

CUSTOM CRM ID

This feature is specifically for customers who utilize a form of CRM in conjunction with DataMotion's secure email services. Customers can use this CRM ID field to ensure that thread IDs or other custom data is retained when sending a secure message.

Enabling the Custom CRM ID Feature

Enabling the Custom CRM ID feature is very simple and only requires an administrator on the DataMotion system. The administrator should perform the following steps in order to enable the feature:

1. Login to the DataMotion web portal (this URL will differ depending on your company).

Home

Login

Upon successful login, you may access your account to send and track your messages.

UserID or Email Address:

admin@company.com

▼ Configure my language settings.

Auto-Detect Language

Password:

.....

Remember User ID

Login

2. Click the **Administrative Tools** link.

Compose Member Center Inbox Track Sent Logout

Integrator: <admin@company.com>

Messages & Files

Compose

Track Sent

Inbox

Drafts

Folders

My Account

Address Book

User Information

Preferences

SecureContact.me

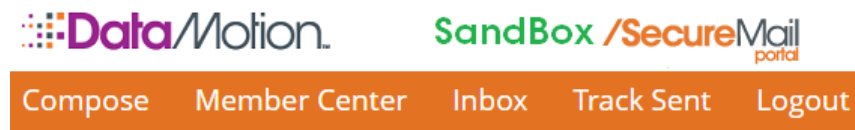
Download Console

Client Downloads

Admin Console

Administrative Tools

3. Click the **Administer your corporate accounts** link.



Administration Console

▼ **Corporate Account Management**

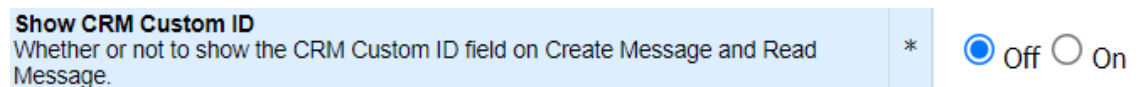
Administer your corporate accounts

4. Click the  icon for your desired company.

5. In the Company Configuration box on the left, click on the **Company Properties** link.



6. Scroll down to the **Interface – Create Message** section and select the **On** radio button for the **Show CRM Custom ID** setting.



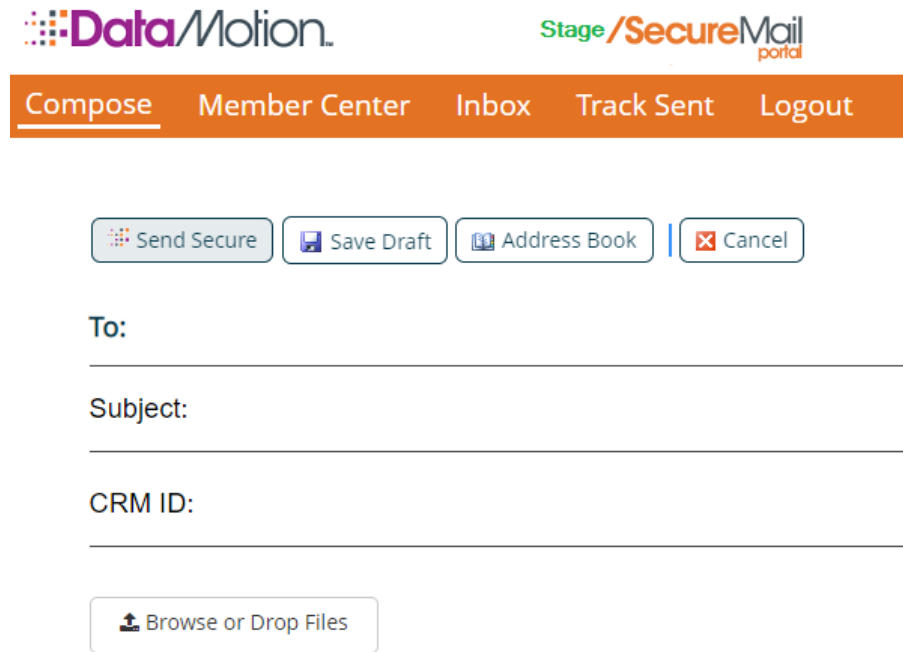
7. Click the **Save** button at the top of the page.

