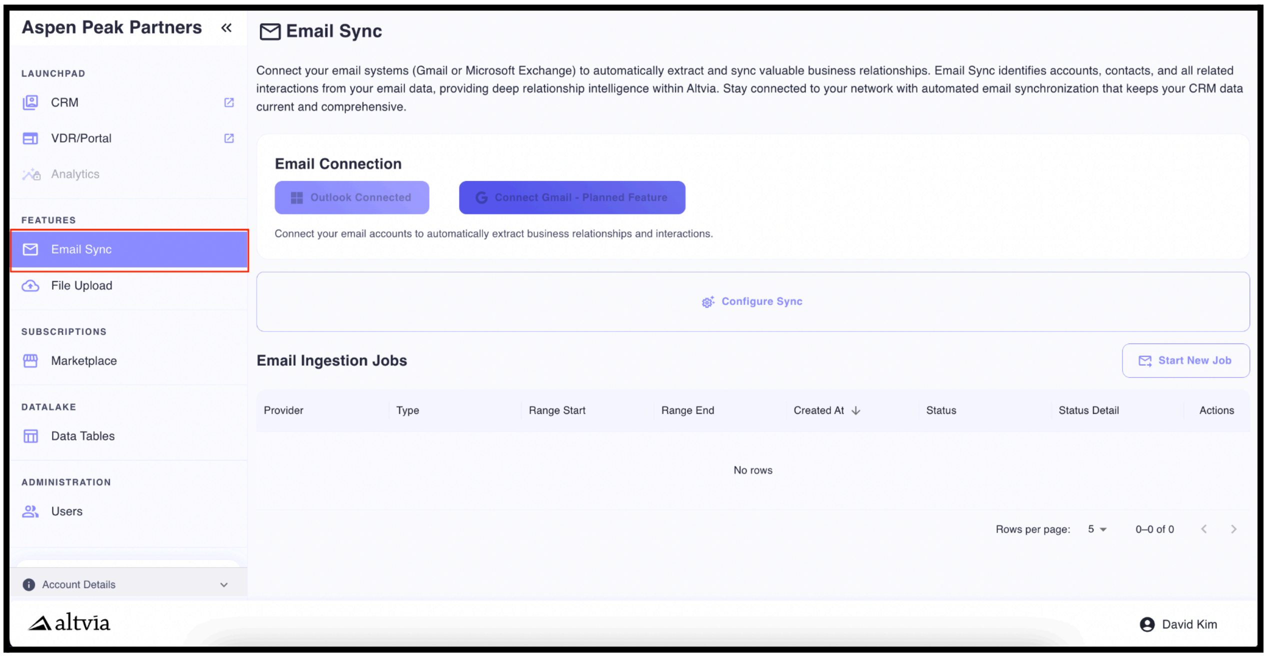
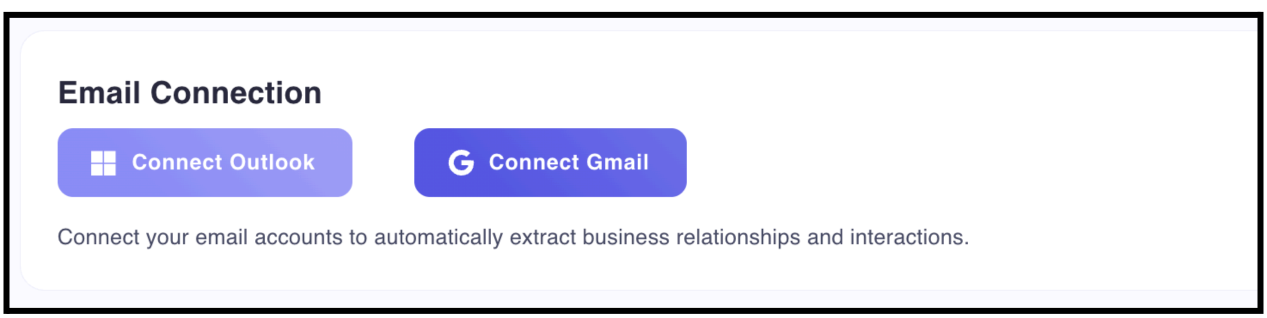
Email Sync User Guide

After receiving an Altvia Launchpad invite, log in and navigate to the left-hand navigation menu. Under ***Features***, click on the ***Email Sync*** item.



