Mailboxes, Microsoft 365 and WhatsApp in the Service Center

Own senders and reply addresses per offer or location, connecting a mailbox to Microsoft 365, incoming mails as cases in the Service Center, replies from your own mailbox, troubleshooting.

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Why mailboxes

Without mailboxes, all customer mails go out with the one sender name and reply address from **Settings** → **Email**. With mailboxes, each offer or location gets its own sender, for example "Eisbahn Berlin Service" replying to info@eisbahnberlin.de and "Climbing Park Team" replying to climbingpark@… Customer replies then reach the right mailbox. Who sees cases in the Service Center is still governed by the role's permission, not by the mailbox.

If you also connect a mailbox to **Microsoft 365**, the Service Center reads incoming mails of that mailbox and creates cases from them. Replies from the Service Center are sent directly from your mailbox and appear in its "Sent" folder.

Creating a mailbox

Settings → Email → Mailboxes → Add mailbox:

- **Sender name**: shown to the customer as sender, e.g. "Eisbahn Berlin Service".
- **Reply address**: customer replies go there.
- **Microsoft 365 mailbox** (optional): the address of the mailbox to connect, e.g. a shared mailbox like info@… Empty means: reply address.

If you delete a mailbox, offers and locations only lose the assignment. Mails then use the company setting again.

Assigning

- **Default**: mark one mailbox in the dialog as **default for all customer emails** and it applies to all offers without their own mailbox. For most companies that is enough.
- **Offer**: in the offer under **Basics**, section **Mailbox**.
- **Location**: in the location, field **Mailbox for customer mails**. Applies to all offers of the location without their own mailbox.

Order: offer before location before company setting. All mails about a booking (confirmation, change, payment link, messages, rebooking proposal) use the mailbox of the booked offer.

Responsible team

By default, all staff with Service Center permission see all cases and are notified about new requests. This can be narrowed per mailbox: in the mailbox under **Responsible team**, choose roles and/or individual people.

- Cases from this mailbox are then visible only to team members, including the sidebar counters. Anyone with the **manage Service Center** permission still sees everything.
- Notifications about new mails in this mailbox go to the team, not to the recipient list from the Service Center settings.
- Cases without a mailbox (live chat, booking portal, form) remain visible to everyone.
- **Default assignee**: new cases from the mailbox are assigned to this person directly.

Example: mailbox "Service" with team "Service team", mailbox "Box office" with team "Box office leads". Each request reaches only those who handle it.

Connecting to Microsoft 365

Prerequisite is a **business mailbox in Microsoft 365** (Exchange Online), i.e. a mailbox your company has a Microsoft 365 licence for. Private addresses at outlook.com, hotmail or live.com cannot be connected.

1. Click **Connect Microsoft 365** on the mailbox. A small window with the Microsoft sign-in opens; the dashboard stays signed in.
2. Sign in with a Microsoft account that has access to this mailbox. For a shared mailbox (info@…) this is usually your own account; for a personal mailbox, the mailbox itself.
3. Microsoft asks for consent for "Unitlify Service Center" (publisher DevMonics UG (haftungsbeschränkt), verified). Reading and sending happens only in the connected mailbox. Depending on your company's settings only a Microsoft 365 administrator can consent; then sign in with the admin account or ask your admin. Consent is given once.
4. The window closes, the mailbox shows green **Microsoft 365** with the mailbox read and the signed-in account.

Disconnect removes the connection, **Fetch now** fetches the inbox immediately. If the signed-in account expires (employee leaves, password reset), the mailbox shows "Connection error"; simply connect again. Recommendation: connect with a service account, not an individual's account.

What happens with incoming mails

- The inbox is fetched every two minutes. Only mails arriving **after** the connection are read; older mails stay untouched.
- Every new mail becomes a case with source **Email** in the Service Center. Sender and subject are on the case, the text is the first message.

- If the subject contains a case number (e.g. "[#SC-123]") or the mail belongs to a conversation replied to from the Service Center, it is attached to the existing case and reopens it if needed.
- If the sender has a booking with you, the most recent non-cancelled booking is linked automatically.
- Mails you sent yourself from this mailbox are skipped.