The Custom CRM ID setting will now be enabled for all users within the company.

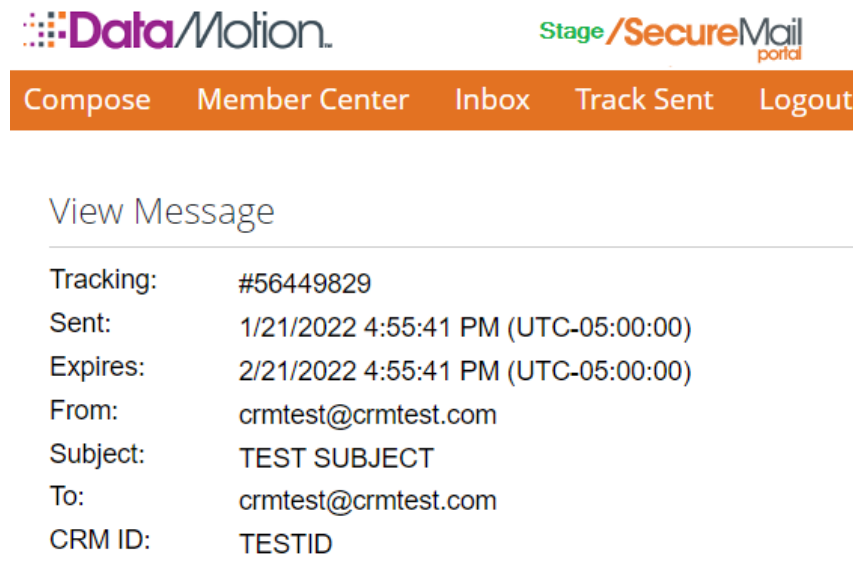
Utilizing the Custom CRM ID

Once enabled, this feature will show a CRM ID field on the Compose and View Message screens which will look something like the following:

Compose



View Message



This CRM ID field can be entered manually on the Compose screen just like a message subject if desired. However, the primary use of this feature is for customers with CRMs to use the Secure

Messaging API (see <https://developers.datamotion.com> for full details) to automatically extract something like a support ticket ID, case number, or any other thread-based identifier utilized by the CRM. This will allow the secure email to retain this custom identifier through the entire lifetime of the email thread.

A typical request body utilizing the Secure Messaging API would look something like the following:

```
{
  "To": ["recipient@example.com"],
  "From": "sender@example.com",
  "Cc": ["cc@example.com"],
  "Bcc": ["bcc@example.com"],
  "Subject": "Sensitive Information",
  "CreateTime": "11:51 AM",
  "Attachments":
  [
    {
      "AttachmentBase64": "Base64StringHere",
      "ContentType": "image/jpeg",
      "FileName": "logo.jpeg",
      "ContentId": ""
    },
    {
      "AttachmentBase64": "Base64StringHere",
      "ContentType": "image/jpeg",
      "FileName": "logo2.jpeg",
      "ContentId": "dm2.png@01D3839B.D4260F70"
    }
  ],
  "HtmlBody": "String content",
  "TextBody": "String content",
  "NotificationTemplate": "Template name",
  "CrmCustomID": "CID-123"
}
```

It is also possible to the SecureMail Gateway in conjunction with this feature. In doing so, just like when using the Secure Messaging API, customers can extract something akin to a support ticket ID, a case number, or any other thread-based identification utilized in the CRM. This will allow the secure email to retain this custom identifier through the entire lifetime of the email thread. Using the DataMotion Gateway will either require access to and experience with email gateway configuration or assistance from DataMotion Support (support can be reached via support@datamotion.com).

No matter the method chosen, upon extraction of the CRM ID, the message thread will look something like the following:

NOTE: The actual SMTP header that will be included in the message itself will be an X-Header corresponding to X-CrmCustomID with whatever value is specified.

View Message

Tracking: #56449839
Sent: 1/27/2022 2:43:11 PM (UTC-05:00:00)
Expires: 2/27/2022 2:43:11 PM (UTC-05:00:00)
From: crmtest@crmtest.com
Subject: RE: TEST SUBJECT
To: crmtest@crmtest.com
CRM ID: TESTID

Test Reply

From: crmtest@crmtest.com
Sent: 1/21/2022 4:55:41 PM
Subject: TEST SUBJECT

Test Body