Press either the ***Connect Outlook*** or ***Connect Gmail*** button to begin connecting your inbox.

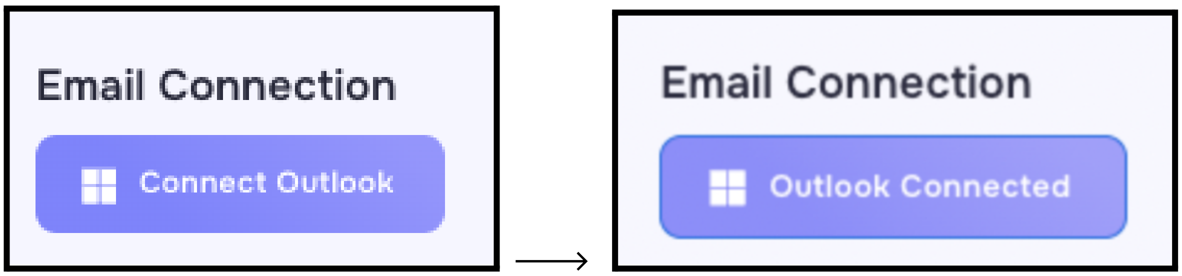


A pop-up window will appear prompting you to login to your selected inbox provider.

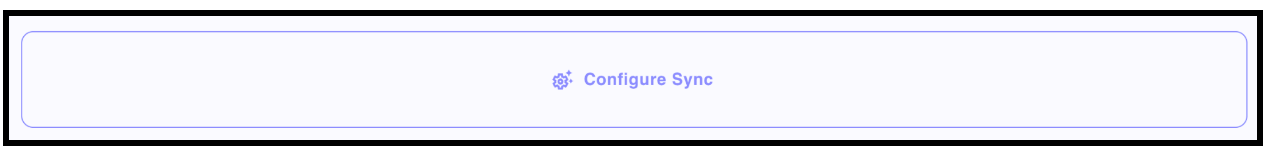
- Enter your credentials in the pop-up window
- Accept permissions request if prompted

- If unable to accept permissions, the internal IT team of your firm may need to get involved to approve the connection in order to proceed.

The inbox connection buttons will switch from ***Connect [Selected Inbox Provider]*** to ***[Selected Inbox Provider] Connected***. This is the user's indication that the inbox has been successfully authenticated with the Email Sync tool.

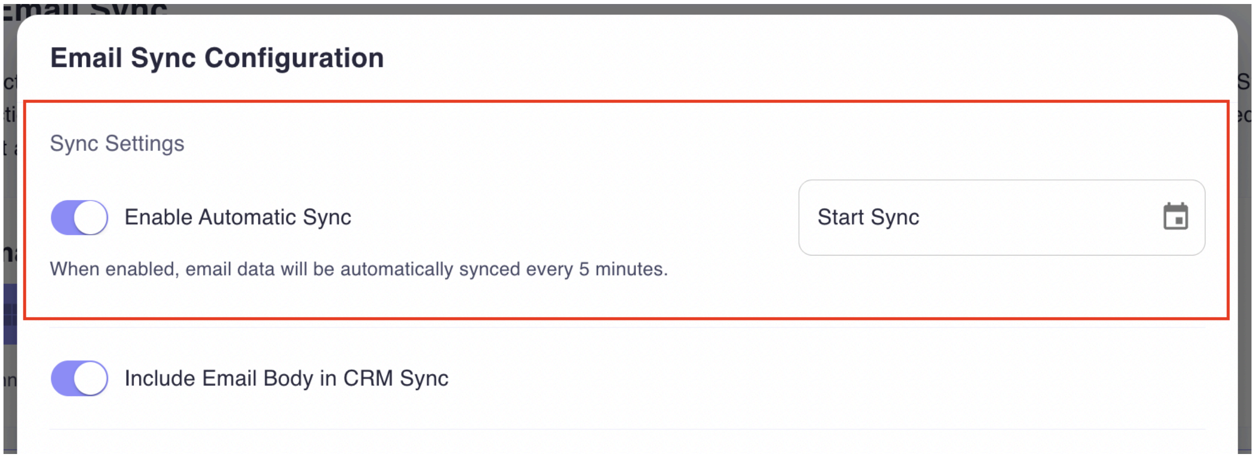


Configure Sync Settings:
The very first step before ingesting any emails into the CRM, will be to configure the sync settings by using the ***Configure Sync*** button found above the ***Email Ingestion Jobs*** table.



