Emailrobot for Exchange/SMTP

Manual

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Contents

Chapter 1- Explaining Emailrobot

What is Emailrobot?

Emailrobot helps companies deal with the ever increasing e-mail overload, by managing corporate e-mail addresses, and automating standard e-mail processing tasks.

What can Emailrobot do?

Emailrobot can perform two main functions: Email Management and Email Automation.

Email Management

This function ‘manages’ corporate e-mail addresses, such as support@yourcompany.com, sales@yourcompany.com and info@yourcompany.com. With Email Management you will be able to:

- Distribute corporate e-mail among several mail agents.
- Send a personalized auto reply including tracking number.
- Automatically archive email into any ODBC database, so that you will have a centralized communications history for each customer or contact that communicates with you via e-mail.
- Track the status of each email – has it been answered and who has answered the email?
- Monitor corporate communications – how many support emails are you receiving, what is the average response time etc. Who is answering how many messages etc.

More information on how to set up Email Management can be found in Chapter 3.

Email Automation

This function allows you to perform automated e-mail tasks, such as:

- Process Web forms into a database
- Send out personalized mailings by querying a database
- Create your own automated e-mail process

Here are just a few examples of what you could do with Email automation: automatically send out invoice reminders at the end of the month, process Internet orders into a database & send auto replies with order numbers, and process sales leads from your website into your contact management package.

Emailrobot includes two scripting methods to automate your corporate e-mail. The more complicated and exceptional your company's needs are, the more advanced the scripting method needs to be:

1. Standard – Emailrobot's scripting Wizards (Chapter 4) provide customized processing, such as processing Web forms into a database, and sending out personalized mailings.

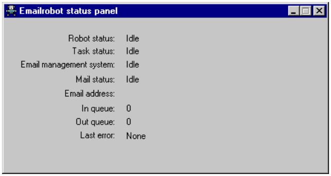
2. Advanced – For complete customization you can use the VBscript option (Chapter 5). In this way, you can program Emailrobot to automate any e-mail related task you can come up with! You can also choose to ask GFI or your reseller to perform this programming for you.

How does Emailrobot work?

Emailrobot is made up out of several components: The Emailrobot, the Emailrobot Task Manager, the Emailrobot Queue View, the Email Communications Viewer, the Emailrobot Connector, and the Mailbox Agent. The last two components, the Emailrobot connector and the mail box agent, are only installed with Emailrobot for Exchange.

The Emailrobot

The Emailrobot is the component that sends, receives, routes and archives all e-mail and processes your scripts. It can run as a service (if you have Windows NT), or as an application in the taskbar (if you have Windows 95). You can view the status of Emailrobot's script processing, by selecting 'Emailrobot Status panel' from the Emailrobot Task manager. Alternatively, you can start up the Emailrobot from the program group or double click the Emailrobot icon in the right hand corner of your screen. Beware though, that in Windows NT, the Emailrobot will already be running as a service in the background.



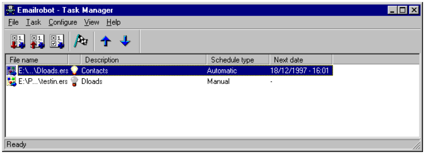
The Emailrobot

The Emailrobot will perform the following tasks:

- Download/scan e-mail
- Run scripts
- Send out e-mail
- Archive e-mail

The Emailrobot Task Manager

With the Emailrobot Task Manager you can create and configure the tasks that Emailrobot should run. These tasks are ‘jobs’ that Emailrobot will perform, and are defined by scripts.



The Emailrobot Task Manager

With the Emailrobot Task Manager you will be able to:

- Configure the Email Management system
- Create scripts using the scripting Wizards or VBscript
- Edit or remove scripts
- Schedule scripts at a certain date or time
- Configure the Email Automation system.
- Specify what Emailrobot should do with e-mail that is not processed.

The Emailrobot Queue View

The Queue View utility allows you to view the outbound message queue. From here you can check whether the message text in the e-mails you wish to send is correct. If you are happy with the e-mail text, subject and recipient information, you can instruct Emailrobot to send out the e-mail. Of course you can also instruct Emailrobot to send out the e-mail without you having to preview it first.

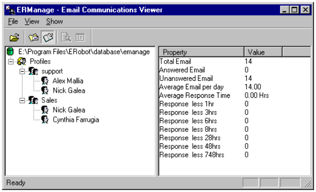
The Queue View utility

The Emailrobot Connector & Mailbox agent

The Emailrobot Connector & Mailbox agent are installed in Exchange server to interact with Exchange server in the most transparent manner. In this way, users (mail agents) will not notice the presence of Emailrobot. These components are not installed in the SMTP version of Emailrobot.

The Email Communications Viewer

The Email Communications Viewer allows you to view, search and track all the e-mails and their replies for a given customer, tracking number or profile. In addition, the Email Communications Viewer gives you vital statistics on the response rate of your mail agents.



The Email Communications Viewer

Chapter 2 Installation

Introduction

Emailrobot is available in two versions – Emailrobot for Exchange and Emailrobot for SMTP.

Emailrobot for Exchange is specially designed for users who have Microsoft Exchange Server. Emailrobot for Exchange includes an Exchange Connector.

Emailrobot for SMTP is specifically designed for users who have an SMTP/POP3 server such as Software.com's Postoffice, Netscape Suitespot, Eudora Worldmail, VPOP3, N-Plex, Sendmail etc.

If you are installing Emailrobot for Exchange please follow the instructions in the next paragraph. If you are installing Emailrobot for SMTP, skip the next section and go to ‘Installing Emailrobot for SMTP’.

Installing Emailrobot for Exchange

Preparing for installation

To install Emailrobot for Exchange, you require the following:

- Windows NT 4 Server
- Microsoft Exchange Server 4, 5.0 or 5.5
- An ODBC compatible database (for example Microsoft Access) installed.
- Internet Explorer 3.02 or 4.0

Before you install Emailrobot, please also check the following:

- Ensure that your Exchange server is running correctly. If you are not sure, check whether you can send e-mail messages from one client to another.

- Make sure that you are able to send and receive e-mail messages via the Internet.
- You will need to be able to create mailboxes for Email Management and for Email Automation.

Running the installation procedure

Before starting the Emailrobot for Exchange setup, please make sure that:

- the Exchange administrator is not running.
- if you are reinstalling Emailrobot, be sure that you have uninstalled the previous version first.
- you are logged on as an Administrator in Windows NT server and Exchange server.

Step 1: Insert the Emailrobot CD-ROM in your CD-ROM drive, and run 'setup.exe' from Windows Explorer. If you have downloaded Emailrobot, double-click on ‘erobotex.exe’.

Step 2: Set-up will now request you to close any open programs. When you have done so, click ‘Next’ to continue.

Step 3: Set-up will ask you to confirm the license agreement.

Step 4: Set-up will now prompt you for your company name, e-mail address and serial number. The serial number is indicated on the CD-ROM envelope. If you are evaluating the product, do not enter a serial number. You will be able to use Emailrobot as a free LITE version.

Step 5: Set-up will now ask you where you want Emailrobot to be installed. Emailrobot will need approximately 10 MB of free hard disk space. In addition to this you must reserve approximately 10 MB for temporary files. Click ‘Next’ to continue.

