

# Email Integration

# Quick Start Guide

This quick start guide has been created to help you start using Xeppo's email integration quickly. This is not an extensive guide, for more detailed information you should refer to the [Email Integration article in Xeppo's Support Centre](#).

In this guide we will cover, at a high level:

- Email integration overview
- Using and locating the unique email address used for your practice
- Key considerations
- Assigning emails
- Quick commands

### Email integration overview

Xeppo's email integration allows a Xeppo user to send emails into Xeppo for a record of the communication. Xeppo stores these as an Activity. Emails can be assigned against any of the following:

- Client record
- Group record
- Project (will also be related to the Client or Group).
- Lead (will also be related to the Client or Group).
- Opportunity (will also be related to the Client or Group).

Each practice has a unique email address which ends in **@xeppo.com.au**. This must be included for an email to be received into Xeppo, and the email must be sent from an email address that matches an enabled user in the Xeppo site.



### Your unique email address

If you want an email to be received into Xeppo, you must include the unique email when sending. Most practices add the email address in the **Cc** or **Bcc** field, but it can be in the **To** field if you prefer. This could be an email you are sending to a client, or an email related to a client; or you may have received an email you want to forward in.

You may want to update below as a record of your unique email for future reference.

**yourpractice@xeppo.com.au**

#### Trying to locate your unique email?

- **Check your URL of your Xeppo site.** For example, if the site was <https://portal.xeppo.com.au/xepdemo/Home>, the unique email would be [xepdemo@xeppo.com.au](mailto:xepdemo@xeppo.com.au).
- Ask the Xeppo administrator or other staff within your business
- Contact Xeppo at [support@xeppo.com.au](mailto:support@xeppo.com.au)

### Key considerations

For an email to be received into Xeppo, all of the following criteria must be met:

- **Must be sent by a Xeppo user**  
The email must be sent or forwarded from an email address that corresponds with an enabled Xeppo user. This is to prevent spam getting into your Xeppo site. If you have received an email, you can forward it into Xeppo.  
*If you change the email address you are using, notify Xeppo Support. A users email address cannot be updated through your site by any staff member.*
- **Unique email address is included**  
The unique email address for your practice must be included in the To, Cc or Bcc field. Where there is correspondence back and forth, check that the unique email is included in each correspondence, this will update the Email Activity in Xeppo. [Click here](#) for more info on how we handle conversations.
- **Your Xeppo site is set up to receive emails**  
The activities app is enabled in your Xeppo site, and email integration is configured.

See [Assigning Emails](#) to understand how your email will be assigned when received by Xeppo.



### Assigning Emails

Xeppo will always try to automatically assign an email when it's received. How it is assigned can be influenced by several factors. All emails sent received into Xeppo are Activities with an Activity Type of Email.

#### **@xep commands have been included in the Subject field**

You can provide additional instruction in the *Subject* field to tell Xeppo exactly where you would like the email to be assigned. For example, a specified Client, Group, Project, Lead or Opportunity. See Quick Commands in this document for a brief overview on using these commands.

#### **Commands have not been included in the Subject field**

If you have not included any @xep commands in the subject field, Xeppo will look through the email for any known client emails and assign to the relevant client. If a matching email address cannot be found to assign the activity to, it will then be Unassigned.

#### **What happens if Xeppo is not able to assign an email?**

If an email is received and Xeppo is not able to automatically assign it, the user who has sent it into Xeppo will receive a notification in Xeppo. These notifications can be accessed through the bell icon, or notifications sections on the landing page when you first sign in to Xeppo.

#### Notifications 2

It was not possible to assign an Email Activity to an existing entity.

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Within the Activities App, the system view **Unassigned Activities** will show unassigned activities, including emails. Unassigned emails can only be viewed by the user that sent them in and Practice Admin users. From here you select the Assign button next to the activity to assign to either a Client, Group, Project, Lead or Opportunity.



### Quick Commands

Commands are an instruction on how you would like Xeppo to assign an email. A few examples are below but you should refer to the [this article](#) for a more in depth explanation.

**To use commands, insert the command in the Subject field, after the actual subject of the email. Do not include any other text after the command.**

You will need the relevant Client, Group, Project, Lead or Opportunity ID – this can be located easily in Xeppo using the URL. The Screenshot below is an example of locating a Project ID.

The screenshot shows a web browser window with the URL `portal.xeppo.com.au/xepdemo/Apps/Activities/Project/Detail/24066`. The page title is "(BPT) (FP) New Client Process" and the project value is "\$5,000.00". The breadcrumb trail is "Home / Projects / Sally Sanderson Group / Sally Sanderson / (BPT) (FP) New Client Process". The project stages are "1. Pre-Appointment (Active)", "2. Appointment", and "3. Post-Appointment".

If I wanted an email to be assigned to this project, I would use the command `@xep #proj 24066`. The email would look something like this...

|         |  |  |
|---------|--|--|
| To      | <input type="text" value="sallysandersonstest@outlook.com"/>           |  |
| Cc      | <input type="text" value="xepdemo@xeppo.com.au"/>                      | ← <i>Your practice's unique email: This must be in either the Cc, Bcc or To field. Example shown is our demo site.</i> |
| Bcc     | <input type="text"/>   |  |
| Subject | Your initial appointment <input type="text" value="@xep #proj 24066"/> | ← <i>The command: Hey Xeppo! Store this email against Project 24066.</i>   |

| Example command                   | Outcome   |
|-----------------------------------|---|
| <code>@xep #client 1328871</code> | Assign email against Xeppo Code (client/entity) 1328871<br><a href="https://portal.xeppo.com.au/xepdemo/Client/Details/1328871">https://portal.xeppo.com.au/xepdemo/Client/Details/1328871</a>                        |
| <code>@xep #group 1600268</code>  | Assign email against Xeppo Group Code (group) 1600268<br><a href="https://portal.xeppo.com.au/xepdemo/Group/Details/1600268">https://portal.xeppo.com.au/xepdemo/Group/Details/1600268</a>                            |
| <code>@xep #proj 24134</code>     | Assign email to Project ID (client/entity) 24134<br><a href="https://portal.xeppo.com.au/xepdemo/Apps/Activities/Project/Details/24134">https://portal.xeppo.com.au/xepdemo/Apps/Activities/Project/Details/24134</a> |
| <code>@xep #lead 22963</code>     | Assign email to Lead ID 22963<br><a href="https://portal.xeppo.com.au/xepdemo/Apps/Sales/Lead/Details/22963">https://portal.xeppo.com.au/xepdemo/Apps/Sales/Lead/Details/22963</a>                                    |
| <code>@xep #opp 140276</code>     | Assign email to Opportunity ID 140276<br><a href="https://portal.xeppo.com.au/xepdemo/Apps/Sales/Opportunity/Details/140276">https://portal.xeppo.com.au/xepdemo/Apps/Sales/Opportunity/Details/140276</a>            |