Enable Automatic Sync:
Enabling automatic sync will **ingest & sync new emails on a 5 minute interval**. New ingestion jobs that run every 5 minutes will display within the Email Ingestion Job table, however, there will only be an ingestion job displayed if the connected inbox has new emails to ingest.

- It is recommended to select a start date & time for automatic sync, this provides a clear starting point for the ingestion process.
    - If no start date & time is selected for automatic sync and no previously successful sync jobs exist, it will **default to 7 days prior.**
- Emails ingested through automatic sync are directly pushed to Altvia's CRM—no manual action required to initiate the sync to the CRM.



Option to include the email body in CRM Sync:
The ***Include Email Body in CRM Sync*** toggle allows users to control whether or not the email body is synced into the CRM.

- Toggled ON - The email body will be ingested and will be populated on resulting Interaction and Interaction Message records within the CRM.
- Toggled OFF - The sync to the CRM will still create Interaction & Interaction Message records, however, the email body will not be included on those created records.

The ***Include Email Body in CRM Sync*** toggle can be turned on or off at the organizational level, if the toggle is turned off at the organizational level, then end-users will see the following message: **"This setting is controlled by your tenant admin"**

Include Email Attachments in CRM Sync
The ***Include Email Attachments in CRM Sync*** toggle dictates whether or not attachments found on ingested emails will also be synced into the CRM. This setting is controlled by tenant admins.

- Toggled ON - Attachments will be ingested and will be related to the resulting Interaction and Interaction Message records within the CRM.
- Toggled OFF - Attachments will not be ingested.

Email Ingestion Direction

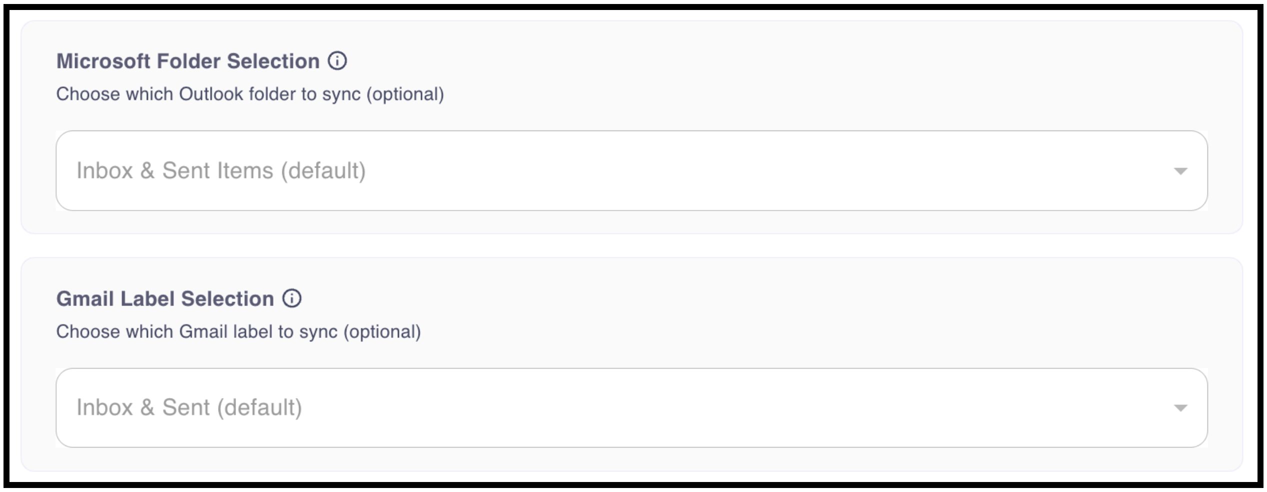
The ***Email Ingestion Direction*** dropdown will dictate the direction of emails that get ingested. This setting is controlled by tenant admins.

