

Inbox: the firm's email, next to its clients

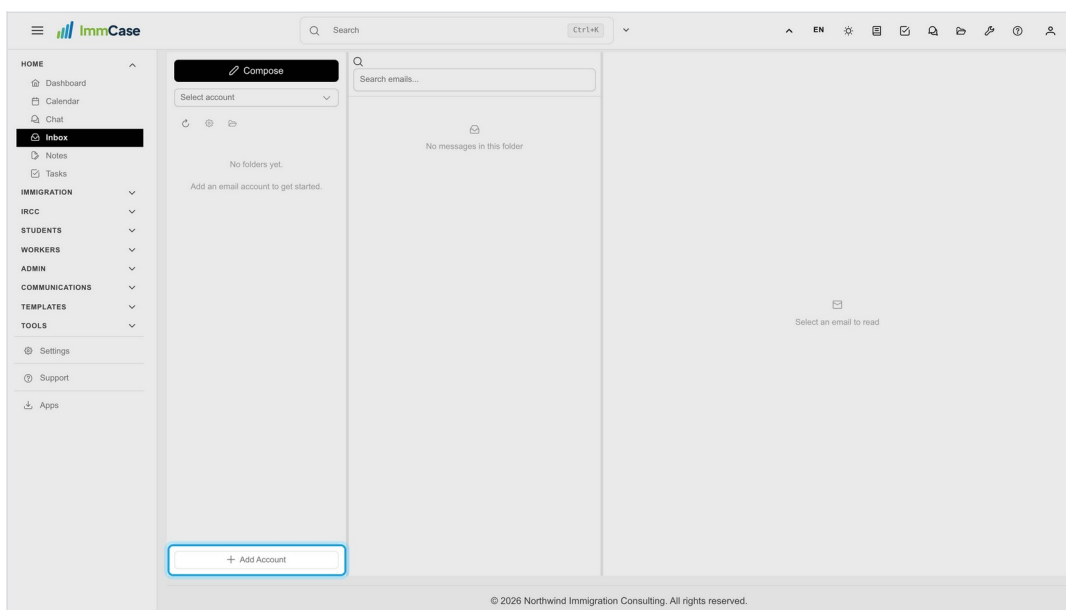
ImmCase · guides.immcase.ca · 2026-10-20

Connect the firm's mailbox once and read and answer email inside ImmCase. When a client writes, ImmCase recognizes them, and your replies are saved on their record for the whole team.

The firm, its staff, the client («Daniela Ruiz») and the new contact («Omar Haddad») in this guide are **fictional**.

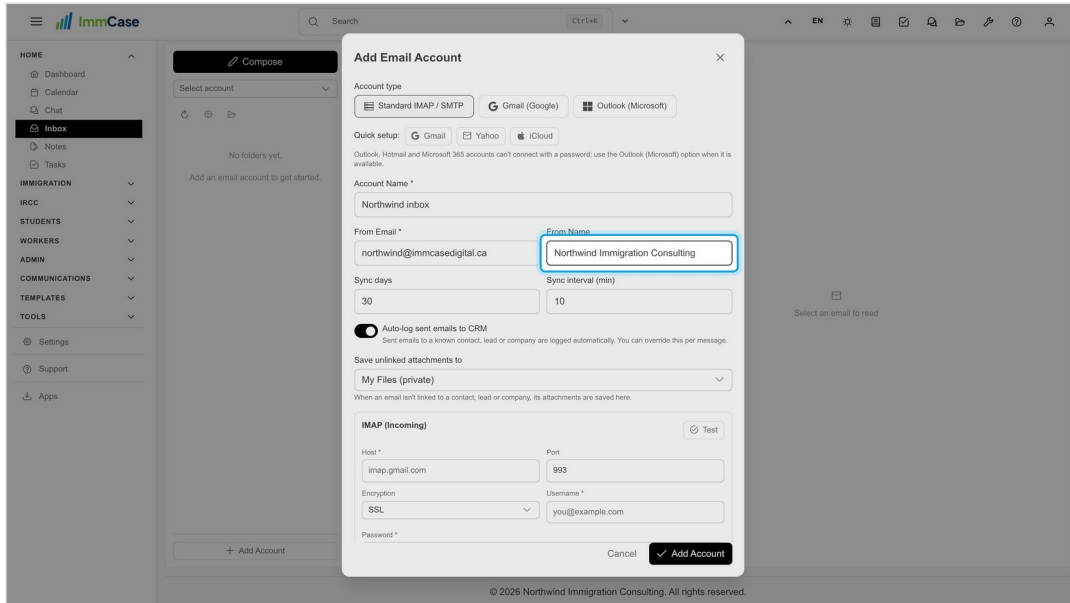
1. Open the Inbox

In the left menu, open **Home** and click **Inbox**. The first time, click **Add Account** at the bottom of the folder column.



