1 Introduction

The “Holy Grail” of CRM has always been “a single view of all customer-related information”. Because e-mail is now so pervasive and in many instances is becoming the primary form of communication between a company and its prospects, customers, partners, suppliers, etc., it is vital that all relevant team members dealing with these contacts have access to all e-mail correspondence. In this way they are aware of what is happening on each account, without necessarily having to be CC’d or (BCC’d) on every mail, resulting in unnecessary clutter in each person’s Inbox.

One of the great features of MX-Contact is its ability to link incoming and outgoing e-mail to the recipients and/or senders that are stored in the MX-Contact **Contacts** folder, and copy these e-mails to the shared (Public) **E-Mail** folder so that this correspondence is visible to other people in the organization.

This document should assist you in answering the following typical questions that are asked:

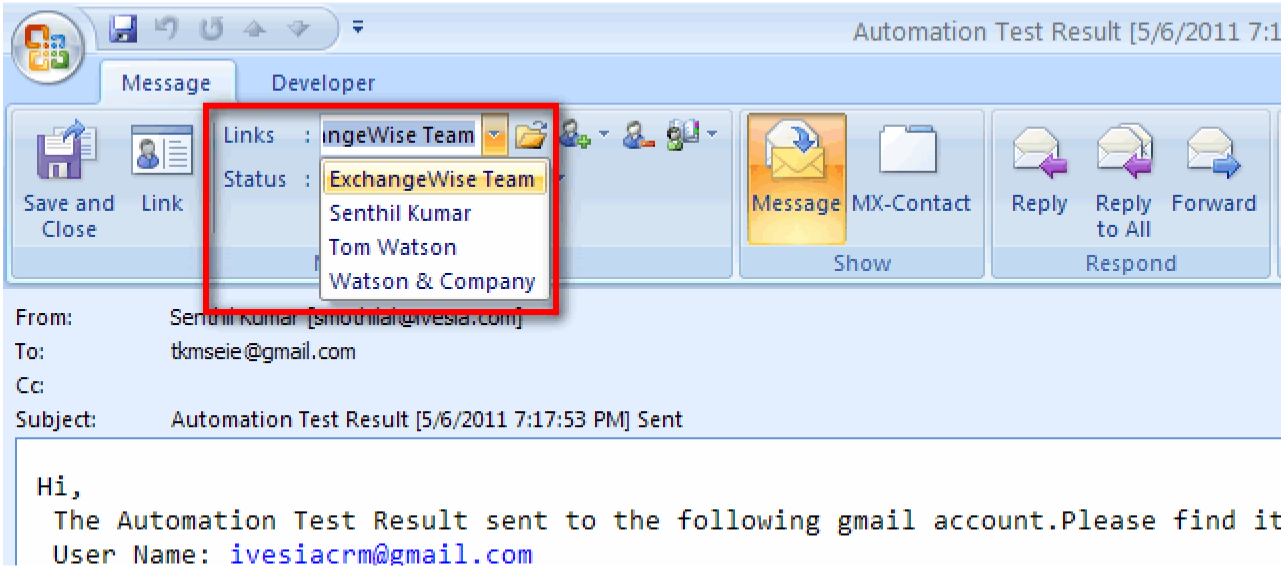
- *How can I share e-mails that I send or receive with other staff members in the company so that they are also aware of client-related correspondence?*
- *How do I stop personal e-mails being shared with other team members?*
- *Can I link e-mails to a contact, company and/or opportunity?*
- *How can I stop being prompted about each e-mail that I send or receive and have MX-Contact link these automatically?*
- *How can I categorise e-mails so that I can group, sort and filter e-mails of certain types (e.g. all support-related e-mails)?*

2 Linking E-Mails

The fact that an e-mail is copied to the shared **E-Mail** folder is one thing. Equally important is the fact that an e-mail may be linked to any number of relevant contacts, companies, Products, Users etc. If an e-mail is linked to a particular Company, this means it is visible on the **E-Mail** tab of that Company (Form) in the MX-Contact **Companies** folder. This would be applicable for example in the case where someone sends 3 emails regarding some requirements from 3 companies. If the Emails are linked to the corresponding companies, it is very easy to review the requirement from a particular company and not all the Emails from that person.

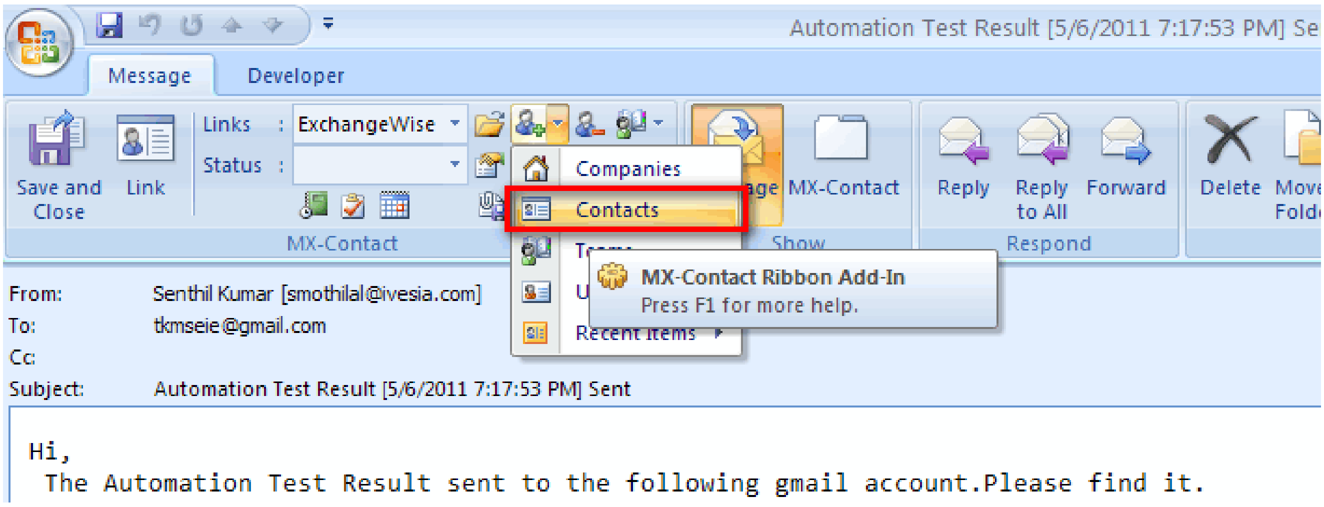
This is shown below for an e-mail which is linked to a **contact** (Tom Watson), 2 **users** (Senthil Kumar & The Exchange Wise Team), a **company** (Watson & Company)