Step 6: Set-up will now query the name of the server computer. Please confirm it.

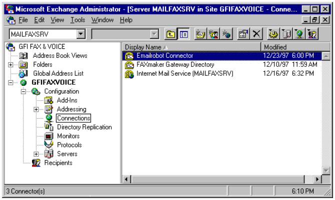
Step 7: The set-up program will now query the Organization and Site name. In most situations, Emailrobot will return the correct Organization name and Site name, but sometimes the automatic querying will not succeed or return erroneous information.

Therefore please check that the format is as follows:

/o=ORGANIZATION/ou=SITE

Where Organization is the name, shown at the top of the Exchange administrator. For example, in the screen grab below, this is GFI FAX & VOICE. If your Organization name contains spaces or other special characters, you must enclose the site name in quotes, as follows; "GFI FAX & VOICE".

The Site name is displayed in the Exchange administrator with a "World" icon next to it.



Exchange administrator with organization "GFI FAX & VOICE' and site "GFIFAX"

Step 8: Set-up will now prompt you for an administrator account to run the Emailrobot services. You should enter the name and password of the administrator account with administrator rights.

If you change your password after installing Emailrobot, you must update the password for the Emailrobot Connector and Emailrobot service from the control panel as well. Otherwise the services will no longer start.

Step 9: Set-up will now finish the installation by creating an Emailrobot program group.

Installing Emailrobot for SMTP

Preparing for installation

To install Emailrobot, you require the following:

- Windows NT 4 (workstation or server) or Windows 95

- SMTP/POP3 server
- Microsoft Access 97 or an ODBC compatible database installed.
- Internet Explorer 3.02 or 4.0

Before you install Emailrobot, please also check the following:

- Ensure that your mail server is running correctly. If you are not sure, check whether you can send e-mail messages from one client to another.
- Make sure that you are able to send and receive e-mail messages via the Internet.
- Make note of your mail server name (in many cases your mail server name is the name of the computer running the mail server). The mail server name is the name you specify in the field ‘SMTP server name’ in, for example, the Eudora or Outlook client.

Running the installation procedure

Step 1: Insert the Emailrobot CD-ROM in your CD-ROM drive, and run 'setup.exe' from Windows Explorer. If you have downloaded Emailrobot, double-click on ‘erobot.exe’.

Step 2: Set-up will now request you to close any open programs. When you have done so, click ‘Next’ to continue.

Step 3: Set-up will ask you to confirm the license agreement.

Step 4: Set-up will now prompt you for your company name, e-mail address and serial number. The serial number is indicated on the CD-ROM envelope. If you are evaluating the product, do not enter a serial number. You will be able to use Emailrobot as a free LITE version.

Step 5: Set-up will now ask you where you want Emailrobot to be installed. Emailrobot will need approximately 10 MB of free hard disk space. In addition to this you must reserve approximately 10 MB for temporary files. Click ‘Next’ to continue.

Step 6: Set-up will ask you to enter your SMTP/POP3 server name located on your LAN. Here you must enter the mail server name which is on your LAN – not the mail server name of your ISP!

Step 7: Set-up will ask you whether your mail server supports APOP. Most mail servers do. If you are not sure, select 'No'.

Step 8: If you have Windows 95, set-up will ask you whether you want Emailrobot to run automatically.

Step 9: The set-up program will now copy all program files to the selected destination, and finish the installation by creating an Emailrobot program group. You will now be asked whether you want to view the Getting Started file. Click 'Finish' to complete setup.

Chapter 3 Email Management

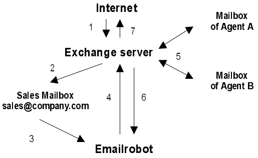
Introduction

With Emailrobot's Email Management, you will be able to:

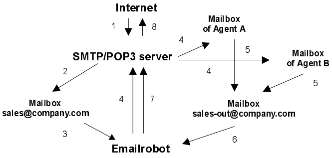
- Distribute incoming e-mail among different persons
- Send personalized auto replies
- Archive all incoming and outgoing e-mail
- Assign tracking numbers to e-mails
- Produce reports on corporate e-mail communication
- Produce communications histories per customer, tracking number or mail agent

In order to use Email Management, you must:

1. Configure your ODBC database
2. Configure the Email Management System
3. Install the Email Communications Viewer on client machines (optional)



How E-mail management works in Exchange



How E-mail management works with an SMTP server

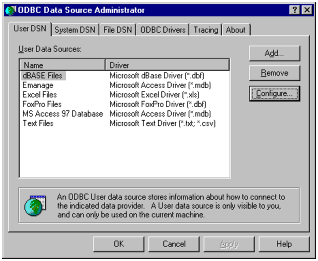
Above is an overview of how the Email management system works with Exchange server or an SMTP/POP3 server.

Configuring ODBC

Emailrobot uses ODBC to allow you to use different kinds of databases, giving you maximum flexibility. We recommend using the included Access database emanage.mdb, located in the Progam Files\ERobot\database directory. If you do wish to use a different database, you will need to create a set of fields in the database. Please check the website for latest details on the format of the database.

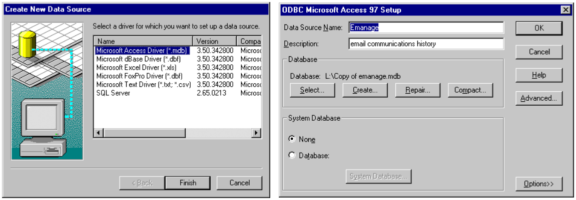
Step 1: Go to the Control Panel (from the task bar or from the 'My Computer' icon)

Step 2: Double-click on the ODBC icon. This starts up ODBC Data Source Administrator dialog. ODBC requires that any database you wish to use is added as either a user DSN (if you want it to be available to you only) or a system DSN (If you want it to be available to all users on this machine). Depending on your preference, you must now select the User DSN Tab or the System DSN.



The ODBC Data Source Administrator

Step 3: Select 'Add'. This fires up the 'Create New Data Source' dialog.



Create new Data Source and enter datasource name, description and select database

Step 4: Select 'Microsoft Access Driver' (This requires you to have Microsoft Access installed). This will start up the dialog ODBC Microsoft Access 97 Setup dialog. Click 'Finish'.

Step 5: Give the database a name and description, then click 'Select' and select emanage.mdb file from the Program Files\ERobot\database directory. Click ‘OK’, and exit the ODBC Data Source Administrator.

Your data source is now setup! In the next paragraph you will have to select this database source in the Configure Email Management dialog.

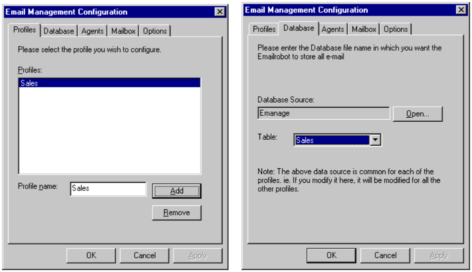
Configuring Email Management for Exchange

For each corporate e-mail address that you wish Emailrobot to manage, you must now create a ‘Profile’: This Profile will contain a number of e-mail management options that you can set for each e-mail address.

