

Auto Email Insertion



Using this new utility from empath-e you can now setup server based automatic email recording on ALL inbound and outbound emails going to and from customers.

Residing as a server service you can setup multiple mailbox repositories that the utility will scan. By comparing the **From:** address and the **To:** address against the data held in SalesLogix the content of the email (including all attachments) will then be added to SalesLogix as a history item. Users no longer have to use SendSLX as everything is performed automatically for them.

For example:

- An email comes in **From:** customer@company.org the utility will search the email address in SalesLogix and add the email content to this contact automatically.
- Your staff send an email **To:** customer@company.org the utility perform the same task as above on the To: address.
- Create **SalesLogix Tickets** - as emails come into support@yourcompany.org the utility will check the From: address and then create a support ticket for this contact automatically.
- **Global Attach** – you can create a holding account for those that cannot be matched, ensuring conversations are not lost.
- **Increase user confidence** - by saving them time, as they no longer need to worry about using SendSLX and this works without needing to run SalesLogix, even if they are on the road.

Call now for pricing and further information



empath-e
MAKING CRM MAKE SENSE

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How does it work?

The utility uses Exchange Web Services (EWS). This is setup automatically on Exchange 2007/10 and simply requires a mailbox account with the relevant permissions over the mailboxes you wish to scan. It is envisaged that you will use Exchange to redirect users' mailbox content (Deliver To: Both) to one or more mailboxes.. For support tickets, simply allow access to this mailbox by the user account setup in the configuration below.

- **SERVER INSTALLATION**
One Service/Multiple Services

Simply copy the application to a folder of your choice. Set the configuration to attach to your SalesLogix database and your Exchange Server. You can run either one configuration such that it will scan multiple mailboxes or, if you prefer, you can setup individual services to scan independent mailboxes.. You can enable or disable the service plugin within the configuration file.

As an email comes into the relevant mailbox the utility will scan that mailbox on a periodic basis (set by you). The emails are processed, attached to SalesLogix and then deleted from the mailbox. The utility then goes idle until the next periodic update.

```
<?xml version="1.0" encoding="utf-8" ?>
<connectors>
  <connector key="saleslogix" type="BITelligent.Connector.SalesLogix, BITelligent.Connector.SalesLogix.SalesLogixConnector" >
    <server>localhost</server>
    <port>1706</port>
    <userid>admin</userid>
    <password></password>
    <database>OWBUNKER</database>
    <RWPassword></RWPassword>
  </connector>
  <!-- Exchange connector -->
  <connector key="exchange" type="BITelligent.Connector.Exchange, BITelligent.Connector.Exchange.ExchangeConnector" >
    <UserName>demouser@empath-e.local</UserName>
    <Password>XXXXXXXXXXXXXXXXXX</Password>
    <ServerUrl>https://mail.empath-e.com/EWS/Exchange.asmx</ServerUrl>
    <DomainName></DomainName>
    <PrimarySmtppAddress></PrimarySmtppAddress>
  </connector>
</connectors>
```

```
<plugin type="BITelligent.ExchangeTicketImport, BITelligent.ExchangeTicketImport.ExchangeHostPlugin"
  enabled="false"
  friendlyName ="Exchange Emails to SalesLogix History"
  >
<config>
  <!-- Interval to process the emails at (Minutes) -->
  <interval>1</interval>

  <!-- Connectors associated with Job -->
  <salesLogixConnector>saleslogix</salesLogixConnector>
  <exchangeConnector>exchange</exchangeConnector>

  <!-- Handles the default assignment if we cannot lookup the contact based on email address -->
  <defaults>
    <defaultContactId></defaultContactId>
    <defaultAccountId></defaultAccountId>
    <defaultSeccodeId></defaultSeccodeId>
  </defaults>

  <smtpConfiguration>
    <config address="demouser@empath-e.com" userId="demouser@empath-e.local" password="XXXXXXXXXXXXXXXXXX" >
  </smtpConfiguration>

  <!-- Location to copy the attachments to -->
  <attachments>
    <attachmentPath>C:\empath-e\SLXLogs\Documents</attachmentPath>
    <saveAttachments>true</saveAttachments>
  </attachments>

  <options>
    <createTicket useAddress="from">false</createTicket>
    <createHistory useAddress="from">true</createHistory>
  </options>

</config>
</plugin>
```