Moffice CRM Mail Settings

Introduction

Moffice CRM features mail settings specifically for external mail addresses, exception mail addresses, exception mail domains, and support mail addresses.

Normally, email that is sent to, from, or CC/BCC to users of Moffice CRM by the addresses or domains of registered contacts (Customers, Potentials, and Leads), will automatically save the emails as records to the contact's Activity History. With the Mail Settings sub-menu in Customization (typically for Administrators only), these saving settings can be adjusted.

The difference between these various menus simplified in the below table. Continue reading on subsequent pages for more detailed explanations and usage guides.

	Normal Email Settings for CRM Users	Mail Settings Sub-Menus				
		External Addresses	Exception Addresses	Exception Domains		Support Mail Accounts
				Free Mail Providers	Other Domains	
What is it?	Email Addresses (email domain with MofficeSuite)	Email Addresses (other email domains / not used with MofficeSuite)	Email Addresses (email domain with MofficeSuite)	Email Domains (gmail, yahoo)	Email Domains (add manually)	Email Addresses (email domain with MofficeSuite)
Effect on CRM Data	**Add** Email Data to Customer Activity History	**Add** Email Data to Customer Activity History	**Remove** Email Data from Customer Activity History	**Add** or **Remove** Email Data from Customer Activity History	**Remove** Email Data from Customer Activity History	**Add** Received Emails to Help Desk as Support Tickets

- **External Addresses**

  Definition

  External mail addresses are mail addresses that belong to other mail domains (not the domain registered with MofficeSuite).

  Usage

  Add external mail addresses to save additional mail content data to Customers' Activity Histories.

  Example

  A company named ABC might have the domains abc.com and abc.net. They currently use abc.com with MofficeSuite. If they receive mail from a specific mail ID belonging to abc.net and would like to include the mail data from that address (ex. **workerA@abc.net)**, they would add the address to the External Addresses sub-menu. Thenceforth, mail content that is sent to, from, and CC/BCC to added contact emails that include the address (here, **workerA@abc.net**) will be saved to Moffice CRM contact records.

- **Exception Addresses**

  Definition

  Exception mail addresses are mail addresses that were made through the domain used with MofficeSuite, but are excepted from adding mail content data to any Customer's Activity Histories.

  Usage

  Add exception addresses to prevent related mail content from saving to Customers' Activity Histories.

  Example

  A company named ABC might have correspondence with a Customer to and from the CEO. The CEO does not want his mail content recorded or visible to others, so he adds his email address **ceo@abc.com** to the Exception Addresses sub-menu. Afterward, any of the mail content he sends or receives from that address will not be added to the Customer's Activity History.

- **Exception Domains**

  Definition

  Exception mail domains are the domains of free email providers or other manually added domains for which you want to prevent saving mail correspondence to Customers' Activity Histories.

  Usage

  Manage exception domains to prevent related domain mail content from saving to Customers' Activity Histories.

  Example

  There are two ways to utilize exception domains.
  1)   Free email providers are services that provide email for free like gmail.com, yahoo.com, outlook.com, etc. By default, Moffice CRM blocks mail content from saving when its ID's domain is listed in the free email providers list. Admins can enable or disable the default exception domains as needed.
  2)   Second, we have other, manually added domains. A company named ABC might have frequent emails (such as reports or other documents) from something.com. However, they would like to exclude this email domain from saving to CRM records. They add something.com to the other domains list and all email correspondence with IDs from that domain will not save to any Customer's Activity History.

- **Support Mail Addresses**

  Definition

  Support mail addresses are for users or alias accounts whose incoming, received mail will be saved to the Help Desk as support Tickets.

  Usage

  Add mail addresses of users or alias accounts that receive many support inquiries so that any email received by that Support Mail address is automatically recorded to the Help Desk menu as a support Ticket, allowing for more efficient Help Desk mail management.

  Example

  For an alias account that receives a lot of support queries such as **support@companyA.com**, add their MofficeSuite domain email address to the Support Mail Addresses sub-menu and instantly have the address' received mail from contacts be sent to the Help Desk as new support Tickets. Any received correspondence from a mail ID that has been added to a Customer, Potential, or Lead in the CRM will show the Ticket in its Activity History.