Step 1: Before creating a Profile, you must create a mailbox for the corporate e-mail address you wish to manage, for instance sales@yourcompany.com.

Step 2: Start-up the Emailrobot Task Manager from the program group. From the ‘Configure’ menu, select ‘Email Management’.

Step 3: Enter the name of the profile in the profile name box (in our example ‘Sales’), and click on ‘Add’.



The Profile and Database tab in the Email management dialog

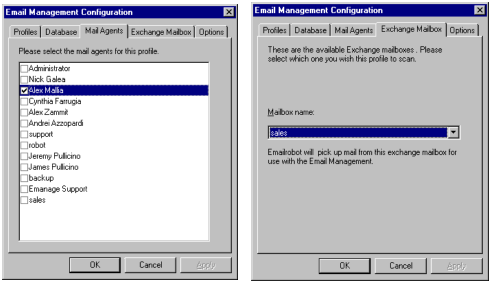
Step 4: You may now configure the management options for this corporate e-mail address in the other Tabs. The following Tabs are available:

Database - In this tab you must specify where you want Emailrobot to store all incoming e-mail:

Database source: You can store it in any database as long as you have configured it as an ODBC source first (how to do this, see above). If you do wish to use a different database, you will need to create a specified set of fields in the database. Please check the website for latest details on the format of the database.

Table: For each profile you must select a separate table to store the e-mails.

Agents - In this tab you must indicate which Exchange users will be answering this mail (i.e. they will be mail agents for this profile/corporate e-mail address). To make an Exchange user a mail agent for a particular profile, simply activate the relevant 'tickbox'.



The Agents and Mailbox tab in the Email management dialog

Exchange Mailbox – In this tab you must enter name of the Exchange mailbox in which you receive your corporate e-mail (our example: sales@yourcompany.com).

Options – In this Tab you can set a number of different options:

Text file for auto reply : Upon receiving an e-mail, Emailrobot can send a personalized custom reply. To personalize the auto reply, you can insert fields in your e-mail message, for example: [*Email.from*]. Emailrobot will then automatically replace the [*Email from*] field with the Email Alias. For example:

*Dear [*Email.from*],*

Thank you for your interest in our products! Please rest assured that we are dealing with your request and that we will get back to you shortly.

Kind regards,

Undeliverable mail: This option allows you to specify what to do with e-mail that is returned. You can either delete the e-mail, save it in a text file, or forward the email to the postmaster/ administrator.

Enable this profile: This option switches the Email Management system for this profile on or off. In this way you can periodically de-activate management of certain e-mail addresses.

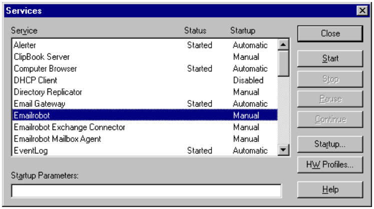
Starting the services

Important: After configuring the mailboxes or changing any settings, you must ensure that the Emailrobot services are started /restarted. To do this, go to the Services applet in the Control panel and start the following services:

Emailrobot

Emailrobot Exchange connector

Emailrobot Mailbox Agent



The Emailrobot services

Configuring Email Management for SMTP

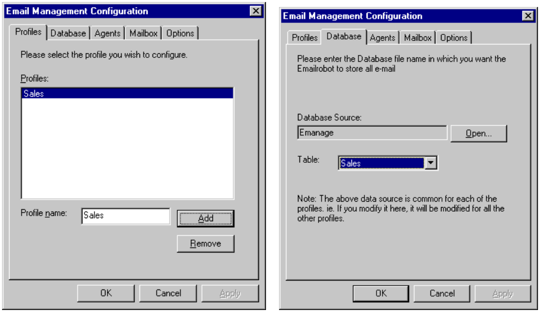
For each corporate e-mail address that you wish Emailrobot to manage, you must now create a ‘Profile’: This Profile will contain a number of e-mail management options that you can set for each e-mail address.

Step 1: Create two mailboxes for each e-mail address that you wish Emailrobot to manage, for example sales@yourcompany.com and sales-out@yourcompany.com. The first mailbox will be used by Emailrobot to pick up inbound corporate e-mail, and the second mailbox will be used by Emailrobot to pick up the replies of the Mail agents and send them out on the

Internet. All replies from the Mail agents will automatically be forwarded to this Outgoing mailbox before being sent out to the actual recipient. Emailrobot will then store the reply messages and update the tracking numbers. This process is completely transparent to the user/mail agent.

Step 2: Start-up the Emailrobot Task Manager from the program group. From the 'Configure' menu, select 'Email Management'.

Step 3: Enter the profile name in the box , and click on 'Add'.



The Profile and Database tab in the Email Management dialog

Step 4: You may now configure the management options for this corporate e-mail address in the other Tabs. The following Tabs are available:

Database - In this tab you must specify where you want Emailrobot to store all incoming e-mail.

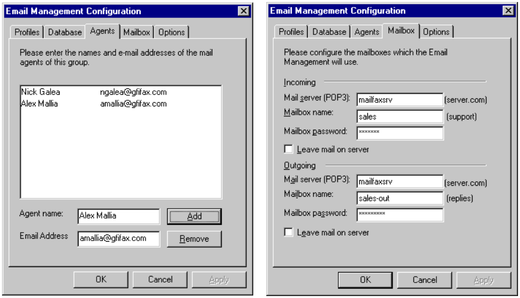
Database source: You can store it in any database as long as you have configured it as an ODBC source first (how to do this, see above). We recommend using the included Access database emanage.mdb, if you are not comfortable creating databases. If you do wish to use a different database, you will need to create a specified set of fields in the database. Please check the website for latest details on the format of the database.

Table: For each profile you must select a separate table to store the e-mails.

Agents - In this tab you must list the names and the e-mail addresses of the persons who will be dealing with the e-mail directed to this address. Type in the name and e-mail address and click on 'Add' for each person.

Mailbox – In this tab you must enter the POP3 mailbox(es) which Emailrobot should use.

Incoming: Here you must fill in the mailbox in which you receive the corporate e-mail. Emailrobot will pick up the e-mail from here every minute. In our example this is sales@company.com.



The Agents and Mailbox tab in the Email management dialog

Outgoing: This mailbox will be used by Emailrobot to pick up the replies of the Mail agents and send them out on the Internet. In our example this mailbox is sales-out@company.com.

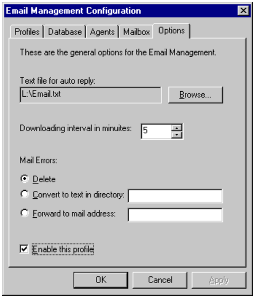
Options – In this Tab you can set a number of different options:

Text file for auto reply: Upon receiving an e-mail, Emailrobot can send a personalized custom reply. To personalize the auto reply, you can insert fields in your e-mail message, for example: [*Senderemail*]. Emailrobot will then automatically replace the [*Senderfrom*] field with the Email Alias. The following fields are supported:

[*sendername*]	Sender name (Email Alias)
[*senderemail*]	Sender e-mail
[*agentname*]	Agent name
[*agentemail*]	Agent e-mail
[*tracknumber*]	Tracking number
[*subject*]	E-mail subject
[*body*]	E-mail body
[*time*]	Time when email was downloaded
[*date*]	Date when email was downloaded

Undeliverable mail: This option allows you to specify what to do with e-mail that is returned. You can either delete the e-mail, save them to a text file, or forward the email to a mail address.

