

BookMine Basics

Email

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Bookmine Basics – Messages/Email

What does the Messages/Email Section of Bookmine Cover?

The Email module in Bookmine is included in both the Marketing and Enterprise versions. It is a critical component if you wish to track communications between your business, your customers and your suppliers. In addition it enables you carry out micro-managed marketing campaigns via email. In a nutshell, the email/messaging module is a complete email system which enables the user to compose and send emails either singularly or as part of large mail outs. As all emails sent and received are automatically linked to the corresponding contact record in Bookmine an invaluable history builds up of every interaction you have had with every customer and supplier. This history is available to everyone instantly where and when it is needed. On download from the Internet into BookMine each email is automatically linked with your existing contact records, automatically building a comprehensive history of communications as a by-product of processing your mail. When looking for an email in BookMine it is as easy as going to a contact's or supplier's record and clicking on the email button. All emails to and from the contact are displayed.

E-mails can be sorted and displayed in numerous ways and a sophisticated search interface enables you to search for not just a particular email but a piece of text anywhere in any email. Losing emails with Bookmine is just about impossible to do!

Email marketing in Bookmine is simple and straightforward (and amazingly effective and virtually cost-free). It is a simple task to include details of selected titles from your inventory (eg the latest cookery

books) into an email and send it to a single recipient or to everyone on the Cookery distribution list (for a distribution list is just a grouping of contacts who have opted in to receive information on particular topics, events, etc.). Bookmine automatically ensures only a single copy of any email is sent to a contact even if they are members of several of the lists included as recipients. It also checks the validity of each email address to ensure it conforms to email address standards and thus is likely to be valid. This greatly reduces bounce backs, which can be a time-consuming task to deal with. All e-mail distribution lists are sent out as BCC (blind carbon copies) so there is no fear of giving away your mailing list or annoying your customers with a large body of email addresses at the top of their email.

A built-in anti-virus function also works to automatically protect your system from email borne virus and worms. By default it will not allow users to open potentially dangerous content, even if you anti-virus software has not picked it up as it may not have been reported yet.

The main email interface

From the **Main Switchboard** click **Messages/Email/F8**. The interface below is displayed.

The screenshot shows the 'Bookmine Marketing V8' interface. At the top, a blue title bar reads 'Bookmine Marketing V8 Licensed to InfoMining Pty Ltd'. Below this is a menu bar with buttons for 'New (F3)', 'Disp(F8)', 'Reply(F4)', 'Forward...', 'Print(F9)', 'View/Find Messages', 'Back', 'Cust Folders', 'Gen Folders', 'Outbox(F7)', 'Today's', 'Resend', 'Move/Cop', 'Associate', 'Delete(F5)', 'Add Dlists', 'Remove (F6)', 'Remove All', 'Inbox(F2)', and 'Week's'. The main area is a table of email messages with columns for 'Del?', 'Status', 'Contact information', 'Date', 'Subject', and 'Action Required'. The table contains several rows of email data, including one from 'ABA News' and another from 'Microsoft Event Registration Confirmation'. At the bottom, there is a 'Form Navigation' bar with buttons for 'Exit', 'Contacts', 'Requests', 'Stock', 'Cat/List', 'OutPut', 'Show Deleted', 'Bulk delete', 'Cancel Mail Operation', 'Send and Retrieve.....', 'Mail and Internet Options', 'Send Only', 'Retrieve only', and 'Close/RAS conn...'. Five yellow callout boxes with arrows point to specific features: 'Start new emails, reply to and forward existing emails' points to the 'New (F3)' button; 'Display an email in Wordpad or Notepad for printing and/or cutting and pasting from' points to the 'View/Find Messages' button; 'Search for emails based on numerous criteria such as date, sender, words in subject, words in body of text etc.' points to the 'View/Find Messages' button; 'View the full details or the administration interface for the customer linked to this email' points to the 'Details...' link in the email table; and 'Send all emails in the out box, download emails from POP server' points to the 'Send and Retrieve.....' button.

Start new emails, reply to and forward existing emails

Display an email in Wordpad or Notepad for printing and/or cutting and pasting from

Search for emails based on numerous criteria such as date, sender, words in subject, words in body of text etc.

View the full details or the administration interface for the customer linked to this email

Send all emails in the out box, download emails from POP server

Set an action status for any email with optional annotations to highlight a required action, etc.