2. Name and sender

Keep **Standard IMAP / SMTP**. Give the account a name your team will recognize, then the **From Email** and **From Name** your clients will see. For Gmail, Yahoo or iCloud, **Quick setup** fills in the servers for you.



Add Email Account

Account type
☒ Standard IMAP / SMTP ☐ Gmail (Google) ☐ Outlook (Microsoft)

Quick setup: ☐ Gmail ☐ Yahoo ☐ iCloud
Outlook, Hotmail and Microsoft 365 accounts can't connect with a password; use the Outlook (Microsoft) option when it is available.

Account Name *
 Northwind inbox

From Email *
 northwind@immcasedigital.ca

From Name
 Northwind Immigration Consulting

Sync days
 30

Sync interval (min)
 10

☒ Auto-log sent emails to CRM
Sent emails to a known contact, lead or company are logged automatically. You can override this per message.

Save unlinked attachments to
 My Files (private)
When an email isn't linked to a contact, lead or company, its attachments are saved here.

IMAP (Incoming)

Host *
 imap.gmail.com

Port
 993

Encryption
 SSL

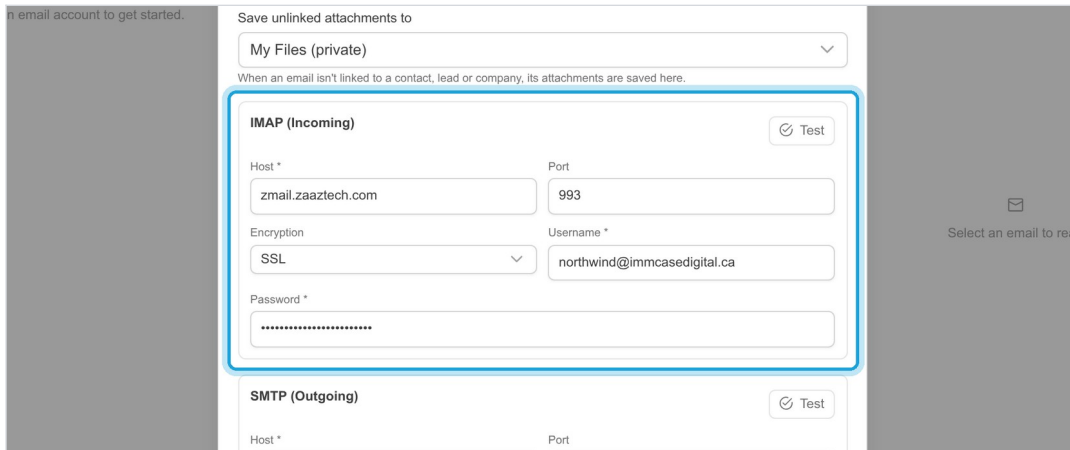
Username *
 you@example.com

Password *

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3. Incoming mail

Under **IMAP (Incoming)**, type the server, your email address as **Username** and the mailbox password (for Gmail, Yahoo or iCloud, an app password). Your email provider gives you these. Click **Test**.



Save unlinked attachments to
 My Files (private)
When an email isn't linked to a contact, lead or company, its attachments are saved here.

IMAP (Incoming)

Host *
 zmail.zaaztech.com

Port
 993

Encryption
 SSL

Username *
 northwind@immcasedigital.ca

Password *

SMTP (Outgoing)

