Colligo Email Manager for Microsoft 365

The Email to SharePoint Connector

01 **Emails and Attachments (Records)**

02 **Tagging, Labelling & Automation**

03 **SharePoint (Adhering to RM Policy)**

Realize Time & Cost Savings, Increase Compliance

Storing emails and attachments in a centralized repository like SharePoint Online instead of leaving them in Outlook:

- Is critical for records management, governance & compliance

- Strengthens knowledge management and collaboration

- Drives consumption and user-adoption of SharePoint and Teams as your system for records and knowledge management, further leveraging your investment in Microsoft 365

Save Emails to SharePoint from Within Outlook

- Quickly and easily file emails and attachments to SharePoint Online without leaving Outlook

- Empower users to save and auto-apply metadata and retention labels to emails compliantly. No app-switching necessary

Search and Share Emails from SharePoint

- Email SharePoint content as links for easy collaboration and file-sharing with team members

- Quickly search across SharePoint right from Outlook for opening or sending files with ease

Filing

- File email and attachments to SharePoint Online, Teams, and OneDrive
- File singular emails (up to 20 at a time) or in bulk (batches)
- Configure default actions to move or copy emails
- Support for Pinned (Favourite) Locations for quick email filing
- Smart conflict resolution to prevent duplicate names for emails and attachments

Classification

- Automatically extract email metadata and/or manually capture custom fields
- Ability to hide non-required fields when tagging metadata
- Support for customized and managed metadata (taxonomies and keywords) and person/group metadata

View

- Browse SharePoint, Teams, and OneDrive

Search

- Search SharePoint, Teams, and OneDrive

Share

- Email SharePoint content as attachments in a new email
- Email attachments from SharePoint as links to prevent multiple copies of the same content

Central Administration

- Centralized and simplified deployment via the Microsoft 365 add-in framework
- Admin capabilities to push sites, policies and streams (libraries) to users

Authentication

- Microsoft 365, Azure AD

System Compatibility

- Outlook Desktop for Mac or Windows, Outlook Online or Outlook on mobile devices
- SharePoint Online

Language

- English

Multi-cloud/Platform

- SharePoint Online, Teams and OneDrive

Microsoft
Preferred
Content AI

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