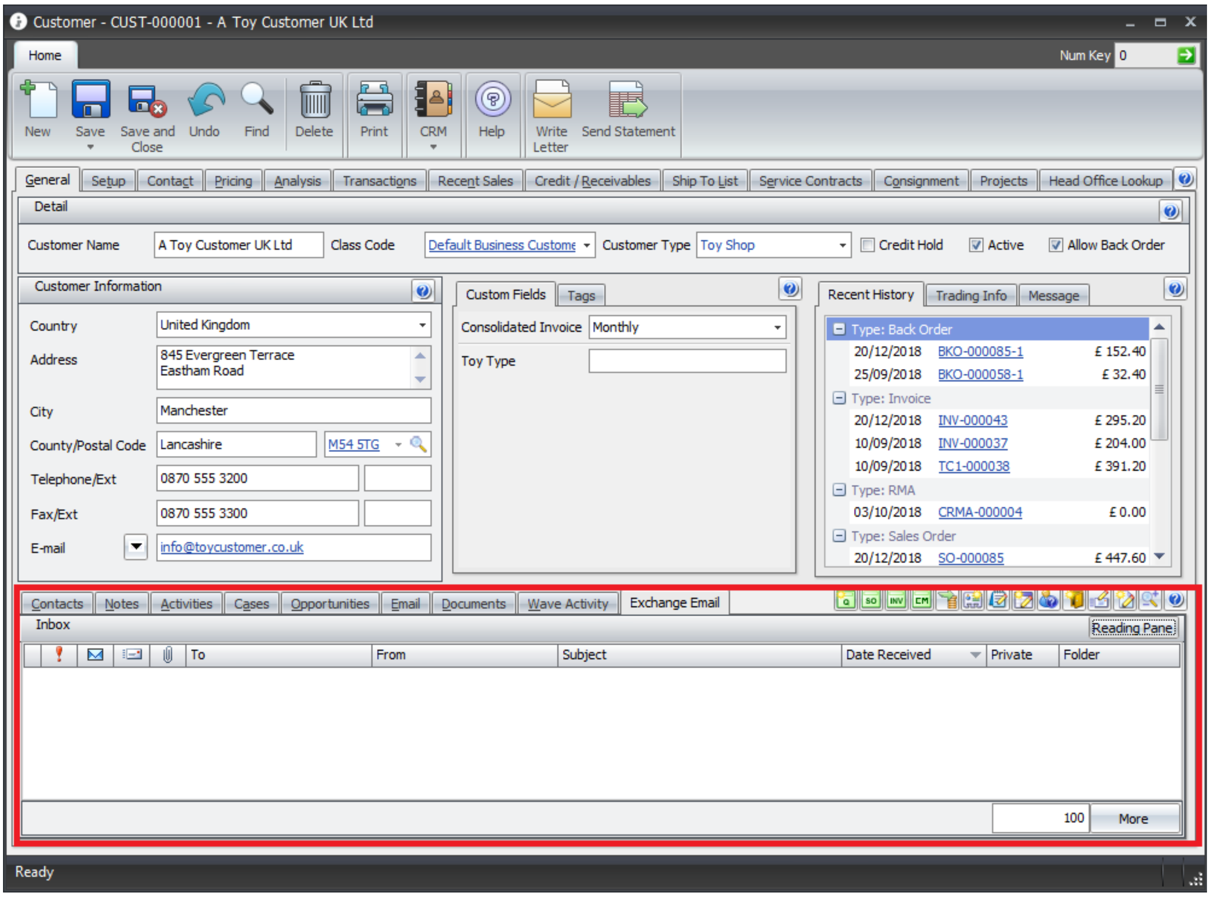
The Exchange Email integration has a number of advantages:

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.