Enable this profile: This option switches the e-mail management system for this profile on or off. In this way you can periodically de-activate management of certain e-mail addresses.



The Email options tab

Starting the services

Important: After configuring the mailboxes, you must ensure that the Emailrobot services are started. To do this, go to the Services applet in the Control panel and start the Emailrobot.

Email reporting & Email communications history

The Email Communications Viewer allows you to view all e-mail communications taking place between your organization and its correspondents. Using it, you can search for e-mail based on recipient, sender, tracking number and date. You can also view a message thread, i.e. see the incoming messages and answers for a particular tracking number.

In addition the Email Communications Viewer provides you with essential information, such as amount of received e-mail, average response time, and percentage of unanswered or outstanding mail. The reports will also allow you to compare the performance of different departments or employees and plot them against time.

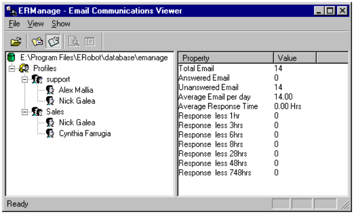
With this information you will be able to determine:

- Whether the amount of sales or support e-mail is satisfactory.
- How much time is actually being spent on answering e-mail and how quickly it is done.
- Whether and when you need to expand or decrease staffing.
- How effective your employees answer their e-mail.
- Whether your customer service is up to scratch.

Besides monitoring your company's response time, you can also monitor your customer's e-mails. For example, you can measure which customers send how many e-mails, which could provide useful information for billing purposes.

Using the Email Communications Viewer

To start up the Email Communications Viewer, select 'Email Communications Viewer' from the Emailrobot program group.



The Email Communications Viewer

Searching for e-mail

To search for a particular e-mail:

Step1 : Select the profile in which you want to search for e-mail, for example support. Do this by right-clicking the profile name.

Step 2: Select 'Search Emails' from the search menu.

Step 3: Fill in the conditions to search for. You can search on: From (sender), Subject, Agent, Date and Time and Tracking number. Select 'OK' to start the search. The Email Communications Viewer will display all e-mails that match your conditions.

Displaying the e-mail.

To display the e-mail, simply double-click on the e-mail or press return.

View Thread

One of the most powerful features of the Email Communications Viewer is the ability to view a message thread, i.e. all the incoming and outgoing mail relating to a particular support issue/tracking number. To do this, highlight the e-mail and select 'Thread' from the 'Show' drop down menu.

Reports

The Email Communications Viewer also allows you to view reports. The following data is available:

Total e-mail: displays the total amount of e-mail received.

Answered e-mail: displays the total amount of e-mail answered

Unanswered e-mail: displays the total amount of unanswered e-mail

Average e-mail per day: displays the average amount of e-mails received per day

Average response time: displays the average response time.

Remember that this does not take into account the fact that some e-mails do not require an answer, and that some e-mails come in at night or during the weekend. Because these e-mails 'skew' the response rate negatively, we have also created other statistics which might paint a more accurate picture, by showing how many e-mails are answered within a certain amount of time.

Response less than 1 hour: displays the e-mail that is answered within 1 hour.

Response between 1 and 3 hours: displays the e-mail that is answered between 1 and 3 hours.

Response between 3, 6 and 8 hours: These would generally be the e-mails which were received during the night/evening.

Responded to e-mail in 24-48 hours: These e-mails can be e-mails which require no answer or were sent during the weekend. They have been put in this category so as not to distort the totals.

The above data is available per profile and per agent. This way you can monitor the performance of a department and a particular agent.

Installing the Email Communications Viewer on client machines

The Email Communications Viewer can easily be set-up on other machines on the network so that other users can access it as well. To install the Email Communications Viewer on a different machine, follow the next steps:

Step 1: Copy the ‘Emview.exe’ file to the client machine. The file can be found in: Program Files\ERobot\database.

Step 2: Set up the e-mail database (e.g. emanage.mdb) as an ODBC data source on the client machine (see 'Configuring ODBC at the beginning of this chapter). To be able to do this, your e-mail database must be located in a shared folder.

Step 3: Start up ‘Emview.exe’. The first time it will ask you to identify the ODBC data source name. Select the data source name of the e-mail database and click ‘OK’. The next time the data source will be automatically loaded.

Chapter 4 Email Automation

Introduction

With Email Automation you can now further automate your company's e-mail-related tasks, such as:

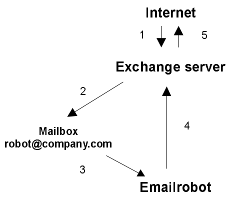
- Automatically processing results of Web forms into a database
- Sending out personalized mailings by querying a database
- Automate any other e-mail related process

To use Email Automation you must:

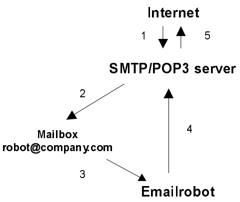
1. Configure your ODBC database

2. Configure Emailrobot Automation

3. Create Inbound and/or Outbound scripts with the Wizards (this Chapter) or VBscript (Chapter 5)



How E-mail automation works with Exchange



How E-mail automation works with an SMTP server

Above is an overview of how the Email Automation works with Exchange server or an

SMTP/POP3 server.

Configuring ODBC

Emailrobot uses ODBC to allow you to use different kinds of databases, allowing you maximum flexibility. For example, to send out a personalized e-mailing, you can retrieve your recipient data from any database that supports ODBC.

However, ODBC requires that any database you wish to use is added as either a user DSN (if you want it to be available to you only) or a system DSN (If you want it to be available to all users on this machine). This can be done from Control Panel on your machine. For instructions on how to do this, please refer to the Chapter on Email Management.

Set up of Email Automation

Configuring Automation for Emailrobot for Exchange

Step 1: Create a mailbox in which Emailrobot should receive all e-mail, for example robot@yourcompany.com (This mailbox must be dedicated to Emailrobot, i.e. you must not use it to receive your personal or other e-mail in, because Emailrobot will process all e-mail which is received in that mailbox.)

All e-mail that you wish to be processed must be forwarded to this mailbox. For example, if you have a Web form which sends mail to register@yourcompany.com and you have a Web form which sends mail to order@yourcompany.com, you should forward both these mails to the Emailrobot mailbox by using aliases on your Web or mail server.

Step 2: Start up the ‘Emailrobot Task Manager’ from the Emailrobot program group.

Step 3: Select ‘Configure’ and ’Email Automation’ from the Emailrobot Task Manager menu. This will fire up the ’Email Automation' dialog, which allows you to specify from where Emailrobot should download mail to process.

The Mail Retrieval for Email Automation dialog

Step 4: Now you must add the mailbox that Emailrobot should scan. Simply click on the checkbox next to the available mailboxes.

Note: If you create a mailbox in Exchange administrator, whilst the Emailrobot Task Manager is active, you must exit and restart the Emailrobot Task Manager for those mailboxes to become visible in this dialog.

