Universal Mail Archiver for SuperOffice CRM

Getting Started

A universal mail archive tool for computer and mobile devices.

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Welcome to Universal Mail Archiver for SuperOffice CRM

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Introduction

The Universal Mail Archiver is an application that gives you the ability to archive e-mails from your computer and your mobile device.

Each e-mail will be archived into the SuperOffice database. The only thing you have to do is fill in the e-mail address that you have configured for the Universal Mail Archiver and the Universal Mail Archiver takes care of archiving your e-mail.

Before you Begin

Product Registration
Registration is done over the internet. Therefore a working internet connection is required.
Please read the following knowledge base article about the registration process.
http://kb.infobridge.com/hc/en-us/articles/203821791

Universal Mail Archiver for SuperOffice CRM

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Quick Step Guide

When you receive an e-mail in your mailbox (on your web mail or your device) and you want to archive this into SuperOffice there are some simple guidelines you can follow.

You can archive incoming and outgoing e-mails with Universal Mail Archiver.

Send an outgoing e-mail

Follow these steps to archive an e-mail when you send an e-mail to your contact person.

1. Create your normal e-mail message.
2. Fill in the “TO” address in your e-mail message (This address must exist in SO in order to correctly archive the e-mail).
3. Fill in the “CC” and/or “BCC” contact persons (if necessary).
4. Add the Universal Mail Archiver e-mail address into the “BCC” address field and the e-mail
   will be archived under the company card of the first contact person in the TO field of the e-mail message.

Reply to an e-mail

Follow these steps to archive an e-mail when you give an answer to your customer contact person.

1. Open the e-mail you have to reply to. (This address must exist in SO in order to correctly archive the e-mail).
2. Add the Universal Mail Archiver e-mail address into the “BCC” address field and the e-mail
   will be archived under the company card of the first contact person you reply to.

Forward an e-mail (without sending it to the customer)

Follow these steps when you forgot to archive the reply of an e-mail message to your customer contact person.

1. Open the e-mail from you send items. (This address must exist in SO in order to correctly archive the e-mail).
2. Add the Universal Mail Archiver e-mail address into the “TO” address field and the e-mail will be archived under the company card.

Forward an e-mail

Follow these steps when you want to forward an e-mail and also want to archive it into SuperOffice.

1. Open the e-mail.
2. Fill in the “TO”, “CC” and/or “BCC” contact persons email addresses (if necessary). (This address must exist in SO in order to correctly archive the e-mail).

3. Add the Universal Mail Archiver e-mail address into the “BCC” address field and the e-mail will be archived under the company card.

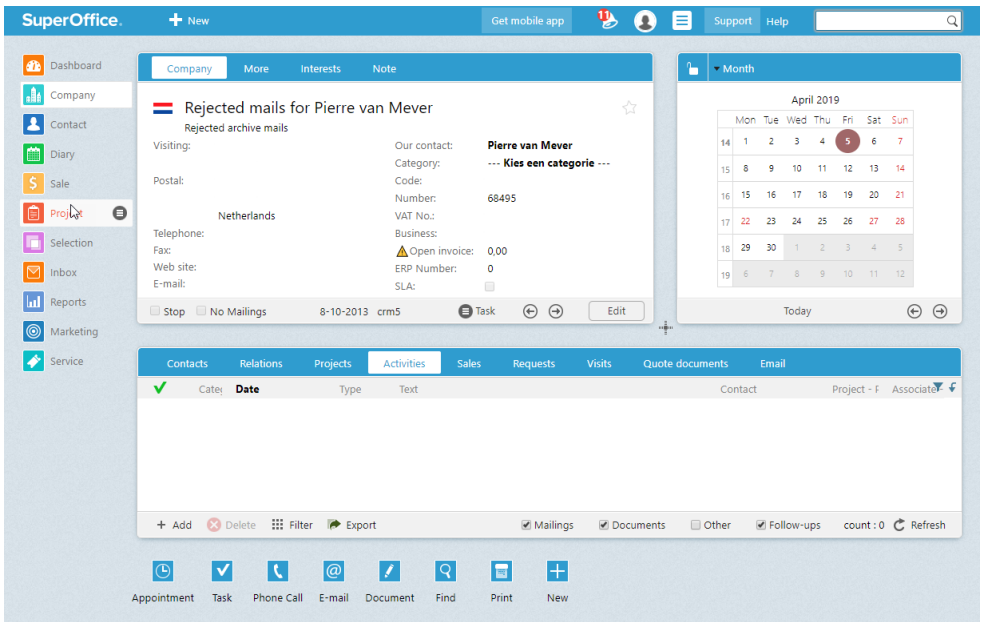
Rejected e-mail message

When you archive an e-mail message and there is no corresponding e-mail address available in SuperOffice then there are 3 possible options that can occur:

1. the e-mail will be archived under the company card “Rejected emails for **[contact person]**“ if the email address cannot be found (see image “Status overview rejected e-mail”).
2. If parameter *DoNotCreateRejectCompany* is activated the email will be archived without storing it with a contact or company.
3. If parameter *CreateNewContact* is activated UMA will try to create a new contact for the company that is using the domain name used in the email address. If the company can not be found the email will be archived based on the previous settings.

Note: Please do not create the company card yourself, it will be done by UMA.

From this company card you can take action on the rejected e-mails.



Status overview rejected e-mail

Hi User,

Here is the status of your archived mail:

Archive date	Mail subject	Type	Archived to	Status	Status description
01/01/2019 12:00	New Message	Outgoing	User (Infobridge Software BV)	OK	
01/01/2019 12:00	New Message	Outgoing	(Rejected mails for System User)	Needs Attention	Email is not archived to correct company/perso Email address was not found in SuperOffice: system.user@infobridge.com.
01/01/2019 12:00	New Message	Outgoing	()	OK	
01/01/2019 12:00	New Message	Outgoing	System user (Infobridge Software BV)	OK	Email is archived to a newly created person wit address: system.user@infobridge.com.
01/01/2019 12:00	RE: New Message	Incoming	User (Infobridge Software BV)	OK	
01/01/2019 12:00	FW: New Message	Incoming	(Rejected mails for System User)	Needs Attention	Email is not archived to correct company/perso Email address was not found in SuperOffice: system.user@infobridge.com.
01/01/2019 12:00	RE: New Message	Incoming	()	OK	
01/01/2019 12:00	FW: New Message	Incoming	System user (Infobridge Software BV)	OK	Email is archived to a newly created person wit address: system.user@infobridge.com.

With kind regards,

Universal Mail Archiver

Status overview archived e-mail message

Depending on the settings of the Universal Mail Archiver you receive a status overview of your archived e-mail messages (For more info about the interval of the status overview e-mails see the installation manual).

The status overview e-mail looks like this (see image below).

Hi Henk,

Here is the status of your archived mail:

Archive date	Mail subject	Type	Archived to	Status	Status description
2/8/2013 8:04 AM	Fwd: Herkomst bezoeker	Outgoing	Marcel Spapens (CrmBizz)	OK	

With kind regards,

Pam
Your personal mail-archiver

Parameters

The Universal Mail Archiver supports the following parameters. To use the parameters for the Universal Mail Archiver add the parameter in the **subject** field of your e-mail message.

This parameter	Will do this
.help	Retrieves this list of possible commands and current settings.
.status	Send the current status overview of the archived e-mails.
.set [[name] [value]]	Sets a value for a specific setting; See the list under this parameter list.
.p	Archive e-mail as private; You can also use this parameter for each e-mail that is archived just by adding it to the bottom of the e-mail.
.r	Create reminder for an e-mail; You can also use this parameter for each e-mail that is archived just by adding it to the bottom of the mail.

Parameter (.set parameter values)

Name	Possible values	Description
ArchiveStyle	1 = Archive first in TO and found in database 2 = Archive all in TO Field 3 = Archive all in TO and CC Field	Defines the style of archiving outgoing emails.
Schedule	1 = Daily 2 = Weekly 3 = Never	Define how often you receive the periodic status mail.
OnlyExternal	yes no	Archive external recipients only and skips associates in TO/CC fields.
CompanyUnique	yes no	When archiving to multiple persons, only archive once per company if multiple persons for this company are found.

Parameter usage example

.set Schedule 1

You can also use parameters for each mail that is archived just by adding it to the bottom of the mail. These parameters are available:

This parameter	Will do this
.g	Archive mail as 'only visible to users in my main user group'.
.pn={value}	Link the email to a project with the specified project number. Format: '.pn=433' (without quotes).
.sn={value}	Link the email to a sale with the specified sale number. Format: '.pn=433' (without quotes).

www.crmplaza.com/Apps/Universal Mail Archiver

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