Host *

Port

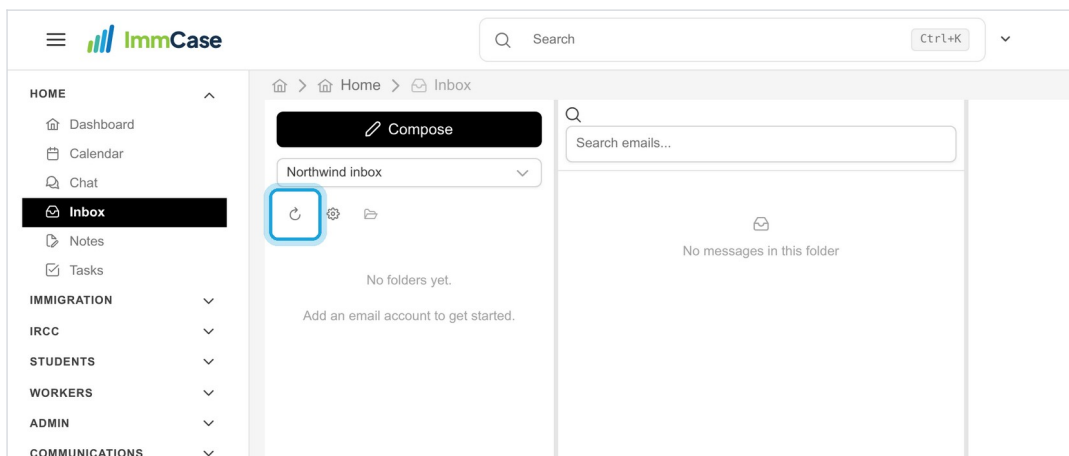
4. Outgoing mail

Under **SMTP (Outgoing)**, the same for sending. Most providers use the same username and password.

The screenshot shows a modal dialog titled "SMTP (Outgoing)" with a "Test" button in the top right. The dialog contains the following fields: "Host *" with the value "zmail.zaaztech.com", "Port" with the value "465", "Encryption" set to "SSL" via a dropdown, "Username *" with the value "northwind@immcasedigital.ca", and a "Password *" field with masked characters. At the bottom, there are "Cancel" and "Add Account" buttons. The "Add Account" button is highlighted with a blue border. In the background, a "Password *" field is also visible.

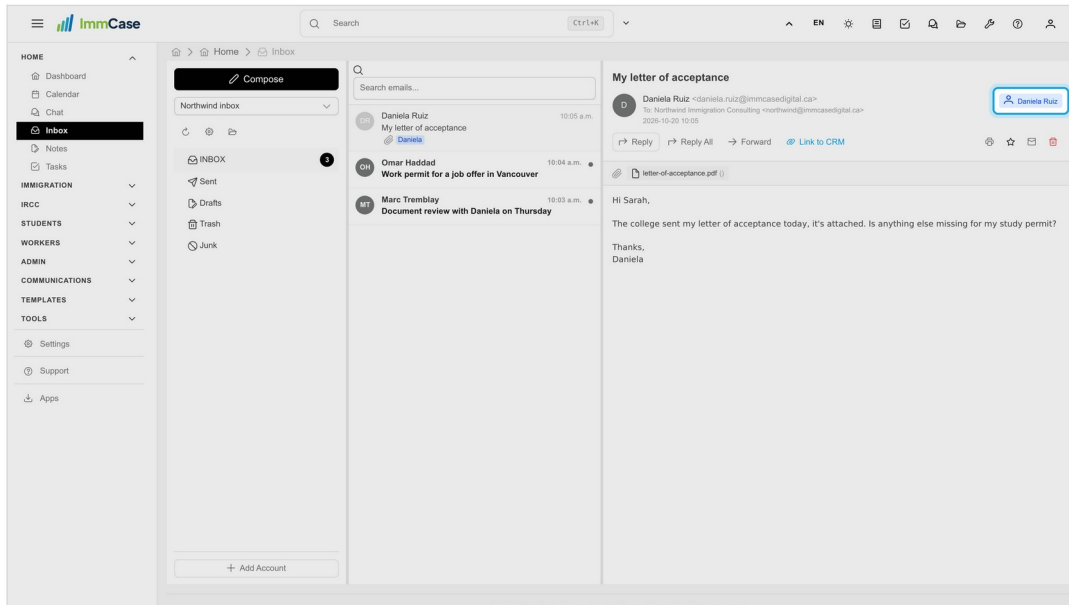
5. Your mail arrives

Click **Add Account**. ImmCase copies the last 30 days of mail; after a few seconds, click  to show your folders. From then on it checks for new mail on its own.



