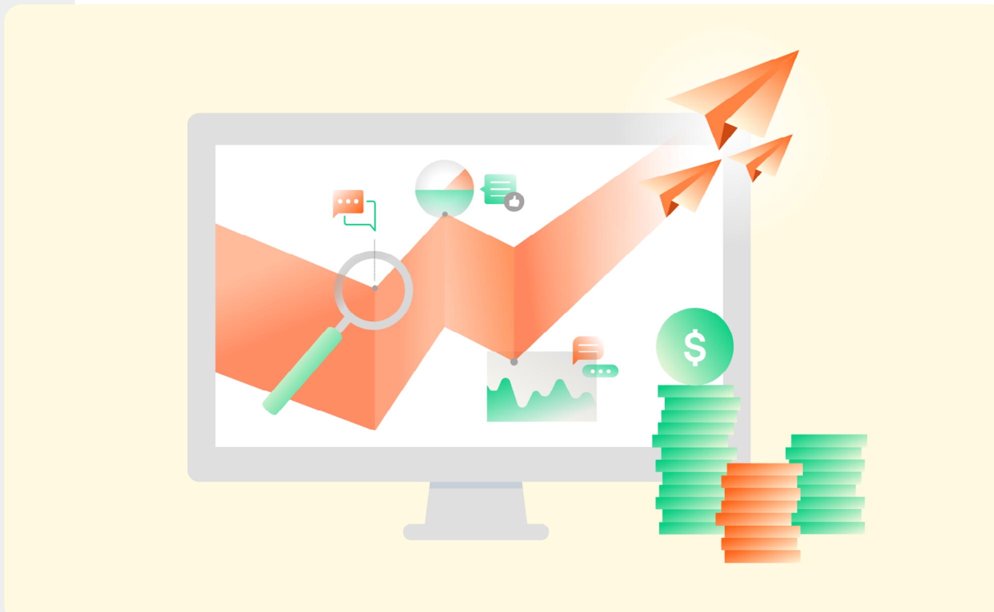
Front

SHARED INBOX MANAGEMENT:

A Guide for Finance Teams



When you're managing Accounts Payable and Accounts Receivable, you're likely already an organizational mastermind. You know that getting back to a customer in a timely manner is critical—and replying to your team internally when they have a question is often just as important.

But when you're using traditional email like Gmail or Outlook to manage these communications and process invoices, things can get...well, pretty messy. You're not only looking at your inbox, but you're also checking payroll, spend management, reconciliation, or ERP software at the same. You're managing a high volume of invoices, working with your team to resolve any issues, and trying to respond back as quickly as you can. It's a fast-paced job that requires meticulous eyes and reactions at the speed of light.

They say time is money—so in this guide, we'll cover how using a shared inbox in Front to manage AP and AR communications can help your team process invoices more accurately and efficiently than with traditional email.

Alright. Let's process some dollars.

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CHAPTER 1:

All about shared inboxes

First things first—here we'll cover all the basics of shared inboxes, like the definition and how they work, plus the benefits and challenges that come from using them for AR or AP teams specifically.

> "Outlook and Gmail make managing group email... a mess."

What is a shared inbox?

A shared inbox is an email inbox that many teammates can access to send and receive emails from the same group address, like ap@dundermifflin.com or ar@vancerefrigeration.com, for example.

Outlook and Gmail both have shared inbox functionality, but it's limited. That's why we built Front. In this guide we'll show you why Front's shared inboxes are better than Gmail or Outlook, popular ways to set up finance inboxes in Front, and other best practices for managing your shared inbox.

How do shared inboxes work?

With the email we're used to, group email means that anyone who's a part of a distribution list or group alias gets their own copy of every email. One person can reply to an email, and unless they hit Reply-all, no one else will see it. If someone deletes an email, everyone else can still see their copy in their inbox.

Things work a little differently with a shared inbox. You're all looking at the same queue of emails. When one person replies, everyone who has access to the inbox can see it. When someone archives an email, it leaves the inbox for everyone.

What are the challenges of shared inboxes in Gmail and Outlook?

