

NEXUS Embedded Email Client

Customer email lives inside the record — not in a separate inbox.

Every quote, order, ticket and invoice generates conversation, and that conversation normally lives in a mailbox nobody else can see. The embedded communication hub keeps the thread attached to the record it belongs to.

Unified Communication Hub

One hub for every mailbox the business runs.

- **Multi-account and shared mailboxes**
Personal mailboxes and shared addresses such as sales, dispatch and accounts receivable connect side by side, each with its own folder tree and signature.
- **Folders, filters and unread focus**
Full folder navigation with unread and flagged filters keeps a busy shared inbox readable without exporting to a second tool.
- **Assignment queues**
Any thread assigns to a specific person with status, so a shared mailbox behaves like a work queue rather than a room where everyone assumes someone else replied.

Security & Verification

Authentication checked on arrival, not in a header nobody reads.

- **SPF verification**
Each inbound message is checked against the sending domain's published policy, with the result shown on the thread as a plain badge.
- **DKIM signature validation**
Signature validation confirms the message content was not altered in transit, which separates a real vendor notice from a convincing forgery.
- **DMARC alignment**
Alignment results surface on the thread, so a payment-instruction change is treated with suspicion before anyone acts on it.

What This Retires

The stack line items this module removes.

- Standalone Gmail and Microsoft 365 business seats for shared operational mailboxes
- Forwarding and BCC habits used to keep records "in the loop"
- Third-party email-to-CRM sync tools and their per-user metering
- Screenshot-and-note evidence trails for audit and dispute resolution

Thread-to-Record Linking

Attach the conversation to the transaction.

- **Customer 360 timeline**
Linked threads appear on the customer record beside invoices, tickets and orders, so the next person to touch the account sees the full history.
- **Orders, work orders and tickets**
A thread links directly to a sales order, work order or ticket, keeping approvals, change requests and scheduling agreements with the job they affect.
- **Invoices and collections**
Payment promises and dispute correspondence link to the invoice itself, giving collections the exact wording rather than a recollection of it.

Rich Text Composition

Composition, attachments and drafts handled in the workspace.

- **Contact auto-complete**
Recipients resolve from the customer and vendor records already in the platform, so a reply reaches the right contact without a copied address.
- **Rich editor and signatures**
A full rich text editor handles formatting and inline images, with a signature manager applying the correct signature per mailbox.
- **Drafts that survive**
Drafts persist against the thread and the linked record, so an interrupted reply is still there after a dispatch call pulls someone away.
- **Attachment storage**
Inbound and outbound attachments store automatically in platform file storage or a connected Google Drive, keeping documents retrievable from the record itself.

Included in every tier — no per-mailbox fee, no per-user email tax, no separate sync subscription.

Connect a mailbox in a trial workspace.

Link a thread to a customer, an order and an invoice, and see the verification badges on live mail.

[Provision Your Free 14-Day Trial →](#)

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