Creating and Updating Records by Email

Create and update records from outside the system by sending emails. You can create records in a table by sending an email to the table's configured inbound email address, if the inbound address is configured to allow record creation in general and you specifically have permission to create records in the table. If you receive an email from the system regarding a record, you can reply to that email to make updates to the record, or simply record your response in the system, depending on how your system is configured.

For example, if you receive an email regarding a support case with a request for more detail, you can reply to the email and supply the information requested.

> ✓ When an email is sent by the system from a record in a table, the table name and record ID are encrypted into the header and the subject line of the outbound email. When an email is received by the system, it looks for the encrypted ID in the subject or header to determine if it is a reply regarding an existing record. If it is, then the email is treated as a record update. If no encrypted ID is found, it is treated as record creation, and the system checks whether record creation is enabled.

Processing Updates by Email

If the email is an update to an existing record:

- A communication record is created and linked to the record from which the original email was sent, so the new email appears within that record. For example, if the original email was sent from a support case, and the customer replies with more details, the communication record is linked to the support case.
- The email body and attachments are typically mapped into an Append Only field and Attached File field in the linked record. How the parts are mapped is defined in the inbound account setup on the Email Updates tab and the Email Parsing tab.

Creating Records by Email

If an email is received with no encrypted ID, permissions determine what happens next.

If record creation is permitted and the sender's group has permission to create a new record, or the account setup grants guests permission to create a new record:

- A new record is created that maps the content of the email according to the options on the Record Mapping tab of the Inbound Email Setup.
- A communication record is created and linked to the new record.

If the conditions are not met, the record is discarded.

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⚠️ If you want unknown users to have permission to create records, be sure to select a user account on the Access tab that has permission to create records in the desired table. The Access tab is part of the Inbound Email Accounts setup.