Open the Email see the **Link** Combo box in **MX-Contact Ribbon** Add-in.

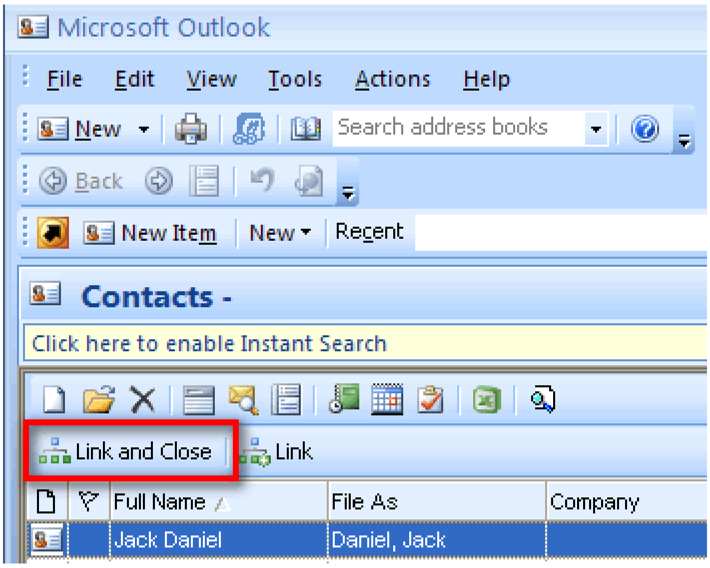


So it is important to realize that an e-mail can be linked to any number of companies, contacts, etc., where it is necessary to see that a particular e-mail is relevant to those items.

An e-mail that is sent to one contact who exists in MX-Contact and CC'd to another (MX-Contact) contact will automatically be linked to these contacts. However, one can easily link that e-mail to another contact who may not have received that e-mail but is in some way connected to that dialogue and therefore it is important to be able to see that item on the **E-Mail** Tab of that contact. To do this select **Contacts** from the **Link to MX-Contact** Menu in the **MX-Contact Ribbon** Add-in.



It opens the **Contacts Link folder**. From there select Contact(s) you want to link and click **Link and Close** button.



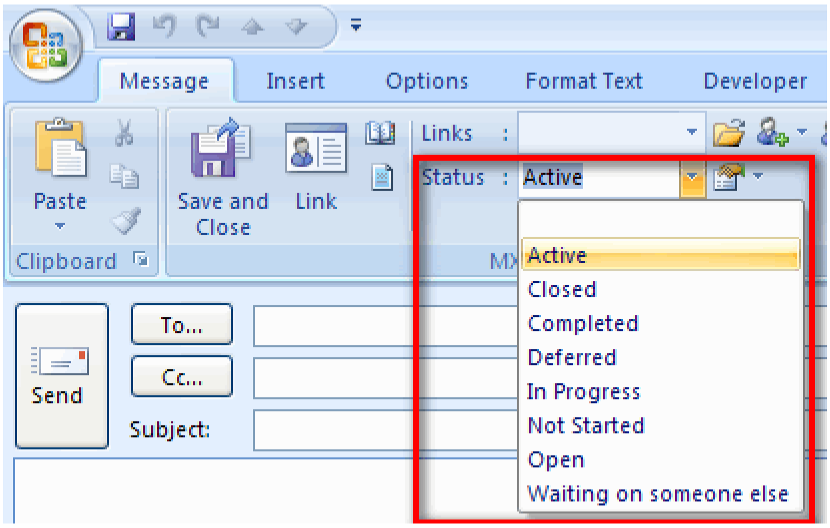
Once an item is linked to the e-mail its name will appear in the **Links** dropdown.

3 Categorising E-Mails

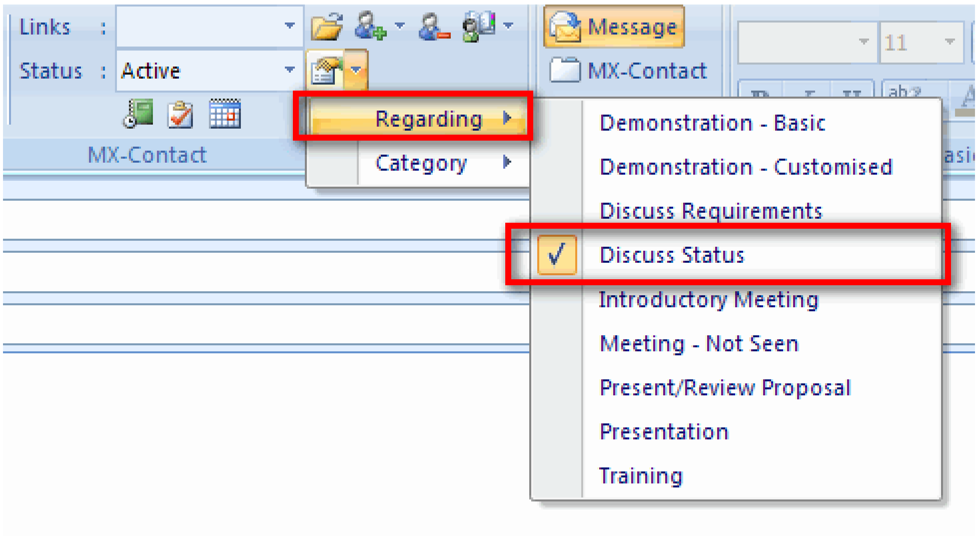
Owing to the large number of e-mails sent and received by all the staff members within an organization, it is often necessary to introduce some type of categorisation of e-mails, so that the e-mails in the Email folder can be grouped, sorted and more importantly filtered, using different Views where appropriate.

