Email Capture

HOW IT WORKS AND HOW TO SET IT UP

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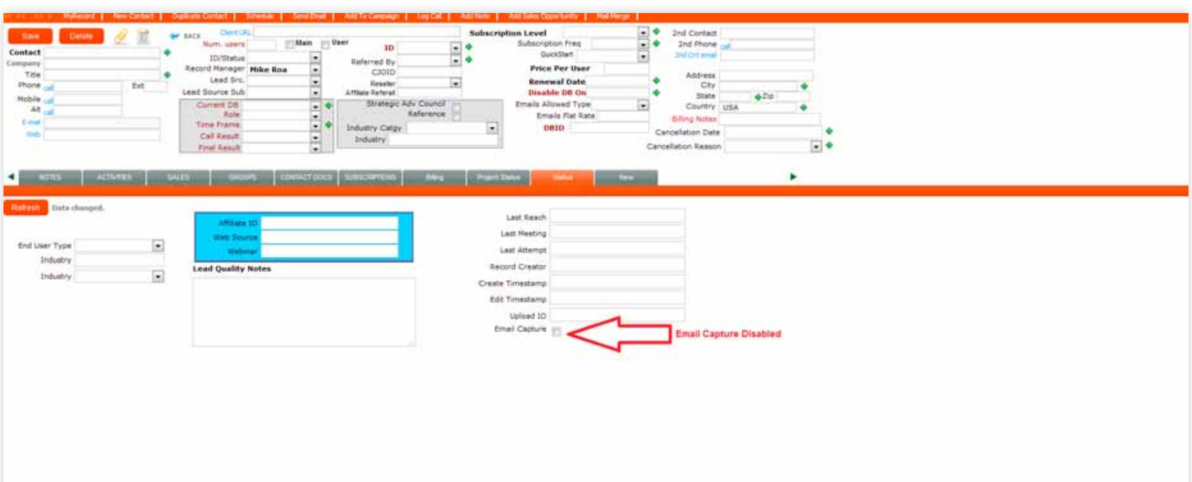
Overview

- 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.



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.