

# Email Capture

HOW IT WORKS AND  
HOW TO SET IT UP

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## Overview

- Email capture stores emails—by contact—in the NOTES section
- Incoming and outgoing emails are captured
- This can also be DEACTIVATED for specific contacts
- When the feature is initially set up for your company, your IT Team needs to set up automatic BCC to the designated email address that the SalesNexus staff will provide for you
- TO DISABLE—THIS MUST BE TURNED OFF ON YOUR EMAIL SERVER
- Initial set up has the email capture box CHECKED for all users and contacts

## Disabling Email Capture—Contact Record Level

When in the contact record view, you can go to the Status tab at the bottom and make sure the “Email Capture” box is not ticked. Once we have made sure it is not ticked, going forward, emails in relation to this record will not be captured under the Notes tab.

The screenshot displays the SalesNexus contact record interface. At the top, there are navigation tabs: Home, Contact, and a dropdown menu. Below this, the contact details are organized into several sections: Contact Information (Name, Title, Phone, Mobile, Email), Subscription Level (Subscription Freq, Price Per User, Renewal Date, Email Allowed Type), and Billing Information (Address, City, State, Country, Billing Notes, Cancellation Date). At the bottom, there is a 'Status' tab. In the 'Status' tab, the 'Email Capture' checkbox is unchecked, and a red arrow points to it with the text 'Email Capture Disabled'. Other fields in the 'Status' tab include 'Last Reach', 'Last Meeting', 'Last Attempt', 'Record Creator', 'Create Timestamp', 'Edit Timestamp', and 'Upload ID'.

## Enabling Email Capture—Contact Record Level

When in the contact record view, you can go to the Status tab at the bottom and make sure the “Email Capture” box is not checked. Once we have made sure it is checked/ticked, going forward, emails in relation to this record will be captured under the Notes tab.

The screenshot displays a CRM contact record form. The 'Status' tab is selected at the bottom. In the 'Status' section, the 'Email Capture' checkbox is checked, and a red arrow points to it with the text 'Email Capture Enabled'. Other tabs visible include 'NOTES', 'ACTIVITIES', 'SALES', 'GROUPS', 'CONTACT DOCS', 'SUBSCRIPTIONS', 'Billing', 'Project Data', and 'Data'. The form contains various fields for contact information, subscription details, and user management.