



Native Email Governance for a Multi-Brand Energy Provider

How Energi Fyn replaced Einstein Activity Capture with GOAT Email — bringing 200 Salesforce users onto a single, native, brand-isolated email governance layer.



200

Salesforce users

Across three brands consolidated onto a single governance layer

3

Brands isolated

Energi Fyn, Fyn Mobil, and EWII separated at the routing layer

100%

Data residency

Every email stored as a native EmailMessage record inside the org

Customer	Energi Fyn — multi-brand Danish energy provider
Industry	Energy and utilities
Region	Denmark — operating across the island of Funen
Salesforce footprint	~200 users across three brands
Replaced	Einstein Activity Capture (EAC)
Solution	GOAT Email — Record Inbox + Global Inbox

Executive Summary

The Decision in One Page

Energi Fyn — a multi-brand Danish energy provider with approximately 200 Salesforce users across three operating brands — set out to replace Einstein Activity Capture after a routine review of cross-brand activity surfaced an architectural concern: contact records belonging to different brands were sharing captured email activity through EAC’s external sync layer.

The team needed an email governance solution that kept data inside Salesforce, isolated email by brand, and supported a clean compliance posture for customer-facing communications.

After a structured evaluation that included a December 2025 technical proposal, a formal compliance review, and a side-by-side architectural comparison, Energi Fyn selected GOAT Email. The solution was approved by the compliance team in February 2026 and is being deployed across the platform alongside an ongoing Salesforce delivery partnership with Quadrix Soft, the publisher of GOAT Email.

The Framing

Email-to-Case created visibility — but not control.

Email existed across brands — but governance did not.

The result was not missing functionality. It was structural risk.

At a glance	
Customer	Energi Fyn — multi-brand Danish energy provider
Brands	Energi Fyn, Fyn Mobil, EWII
Salesforce footprint	~200 users across three brands
Replaced	Einstein Activity Capture (EAC) — external sync architecture
Selected	GOAT Email — native EmailMessage architecture inside Salesforce
Compliance review	Completed February 2026 — security and data handling requirements met
Status	Approved for deployment across the 200-user Salesforce footprint

The Challenge

Energi Fyn operates three customer-facing brands on a single Salesforce platform: Energi Fyn (energy), Fyn Mobil (mobile telecommunications), and EWII (utilities). Many customers are shared across more than one brand — a household might have an energy contract with one entity and a mobile contract with another. Inside Salesforce, those relationships are represented as distinct contacts on distinct accounts, by design. Each brand has its own communication policy, its own templates, and its own customer-facing teams.

Like many Salesforce orgs, Energi Fyn used Einstein Activity Capture to bring email visibility into the platform. As email volume across brands grew, the team began to look more carefully at how that visibility was actually working in practice.

What the review surfaced

A routine review of cross-brand activity capture surfaced a set of concerns that compounded each other. They were not configuration problems. They were direct consequences of EAC’s external-sync architecture — a model in which email data lives outside the Salesforce data model and is reconciled back to records using sender and recipient matching.

- **Cross-brand exposure.** Where the same person appeared on contact records belonging to different brands, email captured for one brand could surface in the activity timeline of an unrelated brand. Communication directed to Energi Fyn could appear on a Fyn Mobil or EWII record without explicit consent — a brand-isolation breach by design of the sync model.
- **Personal communications on business records.** The same matching logic meant private email associated with a personal address could be captured against a business record if the individual was present on both. This is a direct GDPR exposure: personal data processed for a purpose other than the one for which it was provided, with no obvious control plane to prevent it.
- **Audit posture dependent on a third party.** The system of record for customer email was an external store, not the Salesforce org. Retention windows, custody, and data-subject-rights workflows were governed by the sync provider — not by Energi Fyn’s own controls.
- **Visibility without addressability.** Captured email was not a true Salesforce record, so it could not be queried by reports, triggered from Flow, or used as a foundation for automation. Teams could see email; they could not act on it as data.

The Core Issue

The architectural pattern was the problem, not the configuration. EAC’s external sync model could not enforce brand boundaries the way native Salesforce sharing could — and the fix required moving the canonical record from outside the org to inside it.

What it meant on the ground

The architectural concern translated into operational pressure across three teams. Compliance needed clear answers — in writing — about where customer communications lived and for how long. Customer-facing agents needed reliable brand isolation in their day-to-day view rather than user discipline as the only safeguard. The platform team needed an email layer that could be reported on, automated against, and extended without bolt-on workarounds. None of those needs could be addressed by tuning EAC. They required moving the system of record for email back inside the Salesforce org.

