Assignment of Emails to Customers

The Msg Root folder is checked directly, with known folders such as Junk, Deleted, Drafts etc. being ignored except for Inbox and SentItems.
Thus, all user-created folders for the emails are taken into account.

If the email is in the inbox or one of its subfolders, we check the sender for a match among the contacts.

In the backend under Basic configuration \ Settings \ "Ignore domains during email import" domains can be entered that will be discarded.

Furthermore, under Basic configuration \ Settings \ "Domain matching for customers via full email" you can specify for which domains a full match should be made. These can be general addresses, such as @gmx.de or similar.

Rules for assignment:

1. Read recipients (TO, CC)
2. Depending on the backend settings:
   - Exact match with the Contact => email is assigned.
   - No exact match with the Contact: The domain part of the email address is compared with the domain part of the Debtor's email
     - If a match is found, the email is assigned
     - If no match is found, the email is ignored
3. If a match is found, the email is imported and assigned.

The display of Exchange emails can be found in the client under Activities.

If the Opportunities module is used, then the Exchange activity is automatically assigned to a lead/opportunity.

Rules for assignment:

Lead

1. After determining the customer

2. Does the customer have a lead?
3. Is the status of the lead "In progress" or "Deferred"
4. Then assign the activity to the lead.

Opportunity

1. After determining the customer
2. Is the customer assigned to an opportunity?
3. Is the opportunity In progress
4. Then assign the activity to the opportunity

If there are multiple matches, the first one is used.

Revision #5
Created 2026-08-31 10:37:11 UTC by n8n
Updated 2026-09-02 14:58:08 UTC by n8n