- ***Ingest both received & sent emails*** - Both emails that have been received and sent by the connected inbox will be ingested. **This is the default value for this setting.**
- ***Ingest sent emails*** - Only emails that are sent from the connected inbox are ingested.
- ***Ingest received emails*** - Only emails that are received by the connected inbox are ingested.

Microsoft Folder & Gmail Label Selection

Depending on your connected inbox, you will have the option to specify an Outlook folder or Gmail label to sync from ONLY.

- This is a setting that is specific to your user, and each dropdown will pull back the created folders or labels within your connected inbox for you to select.
- Once a folder/label is selected, Email Sync will only ingest items that are found within the select folder/label.
- Ingesting from both the “Inbox” and “Sent” folder/label is the default setting.



When specifying a label to sync emails from with auto-sync enabled, there is a **significant timing** aspect that could impact which emails are ingested.

- As auto-sync runs every 5 minutes, if emails are not correctly added to a folder/labeled right away there could be a scenario where the email is not ingested due to the email not matching criteria in time before the next auto-sync job starts.

Inclusion or Exclusion Email Rules:

- The Inclusion/Exclusion toggle is **controlled at an organizational level** meaning either one of inclusion or exclusion will be enabled for the given organization and all users syncing emails will be subject to using that specific rule type.
- If the Email Rule Type is set to ***Inclusion,*** all domains, sender types, and specific email addresses need to be added at the organizational level by an admin. Users may not input their own specific emails into inclusion rules.
- If the Email Rule Type is set to ***Exclusion,*** domains, sender types, and specific email addresses can be added by end users as they see fit, however, an admin at the organizational level may add specific rules that cannot be removed by end users.

Inclusion Rules:

- Domain: Include any email from a specific email address domain such as altvia.com
- Sender Type: Include based on a value found to the left of the @ in an email address such a **no-reply** or **marketing**
- Specific Email: Enter a specific email address to always include in ingestion jobs, such as jane.doe@altvia.com

Exclusion Rules:

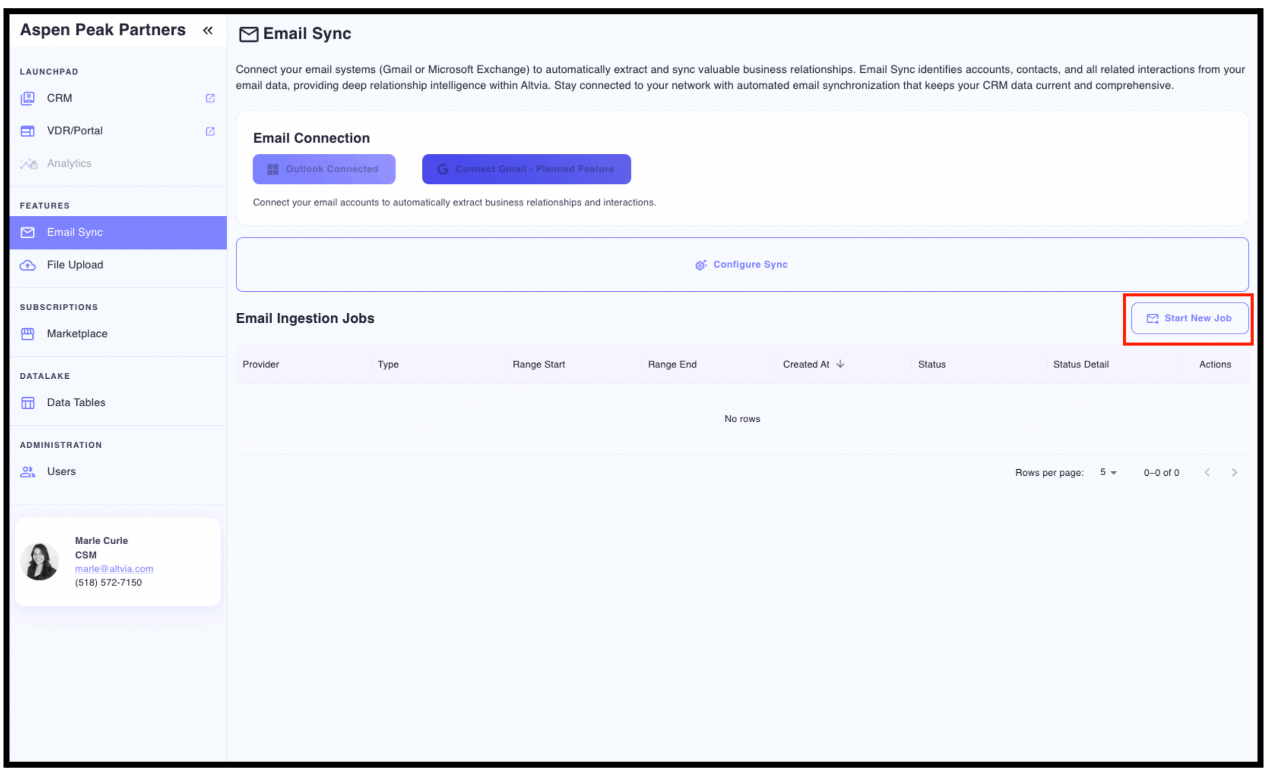
- Domain: Exclude any email from a specific email address domain such as altvia.com
- Sender Type: Exclude based on a value found to the left of the @ in an email address such a **no-reply** or **marketing**
- Specific Email: Enter a specific email address to exclude from ingestion jobs, such as john.doe@altvia.com