Why this matters

Replacing Einstein Activity Capture at scale is rare. Most organizations live with its limitations because the perceived switching cost is too high — three months of evaluation, six months of rollout, unclear data fidelity. Energi Fyn proved the opposite case: the architectural reset across 200 users and three brands was scoped in weeks, not quarters, and changed the posture of the entire email layer. The “EAC is fine” default is a choice, not a constraint.

The Solution

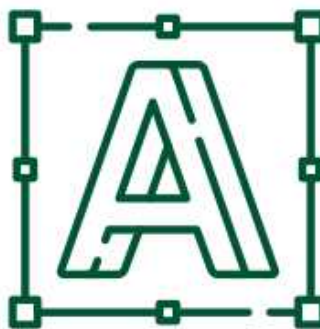
Energi Fyn evaluated GOAT Email against the same architectural criteria that had surfaced the EAC concerns: where the data lives, how brand boundaries are enforced, and how the email layer integrates with the rest of the Salesforce platform.

Why GOAT Email



Salesforce-native architecture

GOAT Email writes every email as a standard EmailMessage record inside the customer’s org. There is no external sync layer. Data residency is preserved by design.



Brand-level routing and isolation

Inbound and outbound email is routed by sender, domain, subject, or record type, with shared mailboxes treated as first-class objects — allowing each brand to have its own inboxes, its own routing rules, and its own visibility controls.



Standard Salesforce reporting and automation

Because email is a native record, it works with Salesforce reports, dashboards, Flow, and Apex. Response times, volumes, and thread ownership are reportable surfaces.