To facilitate this MX-Contact adds 3 different fields in the MX-Contact Ribbon Add-in of Email window, namely **Status**, **Regarding** and **Category**. These are shown below:

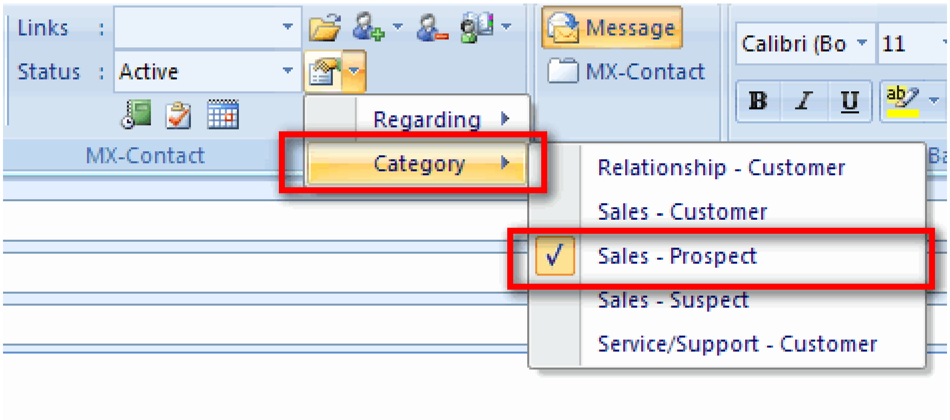
Status Field:



Regarding Field:



Category Field:



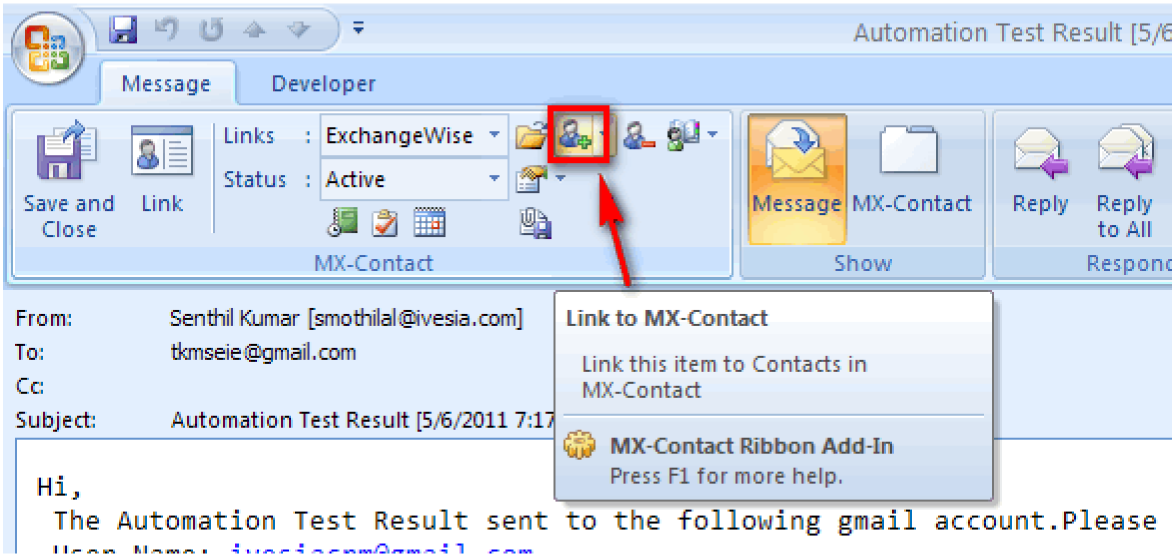
The values of these 3 fields can be changed by modifying the values of the parameters **Status Caption**, **Regarding Caption** and **Category Caption** respectively (See the description of Parameters below).The values selected for **Regarding** and **Category** fields are displayed with a check mark as in above picture.

You can also change the picklists associated with each field by modifying the values of the Parameters **Status Picklist for E-Mail**, **Regarding Picklist for E-Mail** and **Category Picklist for E-Mail** respectively, and then creating/editing these Picklists in the **Picklists** folder.

4 Other Handy MX-Contact Mail Handling Features and Tips

4.1 Create a Contact from an E-Mail

Have you received an e-mail from a contact that is not in MX-Contact but you would like him or her to be. It's simple. Just open the e-mail and click **Link to MX-Contact** button in the **MX-Contact Ribbon** Add-in



It will show the following message. Click **Yes** button.

MX-Contact will try and retrieve any applicable phone, fax and mobile numbers from the e-mail and populate a **New Contact** form with these details. Click on **Save and Close** button in the **New Contact** form. Contact will be created.

What if the contact is a **CC** in the mail you've received (i.e. is not the sender)? Then **Right-click** on that e-mail address and select **Add to Outlook Contacts**.

