



Synergy eMailAssist™

Archive Microsoft® Outlook®
files in Synergy

Synergy eMailAssist enables automatic or selective archiving of emails and attachments from within Microsoft Outlook to the Synergy Document Management™ module. This increased efficiency reduces staff record-keeping time and keeps critical information from slipping through the cracks. Due to its compatibility with Synergy SmartIndex, saved material is intelligently categorized for retrieval.

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BUSINESS VALUE

- Save Money
- Improve Operations

COMPATIBILITY

- SilverLake System®
- CIF 20/20®
- Core Director®

FEATURES

Automatic filing. Set filing preferences per Outlook folder. Have incoming emails processed and filed into Synergy, based on email content or fixed settings. If an email is forwarded, the system recognizes the previous file to reduce duplicate filing.

Ad hoc filing. Select specific Outlook emails, meeting requests, and associated attachments for Synergy filing.

Configuration options. Organize user defaults and folder rules for the purpose of filing emails, conversation history, and meeting requests. You may choose to have attachments filed separately in the relevant Synergy Cabinet. Auto filing can be set to move emails to a selected folder after filing is complete.

Status views in Outlook. Users may add a status column in Outlook to provide a visual indicator of an email's filing status.

USAGE EXAMPLES

Synergy eMailAssist enables you to save emails associated with customer onboarding and loan and mortgage account opening. You can preserve records associated with vendor or employee onboarding. Archive emails, photos, videos, and other documents associated with fraud. You can maintain records of Bank Security Act (BSA) materials, such as emails between banks and law enforcement. Another use is to preserve email chains related to collections.

Emails are saved with attachments intact. This enables an institution to produce original emails when needed rather than trying to laboriously reconstruct records.

WHAT IT DOES:

- Automatically archives Outlook and Lync items to Synergy Document Management according to preference settings.
- Enables ad hoc archiving of items selected by the user.
- Allows users to configure a wide array of defaults and rules for filing.
- Provides a status view in Outlook showing the filing status of an email.
- Works with SmartIndex to appropriately categorize material.

WHAT IT DOES FOR ME:

- Reduces employee time spent saving and finding records.
- Reduces loss of critical records.
- Addresses a common request for proposal questions.
- Eliminates custom record-keeping performed by Jack Henry's Professional Services or a third party.

For more information about Jack Henry Banking®, or to schedule a demonstration or talk to an existing user, email askus@jackhenry.com, call 417-235-6652, or visit www.jackhenrybanking.com.