

TaskRay Email Use

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Contents

[Purpose](#)

[Setup Send from TaskRay](#)

[Setup Upload from Outlook](#)

[Sending from TaskRay](#)

[Uploading from Outlook](#)

Purpose

All communication with a customer regarding their project should be logged within the TaskRay project, either within the project task if it is a task specific conversation, or from the project itself if the conversation relates to the overall project.

TaskRay can send emails directly from a project or project task. Users can also upload received or sent emails to TaskRay projects or project tasks from Outlook with the Salesforce Add-in.

This document walks the user through the setup process for both scenarios as well as a high level overview of sending/uploading emails to projects.

[Top of Document](#)

Setup Send from TaskRay

Prior to generating an email from within TaskRay to send to the customer, ensure that your email account has been connected. From TaskRay, follow the steps below to connect your email account:

1. Select Settings
 - a. Click under your icon at the top right of the screen
2. Select Connected Accounts
3. Select Email and Calendar Accounts
4. Your Office 365 account should be connected here

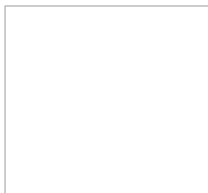
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[Top of Document](#)

Setup Upload from Outlook

To upload customer emails or your emails sent to customers directly via Outlook vs Salesforce, the Salesforce Add-In will need to be added to Outlook. Follow the steps below to set up the add-in.

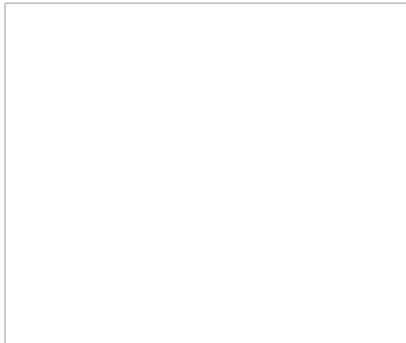
1. Open Outlook
2. Select File
3. Select Manage Add-ins



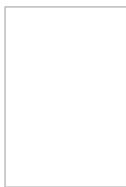
4. In the Search Add-ins box type Salesforce

5. Click the Add button

a. If the add-in is already installed, the option will appear as below with Added vs an Add button



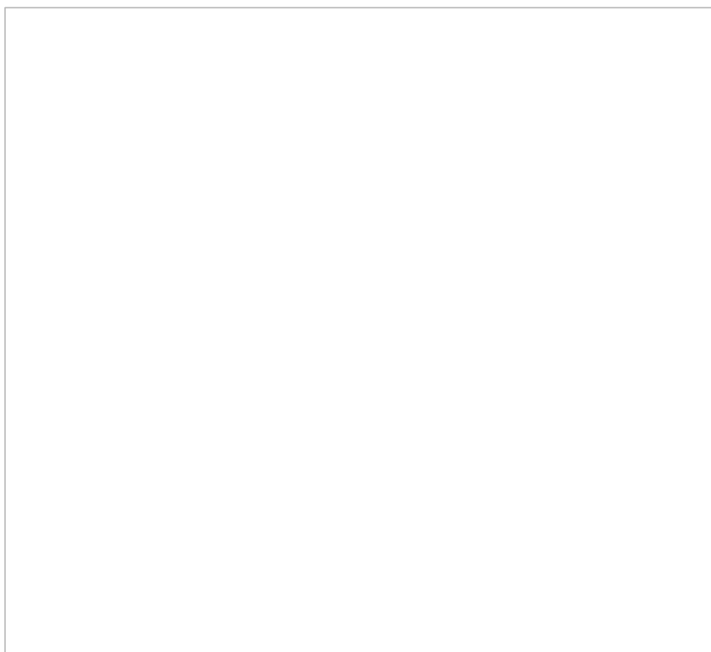
6. In Outlook, you should now see the add-in



7. Click the Add-in option to launch the integration

8. Click the Log In to Salesforce button

9. From the login screen, select 'Use Custom Domain'



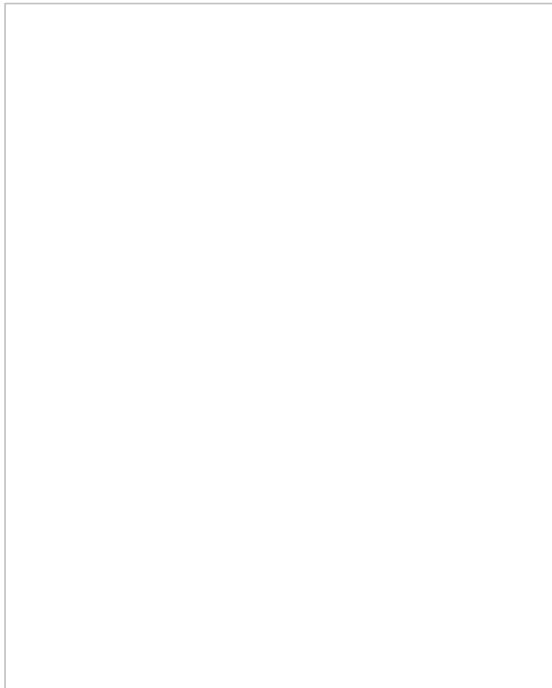
10. For the domain, enter boldgroup and hit Continue

11. Select Log in with Okta SSO

a. User your Bold Group okta login and authenticate

12. Click the Confirm button the app will launch in a window on the right of the screen

13. Pin the application to keep it active



[Top of Document](#)

Sending Emails from TaskRay

For many project activities, an email template is in place to quickly create the appropriate email. It is recommended to use these templates; however, users can create generic emails without using a template. You will need to make sure the Subject line of the email and body of the email is populated if a template is not used.