Downloading Email

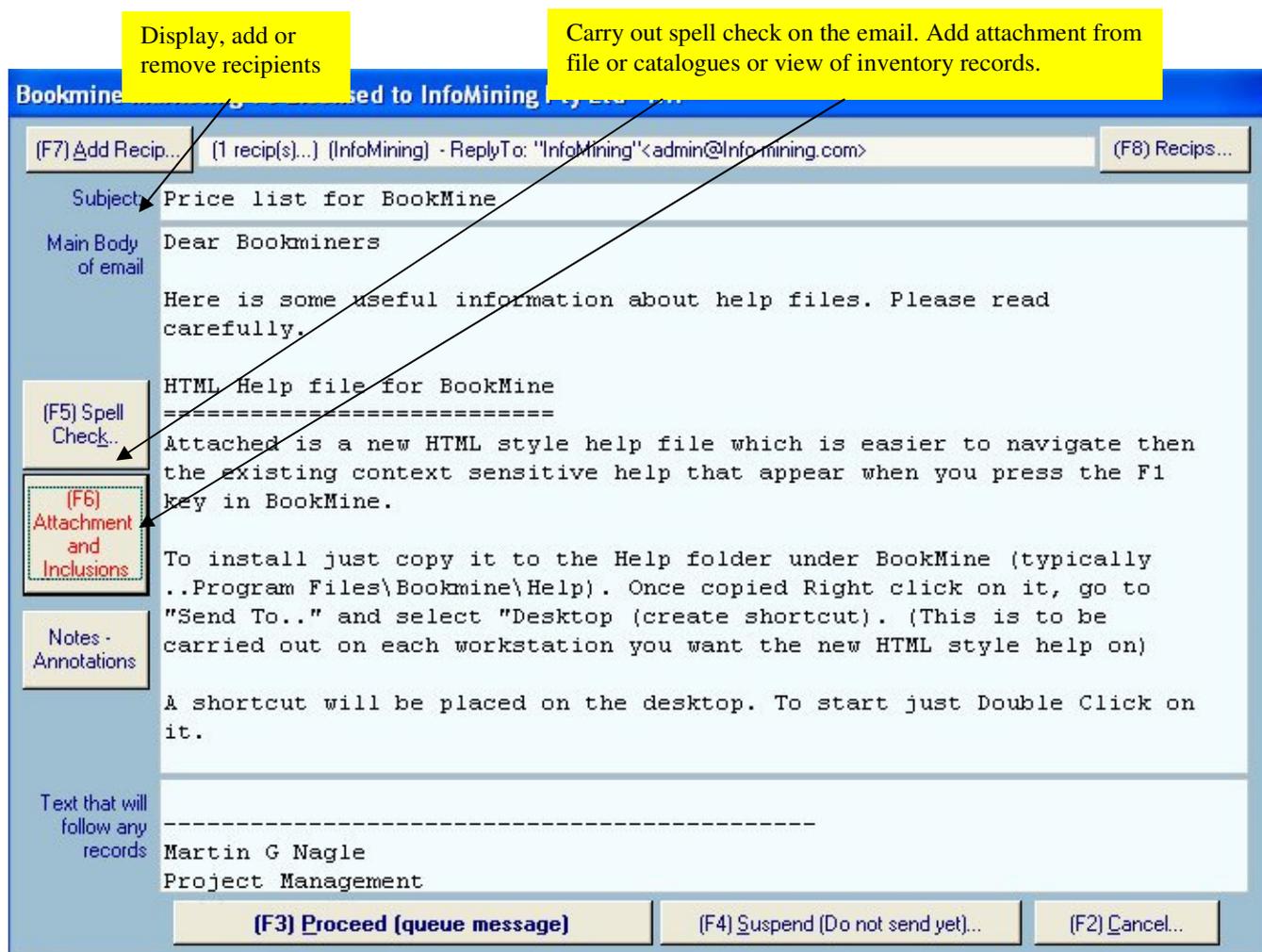
1. From the **Main Switchboard** click **Messages/Email/F8**
2. Click on the **Retrieve Button** (or if you wish to send e-mail at the same time) or the **Send and Retrieve button**.
3. There will be a slight pause while Bookmine carries out this operation. As soon as the email retrieval has been carried out a window will appear on the screen reporting on the number of emails that have been downloaded and how they have been treated – for instance: 50 downloaded, 10 filtered (ie put directly into an email box into which all emails with specific criteria are directed) and 20 auto-Linked (i.e. automatically Linked with known contacts). Alternatively if no email was downloaded a window advising this will be shown.
4. Assuming new email has arrived, the in-box (the main new arrivals box) will be shown on screen. Most commonly there will be a mixture of linked and unlinked e-mails visible. Linked e-mails can be easily identified by the name of the contact in the contact information box. UnLinked e-mails will be highlighted with a yellow coloured contact information box and the name/title in the box will be the one the sender has set up as their ‘from’ address rather than the Bookmine contact name.

