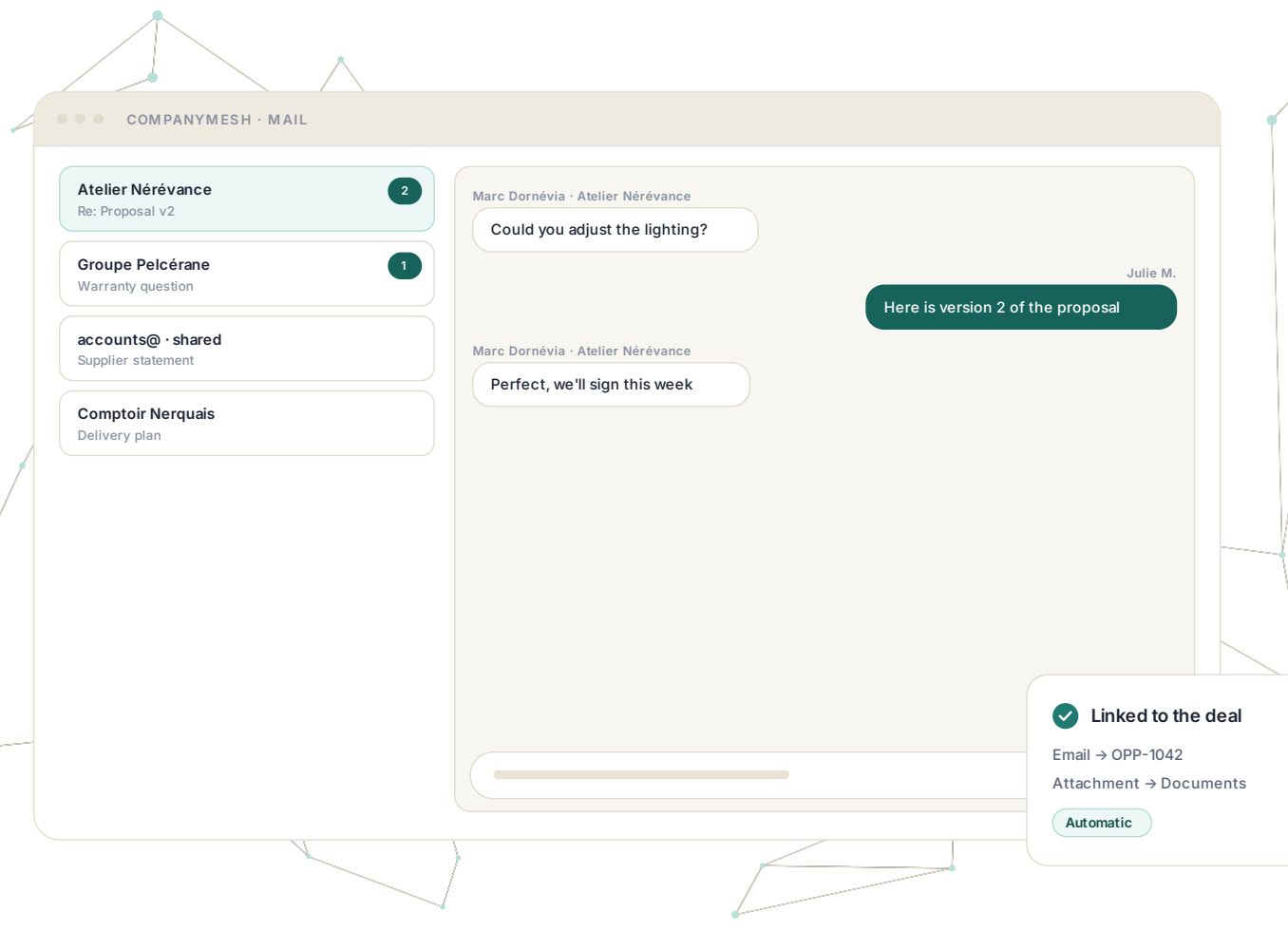


COMMUNICATION

# Built-in email

Your emails, finally filed in the right place.



# Your emails, finally filed in the right place.

Conversations with your customers live in individual inboxes and vanish the moment a colleague is off. Built-in email connects your existing mailboxes to the tool: every email sent or received is filed automatically on the right customer, quote or order.

## A shared history

Every exchange visible to the people who are allowed to see it.

## Less copy-and-paste

Send quotes and invoices straight from the tool.

## Consistent messages

Templates and signatures shared across the team.