Step 5: After you have specified the mailbox from which Emailrobot should download e-mail, click 'OK ' to finish.

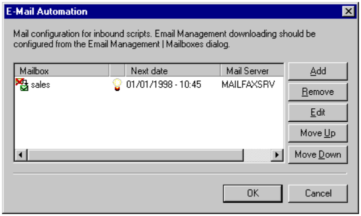
Configuring Automation for Emailrobot for SMTP

Step 1: Create a mailbox in which Emailrobot should receive all e-mail, for example robot@yourcompany.com (This mailbox must be dedicated to Emailrobot, i.e. you must not use it to receive your personal or other e-mail in, because Emailrobot will process all e-mail which is received in that mailbox.)

All e-mail that you wish to be processed must be forwarded to this mailbox. For example, if you have a Web form which sends mail to register@yourcompany.com and you have a Web form which sends mail to order@yourcompany.com, you should forward both these mails to the Emailrobot mailbox by using aliases on your Web or mail server.

Step 2: Start up the 'Emailrobot Task Manager' from the Emailrobot program group.

Step 3: Select 'Configure' and 'Email Automation' from the Emailrobot Task Manager menu. This will fire up the 'Email Automation' dialog, which allows you to specify from where Emailrobot should download mail to process.



The Mail Retrieval Configuration dialog

Step 4: Now you must add the mailbox that Emailrobot should scan, by clicking on 'Add'. This will start up the Mailbox properties dialog, where you must specify your mail server name, mailbox name, mailbox password and download interval.

General options: You can also specify whether Emailrobot should delete the e-mail after retrieving it, and you can also temporarily switch off downloading of e-mail.

Time scheduling: This allows you to specify when Emailrobot should scan the POP3 mailbox to retrieve e-mail.

Step 5: After you have specified the mailbox from which Emailrobot should download e-mail, click 'OK ' to finish.

Creating scripts using the Wizards

Emailrobot includes two scripting Wizards: one for incoming mail and one for outgoing mail. To access the Wizards, choose 'Task' from the 'Emailrobot Task manager' menu.

The Inbound Script Wizard

With the Inbound Script Wizard you will be able to:

- Archive e-mail
- Send auto replies
- Route e-mail
- Process Web forms into a database

The Inbound Wizard includes the following dialogs that you can configure:

Dialog 1. Email fields

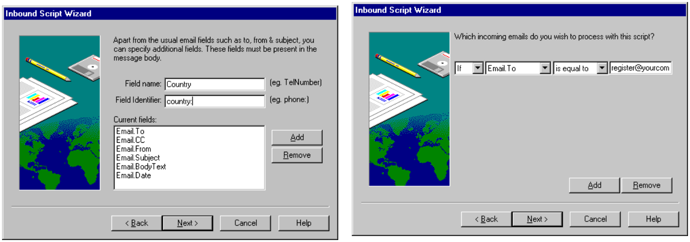
Each e-mail contains a To, From, Subject, CC and Body Text field. You can specify which fields you wish Emailrobot to use. You can also add your own custom fields. For example, if you have a website with an enquiry form that allows the customer to specify a country or a telephone number, you can add the fields in the first dialog and use it for analysis later on in the script.

To do this, you must have created a Web form that specifies the phone number and country name in the script, and precedes it with a ‘Field Identifier’, such as ‘phone:’ or ‘country:’ Using this Field Identifier, Emailrobot will find the number and country name, and will be able to use it as a field. For more information on creating Web forms see the Emailrobot web site at http://www.emailrobot.com.

Dialog 2. Conditions

Here you must specify which e-mails you wish Emailrobot to process.

For example, if you want to process e- mail sent to register@yourcompany.com, you must select ‘If’, ‘Email To:’, ‘is equal to’ and enter ‘register@yourcompany.com’.

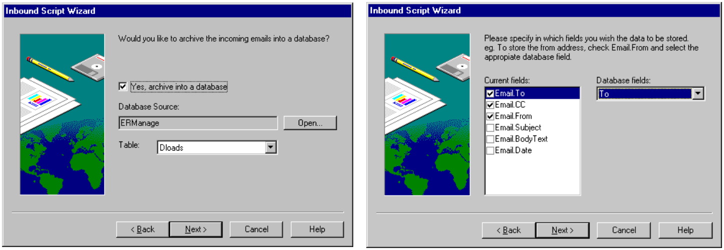


The 'Email fields' and 'Conditions' dialogs in the Inbound Script Wizard

You can add more conditions – each additional condition must be either AND (in this case the condition must be met also) or OR (Either of the conditions must be met).

Dialog 3. Archive e-mail

This dialog allows you to archive the e-mail into an ODBC data source. In the 'Database Source' you need to specify the database source, and in 'Table' the table in Access. If you do not wish to archive e-mail, uncheck the box and click 'Next'. You will then go on to Dialog 5.



The 'Archiving' and 'Specifying fields' dialogs in the Inbound Script Wizard

Dialog 4. Specify fields

If you have specified to archive e-mail into a database, you will need to indicate which e-mail fields must be stored in which database fields. To do this, check the e-mail field and then select the appropriate field. Repeat this for all fields you wish to archive.

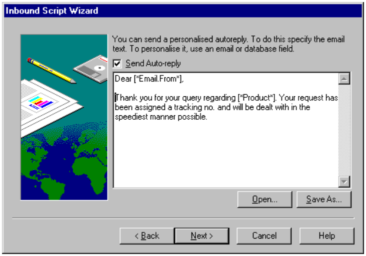
Dialog 5. Send auto reply

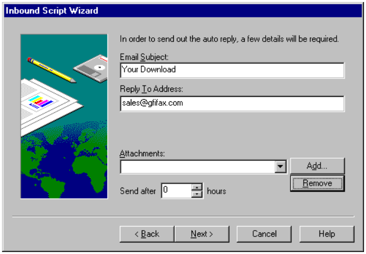
You can choose whether to send the sender of the e-mail and automated reply. This automated reply can be personalized, simply by inserting a field name, for example the To: field in the reply of the message. For example, you could use the following auto reply message:

*Dear [*Email.From*],*

*Thank you for your query regarding [*Product*]. Your request has been assigned a tracking no. and will be dealt with in the speediest manner possible.*

If you do not want to send an auto reply, uncheck the box and click 'Next'. You will then go to Dialog 7.





The 'Email fields' and 'Conditions' dialogs in the Inbound Script Wizard

Dialog 6. Auto reply options

If you have specified to send an auto reply, you must type in the e-mail subject, which will appear in the subject line of the message, and the reply to address.

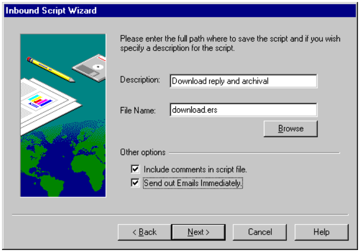
You can also delay sending the auto reply, by using the option 'Send after <number> hours'. In addition you can attach a file to the auto reply.

Dialog 7. Route the e-mail

If after processing the e-mail, you want the mail to be forwarded to a particular mailbox or person, enter the e-mail address where the mail has to be redirected to. If you do not want to forward the mail, uncheck the box and click 'Next'.