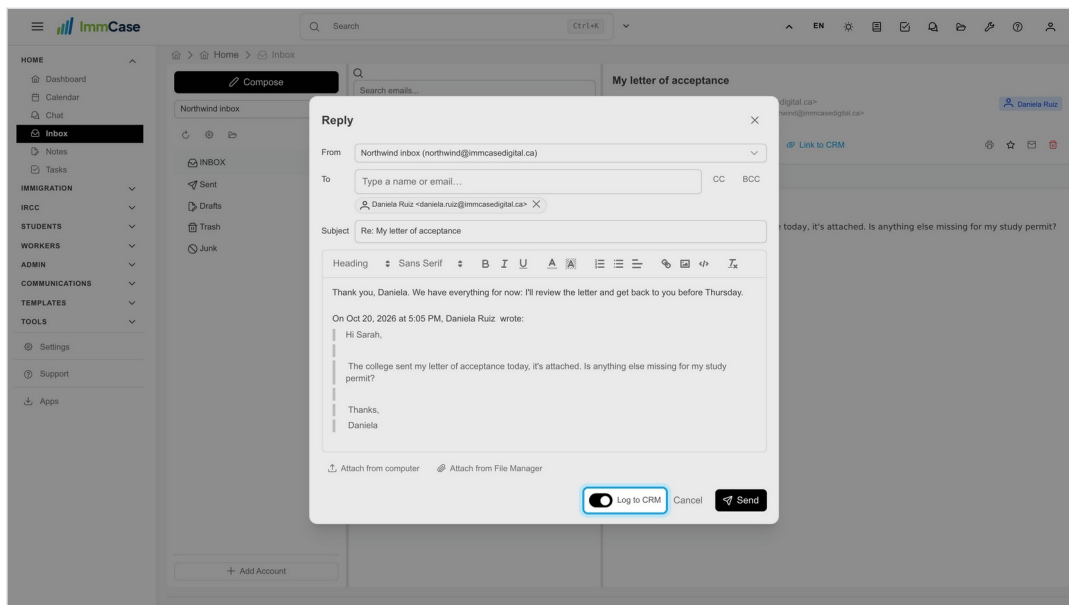
6. ImmCase knows the client

Open an email. When the sender's address is one of your contacts, their name appears at the top right: click it to open their record.



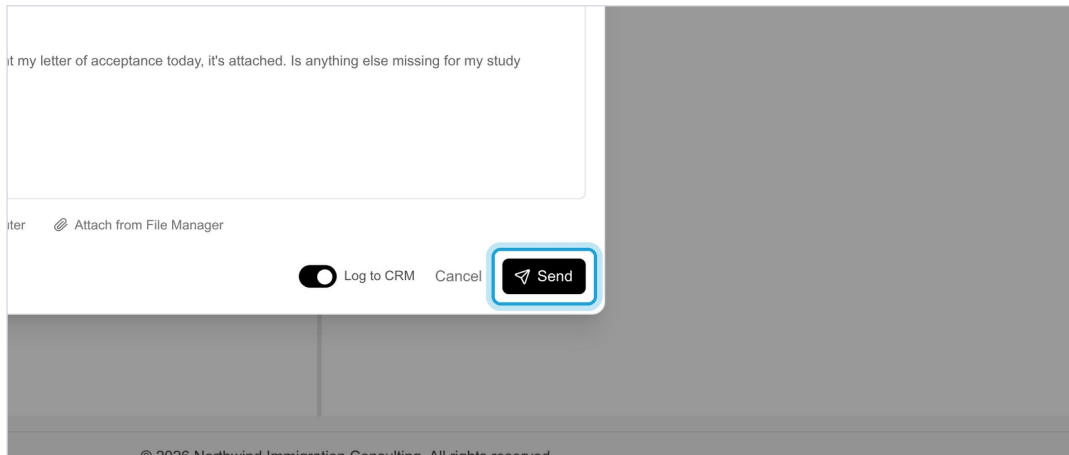
7. Reply, and keep a copy on file

Click **Reply** and write above the quoted message. Leave **Log to CRM** on: the email is saved on the client's record. Turn it off for a message that shouldn't be kept there.