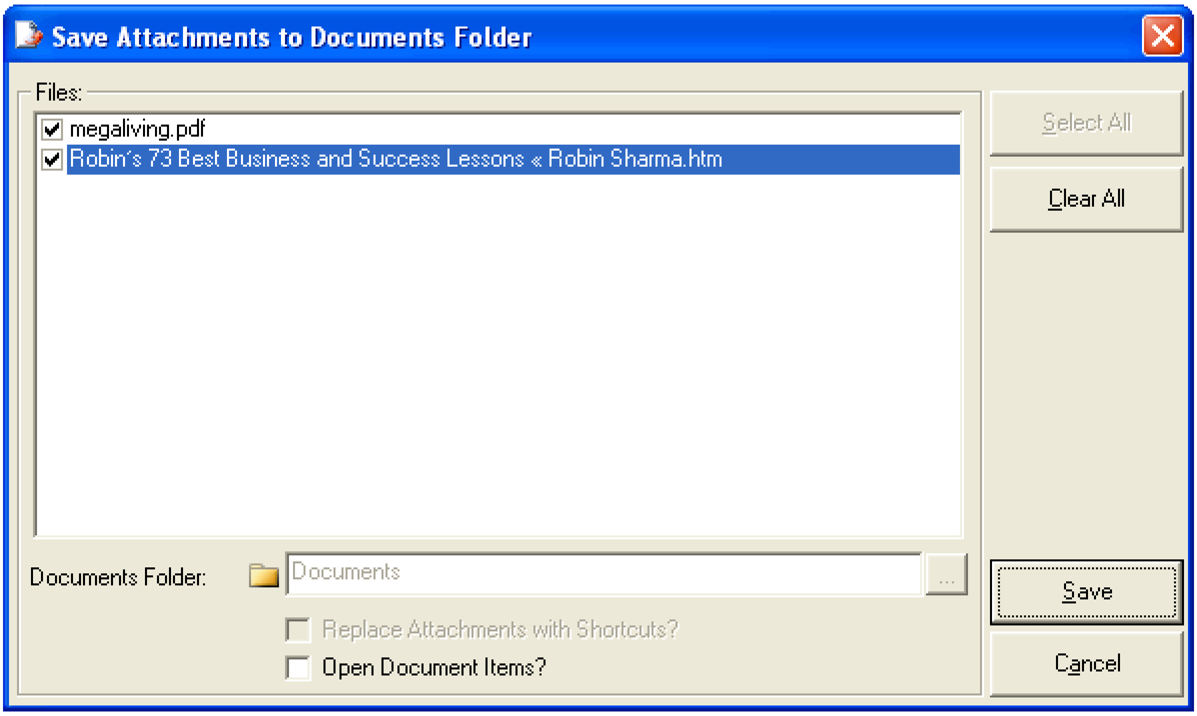
Following message will be displayed. Answer **Yes** to the prompt:

MX-Contact will try and retrieve any applicable phone, fax and mobile numbers from the e-mail and populate a **New Contact** form with these details. Click on **Save and Close** button in the **New Contact** form. Contact will be created.

4.2 Save Attachments

If an MX-Contact contact sends you an e-mail that has an attachment in it that you would like to save to the MX-Contact **Documents** folder, simply open the e-mail and click **Save Attachments** button in **MX-Contact Ribbon** Add-in**.**

When you click the **Save Attachments** button, you are now presented with the dialog box as shown below:



This dialog gives the user the following flexibility:

1. The user can nominate which attachments should be stored in the **Documents** Folder. A **Document Item** is created for each attachment, with the attachment saved as an attachment if documents are stored in the Outlook/Exchange Documents Folder (Parameter **Documents Stored in MX-Contact** = **True**) or a link to the attachment saved in the File System if documents are stored in the Windows File System (Parameter **Documents Stored in MX-Contact** = **False**)
2. The user can change the location of the shared **Documents** Folder.

By default all attachments will be selected except image files (because these would usually be the images for logo files, newsletter graphics, etc. However you can select all files or certain select image files if required by checking the relevant check boxes.

2 other options are available:

- **Replace Attachments with Shortcuts:** For inward mails and e-mails already sent, you can replace the attachment with a shortcut to the document on the File System. This is to save space in the Exchange Server store, given that attachments can often be several MBytes in size.
- **Open Document Items:** This opens the Document Item that is created for each attachment, so that one can correctly categorise the document using the **Document Type**, **Document Sub-Type** and **Categories**.

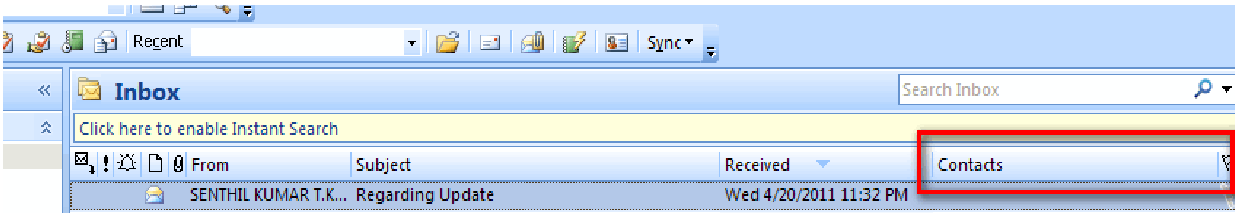
When you are ready click **Save** to begin processing the attachments.

If there is more than one attachment you will be prompted individually for each attachment in the mail.

The logic behind saving e-mail attachments to the documents folder is to save others (and yourself) from having to hunt through every e-mail received to find a particular document (spreadsheet, etc.) that was received. All documents are where they should be namely in the **Documents** folder.