Dialog 8. Description

Here you must give the script a description and enter the file name in order to save the script in the Program Files\ERobot\scripts\files directory. You can also specify whether Emailrobot should 'Add comments in the script file' (this is only useful if you plan to edit the scripts at a later stage), or 'Hold mail in queue for previewing'. This last option will allow you to preview e-mail before it is sent out. You can preview the e-mail in the 'Emailrobot Queue view utility'. Remember that no e-mail will be sent out before you preview it and send it out!

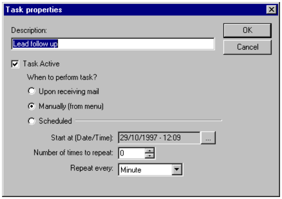


The 'Routing' and 'Script name & options' dialogs in the Inbound Script Wizard

After creating the script, you will be able to view your settings and change them if necessary. After you click 'Finish', the 'Task Properties' dialog will automatically pop up. Here you can specify when the Emailrobot should run your script (=Task). You can specify to run it manually (from the menu 'Task', 'Run now'), each time e-mail is downloaded, or at scheduled intervals.

After configuring this option, click ‘OK’. Your task will now be listed in the main window of the Emailrobot Task Manager.

If you later wish to edit the script, you can do so by selecting it in the ‘Emailrobot Task Manager’ and choosing ‘Edit script’ from the ‘Task’ menu. If you wish to remove it, choose ‘Remove script’.



The Task properties dialog

The Outbound Script Wizard

The Outbound Script Wizard allows you to create scripts that create outgoing e-mail. With the Outbound Script Wizard you can:

- Send follow up e-mail
- Send payment reminders
- Send regular newsletters or customer information
- Send personalized mailings

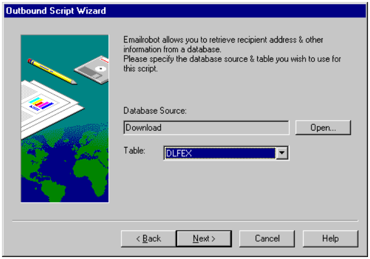
The Outbound Script Wizard includes the following dialogs that you can configure:

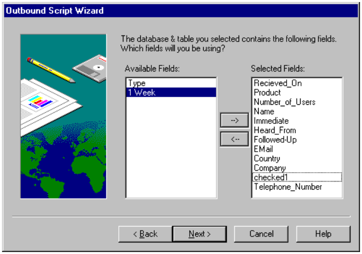
Dialog 1. Specify database

Specify the database from which Emailrobot must retrieve the recipient details.

Dialog 2. Specify fields

Emailrobot will list all retrieved database fields under ‘Available fields’. You must now indicate which fields you will be using in your Outbound Script. In many cases you will be using fields such as: Email address, Name, Company, Product interest, Date last contacted, etc. To select fields, click on an available field and click on ‘>’. If you want to deselect a field, click on it and click ‘<’.



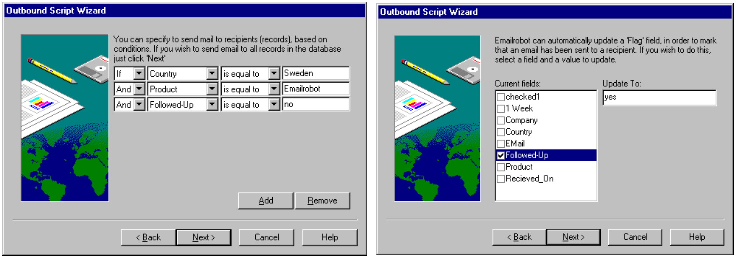


The ‘Specify Database’ and ‘Specify fields’ dialogs in the Outbound Script Wizard

Dialog 3. Conditions

This dialog allows you to set conditions according to which Emailrobot will determine whether to send out an e-mail or not. (i.e. Emailrobot will query the database with these conditions)

For example, if you have a database with prospects, and you wish to send your Swedish resellers a special offer in Swedish, you will need to set the ‘Country’ equal to ‘Sweden’, and the ‘Customer Type’ equal to ‘Reseller’. If your offer is only meant for Swedish resellers interested in a particular product, you would have to set an additional condition for the product interest field.



The ‘Conditions’ and ‘Update database fields’ dialogs in the Outbound Script Wizard

Dialog 4. Update database field (Flag).

This function is handy if you want to keep track of which customers you have already sent a follow up e-mail. To do this, you must add a separate field in your database, called a flag. For instance you could call this field ‘Mail Sent’. If Emailrobot comes across this flag when processing your mail, it will automatically update it to the name you entered in the dialog. For instance if you enter ‘TRUE’, Emailrobot will set the flag field to ‘TRUE’ for each customer who received an e-mail. You could thus eliminate a re-send of the follow-up mail next time you run the script.

Dialog 5. Specify e-mail text

This dialog allows you to specify what e-mail text you wish to send. You can personalize an e-mail by using fields in the text. For example, you could write:

*Dear [*Firstname*]*

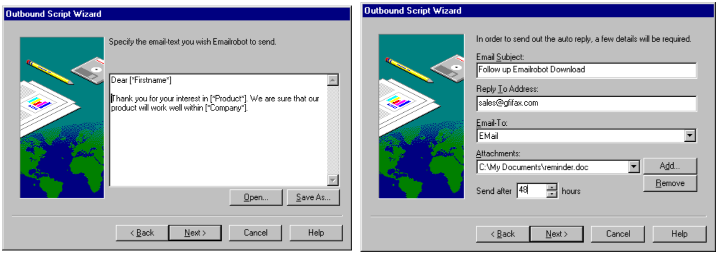
*Thank you for your interest in [*Product*]. We are sure that our product will work well within [*Company*].*

Note, that for this example to work, you would need to have the fields [Firstname], [Company] and [Product] in your database.

Dialog 6. Email options

This dialog allows you to specify the Subject line, and Reply To address. You must also indicate the database field where the e-mail addresses of the recipients are stored, e.g. ‘Email Address’.

You can also delay sending the e-mail, by using the option ‘Send after <number> hours’. In addition you can attach a file to the e-mail.



The ‘Email text’ and ‘Email send options’ dialogs in the Outbound Script Wizard

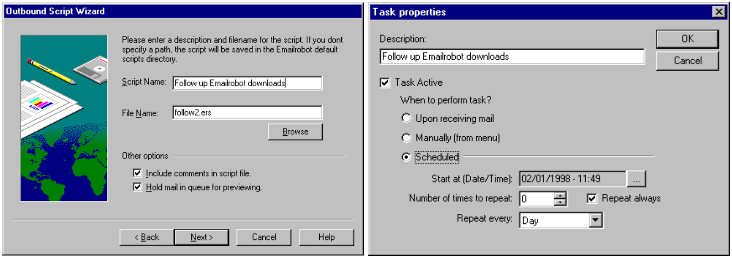
Dialog 7. Description

Here you must give the script a description and enter the file name in order to save the script in the Program Files\ERobot\scripts\files directory. You can also specify whether Emailrobot should ‘Add comments in the script file’ (this is only useful if you plan to edit the scripts at a later stage), or ‘Hold mail in queue for previewing’. This last option will allow you to preview the email before it is sent out. You can preview the e-mail in the ‘Emailrobot Queue view utility’. Remember that no e-mail will be sent out before you preview it and send it out!