If you're not using Front and instead are using Gmail or Outlook shared inbox functionality, there are some common challenges teams see. Be aware of these challenges when you're considering using a shared inbox in Gmail or Outlook:

Lack of ownership on requests
You cannot assign owners to emails in Gmail or Outlook shared inboxes. This means no one has a clear view of what requests they're responsible for answering. To give ownership, you'd have to define this for everyone, i.e. establishing spoken rules such as, "Jim handles all requests about billing from customers with 100+ teammates."

No way to work together on emails
In a shared inbox in Gmail or Outlook, you cannot work together with a teammate to write an email reply. You have to forward an email to a teammate to discuss it, or you have to take the conversation to another platform, such as Teams or Slack.

No access to analytics
It's tough to see which teammates reply to the most emails, which customers email you most often, or any insight into your emailing habits. This means it's hard to keep promises on SLAs, tough to staff appropriately, and hard to know how to divvy up customer accounts to your team.

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CHAPTER 2:

How finance teams use shared inboxes in Front

These are the top shared inboxes teams set up in Front, for your inspiration. Of course, the sky's the limit! You can choose the shared inboxes you set up for your unique team.

- Accounts receivable (ar@, accountsreceivable@)
- Accounts payable (accounts.payable@, ap@)
- finance@
- accounting@
- billing@

"With Front no one has to waste time manually routing messages."

What are the benefits of shared inboxes in Front for finance teams?

While every team is a little different, there are a few benefits AR and AP teams tend to see when they start using a shared inbox in Front, instead of using Gmail or Outlook:

No more inquiries slipping through the cracks
You can assign messages to set owners for specific teammates in Front, so your team won't miss a message or drop the ball, even when you're dealing with high-volume inboxes.

Automatic routing reduces errors and saves time
Got teammates with areas of expertise? Tiers of finance support? Internal account owners? You can automate the routing of new requests based upon triggers like CRM properties of the sender or keywords in the inquiry. That way, no one has to waste time manually routing messages—instead, everyone knows exactly what they're responsible for automatically.

Internal comments make collaboration simple
When you need to let a CSM know of a billing issue or check with a manager on an approval for customer concession, Front gives you an easy way to chat it out internally: comments. Instead of forwarding or sending separate Slack threads, just @mention a teammate on an email to discuss it internally and be on your merry way.

Performance visibility for managers
Managers can monitor performance, keep an eye on workload, and stay in the loop on progress for requests at-a-glance. You can also reference assignments per teammate and response time to understand who needs some extra help and pinpoint areas for improvement.

Spot trends over time to improve
Team leads can use Front's tags to organize the many types of requests you receive—whether it's internal, from customers, refunds, or more. You can see volume over time and understand what types of requests you get most often, so you can make smart decisions with staffing over time.

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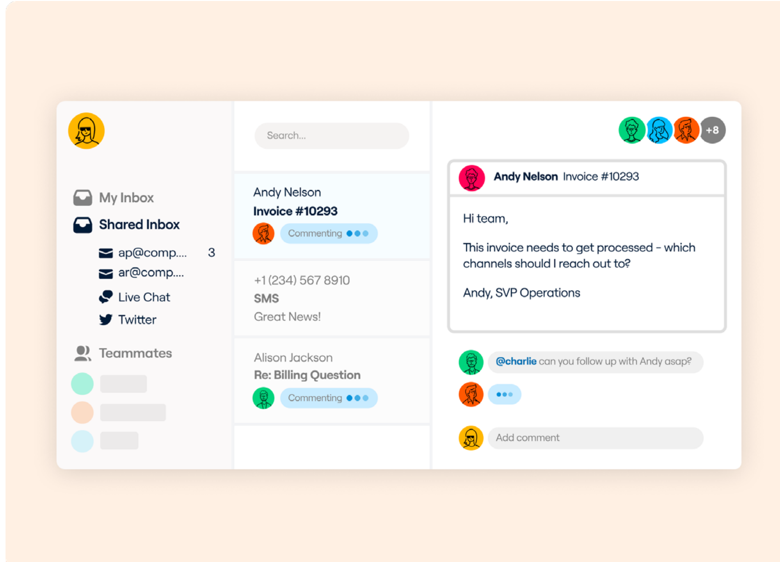

Popular shared inbox workflows for finance teams

Here are the most common workflows AR and AP teams rely on in Front—for assigning requests, collaborating on them, and organizing them to understand your communications on the whole.