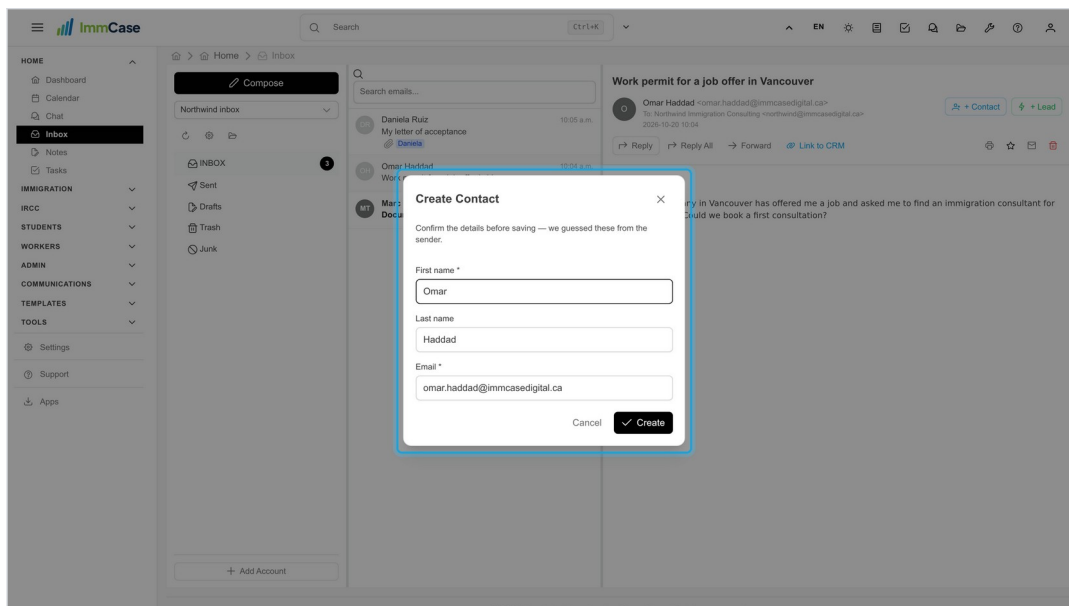
8. Send

Click **Send**. It goes out from the firm's address.



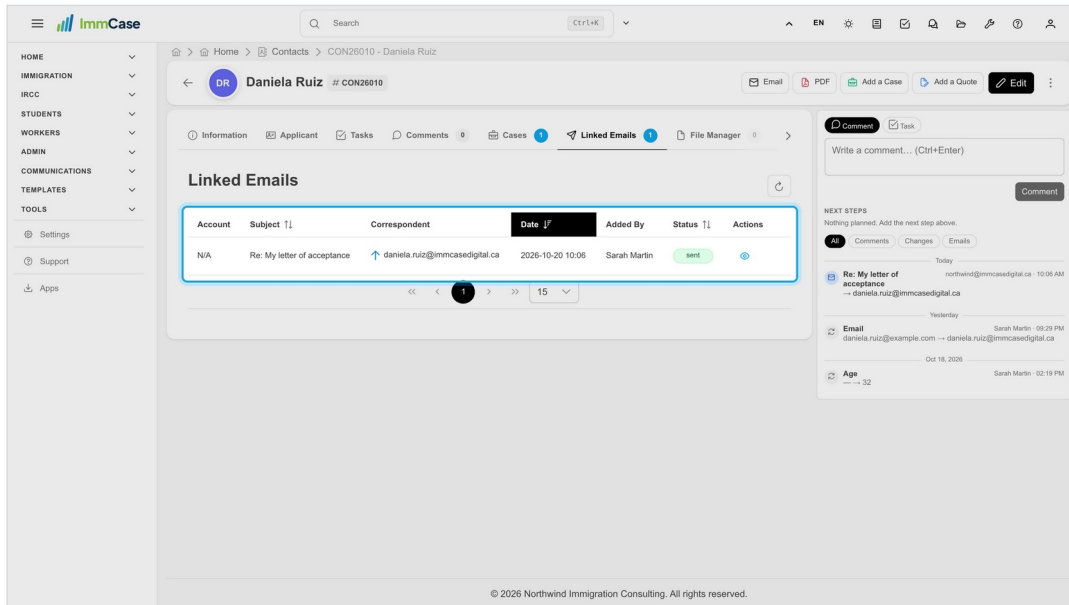
9. Someone new

When someone who isn't in ImmCase writes, click **+ Contact**. Check the name and email ImmCase took from the message, then click **Create**: the contact is made and the email is linked to it.



10. On the client's record

On the client's record, **Linked Emails** lists the emails sent with **Log to CRM**, so anyone at the firm can see what the client was told.



Good to know

- **A shared mailbox:** the gear above the folders opens the account; under **Shared with**, give colleagues access to read and send from it.
- **Which folders:** the folder icon next to the gear chooses which mail folders ImmCase copies.
- **From a client's record: Email** at the top of a contact starts a message from one of the firm's email templates.
- **Several addresses:** add one account per mailbox; **Add Account** stays at the bottom of the folder column.

Questions: hello@immcase.com.