After creating the script, you will be able to view your settings an change them if necessary. After you click ‘Finish’, the ‘Task Properties’ dialog will automatically pop up. Here you can specify when the Emailrobot should run your script (=Task). You can specify to run it manually (from the menu ‘Task’, ‘Run now’), each time e-mail is downloaded, or at scheduled intervals. After configuring when you wish Emailrobot to run the script, click ‘OK’. Your task will now be listed in the main window of the Emailrobot Task manager.

If you later wish to edit the script, you can do so by selecting it in the ‘Emailrobot Task

Manager' and choosing 'Edit Script' from the 'Task' menu. If you wish to remove it, choose 'Remove Script'.



The 'Script name & options' and 'Task properties' dialogs in the Outbound Script Wizard

Examples

To illustrate the use of the Wizard, we will walk you through the creation of a few popular e-mail-processing applications.

Example 1: Sending out a personalized e-mailing

Before you start the Outbound Script Wizard, you will have to prepare:

1. A database with recipient contact details. Since Emailrobot supports ODBC, which can connect to almost any database, it can be your current contact database. If you don't have a contact database you will have to create one.

2. A text for the e-mail. The text can include database fields in the following format:[*FIELD*]. For example, to address an e-mail personally, you would write:

*Dear [*Name*],*

*We are just sending you this e-mail to let you know that we are running a special offer on [*Product*]. We are sure that [*Company*] would like to take advantage of this!*

Step1: Start up the ‘Outbound Script Wizard’ by selecting ‘Add Outbound Script’ from the ‘Task’ menu in the ‘Emailrobot Task Manager’. Click 'Next' to continue on to the first page of the Wizard.

Step 2: Specify the database name and table, which contains the list of contacts/customers that you wish to send the e-mailing to. Click ‘Next’. Remember that your database must be set-up as an ODBC data source.

Step 3: Of the available fields, specify the fields you will be using. This includes the field which contains the e-mail addresses, but also any fields that you want to use in the text. For example, if you want to send the above text, you have to select the fields ‘Name’, ‘Product’ and ‘Company’.

Step 4: Now you must specify which contacts from the database should receive e-mail. To do this you can set conditions which have to be met. For example, if you want to send a mail to all prospects with interest in the product ‘FAXmaker’, you must have a field product interest, and set the condition:

“If - Product interest - is equal to – FAXmaker.”

Step 5: If you wish to keep track of whom you sent an e-mail mailing, you will have to specify a flag field in your database, which the Emailrobot can update to, for example ‘TRUE’, or ‘YES’.

Step 6: Enter the e-mail text you wish to send.

Step 7: Specify E-mail subject, Reply to address. In addition you must select which database field contains the e-mail address. You can also add an attachment and delay sending the message.

Step 8: Here you must give the script a name and enter the file name to save the script in the Program Files\ERobot\scripts\files directory. If you wish to preview the e-mails before sending them out, check ’Hold for previewing’.

After creating the script, the Outbound Script Wizard will automatically start up the Task properties dialog. The Task properties dialog allows you to specify when the Emailrobot should run your script (=Task). You can specify to run it manually (from the menu ‘Task’, ‘Run Now’), each time e-mail is downloaded, or at scheduled intervals. After configuring, when you wish Emailrobot to run the script, click OK. Your task will now be listed in the main window of the Emailrobot Task Manager.

Step 9: To run the Task now, select the Task in the Emailrobot Task Manager, and select 'Run Now' from the Task menu.

Your e-mail will be prepared. If you have specified 'on hold for previewing', you will have to start up the Queue View utility, check whether the e-mail is correctly addressed and created, and if so, select Send!

Example 2: Process e-mail generated by a Web form into a database

The use of Web forms to collect information on visitors has become very popular. Although you could set-up your Web server to process the information into a database directly, it is often more practical and certainly more economical to have the information collected sent to you as an e-mail. This is very easy to set-up on your web server, and Emailrobot is able to intercept those e-mails and process them into a database of your choice as they are received. To set-up this system, you will need to do the following:

Step 1: Install a form handling script on your Web server. For more information about this script and how to install it, check the Emailrobot website FAQ.

Step 2: Create a form on your website that collects all the information you need from your web-visitor. For each piece of information that you collect, you will need to make a separate field name. Make note of this field name. If you are not sure how to create a form, check the Emailrobot website FAQ on how to create a Web form using Frontpage Express or Frontpage. A sample form, 'wwwform.htm', is included in the Emailrobot\Samples directory.

Step 3: You need to set-up a mailbox or an e-mail address or a unique subject line by which Emailrobot can identify which Web form has generated the e-mail. In many cases you might have multiple Web forms, and for each Web form you probably have different information that needs to be stored in a separate way. If you are using a separate mailbox you will need to add it to the list of mailboxes that are checked periodically.

Step 4: Create a database with all the fields that you have used in the Web form, so that Emailrobot can insert the Web form fields into the database. As an example you can use wwwform.mdb, located in the samples directory.

Creating the script

Step 1: If you are using a separate mailbox, select 'Email automation' from the 'Configure' menu. Select the mailbox to which the form output will be e-mailed.

SMTP version only:

If you have Emailrobot for SMTP, you must now add the mailbox that Emailrobot should scan. Click ‘Add’ and specify mail server name, mailbox name, mailbox password and download interval.

After you have specified the mailboxes that Emailrobot should download, click ‘OK’ to proceed to create a task to process the e-mail.

Step 2: Start up the Inbound Script Wizard, by selecting ‘Add Inbound Script’ from the ‘Task’ menu in the ‘Emailrobot Task Manager.

Step 3: Add all the fields that you have used in the Web form. To do this correctly, you must know how your Web form is going to store each e-mail field. For example, the visitor’s name might be stored as name:. In this case, enter ‘name’ as the field name, and as the field identifier, enter 'name:'.

This will cause Emailrobot to look for a string 'name:'. When it finds this string, it will assume that the text after that ‘tag’ is actually the name of the visitor. Repeat this for each field that you have used in your Web form. When you are finished, select ‘Next’.

Step 4: If the mailbox you are using is used for other e-mail also, you will have to specify how Emailrobot will identify a particular e-mail from a Web-form. This can be done by having the Web form send the e-mail to a particular e-mail address (if you use an alias you would not need to set-up a separate POP3/Exchange mailbox), or by using a unique subject line.

If you used a unique subject line, you must add the condition:

“If - Email.subject – is equal to – Your unique subject”

If you used a separate e-mail address, you must add the condition:

“If - E-mail.to – is equal to – Your unique email address/alias”

Step 5: Select the database you wish the data to be imported to. If you do not have a database and do not wish to create one, you can use the sample database included with Emailrobot in the database subdirectory. Select the database to which you wish to archive the form output. Remember to set it up as an ODBC data source first!

Step 6: Specify which e-mail fields you wish to import into which database fields. If you are using our sample database, select the 'Email.To' field, and then select the 'To' field from the database fields List box. Then select the 'E-mail.CC' field and select the database field 'CC'. Do this for all e-mail fields.

