

Displaying the contents of attached emails as text for easy accessibility and reporting

If you attach emails to your SageCRM system, one of the challenges you run into is that the body of the email is stored in HTML format. So when you look at the Communication tab in SageCRM, you can't see the contents of the email from the list view. You have to click on the email to open it up and read the contents. This also becomes an issue when you want to run sales activity/communications reports. The only data that shows up on the reports is the Email Subject. The contents of the email is not able to display on the report, which limits the benefits of the report.

Effective Solutions has developed scripts that will read through your attached email communications and convert the first 400 characters of the HTML body of the email and write it to the Details of the communication so the text can be displayed on the Communications List view and also on Communications reports.

See the example of the emails attached to the communications in SageCRM below. Notice the Activity Details column, this is normally blank for emails that are attached. You can now see the first 400 characters without having to click on the email to open it up.

80 Communications, Page 1 of 4							Go to
Date / Time	Action	From	Person	Subject	Activity Details	Has Attachments	User
03/31/2017 2:33 PM	E-mail Out		Jason Ellingson	RE: ACT training	Hi Buddy, Just following up if you were still interested in a training session on ACT. Let me know. Thanks, Jeff From: Jeff Bonell Sent: Friday, March 17, 2017 8:52 AM To: 'bbree@allistool.com' Subject: ACT training Hi Buddy, Let me know if you would like to setup training for next week. I am pretty open between 9AM and 4pm. Thanks, Jeff BonellEffective Solutions1-414-525-2975jeff@effsolutions.comhttp://www.effsolutions.comhttp://www.qsalesdata.comhttp://www.s50sales.com	<input checked="" type="checkbox"/>	Jeff Bonell
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03/14/2017 8:48 AM	E-mail Out		Jason Ellingson	RE: refresher course for ACT	Sure Jason. What does this Thursday or Friday look like for you? Don GruborEffective Solutions - CRM Consultants 13160 W. Burleigh Rd. Brookfield, WI 53005Main: 414-525-2975 Cell: 414-698-4798dgrubor@effsolutions.com www.effsolutions.co...	<input checked="" type="checkbox"/>	Don Grubor
03/13/2017 7:39 AM	E-mail In	jellingson@allistool.com	Jason Ellingson	refresher course for ACT	Don, Would you be able to give me a refresher course on ACT? It's been about 3 years since we have had it and we have really only used it for quote follow up. We are moving into a model now that we would like to use the reports more, and become mor...	<input checked="" type="checkbox"/>	Don Grubor
03/02/2017 7:20 AM	E-mail In	jellingson@allistool.com	Jason Ellingson	problems syncing ACT	Hi Don, Can you or someone contact me to help me with ACT? I am unable to sync. I will be in the office for the next 1.5 hours, so there shouldn't be any issues with firewall or getting on to the network like has been in the past. Thanks and have a...	<input checked="" type="checkbox"/>	Don Grubor
07/22/2016 10:20 AM	E-mail Out	jeff@effsolutions.com	Jason Ellingson	RE: ACT questions - mobile device access	Sounds good. Just keep me updated. Thanks, Jeff From: Jason Ellingson [mailto:jellingson@allistool.com] Sent: Friday, July 22, 2016 10:20 AM To: Jeff Bonell Subject: RE: ACT questions - mobile device access Jeff I am still waiting to hear from our L...	<input checked="" type="checkbox"/>	Jeff Bonell

And here is what the results look like when you run a Communications Report from SageCRM.

Date / Time	Company Name	Person	Action	Status	Subject	Activity Details	User
03/31/2017 2:33 pm	Allis Tool & Machine	Jason Ellingson	E-mail Out	Complete	RE: ACT training	Hi Buddy, Just following up if you were still interested in a training session on ACT. Let me know. Thanks, Jeff From: Jeff Bonell Sent: Friday, March 17, 2017 8:52 AM To: 'bbree@allistool.com' Subject: ACT training Hi Buddy, Let me know if you would like to setup training for next week. I am pretty open between 9AM and 4pm. Thanks, Jeff BonellEffective Solutions1-414-525-2975jeff@effsolutions.comhttp://www.effsolutions.comhttp://www.qsalesdata.comhttp://www.s50sales.com	Jeff Bonell
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03/14/2017 8:48 am	Allis Tool & Machine	Jason Ellingson	E-mail Out	Complete	RE: refresher course for ACT	Sure Jason. What does this Thursday or Friday look like for you? Don GruborEffective Solutions - CRM Consultants 13160 W. Burleigh Rd. Brookfield, WI 53005Main: 414-525-2975 Cell: 414-698-4798dgrubor@effsolutions.com www.effsolutions.com From: Jason Ellingson [mailto:jellingson@allistool.com] Sent: Monday, March 13, 2017 7:40 AM To: Don Grubor Subject: refresher course for A	Don Grubor
03/13/2017 7:39 am	Allis Tool & Machine	Jason Ellingson	E-mail In	Complete	refresher course for ACT	Don, Would you be able to give me a refresher course on ACT? It's been about 3 years since we have had it and we have really only used it for quote follow up. We are moving into a model now that we would like to use the reports more, and become more efficient to use it for call scheduling and activities. Let me know when you would have time to either meet face to face or have a conference cal	Don Grubor
03/02/2017 7:20 am	Allis Tool & Machine	Jason Ellingson	E-mail In	Complete	problems syncing ACT	Hi Don, Can you or someone contact me to help me with ACT? I am unable to sync. I will be in the office for the next 1.5 hours, so there shouldn't be any issues with firewall or getting on to the network like has been in the past. Thanks and have a good day. Regards, Jason Ellingson Sr. Sales Engineer (C) 262-720-6770 (O) 414-453-5500 ext.31 www.allistool.com	Don Grubor
07/22/2016 10:20 am	Allis Tool & Machine	Jason Ellingson	E-mail Out	Complete	RE: ACT questions - mobile device access	Sounds good. Just keep me updated. Thanks, Jeff From: Jason Ellingson [mailto:jellingson@allistool.com] Sent: Friday, July 22, 2016 10:20 AM To: Jeff Bonell Subject: RE: ACT questions - mobile device access Jeff I am still waiting to hear from our IT contractor. I don't know how to get you into our server remotely. I am going to be getting a new Surface in the near future. I'm thinking it w	Jeff Bonell
06/13/2016 10:30 am	Allis Tool & Machine	Jason Ellingson	Phone Out	Complete	Assist Jason with accessing ACT for Web on his phone and testing the functionality		Jeff Bonell

The cost to install and implement these scripts on your system is \$800.