Replying

For cases from a mail, replies in the Service Center are sent from the connected mailbox, with your sender name and the case number in the subject. The mail then sits in your "Sent" folder. If no mailbox is connected, Unitlify sends the reply with the mailbox's sender name and reply address.

WhatsApp Business

Guests write to your WhatsApp number, every message becomes a case with source **WhatsApp**, replies from the Service Center go back via WhatsApp. Your **WhatsApp Business app keeps working in parallel** (Meta calls this coexistence): what is written in the app also appears in the case, and vice versa.

Connecting: Service Center → Settings → card **WhatsApp Business** → **Connect WhatsApp**. The Meta sign-in opens: sign in with the Facebook account that manages your company at Meta, choose your company, then **take over the existing number from the WhatsApp Business app** (scan the QR code with the phone running the app). Optionally, contacts and the last six months of chats are imported. Afterwards the number shows green in the card.

Requirements at Meta: a Facebook business account (Business Manager) and a payment method stored in the WhatsApp account. Pure customer requests cost nothing there.

How it works:

- Every incoming message from a number lands in the open case of that number, otherwise a new one is created. If the guest has a booking with that phone number, it is linked automatically.
- Images, voice messages and documents appear as a note for now; the file itself is in the WhatsApp Business app.
- Replies from the Service Center are only possible **within 24 hours of the guest's last message**. After that WhatsApp only allows paid templates, which Unitlify deliberately does not use. The editor shows when the window has closed; then get in touch by email or phone.
- Replies from the WhatsApp Business app appear in the case as messages from the app.
- The **Mailbox** field on the connection defines which team sees and is notified about WhatsApp cases.

Costs: Incoming messages and replies within 24 hours are free at Meta. Unitlify sends no marketing or template messages.

Disconnect removes the connection; the app keeps working unchanged.

Signature and legal footer

Signature: Under **Settings** → **Email** you define a default signature for Service Center replies; each mailbox can have its own. Placeholders: `{name}` (replying staff member, as shown in live chat), `{mailbox}` (mailbox name), `{company}`, `{phone}`, `{website}`, `{email}` (reply address of the mailbox). Without a signature, "Name · Company" appears under the reply as before.

Legal footer: Under German law, business emails of a GmbH, UG or AG must state the company with legal form, registered office, register court and number and the authorised representatives (Sec. 35a GmbHG, Sec. 37a HGB, Sec. 80 AktG). Unitlify adds this line automatically to the end of **every** customer email of the company, including booking confirmations and payment links, in the language of the mail. The data comes from **Settings** → **Company** → **Tax & registration**: company name, address, commercial register (e.g. "Amtsgericht Charlottenburg HRB 291111 B"), **managing directors** (new, names only, e.g. "Dean Kidder, Dominik Kriehuber"; for an AG enter "Vorstand: name") and VAT ID. The footer uses the usual block format: company and address, phone, email and web, then registered office, register court, representatives and VAT ID. If a field is empty, that line is omitted, so check the company data once completely.

Privacy

Incoming mails are stored encrypted like all case messages. The Microsoft sign-in stays with Microsoft; Unitlify only receives an encrypted access grant for the mailbox and no password. You can revoke it at any time via **Disconnect** or in your Microsoft 365 admin center.

Troubleshooting checklist

What	Where
"Connection error" or red error text on the mailbox	Click **Fetch now**. If the error stays, **Disconnect** and connect again.
Error `graph:401` right after connecting	The mailbox is not yet fully set up at Microsoft (fresh licence). Fetching retries automatically every two minutes.
Microsoft says "Admin approval required"	Sign in with your company's Microsoft 365 admin account or have the admin consent.
Private address (outlook.com, hotmail)	Not possible, a Microsoft 365 business mailbox is needed.
Mail does not show in the Service Center	Wait two minutes or **Fetch now**. Only mails after the connection are read. Your own sent mails are skipped.

What	Where
Customer mails come from the wrong sender	Check the assignment: offer (Basics → Mailbox) before location before company setting.