Dynamic Domain List Functionality:

Email Sync offers the ability to read from a CRM report to grab all unique domains from contact records found in the report and feed them into the list of domains configured for Email Sync.

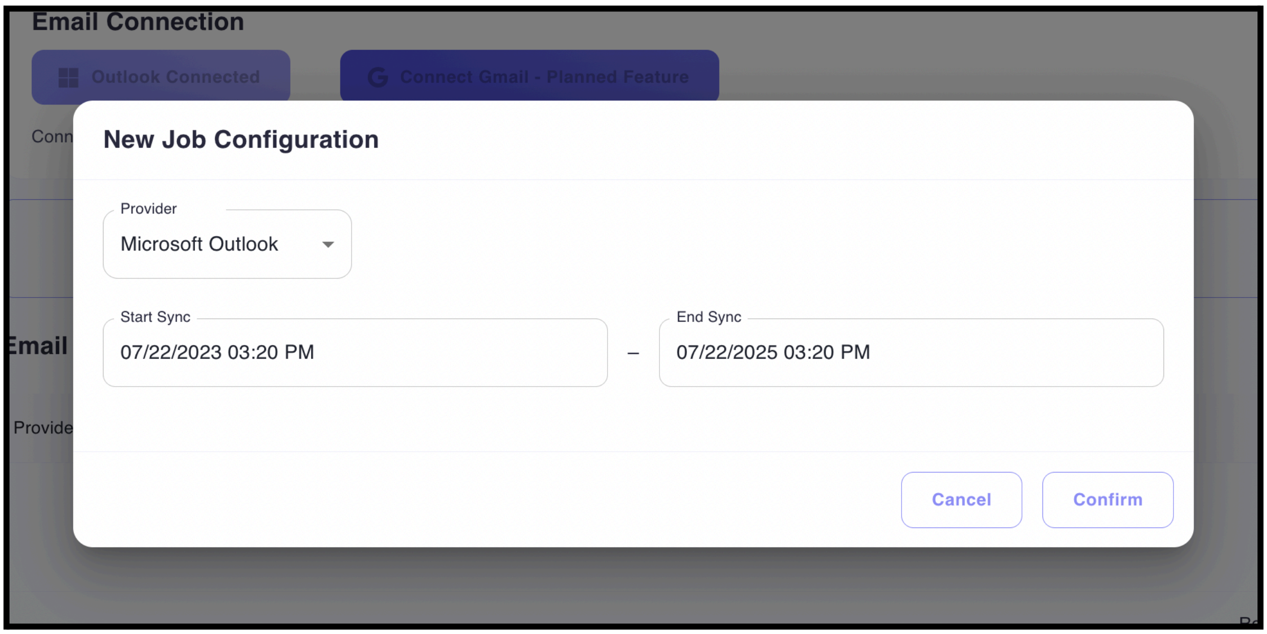
- This can be used regardless of if Exclusion rules or Inclusion rules are used.
- These domains are added at a tenant level and can only be removed by an admin.
- Dynamic Domain List can only be set up by an admin, please reach out to support@altvia.com if you would like to learn more.

