Email Integration

Email Integration allows your Synergist system to become a more complete 'digital job bag'. The ability to file emails against prospects, clients, jobs or phases is an excellent facility that your organisation could make use of.

How to set up

Using email integration will depend on your email software and how your network is structured. Not all Organisations will be suitable for this feature to work. Visit the Synergist Knowledgebase for further information: http://kb.synergist.co.uk/article/AA-00232/0/

The Synergist helpdesk will be able to discuss individual cases so please contact them if you are still unsure if your Organisation will be suitable. They can also assist in setting up email integration & attachments.

A special email address will be set up on your email server, usually called something like synergist@yourcompany.co.uk . Synergist will poll this email account every 15 minutes and collect any emails to be copied in to Synergist.

How does is work?

Emails can be filed against the following records on the 'Activities' tab.:
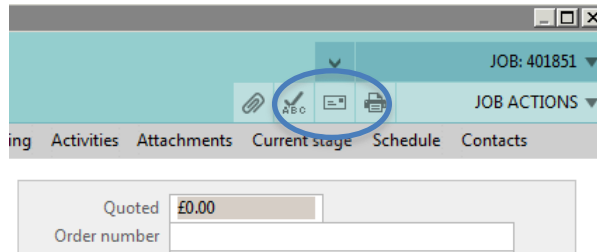
- **Clients**
- **Contacts**
- **Prospects**
- **Jobs**
- **Phases**

In order for the email to be filed within the synergist then it must contain a special code. This code can be anywhere within the **title or main body of the email**. You will also need to forward, copy or blind copy in the special email address that will have been set for this purpose within your organisation e.g. Synergst@yourcompnay.co.uk .

Format of coding:

- Client:1/
- Job:1/
- Phase:1/

Generating the email integration codes via Synergist

Clicking on the **envelope icon** in the top right hand corner of a **Prospect, Contact, and Client, Job or phase** will generate an email from your email account, with your email signature. This email will be populated with the relevant coding. Depending on your email software a new email will flash ready for you to view and send.
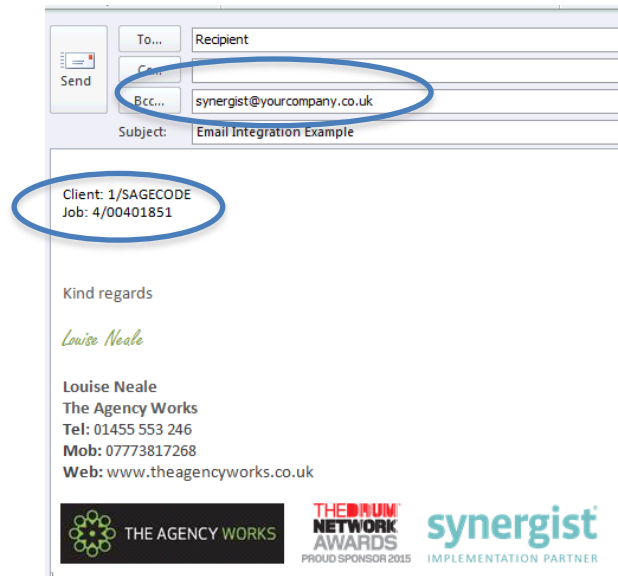
The Synergist address is automatically added as the bcc address.

The client (Sage) code & job number are added to the body of the email. Either type your email above this or copy and paste the coding towards to the bottom of the email. Your email signature is automatically added to the email.

Who is the email addressed to?

The email 'To' address will either be your job contact or you can select client or internal contacts from your Synergist system or alternatively use an email address from your email address book.

Once you have clicked the envelope icon on the job record then the option to select Synergist contacts becomes available.

Where is the email recorded?

The email will be filed against the relevant Prospect, contact, and client, Job or Phase under the activities tab. It will be filed under an activity type of **email** and will be dated based on when it was sent.

The email is recorded as part of the Synergist data file. The references, as detailed earlier, have to be contained within the email.

What about attachments to the email?

If your Synergist systems have been set up to attach documents then any attachments to the email will also become attached to the Client/job etc.

What about filing my clients email?

If your Client sends you an email there are two methods in which this can be filed:

1. If they are replying to your email and they click 'reply to all' then the bcc email address will also be copied along with the references anywhere in the history of the email being sent. It relies on your send using 'reply to all'.

2. Forwarding your clients email to your special Synergist address and then adding in the Client or job code manually. Codes must start with Client:1/ or Job:1/ (The 1/ refers to your Synergist company number. Please check your own Synergist system for this prefix). If no reference is contained within the title or body of the email then the recipients email address is used as a reference meaning the email would be copied to the contact and client record.

Does it record every email that I send?

Only emails that are sent to synergist@yourcompany.co.uk would be filed against Synergist. You have full control over clicking the send button.

When might I use email integration?

When would you file emails? Apply the same logic. If sending or receiving key documents e.g. quotations, requests for additional work or amends then you may choose to copy in your Synergist job. This would mean the file is readily available for reference by you or anyone else that might need to be aware.

Read only emails are visible via the Synergist app. Download from the app store and check with the helpdesk what settings you need to be able to log on.

THE AGENCY WORKS

The Agency Works Top Tip for using email Integration...

- Log on to Synergist at the same time as your emails. It should be a daily tool, not just for creating estimates & quotes.

- Generate the coding for key emails via Synergist then send via your email software.

- Repeat – To get the full benefit from email integration it needs everyone to get into the habit of filing emails in this manner.

Please contact The Agency Works at clientservices@taw.co.uk or call 01455 553246 If you wish to discuss further using email integration via Synergist.