4.3 Show the Contacts Field in your Inbox View

The Contacts filed in Outlook shows which other items are linked to a particular item (e-mail, journal, task, etc.) It is a good idea to add the **Contacts** Field to your Inbox View(s) so that you can see at a glance which e-mails are linked to MX-Contact. You do this by right-clicking on the Header Bar of the Item List and selecting **Field Chooser**. You drag the **Contacts** field from the **All Contact fields** list onto your View:



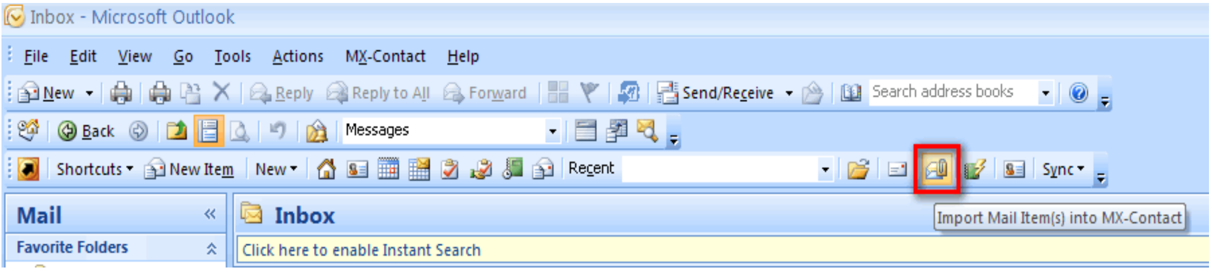
Another reason this is important is because, even when you have the MX-Contact parameter **Link Incoming E-Mail** is set to **On Receipt**, sometimes e-mails drop into your Inbox too fast for MX-Contact to process (actually this is an Outlook issue – for those technically minded the Inbox Add Event does not fire for every mail.) So if you receive your mail from a POP account and 10 e-mails land in your Inbox at once, only about 3 of them will be linked. You will see then that only 3 e-mails have Contact Names appearing in the **Contacts** field.

4.4 Link Multiple E-Mails

How do you link a lot of mails at once, particularly when you are experiencing the issue described in 4.3?

This is easy.

On the MX-Contact Toolbar there is a button called **Link MX-Contact Mail Item(s).**



Select all the e-mails that are not linked (the **Contacts** Field is empty). You can sort your Inbox by this field if necessary.

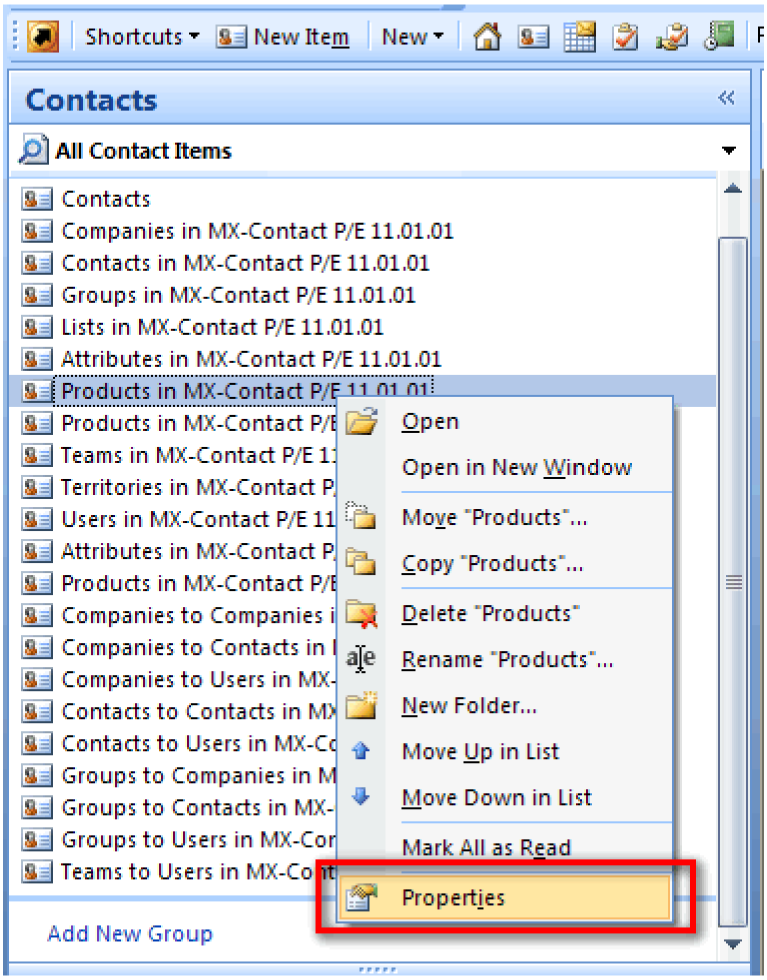
Click on the **Link MX-Contact Mail Items** button.

If you have selected a large number of mails, go and make your self a cup of coffee while this is running – you will not be able to do anything else on your PC!

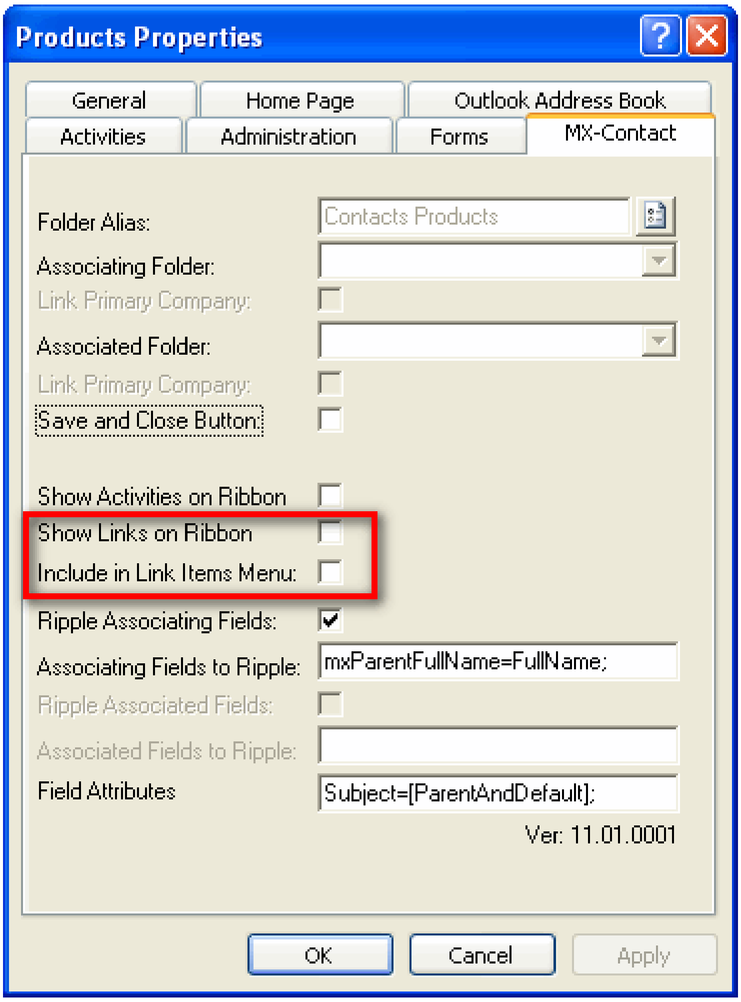
4.5 Add other Folders to the Link Items Menu