Let's get into detail about how to add addresses/domains to each of these sub-menu settings.

How To: Add an External Mail Address

To add an external mail address for which mail content you would like to add to the CRM, first head to Customization > Mail Settings > External Addresses. From there, click the + add button to enter the information you need. Moffice CRM supports both POP3 and SMTP types.

Any external mail addresses that are saved will be displayed in the list below.

How To: Add an Exception Mail Address

To add an exception mail address for which mail content you would like to prevent from saving to the CRM, first head to Customization > Mail Settings > Exception Addresses. From there, click the search bar to find the CRM user you wish to add to the list similar to the example below.
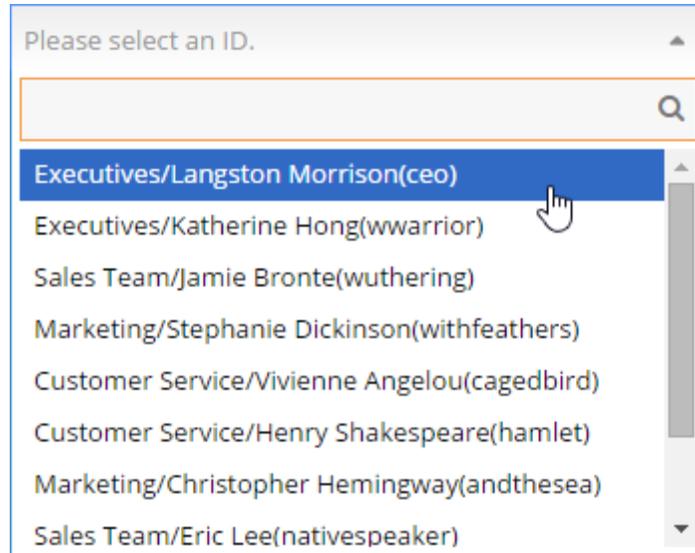
That user will be added to the list as a new exception mail address so their email correspondence will not be added to any Customer's Activity History.

How To: Enable or Disable Free Email Provider Domains

To check which free email provider domains are blocked by default from saving to Moffice CRM, first head to Customization > Mail Settings > Exception Domains. Make sure you are on the Free Email Providers tab. You will notice a long list of provider addresses as well as a lock beside each domain.

✉ Exception Domains▾

📢 All mail IDs in the below domains will NOT have their content saved to the respective Customers' Activity Histories.   ✕

Free Email Providers	Other Domains

Domain	
facebook.com	🔒
google.com	🔒
google.co.kr	🔒
naver.com	🔒

A closed lock means the domain is blocked from saving to Moffice CRM. An open lock allows mail IDs from that domain to save to Moffice CRM. To open the lock, simply click it and the block will be canceled so mail IDs in that domain can save to Customer Activity Histories.

✉ Exception Domains▾

📢 All mail IDs in the below domains will NOT have their content saved to the respective Customers' Activity Histories.   ✕

Free Email Providers	Other Domains

Domain	
facebook.com	🔒
google.com	🔒
google.co.kr	🔒
naver.com	🔒
daum.net	🔒
hanmail.net	🔒
yahoo.com	🔓
nate.com	🔒

How To: Add Other Exception Domains

To add new exception domains wherein mail IDs of that domain will not save to records in Moffice CRM, first head to Customization > Mail Settings > Exception Domains. Make sure you are on the "Other Domains" tab. Simply type in the domain and click on the + add button beside it to add the exception domain to the list. Use the trashcan icon beside any exception domain to delete it.

Before:

After:

How To: Add Support Mail Addresses

To add the mail address of a user or alias account whose received mail will be added as Help Desk Tickets, first head to Customization > Mail Settings > Support Mail Addresses. Then, search for the name of the user or their ID in the search bar, click the desired user, and finally click the + add button to register them to the list.

Any future mail received by this address will automatically have its mail content added as a support Ticket in the Help Desk menu. Click the trashcan icon to remove any IDs from the list.

A new Ticket as shown in Help Desk will have the default Ticket label and the received email's title as the name of the Ticket. These Tickets can likewise be linked to Customers in the Ticket details page.

Email addresses that have been added previously to a Lead, Potential, or Customer record in the CRM will show the received email in the contact's Activity History.