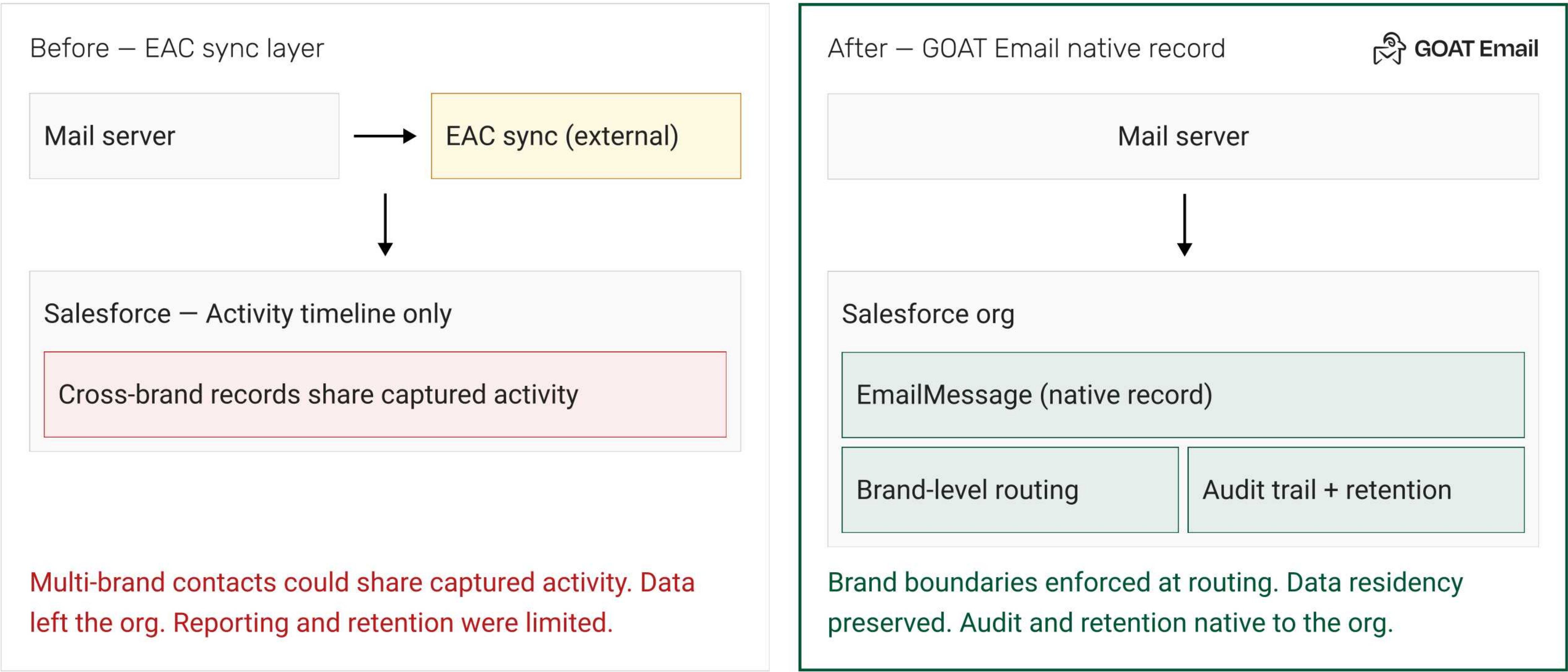
Audit and retention native to the org

Email records inherit the org’s sharing rules, audit logging, and retention policies. There is no second policy regime to reconcile.

What changed for end users

For customer-facing teams, the change was operational, not abstract. Agents now work directly inside Salesforce shared inboxes — one tool, brand-isolated, with full thread visibility and clear ownership per record. They no longer assemble customer history by switching between Salesforce, Outlook, and forwarding rules. Every email lands on the right record, in the right brand context, with the right owner — by the time the agent sees it.

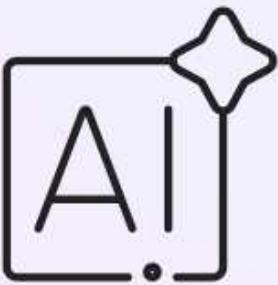
Architecture — before and aft



AI Readiness

Structured email data is a prerequisite for AI.

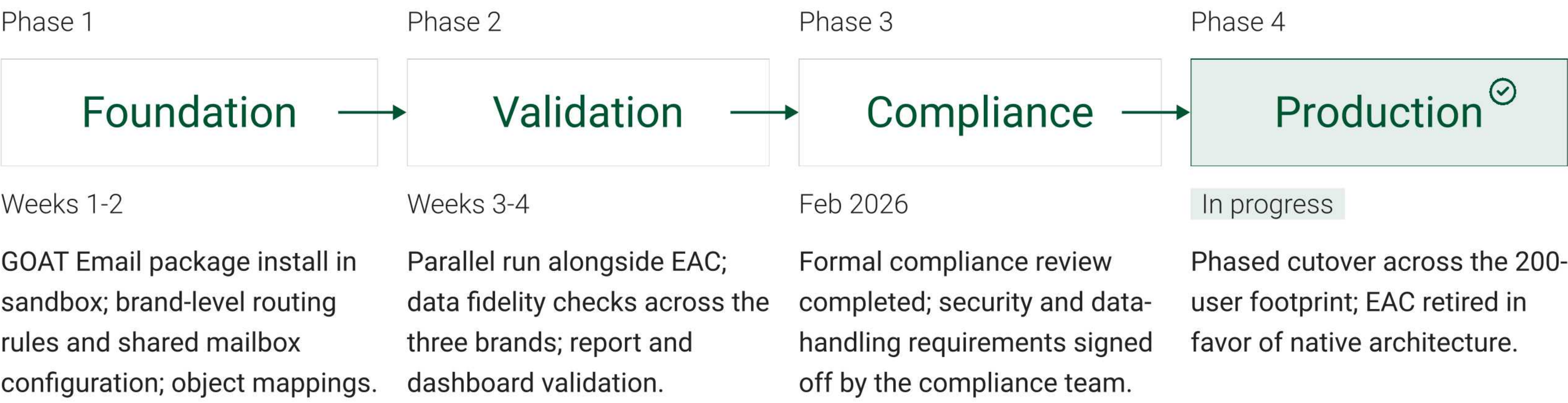
Agentforce and other agent runtimes ground on the data that lives natively inside the Salesforce org. Email captured in an external sync layer is not natively queryable, which means agents operating on top of it work with incomplete customer context. By moving email into the standard EmailMessage object, Energi Fyn positioned the email corpus to power AI use cases — from response drafting to case summarization — as those programs advance.



Implementation approach

The deployment plan was structured as a parallel-run cutover rather than a big-bang switch. GOAT Email was installed in a sandbox environment and configured against Energi Fyn’s object model, brand structure, and shared inboxes. EAC remained active during the parallel-run period to provide a fallback while the native architecture was validated against production-equivalent traffic.