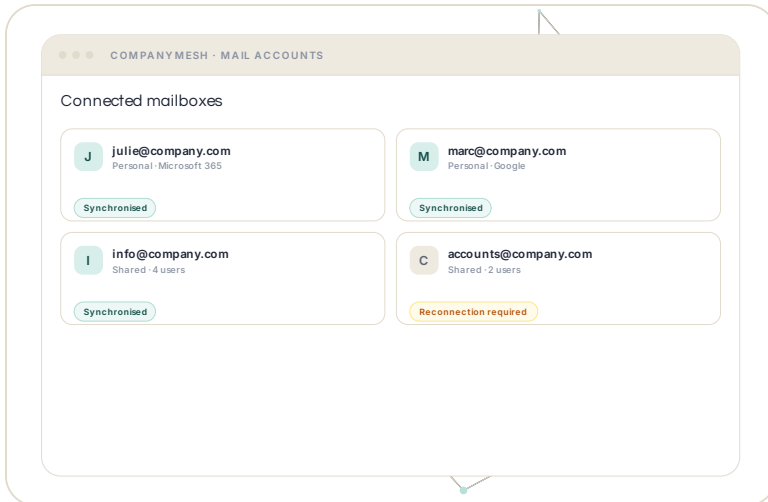
## Keep your mailboxes

You keep your current email, fully synchronised.

## In this module

- 1 Your mailboxes, connected
- 2 Automatic filing
- 3 Templates and signatures
- 4 Reliable, tracked sending
- 5 A unified inbox

## FEATURES



### 1 Your mailboxes, connected

**Your habits stay exactly as they are.**

Connect your Microsoft 365 or Gmail accounts, or any IMAP mailbox. Emails sync both ways: whatever you send from the tool shows up in your sent items.

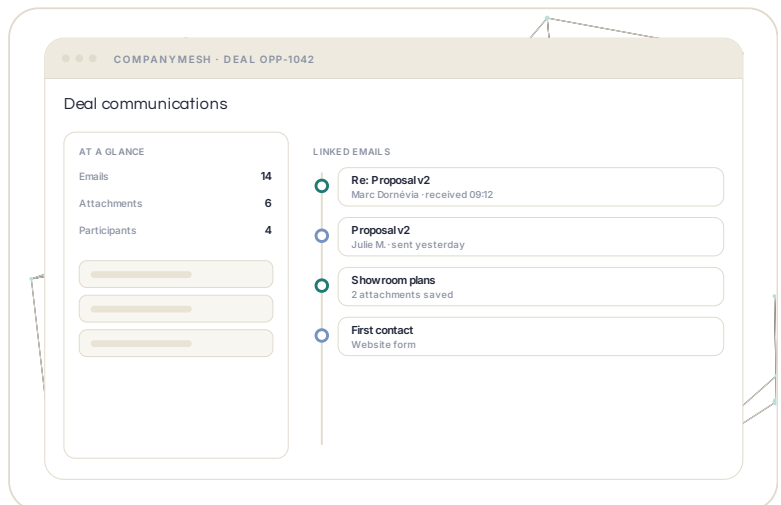
#### What it enables

- Secure connection (OAuth) or IMAP / SMTP
- Personal and shared mailboxes
- Access rights per mailbox and per user
- Automatic folder synchronisation

### 2 Automatic filing

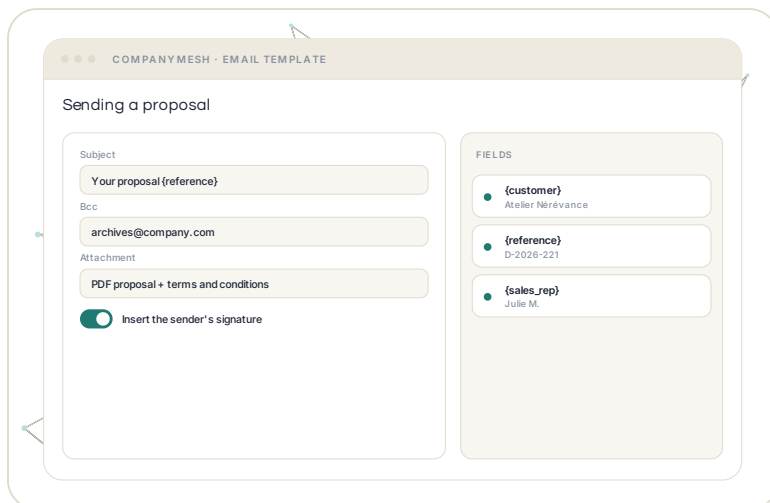
**Every email in its place.**

Emails are linked to the right customer, project, quote or order, based on the sender's address and the references detected. Conversation threads are rebuilt.