Assigning requests to the right owner: This is the core workflow most finance teams rely on in Front. Depending on your team size and specializations, your assignment workflows might look different:

- **Smaller finance teams:** Teammates simply assign conversations to themselves from a shared inbox so others know it's being handled.
- **Teams with specializations:** If you have dedicated expert for expenses, for instance, use rules in Front to route conversations from an accounts.receivable@ shared inbox to a sub-team inbox, like "Expenses".
- **Teams with account owners:** These teams use rules to assign conversations from dedicated accounts to their finance owner. You can create this automation by integrating your CRM like Salesforce into Front.
- **Teams with tiered support:** For teams that give tiered support for larger customers, you can use rules in Front to move conversations from a catch-all inbox to tiered sub-inboxes for priority support. The tier of finance support for a given customer is usually determined by account data in your CRM.

Collaborating internally with ease: This is one of the top things people love about Front. Commenting allows your team to coordinate their responses with other stakeholders in the company without forwarding and cc'ing. It's chatting, internally, on email threads.

- **Commenting for approvals:** For example, an analyst may loop in an account owner from client services to approve a billing concession.
- **Writing drafts together:** Teams like to share drafts of emails to get approval on customer communication either from the account owner or a team manager.

Track common requests with tags: Since finance teams often have a large range or requests coming into a shared inbox, tag-ging helps you understand trends in volume over time and makes it easy to see what kind of request you're working with at-a-glance. There are several ways teams apply these to categories requests:

- **Manually**: Teammates can add tags as requests come in and are read. Then admins can track tag volume over time.
- **Automatically:** You can create rules to add tags automatically, based on sender, keyword, or other triggers.

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CHAPTER 3:

Setting up a shared inbox for your team

In this chapter, you'll find best practices for setting up a shared inbox in Front and a list of ways you can measure your finance team's performance through Front's analytics.

“Tag messages to get insight into volume.”

Best practices for managing a shared inbox

As a leader, you can set up automation and templates in Front for your team to use. You can also connect other apps to give everyone a jump start. Follow these best practices to help your team get up and running smoothly.

Build email templates
Save common responses so you can easily reuse them, send consistent responses faster, and spend more time personalizing responses.

Save email signatures
Save several signatures so you can sign off appropriately depending on the inbox you're working from.

Create shared inbox roles & permissions
Get maximum control over your inbox by setting custom permissions for your team. For instance, keep your team's voice and organization consistent by setting limits on who can create email templates or create folders or labels.

Integrate your calendar
No more clicking around to send invites and check availability. Connect your calendar to your shared inbox so that your team can manage their schedule directly next to their email.

Connect other apps to your shared inbox
You can integrate your other critical apps into your shared inbox so you can update and reference Salesforce, make a Jira ticket, and more, directly from your email.

Measuring team performance with a shared inbox

As a manager, it's hard to get insight into your team's work when you can't see it. Front allows team leaders to get insight into the work of each team member, and the team as a whole, through analytics. There are 3 common analytics reports that finance admins use:

Inbox report
Check this report for a shared inbox like accounts.receivable@ to understand average response time. Admins want to ensure that they're responding to customers in a timely manner and keeping requests from skipping through the cracks.

Tag report
If you're using rules that automatically tag conversations as a certain type of request based on sender, subject, or body, this is a great report to check. The tag report lets admins understand which types of requests (internal, external, refund request, etc.) are the most popular, and how the volume of each request type is changing over time.

Individual team member performance report
Track team performance broken down by response time and total # of requests handled. These metrics are particularly useful for admins to understand top performers and teammates that need coaching or extra support.

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