Step 7: If you wish to send an auto reply you can specify one here.

Step 8: If you wish the Web form e-mail to be forwarded to another mailbox, you must enter the e-mail address here.

Step 9: Give the script a name and enter the file name to save the script in the Program Files\ERobot\scripts\files directory.

After creating the script, the Inbound Script Wizard will automatically start up the Task properties dialog. The Task properties dialog allows you to specify when the Emailrobot should run your script (=Task). You can specify to run it manually (From the menu Task, run now), each time e-mail is downloaded, or at scheduled intervals. After configuring, when you wish Emailrobot to run the script, click 'OK'. Your task will now be listed in the main window of the 'Emailrobot Task Manager'.

Example 3: Scheduled sales follow up

This script allows you to send out an automated e-mail to your (potential) customers, for instance customers who have inquired about your product. An example is a software company, which provides demos of their product for download. Before the customers can download the product, they have to fill in their contact details in a Web-form. The data of this form is sent to the Emailrobot which processes the data into the database. Exactly one week later, the customer receives a personalized e-mail inquiring how the evaluation is progressing!

To set-up a similar script, you will need to have the customer details in a database including the date when the customer inquired about your product.

Furthermore, you must have prepared an e-mail text, which includes the fields you wish to use in the following format [*FIELD*], where field is the field name you wish to insert in the text. For example, to address an e-mail personally, you would write:

*Dear [*Name*],*

*We noticed that you downloaded [*Product*] from our website and were just wondering how you were getting on with the evaluation.*

After you have decided and prepared on the above issues, you are ready to create a personalized follow up!

To do this, start up the Outbound Script Wizard, by selecting ‘Task’ and ‘Add Outbound Script’ in the Emailrobot Task Manager.

Step 1: Specify the database name and table which contains the list of contacts/customers that you wish to follow up.

Step 2: Of the available fields, specify which fields you will be using. This includes not only the field that contains the e-mail addresses, but also any fields that want to use in the e-mail text. For example, if you want to send the above message, you have to select the fields ‘Name’ and ‘Product’.

Step 3: Specify the contacts you wish to send e-mail, by setting the conditions that have to be met. For example, if you want to send an e-mail to all prospects with interest in the product ‘Emailrobot’, you must have a field product interest, and set the condition:

“If - Productinterest - is equal to – Emailrobot”

Step 4: If you wish to keep track of whom you sent a follow up e-mail, you will have to specify a flag field which the Emailrobot can set to ‘TRUE’, or ‘YES’.

Step 5: Enter the e-mail text. You can type in the message immediately, or open a text file, which contains the e-mail message.

Step 6: Specify E-mail subject, reply to address. In addition, you must select which database field contains the e-mail address. To delay the mail, for example for 3 days, simply enter ‘Send mail after 72 hours’.

Step 7: Give the script a name and enter the file name to save the script in the ERobot\scripts\files directory.

After creating the script, the Outbound Script Wizard will automatically start up the Task properties dialog. The Task properties dialog allows you to specify when the Emailrobot should run your script (=Task). You can specify to run it manually (From the menu Task, run now), each time e-mail is downloaded, or at scheduled intervals. After configuring, when you wish Emailrobot to run the script, click ‘OK’. Your task will now be listed in the main window of the Emailrobot Task Manager.

Chapter 5 Creating scripts using VBscript

Introduction

Emailrobot uses the Microsoft Visual Basic Scripting Engine to allow you to customize your Emailrobot scripts. Microsoft VBscript is the 'World Wide Web edition' of the popular Visual Basic language.

If you already know Visual Basic or Visual Basic for Applications, VBscript will be very familiar. Even if you are not yet familiar with Visual Basic, you will find VBscript easy to learn. We recommend that you consult a Step by Step book available from Microsoft Press.

VBscript documentation

Because VBscript is a very powerful & evolving scripting environment, we have not included the VBscript documentation in the manual. Rather, we have created an online link to the official Microsoft manual on our website.

To view the online manual of VBscript, go to the following URL:

http://www.emailrobot.com/docs/vbscript.htm

For more information on VBscript, visit the Microsoft website on:

http://www.microsoft.com/scripting

VBscript Emailrobot commands

GFI is continuously adding more commands and improving the documentation for each command. Therefore we have chosen to create an online explanation of the commands This ensures that you will always have the latest information.

For a complete listing of the latest Emailrobot VBscript commands please check the following document on our website: http://www.emailrobot.com/docs/erfunctions.htm

The app farm on Emailrobot site

Emailrobot includes some example scripts, but you will find the largest collection on the Emailrobot Web site: http://www.emailrobot.com.

GFI have created a special section for Emailrobot scripts, called the Application farm. Here GFI, customers and third party developers can post and download Emailrobot scripts. To go to the Application Farm, go to the following URL:

http://www.emailrobot.com/pages/appfarm.htm

Chapter 6 Troubleshooting

When you are having problems

If you have any questions or encounter any problems, you can consult the support section on the Emailrobot website:

http://www.emailrobot.com/pages/esupport.htm

The following FAQ's are available:

Emailrobot Pre-sales FAQ

http://www.emailrobot.com/pages/eropsfaq.htm

Technical support - Emailrobot for Exchange FAQ

http://www.emailrobot.com/pages/erxtsfaq.htm

Technical support Emailrobot for SMTP FAQ

http://www.emailrobot.com/pages/erstsfaq.htm

Furthermore, you will also find the latest version of this manual on the Emailrobot website:

http://www.emailrobot.com/ermanual/erobot.htm

If you do not find your answer on the FAQ, please send an e-mail to support@gfifax.com or contact your dealer or distributor, or one of GFI's offices.

Glossary of Terms

APOP - An authentication method which provides for both origin authentication and replay protection, but which does not involve sending a password in the clear over the network.

Domain Name - A Domain Name identifies an individual Internet computer, and can be a single word or abbreviation that makes up part of a computers unique name, such as "gfifax.com".

Field - A field is a space in a database management program, which is reserved for a specified piece of information. Data fields might be: "Firstname, Lastname, Company, Address".

FormMail - FormMail is a generic WWW form to e-mail gateway, which will parse the results of any form and send them by e-mail to the specified user.

Microsoft Access - A database management program for PC's that features Wizards, automated assistants that help organize and locate data, and Access Basic, a powerful application programming language.

Open Database Connectivity (ODBC) - ODBC is a standard API for accessing information from different data storage formats and programming interfaces. It is an industry standard which nearly all software publishers support.

Post Office Protocol (POP3) - An Internet electronic mail standard that specifies how an Internet connected computer can function as a mail-handling agent.

Script - A script is a series of instructions, similar to a macro, that tells a program how to perform a specific procedure. Scripts can be made by programming, but also by making use of built-in script forms.

Simple Mail Transfer Protocol (SMTP) - An Internet protocol for transferring mail between Internet hosts. SMTP is often used to upload mail directly from the client to an Intermediate host, but can only be used to receive mail by computers constantly connected to the Internet.

Web form - A Web form is a set of document features (e.g. fill-in text areas, drop-down list boxes, check boxes) that enable you to interact with a web page. For example an order form, or a subscription form on the Internet.

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