Reading an Email (Open)

To read an email click on the Open button adjacent to the email you wish to open. After reading the text of an e-mail it is easy to progress to other e-mails you wish to read by using the up or down arrows (found at the top and bottom of the screen of the open email screen) which will take you to the email directly above (up arrow) or below (down arrow) in the in-box.

Creating new emails (F3)

Use the New command (F3). You are prompted for the recipients. You can elect to send it to a single or multiple recipients. These can be added to or removed any time before the email is actually sent. Follow the prompts onscreen. The interface below is displayed.



A blank email will then be displayed. Type a subject (can use the glossaries to insert common subjects) and the text which you wish to send into the Main Body of the Email and import any records you wish to include in the email (see full description of how to do this under Including Stock/Inventory in e-mails). You can include attachments as required. In addition you can spell check the email. To queue the email for sending press **Proceed/F3** this will queue the email in Bookmine's outbox.

How to Reply to an Email

To reply, the e-mail you wish to reply to must be Linked with a contact in Bookmine. See details of how to do this under How to Link an Email. Replying to a Linked e-mail is a simple matter of clicking **Reply/F4/AltR** if you are in an open email or if viewing e-mails in the Inbox making sure that the small black arrow in the furthest column left is in line with the email you wish to reply to and clicking **Reply/F4/AltR**.

ReplyTo Addresses – Computer Based Role Based and Operator Based

In BookMine the Reply To address specified in outgoing emails can be Operator Based, Role Based, Terminal Based, or Organisation based. This means you can control which addresses replies are sent to.

Using Role based operator account to sort email into general folders

Typically in a small business everyone uses the same **reply to** address such as books@Organisation.com. By default replies are sent back to this address. This means that all incoming email, while automatically linked to the person or organisation's contact record that sent it, ends up in a common inbox (BookMine's internal filtering can be used to auto filter based on most parts of emails – see below for details).

BookMine has extensive filtering capabilities to help you manage this but in addition provides two mechanisms to aid role based or operator based filtering.

These are:

- Each computer terminal can be configured so that all emails created on it have a specific Reply To.
- Selected operator accounts (representing individuals or roles within the organisation) can have specific Reply To addresses that are used when they are logged on to any computer.

The **Reply To** address that applies is then set as follows.

- If the operator/role logged on has a specific **Reply To** address that address is used.
- If there is no operator level Reply To the Reply To for the computer terminal is used, if set.
- If both the Operator and the Computer terminal Reply To addresses are blank then the Organisation's Reply To is used.

Configuring Reply to addresses: Organisation and Computer level:

The Organisation and Computer Terminal ReplyTo's are set under Mail and Internet Options. Great care should be exercised when modifying this as you can suspend all sending and receiving of email.

Adjacent to the *Current Active Mail Profile* click the **Modify** command. From here the Organisation level optionally Computer level ReplyTo address can be set. Read the instructions carefully before modifying. Note: if you specify an incorrect ReplyTo address replies will not arrive in your inbox. Hopefully the sender's will warn you that replies are being bounced back so that you can correct the situation.

Configuring Reply to addresses: Operator/Role level

The operators Reply To is set by your Administrator. Most operators should not have specific Reply To addresses set up for them as it defeats one of the benefits of having common email. However no matter how many operators their own addresses Bookmine's email still gives everyone access to all communications as they are linked to the contact's record as well as being filtered into specific folders and can be searched for by date and content.

Filtering based on Organisation, Computer, Operator and Role based Reply To

Once set up Bookmine's mail filtering (see below) can be configured to filter all emails sent to specific usernames into specific general email folders. For example staff involved in purchasing can log on to any

terminal as a generic Purchasing operator for which a ReplyTo has been configured. Lets say this address is Purchasing@Organisation.com. Any emails created when this operator is logged on will have this ReplyTo address.

