



## EMAIL-TO-ANYTHING

**An intelligent data management application which ingests and structures unstructured data in Salesforce, enhancing decision-making and operational effectiveness.**

Imagine an app that takes the chaos out of data management in Salesforce. Email-to-anything, ingests raw, unstructured data contained within inbound messages and turns it into structured, actionable information in Salesforce. Think Leads, Opportunities, Cases, Work Orders – or any other Salesforce object. It's not just about storing data—it's about directing it to where it's needed most, making it easily accessible and usable by the right people at the right time. Email-to-anything empowers your team, making critical information easily accessible, streamlining your operations for maximum effectiveness.

**Datasheet**

Version 1.0

### KEY FEATURES

**Data Ingestion** - Ingest and structure raw unstructured data from inbound communications e.g. Leads, Cases, Opportunities, Work Orders, support requests

**AI-Powered Dynamic Actions** – Trigger AI calls from field updates, to help enrich and categorize inbound communications

**Unified Data Management** - All information in one organized place, easily accessible and usable

**Automated record creation** – Automatically create any record from an inbound communication e.g. Email-to-Lead, Email-to-Case, Email-to-Work-Order, Email-to-anything

**Automated field updates** – identify pertinent data within unstructured data and update Salesforce records/fields accordingly

**Intelligent Email Management** - store, view, and manage emails against all relevant records, with attachments included.

**Send emails** from any Salesforce object – Send mass emails to distribute lists or send one-to-one emails directly from Salesforce

**Capture** - Capture email replies in Salesforce, both from 1-2-1 emails and mass emails (e.g. Pardot)

### BENEFITS

**Structure unstructured data**  
Ingest critical information and make it easily accessible in Salesforce. Facilitating enhanced decision-making

**Enhanced Productivity**  
Through the elimination of time-consuming manual data entry, and also by deploying smart prioritization

**Advanced Automations**  
Trigger specific actions or analysis when any field is updated. This level of automation can vastly improve the speed and accuracy of workflows

**Comprehensive Communication Management**  
A centralized hub to store, view, and manage all emails and relevant communications against all records

**Accuracy and Timeliness**  
Records are always accurate and up-to-date, assisted by real-time calls to AI models when fields update

**Improved Customer Service**  
Email-to-anything offers a more holistic understanding of customers, enhancing service delivery and customer relationships

## USE CASES

### Enhanced Lead & Opportunity Management

Ingest lead and opportunity information from emails and social media channels. Create & update leads automatically. Upon receiving new information, Dynamic Actions can trigger a lead scoring mechanism, ensuring the sales team focuses on the highest potential leads first. This is Email-to-Lead on steroids.

### Sentiment Analysis in Service teams

Ingest and structure customer queries from various channels like email, Twitter, or WhatsApp. The Dynamic Actions feature can perform sentiment analysis to prioritize critical or negative customer queries. Identify pertinent data within unstructured data and update Salesforce records/fields accordingly.

### Case Triaging – Any Team

Automatically categorize and prioritize cases based on severity, urgency, or other factors from various data sources.

### Incident Management in IT

Auto-generate and update incident tickets from emails or Teams messages. Based on updates, the Dynamic Actions could suggest the best possible solutions by referencing an AI model.

### Policy Management in Insurance

An insurance agent can use Email-to-anything to update policy records based on emails from clients. The AI-powered feature can also trigger a call to an AI model to check policy compliance or generate risk scores.

### Patient Communication in Healthcare

Healthcare providers can use Email-to-anything to manage and track patient communication across various channels, providing a more seamless patient experience.

### Crisis Management in Public Relations

PR professionals can use Email-to-anything to monitor brand sentiment across multiple channels such as Twitter and email, enabling them to respond swiftly and effectively to potential crises.

### Recruitment/HR

Human Resource professionals can leverage Email-to-anything to automate and structure candidate information coming from various job application platforms. Upon updates to an applicant's record, AI can provide real-time analysis of candidate suitability based on the job requirements.

For further information please contact  
one of our Salesforce Automation Specialists

Sales Enquiries: [sales@ortooapps.com](mailto:sales@ortooapps.com)

Technical Enquiries: [support@ortooapps.com](mailto:support@ortooapps.com)

Call: 44 (0) 20 3111 1323

[ortooapps.com](https://ortooapps.com)

