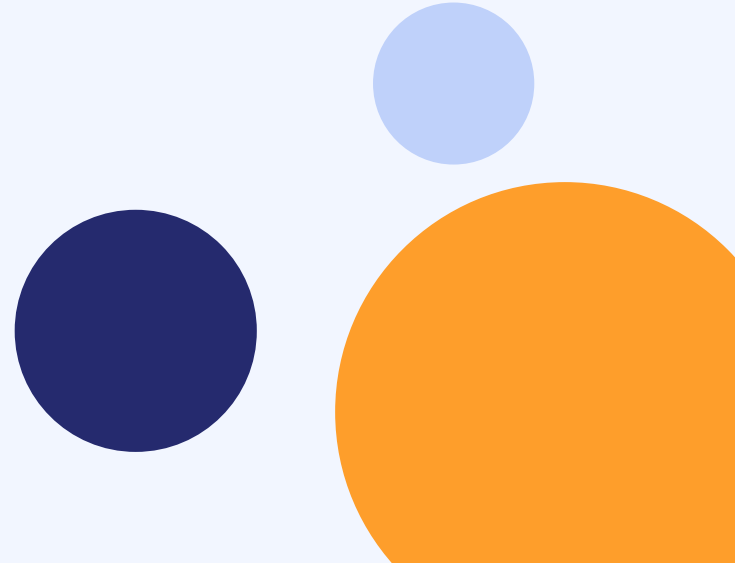


Inbound Email Sync

Training Tuesday
May 2026



Agenda

How to document both inbound and outbound messages for better organization and visibility.

- Logging Outbound Messages
- Logging Inbound Messages
 - 2 legacy methods
 - 1 exciting new automatic method
- Questions

Logging Outbound Messages

Documenting messages you SEND to candidates and clients

- **TE Recruit emailer is the absolute easiest way to make sure everything you send is logged**
 - Every message is automatically linked to the appropriate records
 - Documents are readily available for attaching
 - NOTE: If you connect your Microsoft 365 or Google accounts, non-mass emails will actually show in Sent Items there too!
- **If you prefer to use Outlook and Gmail (or really any other), use your custom Log Email**
 - Go to Setting → Email → Parse and Log Addresses and copy your log address
 - Add that address as a BCC to any message, and TE Recruit will attach it to record(s) with that email address

Logging Inbound Messages (manual)

Documenting messages you RECEIVE from candidates and clients

- **Your custom Log Email Address**
 - Forward any message you want logged your custom Log Address
OR
 - Reply to the message and BCC your Log Address
- **Outlook Add-in**
 - If you using Office 365 Hosted Mail you can [download our Outlook Add-in](#)
 - It brings TE Recruit lookup and logging tools into your Outlook client

These methods only log when you tell them to!

Both of these options can be used on both Standard and Pro Tier.

Logging Inbound Messages (automatic)

Documenting every messages **AUTOMATICALLY** when **RECEIVED**

- **Inbound Email Sync** PRO
 - Go to Setting → Addons & Integrations → Inbound Email Sync
 - Choose Microsoft or Google mail account to connect
 - All **new** inbound messages will be automatically logged to any People/Company records in your TE Recruit database with that from address
 - NOTE: Google/Microsoft administrators may need to authorize TE Recruit as a trusted app in order for other members of the organization to take advantage of inbound email syncing

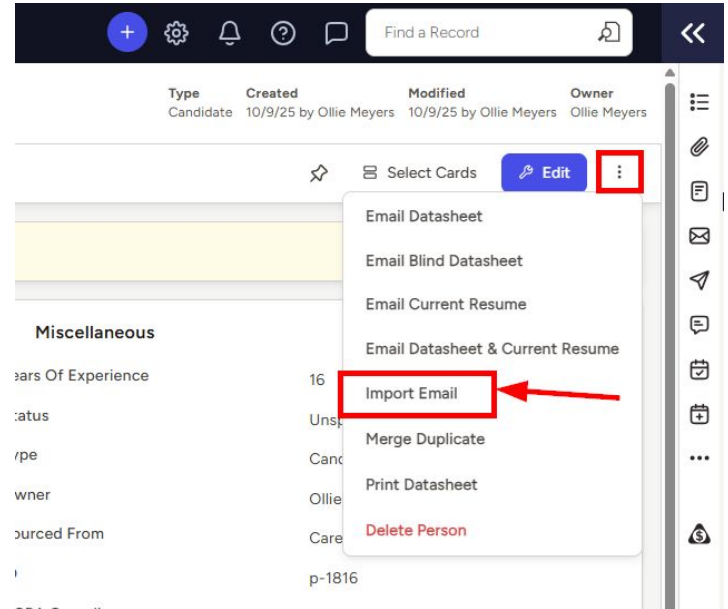
This options can be used only on the Pro Tier

These methods logs every email received to any record(s) in your database!

Logging Inbound Messages (automatic)

Add 90 days worth of emails that occurred before turning on Inbound Sync

- For cases where email correspondence has taken place prior to enabling Inbound Email Sync, an Import Email option is available on People and Company Datasheets allowing you to manually import messages from your connected email account within the past 90 days.



The screenshot displays a CRM interface with a table of records. The table has columns for Type, Created, Modified, and Owner. A record is highlighted in yellow. To the right of the record, there is a dropdown menu with several options. The 'Import Email' option is highlighted with a red box and a red arrow pointing to it. The other options in the dropdown menu are: Email Datasheet, Email Blind Datasheet, Email Current Resume, Email Datasheet & Current Resume, Merge Duplicate, Print Datasheet, and Delete Person. The 'Edit' button is also visible in the interface.

Type	Created	Modified	Owner
Candidate	10/9/25 by Ollie Meyers	10/9/25 by Ollie Meyers	Ollie Meyers

- Email Datasheet
- Email Blind Datasheet
- Email Current Resume
- Email Datasheet & Current Resume
- Import Email
- Merge Duplicate
- Print Datasheet
- Delete Person

Benefits

Inbound Email Sync value, at a glance

- **Eliminate manual logging, save time and admin work**
 - Incoming emails are logged automatically
 - No more copy/paste, forwarding to sp, or Outlook Add-in
- **Documented communication history**
 - All inbound emails captured on candidate, contact, and company records
 - Cleaner, more accurate data - improves reporting and decision making
- **Improve team visibility and collaboration**
 - Entire agency sees the same up-to-date communication history

Why - Use Cases

Where Inbound Email Sync delivers value across day-to-day recruiting activities

- **Use Case 1: High-Volume Recruiter**
 - A recruiter handling a large volume of candidate/contact emails per day no longer needs to log each message manually. Every incoming email is automatically documented
- **Use Case 2: Account Collaboration**
 - When multiple team members work the same Job, everyone can see full email history without asking someone to forward threads
- **Use Case 3: Owner / Manager Visibility**
 - Managers can see true engagement activity via reports without relying on manual logging consistency
- **Use Case 4: Vacation or Coverage Situations**
 - If a recruiter is out, another team member can quickly review the latest communication history in TE Recruit instead of digging through inboxes

Getting Help

Inbound Email Sync

- [Inbound Email Sync Overview](#)
- [Authorizing TE Recruit as a Trusted App - Google Workspace](#)
- [Importing Previous Email Correspondence](#)
- [Configuring Microsoft admin approval](#)

Using your Log Address

- [Logging Emails via Log Address](#)

Outlook Add-in

- [Logging Email via the Outlook Add-in](#)

Use Microsoft or Google Workspace to send non-mass emails from TE Recruit

- [Microsoft Integration](#)
- [Google Integration](#)

Questions?