To automatically filter all replies into a specific folder called **Purchasing** : (i) create a new general email Folder called **Purchasing** (ii) Set up a filtering rule that triggers on the **To address**, specifying Purchasing@YourOrganisation.com to trigger on and the **Action** to take as **Move To folder** Purchasing.

In future the **purchasing** staff need only look in the Purchasing email folder. This is repeated for all other **Role** based operators such as Promotions, etc.

Web Orders and **Mail Orders** can also be handled using this technique. Have your Web Master set up a specific email username that all orders are sent to such as **WebOrders@YourOrganisation.com** and create a **Web Orders** folder and a filter to match.

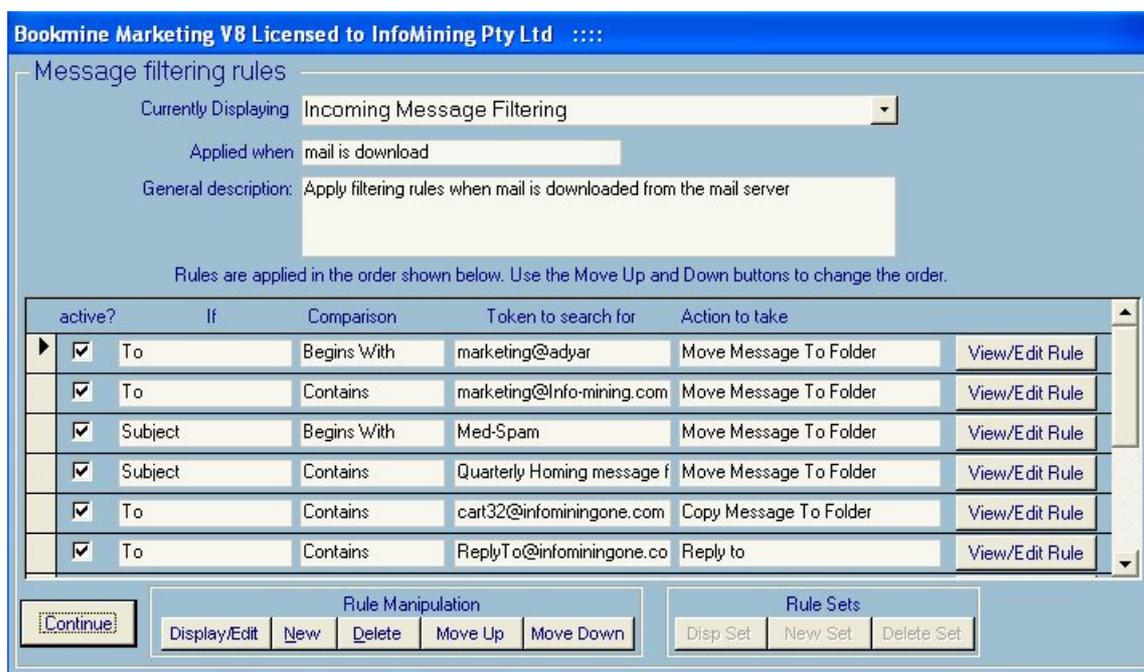
Note: All incoming emails will also be automatically linked to the corresponding sender's contact record based on their From Address.

Sending queued Emails

E-mails are **queued** when the **Proceed** Command is used after you are finished creating an email. They are not actually sent until the **Send** or **Send/Retrieve** is clicked. These buttons can be found in the both the **Main email interface**.

Filtering - Setting up mail filters

From the main summaries form click the Mail and Internet options > Click the Mail filtering Tab > Mail Filtering Rules. The screen below is displayed. From here you can add new rules. The rules can be triggered on any part of the email and the action to be taken specified from a list of available actions.



Example

Using this interface you can filter emails into specific folders as they are downloaded from the Internet. For example you could trigger on a Subject line that has WEB Order at the start of it and specify the action to be Move to the WEB Orders folder. After downloading all Web Order email would be in the Web Order folder.

Operator/Role based filtering based on ReplyTo addresses

You could also set up a rule that triggers on the **To address** in incoming emails. This works in conjunction with the operator or role based ReplyTo address strategy explained above. The replyTo address in this case depends on which operator or role was logged in when the email being replied to was created. For example a **Purchasing** operator/role could have a specific replyTo set for it. All replies to emails sent from them could then be filtered into a general Purchasing Folder using the Move To Action. The possibilities are endless but remember filtering will do what you tell it to do. Hopefully that corresponds closely to what you wanted it to do. Examine the order and meaning of all rules carefully before implementing.