#### What it enables

- Filing by contact and by reference
- Grouped conversation threads
- Attachments saved to documents
- One-click manual filing



### 3 Templates and signatures

**One shared tone, fast messages.**

Create templates for every situation (sending a quote, confirming a deposit, a reminder) with the project's fields filled in automatically. Every user has their own signature.

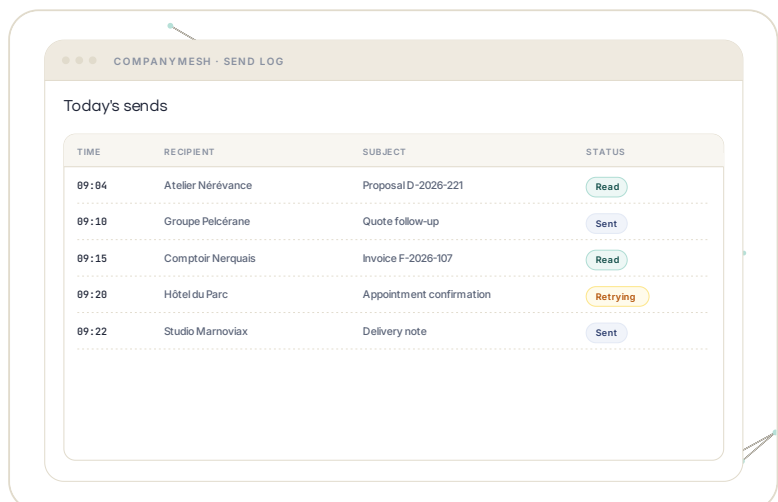
#### What it enables

- Templates with dynamic fields
- Fixed or generated attachments
- Predefined CC and BCC
- Signatures per user

### 4 Reliable, tracked sending

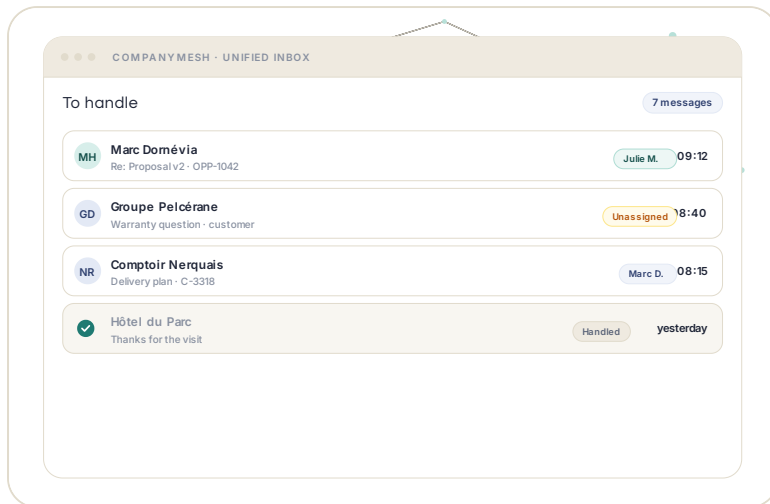
**You know what went out, and what was read.**

Emails go through a sending queue that handles provider limits and retries. Optional open tracking tells you when a message has been read.



#### What it enables

- Sending queue with retries
- Optional open tracking
- Sending log
- Controlled bulk sending



## 5 A unified inbox

### The whole team, one view.

One view brings together the unhandled messages from every mailbox you can access. Search by customer, project or keyword, with the full history on the record.

#### What it enables

- Unified multi-account view
- Search by customer or reference
- Read / handled status
- Assign a message to a colleague

TAILORED

# Adapted to your business

Shared mailboxes (info@, accounts@), personal mailboxes, filing rules, message templates for every stage of **your** process: we set up email around your organisation and everyone's access rights.

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## This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

### A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

### The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

### Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

## CONNECTORS

# Available integrations

Compatible with the tools you already use:

### Email providers

Microsoft 365

Outlook / Exchange

Gmail / Google Workspace

IMAP / SMTP

### Transactional sending

Brevo

Dedicated SMTP

### Documents

PDF

OneDrive / SharePoint

Google Drive

Non-exhaustive list: other tools can be connected to suit your needs.

## Works with

`crm.contacts` Customers & contacts

`crm.quotes` Quotes & sales proposals

`erp.billing` Invoicing

`comms.chat` Team chat & real time

`auto.workflows` Automations

## Let's talk about your future tool

Tailored demo, by appointment.

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