To create an email directly in Salesforce:

1. Under the 'Activity' section of the project or task select 'Email'
2. Click in the 'Write an Email' box

Graphical user interface, text, application, email Description automatically generated



3. Enter the recipient(s) name in the 'To' field

- a. Select the Primary Implementation Contact from the project's 'Customer Onboarding Information' section
- b. Click 'cc' in the 'To' to copy recipients

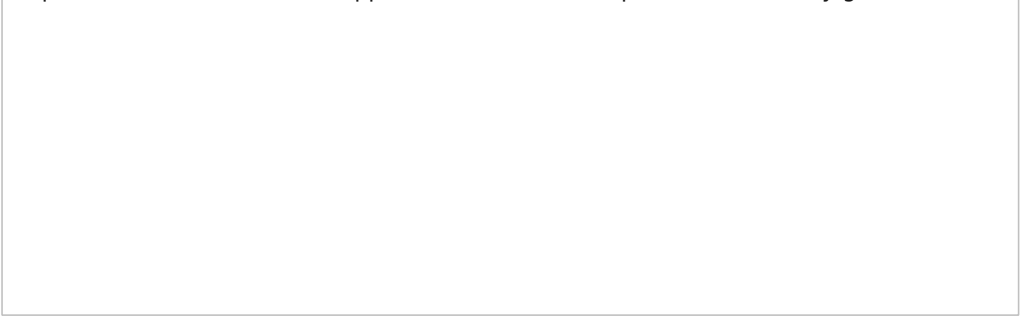
4. From the bottom of the email, select the template icon to pull in a template to populate the email subject, content, and signature information



5. Select the appropriate template

- a. Recently used templates will show in the list to select
- b. Click Insert Template to locate additional templates
- c. Search for the correct template by entering a template name in the Search box

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1.

d. Click on the template name to select it

e. The template will populate the subject, content, and signature information

f. It pulls information from the project for all areas with brackets as shown above. Do not edit these fields.

6. Edit the body of the email

a. Read the contents to ensure that the email template is appropriate.

b. Edit all areas in red with the correct information for the customer

7. Review/Add email attachments

a. Review existing attachments and remove any that do not apply to the project

image.png

b. Click the Attachment icon to upload additional attachments

8. Click Send to send the email

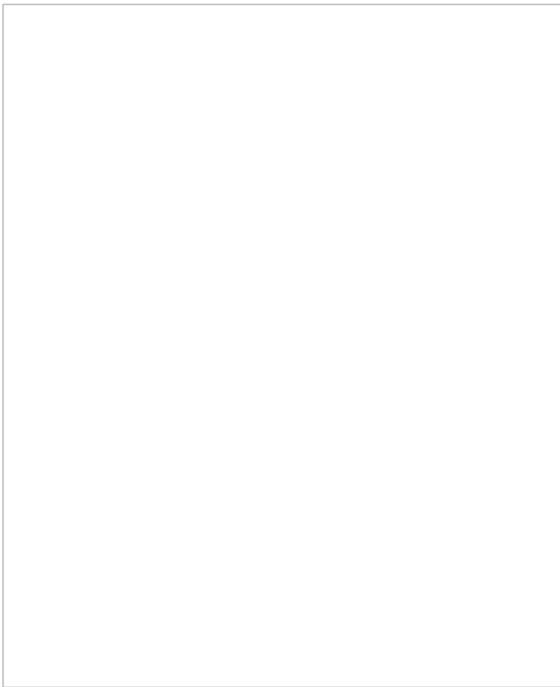
9. The email will appear in the Activity section

[Top of Document](#)

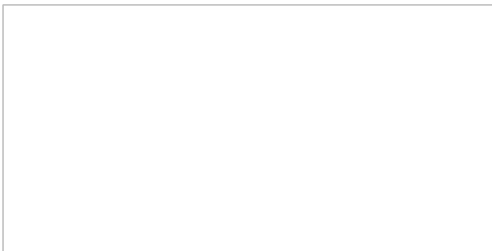
Uploading Emails to TaskRay

To upload an email, select the email and follow the steps below:

1. Click Log Email



2. Select where the email will be uploaded to from the drop-down menu
 - a. TaskRay Tasks – for task specific conversations
 - b. TaskRay Project - for project summary conversations



3. Click in the search box and enter the task or project name
 - a. A drop-down box will show recent tasks/projects

- b. If the task or project is open it may show at the top of the list
- 4. Click Save
- 5. The email will now be visible in the project or task Activity section
 - a. Refresh the screen and confirm email was uploaded

[Top of Document](#)