Once email sync settings are in place, in order to ingest emails manually from the connected inbox, press ***Start New Job***.



This will prompt the user to select both a start sync & end sync time frame for the ingestion job to know which date range to use when identifying emails to ingest.

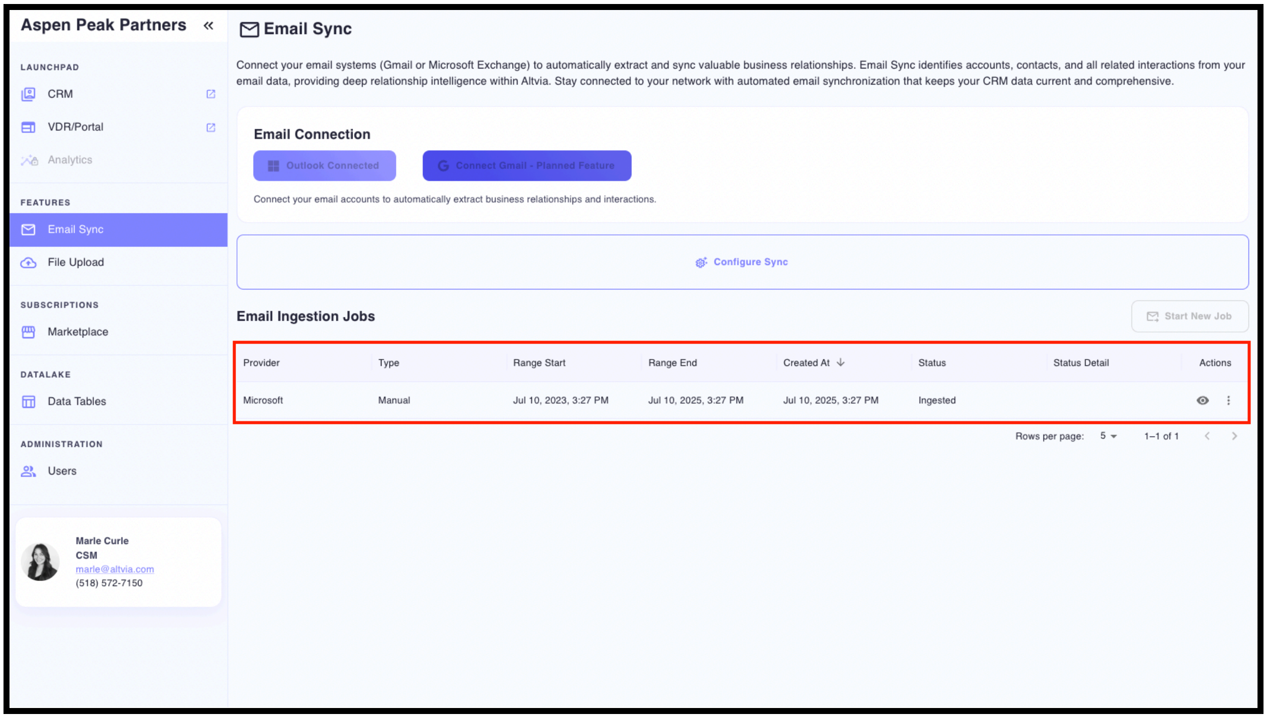
- If there are no previous successful email ingestion jobs, it is recommended to select a start date & time, this provides user control over how far back in their inbox emails should be ingested from.
    - **If no start date & time is selected, it will be default to 7 days prior.**
- If there are previous successful email ingestion jobs, then the start sync date will be set to the end range of the most recent successful email ingestion job to prevent emails being ingested twice.



