



akuiteo
BUSINESS SOFTWARE

User Guide

CATCHMAIL

Version 4.6

Revision number: 2

Published in: January 2022

Written by: Documentation team

Copyright (c) 2006-2022 Akuiteo S.A.S. All Rights Reserved.

Any total or partial reproduction of this material, whether its form or content, without prior written permission from the author, is strictly prohibited. The French law only allows, on one hand, copies or reproductions strictly reserved for private usage of the copyist and not destined for collective usage and, on the other hand, analysis and short quotes for the purpose of illustration.

The Akuiteo designation and logos are registered trademarks of the Akuiteo S.A.S. company. Any use of the trademarks without the authorization of the Akuiteo S.A.S. company is prohibited.

Visit: <http://www.akuiteo.com> and <http://www.akuiteo.com/blog/>

Table of Contents

1 Preface	4
1.1 Revisions	4
1.2 Help desk	4
2 Objective	5
3 Using the CatchMail feature	6
3.1 Transferring the email	6
3.1.1 Entering a specific email subject	6
3.1.2 Entering a partial email subject	7
3.2 Creating the event in Akuiteo	7

1 Preface

1.1 REVISIONS

Revision 2	Published in January 2022 <ul style="list-style-type: none">Updated the Categories of automatically created events (p. 8) sub-chapter.
Revision 1	Published in November 2021

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

2 Objective

The Catch Mail feature enables you to automatically create events in Akuiteo from an email received on any of your email addresses (Outlook, Gmail, etc).

This feature makes it possible to quickly track any relevant interactions with a third-party or a management object via an event (notes, document or appointment).

Catch Mail is not partitioned and can be used by users that are set up **for several companies in** Akuiteo.

3 Using the CatchMail feature

For more information about setting up Catch Mail, contact your project manager.

3.1 TRANSFERRING THE EMAIL

- 1 After you have received an email, click on **Transfer** from your email inbox.
- 2 In the **Recipients** area, enter the **catchmail@mycompany.com** address.

3.1.1 Entering a specific email subject

If you directly enter the name of the third-party or management object, or the category, the event will be immediately created.

In the email's **Subject**, enter at least one of the following information then click on **Send**:

Type	Format	Example
Name or code of third-party	For example @customername or @customercode or @"customer name" if the name includes spaces. It can be a customer, an employee or a supplier. Note: required if there is no project number specified.	@AKUITEO
Management object	#projectnumber Enter the code or number of the project, sales order, purchase order, quote, quotation, sales invoice, purchase invoice or opportunity. Note: required if there is no customer name specified.	#PRJCT_ 1234
Event category	/categoryname	/NEGO

Reminder

- You can **combine** all this information in the email's subject.
- You must add a space before each information.
- The order in which you write the information in the email's subject does not matter.
- This information is not case-sensitive and you can use uppercase and lowercase characters.
- Single ' and double " quotation marks can be used for chains of characters with spaces.
- If you enter a partial value in the subject, Akuiteo first searches for a strict match with the given value. If there is no result, then Akuiteo will search for call names that start with the given chain of characters.

Examples

Email subject: FW: email title @AKUITEO

Or

```
Email subject: FW: email title @AKUITEO #PRJCT_1234
```

Or

```
Email subject: FW: email title @akuiteo /NEGO
```

Or

```
Email subject: FW: email title #PRJCT_1234 /nego
```

Or

```
Email subject: @AKUITEO FW: email title #prjct_1234 /NEGO
```

Or

```
Email subject: FW: email title @"customer name"
```

Or

```
Email subject: FW: email title @'customer name'
```

3.1.2 Entering a partial email subject

If you do not exactly know the name of the management object or third-party, you can enter only part of this name, provided there is only one management object or third-party with this name.

Examples

```
Email subject: FW: email title #prjct_
```

Or

```
Email subject: FW: email title @AK
```

3.2 CREATING THE EVENT IN AKUITEO

Akuiteo automatically creates the event after the email has been transferred.

In Akuiteo, search for the event and open it.

Links between the email and the event

In the event, you will find all the information retrieved from the email.

Email component	Becomes in the Event record sheet...
Email body	Content of the Notes field

Email component	Becomes in the Event record sheet...
Sender name	Third-party in the Linked third parties section
Project entered in the email subject	Project in the Linked akuiteo objects section
Email reception date from the server	Event start date
Person who transferred the email	Event owner
Email subject Make sure to modify the subject if needed before transferring the email.	Event object

Links with a type of management object or a third-party

If you entered data on a management object or third-party, Akuiteo makes that link in the Event record sheet.

Email component	Consequences
There is only one management object or third-party starting with a portion of the subject	Akuiteo directly creates the Event record sheet linked to the relevant management object or third-party.
There are several management objects or third-parties starting the same way	An email is sent to the sender's address since the subject must be more detailed. In this case, there is no event created.
There are several management objects or third-parties starting the same way, but only one management object or third-party exactly matches this portion	Akuiteo directly creates the Event record sheet linked to the relevant management object or third-party.

Attachments

If the email contains attachments, they are retrieved in Akuiteo under the **Linked documents** tab.

Categories of automatically created events

The default type for created events depends on how event categories are set up, from the setup menu **General setup > Cross-cutting > Event categories**.

To determine the event category:

1. CatchMail starts by searching for the category's code in the email subject (for example /NEGO, /CREA, /NOTE, etc.).
2. If there is no category in the email subject, CatchMail then searches for the event category checked as **Default from the emails** in the setup.
3. If there is no category set up as **Default from the emails**, CatchMail searches for the event category set up with the **MAIL** code.

4. If the **MAIL** category has not been set up, an error log will let you know the event could not be created.

Once the category is found, the event type is determined according to the boxes checked in the event categories setup window, in the following order:

1. The **Notes** box
2. The **Appointment** box
3. The **Project tasks** box

Example

NEGO	<input checked="" type="checkbox"/> Project tasks	<input checked="" type="checkbox"/> Appointment	<input checked="" type="checkbox"/> Notes
MAIL	<input checked="" type="checkbox"/> Project tasks	<input checked="" type="checkbox"/> Appointment	<input type="checkbox"/> Notes
QUALITY	<input checked="" type="checkbox"/> Project tasks	<input type="checkbox"/> Appointment	<input type="checkbox"/> Notes

In this example:

- A note will be created for the NEGO category
- An appointment will be created for the MAIL category
- A project task will be created for the QUALITY category

Email address in the text body

If there is an email address in the **email body**, Akuiteo automatically searches for this address.

Email address...	Consequences in the Event record sheet
Of a single customer contact	The customer is added to the Linked third parties section.
Of an employee	The employee is NOT added to the Linked third parties section.
Of a group of contacts	The contacts are NOT added to the Linked third parties section.

Event not created

In some cases, the event cannot be created.

If...	Then...
Multiple third-parties are associated with the project	No event is created.
The third-party or category was not entered correctly	No event is created and an error email is sent.

Multi-company case

The CatchMail feature takes into account users in a multi-company context:

If...	Then...
There is no employee found from the sender's email in all companies	An error email is sent and no event is created.
A single employee is found from the sender's email in all companies	The company taken into account will be the employee's one at this date.
Several employees are found from the sender's email in different companies.	The company taken into account will be determined using tags.