You may want to link incoming e-mails to a **Product** Item. How do you do this easily?

The simple answer is that you need to add the **Products** folder to the Link Items menu. You do this by right clicking the **Products** folder, selecting **Properties.**



Then click on the **MX-Contact** tab in the **Product Properties** window

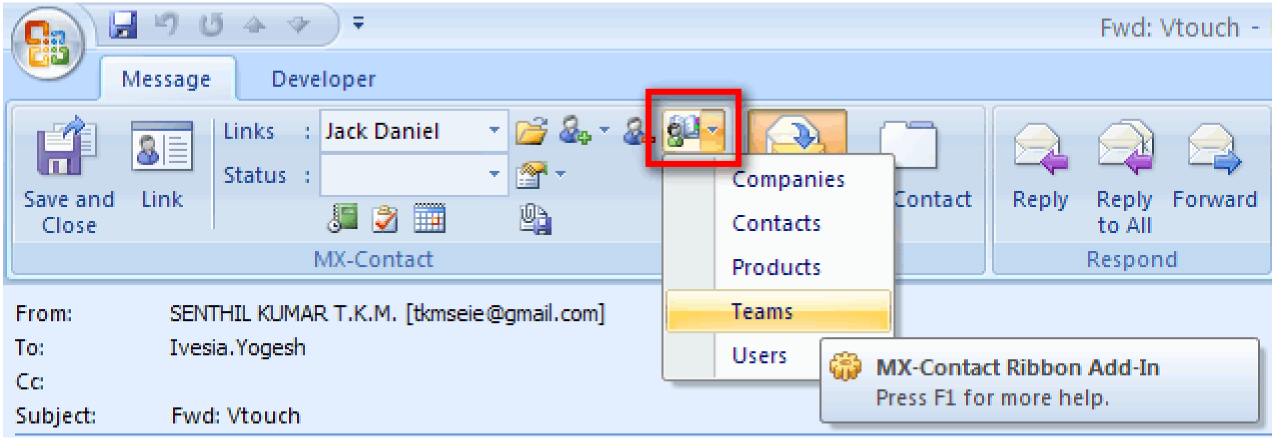


Check the boxes marked **Show Links on Ribbon** and **Include in Link Items Menu**. Then restart the Outlook.

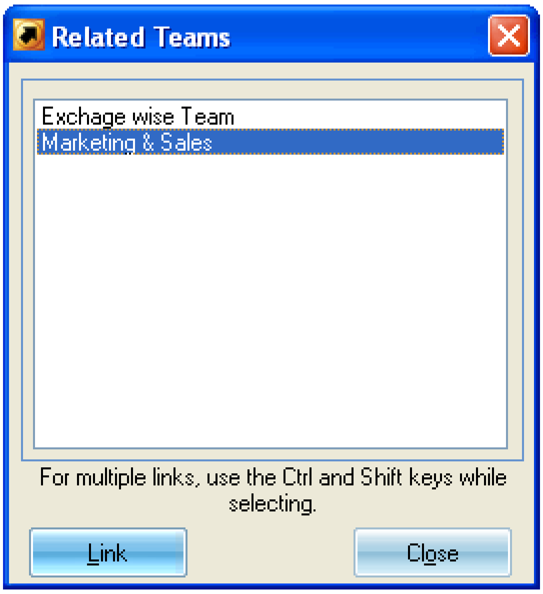
4.6 Linking Related Items

Once you have added a folder to the **Link Items** menu (see section 4.5), you can now easily link an e-mail to a related item of any other items (Eg: Contact, Users, Company) already linked to the e-mail.

Open the e-mail and Click on any item in the **Related** Menu in the **MX-Contact Ribbon** Add-in. (Eg: **Related → Teams**)

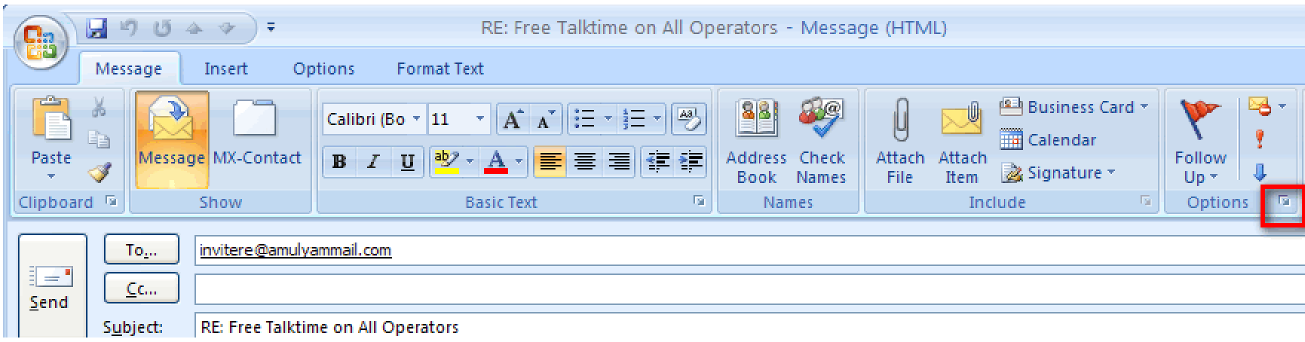


In a small window it will show the **Related Items** list. From the list, select the items you want to link with this email and click **Link** button. For Multiple selections use Ctrl and Shift buttons.