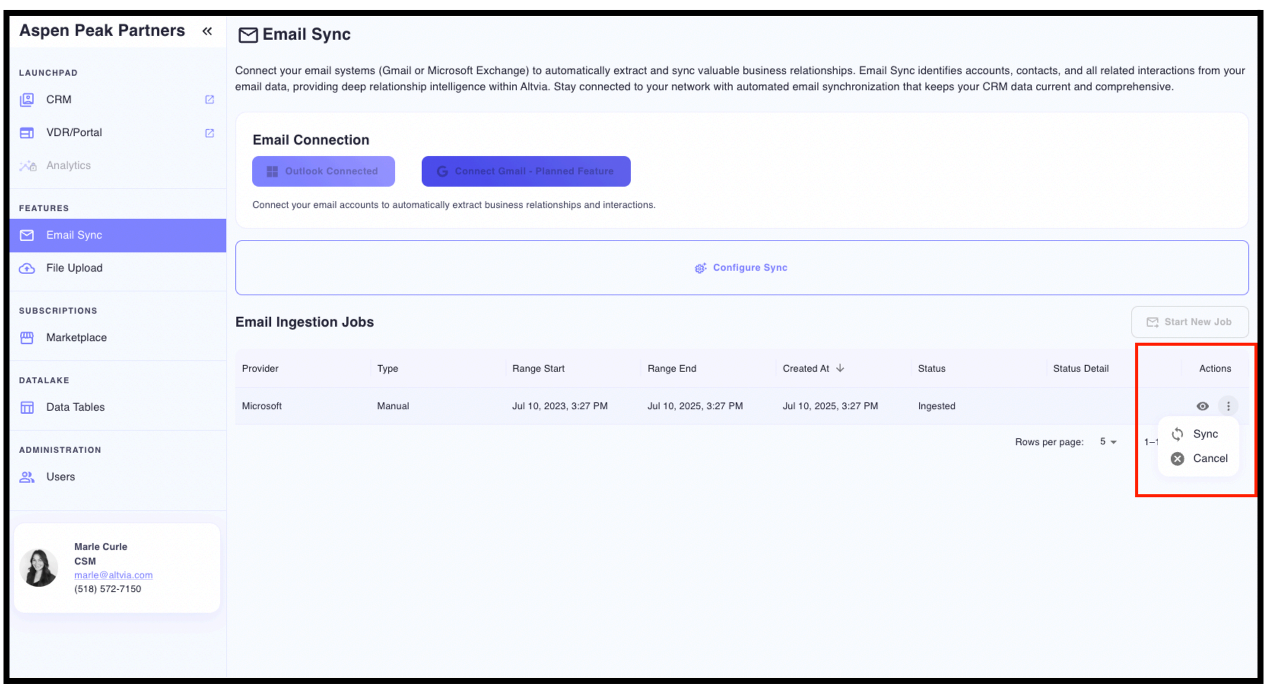
Once the start & end ranges have been selected and the ***Confirm*** button is pressed, a new ingestion job will begin, it will appear in the list of ***Email Ingestion Jobs*** along with a status of ***Ingesting*** indicating that the process of ingesting email data is running.

Once an email ingestion job is complete and the status has been updated to ***Ingested***, it will allow users to view the corresponding emails that were ingested along with Account & Contact data extracted based on the recipients on the emails.

- High-level summary statistics for the ingestion job can be found at the top of the email ingestion job view.
- Ingested data will be broken out amongst multiple object tabs: Accounts, Contacts, Interactions, Interaction References, and Interaction Messages.
- These can be viewed by clicking the view icon for the relevant email ingestion job.