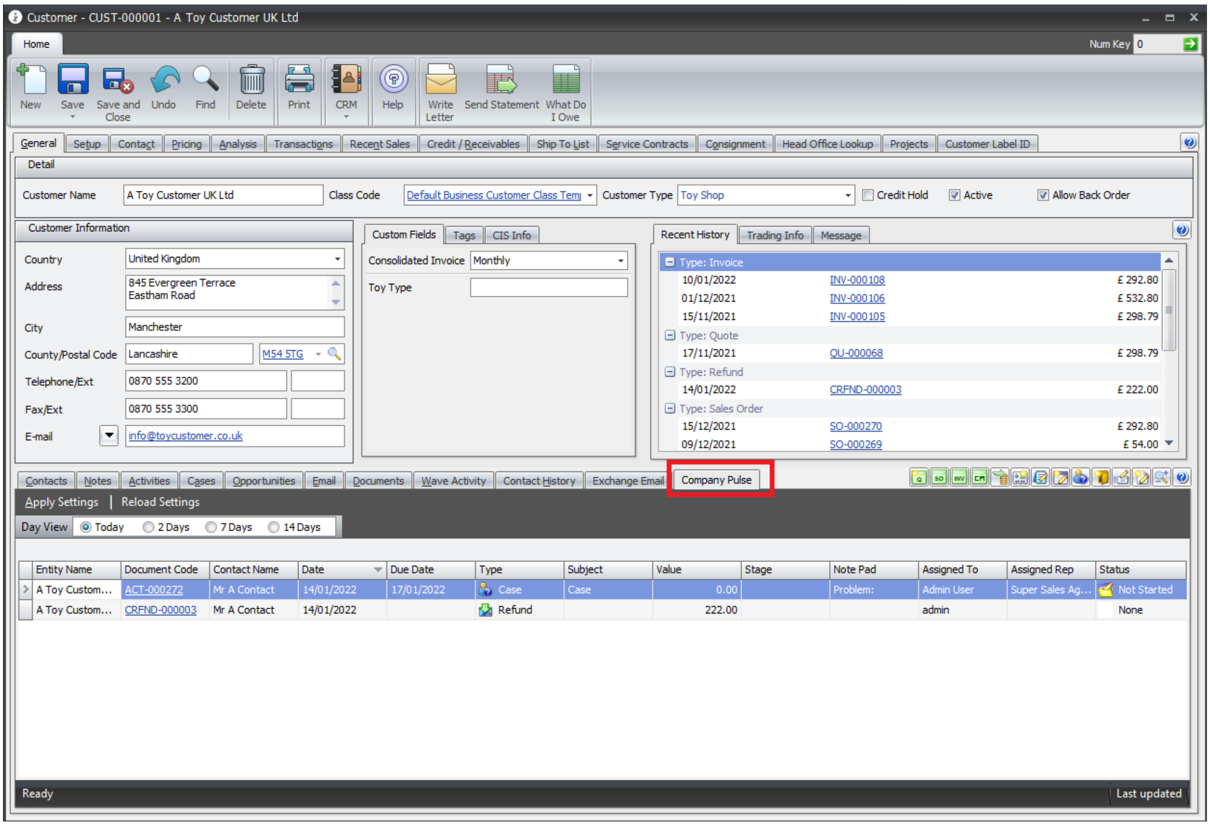
You can sync all emails in your sent and received folders but we don't recommend it as a lot of emails are not worthy of note. i.e. we seem to have a lot of chat type email conversations with customers which would be a waste of time reading by another user.

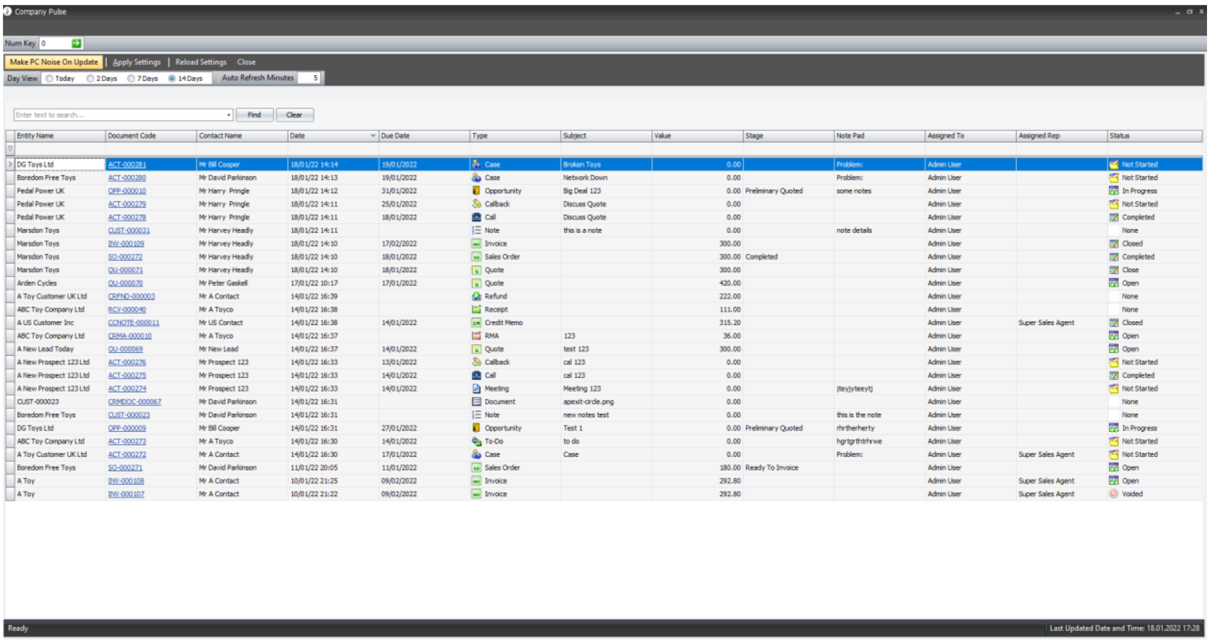
If sending emails from Interprise they will also be sent using the Exchange 365 Connector. So any purchase orders or invoices etc. would go using your Exchange 365 email account. This means that you would have a copy of them in exchange and the entity record.

You can see emails in the record like below:



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/





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.