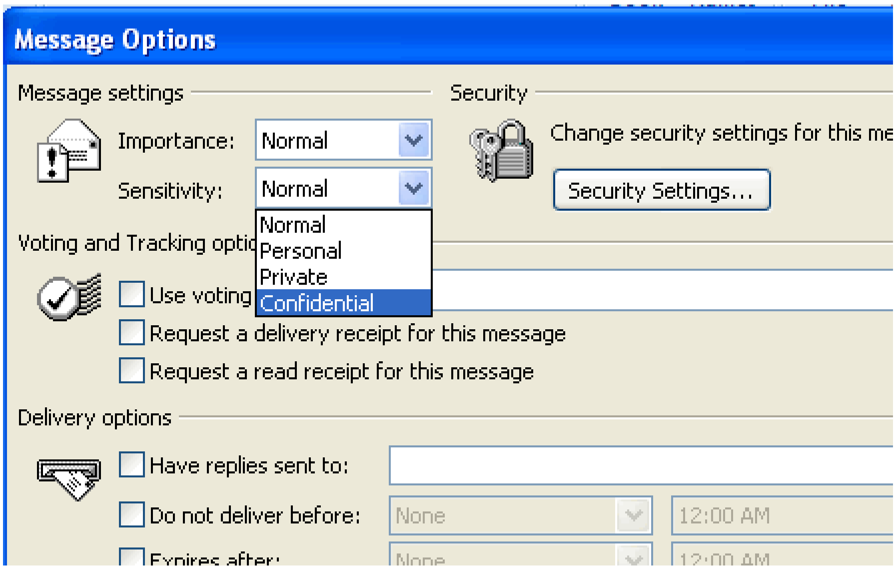


4.7 Keeping Certain E-Mails Confidential

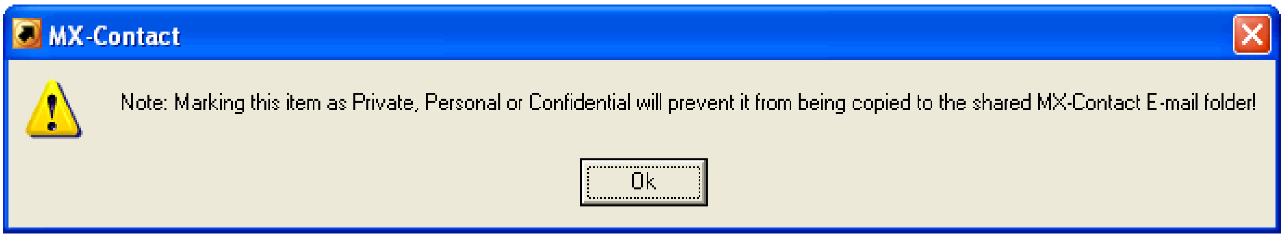
Even if your e-mails parameters are set such that every e-mail to or from a contact in the MX-Contact Contacts folder is automatically linked and copied to the E-Mail folder (See section 6), you can prevent this from occurring if you mark an (outgoing) e-mail Personal, Private or Confidential. You do this by clicking the **Options** button on an e-mail:



You select from the **Sensitivity** dropdown:



The following message will then be displayed:



Any **inward** e-mail marked by the sender as Private will also not be copied to the shared **E-Mail** folder.

5 Setting up E-Mail Handling

The next point to understand about the linking of e-mails is that only e-mail to or from a contact that exists in the MX-Contact **Contacts** folder **can** be linked to MX-Contact. So for example one need **not** be concerned that a confidential e-mail to a personal friend or family member will end up being read by the whole company if that contact is not in MX-Contact. This is even the case if that private contact is in one's Personal Contacts folder, i.e. the Contacts folder that forms part of your Outlook Mailbox. An e-mail sent to any **personal** contact or any contact that exists in a folder outside the MX-Contact **Contacts** folder will never end up in the shared e-mail folder.

Therefore only mail to "public" contacts **can** ever be made "public" (but not necessarily **will** be).

One of the challenges in handling e-mail though is deciding if all customer/contact-related e-mail should be copied to the Public Folder. In certain situations, one can argue that e-mails that are either a) trivial (jokes, etc). or b) confidential should not made “public”. The other issue is to decide about whether this linking process should occur automatically, or be manually done. This is where MX-Contact’s **Parameters** come into play. These are described below.

6 Setting up the Parameters

In MX-Contact there is a **Parameters** Folder which contains “system settings” that can be changed to suit particular preferences. This folder is a sub-folder of the **System** folder. Normally these settings are setup by the Administrator of MX-Contact. Currently these settings apply to all MX-Contact users and are not individually set (we are looking into doing this in the future).

The following parameters can be changed depending on how you want e-mail to be handled.

- **Link Incoming E-Mail**
- **Link Outgoing E-Mail**
- **Copy Linked E-mail to E-Mail Folder**
- **Resolve Exchange Users**
- **Resolve Incoming Email Contacts**
- **Resolve Incoming Email Users**
- **Status Caption**
- **Regarding Caption**
- **Category Caption**
- **Status Picklist for E-Mail**
- **Regarding Picklist for E-Mail**
- **Category Picklist for E-Mail**

A more detailed description of each parameter appears below. To change a parameter, you navigate to the **System\Users** folder (open your Folder List if it is not showing by selecting **View, Folder List** from the main Outlook menu). You double-click on the relevant parameter to open and edit it. In certain cases you may need to click **Edit, Revise Contents** in order to change the parameter’s value.