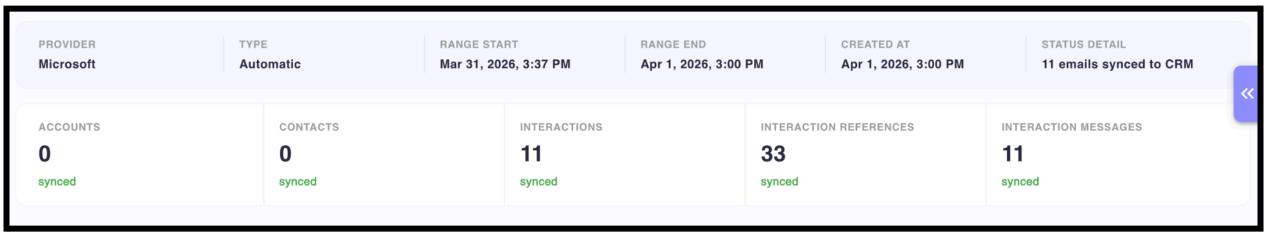


In order to sync the ingested data into Salesforce, the user must press the ***Sync*** option within the actions menu. This will start the Sync to CRM process which will push in records as Account, Contact, Interaction, Interaction Message, and Interaction Reference records.



After the sync completes for the entire email ingestion job, the status will be updated to ***Synced***. The ***Status Detail*** column will display the number of emails that were successfully synced into the CRM for the given ingestion job.

Within each email ingestion job after the sync to CRM, the high level summary statistics will update to reflect how many Account, Contacts, Interactions, Interaction References, and Interaction Messages were created within the CRM. This count will sum up only the records that were created, if matches were found to existing records and were not pushed, those do not count within the total count.



The ***Sync Status*** columns for each record found in the ingestion job will be updated and can be viewed for the email ingestion job. There are multiple sync statuses that will display for each object type but the most notable sync statuses are:

- ***Success*** -> The record was successfully created within the CRM
- ***Failed*** -> The record was not created within the CRM, and the Failed Error column will update with information on why
- ***Exact Match Found*** -> An exact match was found for the record being created, and the exact match record was used instead of a new record being created
- ***Duplicate Detected*** -> A duplicate rule within the CRM was triggered, and the identified potential duplicate record was used instead of creating a new record

FAQs

Which email providers are currently supported?

- Microsoft Outlook and Gmail are currently supported.

What does the sync to CRM do?

- The syncing process will create ingested emails as Interaction & Interaction Message records within the CRM along with associating recipients as Interaction References to the parent Interaction record.

How are account & contact records created within the CRM?

- Email Sync will create new account & contact records for recipients found on ingested emails within the connected CRM when necessary. Email Sync will first go through a matching process for both Accounts & Contacts in order to use as many existing records as possible.
- Contacts are matched to existing contact records through an exact email address match.
- Accounts are matched in the following order:
  - Email Sync finds a contact with an exact email match, Email Sync will use that contact's associated account record.
  - Email Sync will extract the domain from a sender/recipient's email address, and use the extracted domain to match to existing contact records with that same domain within their email. If a match is found, Email Sync will use that contact's associated account record.
  - Accounts that have an exact name match.

What impacts an email ingestion job start date?

- For Automatic Sync - ongoing ingestion jobs will always use a start date that is the end date of the most recent fully ingested ingestion job. This includes jobs that are fully synced.
  - If no previous fully ingested job exists when starting automatic sync, then the start date will default to 7 days prior.
- For Manual Sync - Any new manual sync will use the end date of the most recent fully ingested ingestion job as the start date.
  - If no previous fully ingested job exists, then the start date will default to 7 days prior.

How does Email Sync handle ingested emails that are a part of the same email thread?

- All emails that are a part of the same email thread will be ingested and synced under the same parent Interaction as Interaction Message records which can be viewed on the Interaction record in the CRM.
- The Interaction Notes field on the parent Interaction record will stay up to date with the email body from the most recent Interaction Message record in the thread.

How many emails can be ingested within one email ingestion job?

- Up to 10k emails can be ingested within one email ingestion job.
    - It is not advised to always be ingesting that many emails. Over time ingestion jobs should only be ingesting a handful of emails every time.

Are there any file size limitations on ingested emails included in the sync to the CRM?

- Yes, any files exceeding 36MB will not be ingested.

How long is email data stored before being removed?

- Email data is stored for 60 days before being deleted. If an email ingestion job is not synced to the CRM within that 60 day time frame, then that data will be lost and the ability to sync it to the CRM will be gone.