Validation surfaced the questions any platform team would ask: thread continuity across the three brands, attachment fidelity, performance at the routing layer under real volume, and the right cutover sequence for shared mailboxes that some teams depended on hour-by-hour. The parallel-run window was specifically scoped to address those questions on data, not on assumptions — and the cutover only proceeded once each was answered.



Outcomes

Outcomes are reported as observed at the close of the compliance and validation phase. Quantified post-deployment metrics will be added in a follow-up update once the full production rollout has stabilized.

Architectural

- **Native data residency.** Email is now stored as EmailMessage records inside the Salesforce org. The external sync layer is no longer part of the email path.
- **Brand isolation.** Routing rules enforce brand boundaries for inbound and outbound email. Activity captured for one brand is no longer visible on records belonging to another.
- **Single source of truth.** Reports, dashboards, and Flow automations operate against a single canonical email record, eliminating reconciliation between platforms.

Compliance and governance

- **Compliance review completed.** Security and data-handling requirements were reviewed and signed off in February 2026 by Energi Fyn’s compliance team.
- **Audit-ready posture.** Email records inherit the org’s standard audit trail and access logging, supporting both internal review and external requests.
- **Retention under policy.** Retention is now governed by the same policy regime as the rest of the customer communications data set, rather than by an external provider’s default.

Operational

- **Brand-level shared mailboxes.** Each brand now operates managed shared mailboxes with their own routing, assignment, and visibility rules — replacing previous workarounds.
- **One tool, not three.** Customer-facing teams work inside Salesforce shared inboxes rather than switching between Salesforce, Outlook, and forwarding rules to assemble customer context.
- **Ownership clarity.** Every thread has a defined owner and assignment trail; orphaned threads in shared inboxes are no longer a routine source of dropped responses.

Observed improvements (directional)

Quantified post-deployment metrics will be added in a follow-up update. Directional improvements observed during validation and the early production phase:

Area	Before GOAT Email	After GOAT Email
Customer history retrieval	Minutes of manual reconciliation across EAC, Outlook, and forwarding rules per query	Seconds — full thread across all brands in a single Salesforce report. No cross-system reconciliation.
Cross-brand isolation	User discipline as the only safeguard against bleed	Routing-level enforcement — no cross-brand bleed by default
Ownership of shared inboxes	Threads orphaned at every handoff; “did anyone reply?” was a recurring question	Owner stamped on every thread the moment it lands; assignment trail audited
Compliance posture	Custody, retention, and audit dependent on a third-party sync provider	Custody, retention, and audit under Energi Fyn’s own Salesforce controls — no third-party dependency
Tool switching for agents	Salesforce + Outlook + Slack workarounds + a tracking spreadsheet	One tool — Salesforce shared inbox, brand-isolated
AI / Agentforce readiness	Email not natively queryable — agents work on partial customer context	Email native and queryable — foundation for grounded agents

In their words

We did not have a feature problem with EAC — we had a structural one. Email lived outside the org, brand boundaries could not be enforced, and our compliance posture depended on a sync layer we did not control. GOAT Email moved the canonical record back inside Salesforce, where every other governed object already lives. That was the only answer that scaled across our three brands.”



Christian Helleskov Hennie
Salesforce Platform Lead, Energi Fyn
★★★★★



About the Organizations

About Energi Fyn



Energi Fyn is a Danish energy provider operating across the island of Funen. The organization runs three customer-facing brands — Energi Fyn (energy), Fyn Mobil (mobile telecommunications), and EWII (utilities) — on a unified Salesforce platform serving approximately 200 users across operations and customer-facing teams.

About GOAT Email



GOAT Email is a 100% Salesforce-native email governance layer built on the standard EmailMessage object. It delivers thread ownership, shared mailbox management, brand-level routing, audit and retention controls, and native reporting for enterprise Salesforce orgs that need email to be a governed business record rather than a passively logged activity.

GOAT Email holds a 4.98 / 5.0 rating on the Salesforce AppExchange and is Salesforce Security Reviewed.

About Quadrix Soft



Quadrix Soft is the publisher of GOAT Email and a Salesforce-focused product and platform-services partner headquartered in Niš, Serbia. Quadrix combines a managed AppExchange product practice with delivery capacity for implementation, integration, and ongoing platform engineering.

Take the next steps

To discuss how a native email governance layer could replace Einstein Activity Capture in your Salesforce environment, contact the Quadrix Soft team at info@goatemail.com. Architectural and security documentation is available under NDA.

The one-line takeaway

Email became a governed Salesforce object — not an external activity feed.