6.1 Link Incoming E-Mail

This parameter has 4 possible values, namely **On Receipt** (the default), **On Receipt Delay**, **On Open**, and **Manual**:

- **On Receipt:** Any e-mail from a sender who exists as a contact in the MX-Contact Contacts folder (as identified by his or her e-mail address) will automatically be linked to that e-mail as it arrives in your Inbox.
- **On Receipt Delay:** One of the issues around using the setting **On Receipt** is that some users find it distracting that the e-mail is processed when they are busy doing something else like composing another e-mail. When this option is set, MX-

Contact processes the e-mails into a queue as they are received, and does not immediately link them. Processing of these "queued" will not start until there has been no activity (keystroke or mouse click) on the user's machine for a period of 60 seconds.

- **On Open:** As an e-mail is **opened** in your Inbox, all the sender and recipient e-mail addresses will be checked against the contacts existing in the MX-Contact Contacts folder and those contact(s) found will be linked to the e-mail.
- **Manual:** Only when a user clicks the **Link to MX-Contact** button on the MX-Contact **Mail** Toolbar (displayed at the top of a mail item) will the senders and recipients of that e-mail that exist as contacts in the MX-Contact Contacts folder be linked to that e-mail.

Please note the related parameter **Copy Linked E-Mail to E-Mail Folder.** This governs whether a linked e-mail is automatically copied to the E-Mail folder or prompts the user each time.

6.2 Link Outgoing E-Mail

This parameter has 3 possible values, namely **On Send** (the default), **On Send Delay** and **Manual**:

- **On Send:** Any e-mail sent to someone who exists as a contact in the MX-Contact Contacts folder (as identified by his or her e-mail address) will **automatically** be linked to that e-mail as it drops into your Sent Items folder and copied across to the (Public) E-Mail Folder. The importance of this is that you do not really have to "link" an outgoing e-mail at all – just inserting an e-mail address of a contact that is a "public" contact and clicking send will result in that e-mail being linked to the contact.
- **On Send Delay:** When this option is set, MX-Contact processes outgoing e-mails into a queue as they are sent, and does not immediately link them. Processing of these "queued" e-mails will not start until there has been no activity (keystroke or mouse click) on the user's machine for a period of 60 seconds.
- **Manual:** Only when a user clicks the **Link to MX-Contact** button on the MX-Contact Mail Toolbar that is displayed at the top of a mail item will the senders and recipients of that e-mail that exist as contacts in the MX-Contact Contacts folder be linked to that outgoing e-mail.

Please note the related parameter **Copy Linked E-Mail to E-Mail Folder**. This governs whether a linked e-mail is automatically copied to the E-Mail folder or prompts the user each time.

6.3 Copy Linked E-Mail to E-Mail Folder

This parameter has 3 possible values, namely **Yes**, **No**, and **Prompt**:

- **Yes:** Any e-mail linked to an MX-Contact Contact, Company, etc. will be copied across to the (Public) **E-Mail** Folder without prompting the user to confirm this each time.

- **No:** Linked e-mails will never be copied to the (Public) **E-Mail** Folder.
- **Prompt:** The user will be prompted each time an e-mail is linked to a Contact, Company, etc. if they would like that e-mail copied from their Inbox or Sent Items folder to the (Public) **E-Mail** folder.

6.4 Resolve Exchange Users

MX-Contact was originally designed to automatically skip linking E-Mails from users on the same domain. The reason for this was to avoid searching the Public Contacts folder for an e-mail address every time a mail was received by one user from another internal user on the same Exchange server.

What was not fully considered was that several users need the facility to have internal contacts (usually from other offices) in their MX-Contact Contacts folder and track e-mails, etc. in the same way as for an external contact.

This has been changed but an extra parameter **Resolve Exchange Users** has been added. This must be set to **True** in order that e-mails from contacts with e-mail addresses on the same domain as the recipient be linked to MX-Contact.

6.5 Resolve Incoming Email Contacts

This parameter has 2 possible values, namely **True** (the default), or **False.** Setting this to **False** basically disables all the linking functionality, so that no e-mail would ever be linked to a contact, even if that contact is in MX-Contact.

6.6 Resolve Incoming Email Users

This parameter has 2 possible values, namely **True**, or **False** (the default). If set to **True**, any e-mail from an internal user that is also an MX-Contact User (i.e. is in the **System\Users** folder) will be linked to that user, irrespective of whether that e-mail is sent to an external contact who is in the MX-Contact Contacts folder or not.

6.7 Status Caption/Regarding Caption/Category Caption

These 3 parameters allow you to change the label(s) of the **Status, Category** and **Regarding** fields that are added on **MX-Contact Activity** Toolbar that appears at the top of an E-Mail. Be aware that changing a caption also changes the label for that field on the other activity forms, namely Journals, Tasks, Appointments and Documents.

6.8 Status Picklist for E-Mail/Regarding Picklist for E-Mail/Category Picklist for E-Mail

These parameters allow you to change the picklist(s) that are loaded in the **Status**, **Regarding** and **Category** dropdown lists that appear at the top of an E-Mail. These picklists can be individually set for each of the Activity forms, namely E-Mails, Journals, Tasks, Appointments and Documents.

Note that if you set the Parameter **Status Picklist for E-Mail** to **Status/E-Mail**, you must create a Picklist in the Picklists folder called **Status/E-Mail** and add the relevant entries for that picklist that you want to appear in the **Status** dropdown list on the E-Mail form.

7 Summary

As can be seen, several options exist for managing e-mail in MX-Contact. When setting the parameters it is important to consider both the company's need to share information along with individual user's personal preferences in terms of what information should be shared. At the end of the day what is in the customer's best interests should be the main basis for determining the correct approach.