



System Configuration Help

Customer Guide v5.0

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System Configuration Help

The following outlines basic elements within IFM eMail Manager that should be configured for the system to work properly as well as additional suggested configurations to help you get the most out of your eMail Manager system. Items noted with a **red asterisk (*)** are required elements.

1. Site Preferences (Super Admin only)

1.1. Definition:

The Site Preferences section allows you to configure your system “look and feel” as well as other general system settings.

1.2. Importance of Setup:

Configuring the Site Preference allows you to brand the system as your own – this is what your customers will see – and establishes general settings for all of your customers.

1.3. How to Setup:

Navigation: Setup > Site Preferences

Click on the Setup link at the top of the eMail Manager page.

Click on the Site Preferences link.

Complete the form as follows:

- * **Company Name:** Type the name of your company. Avoid using any special characters such as stars (*), apostrophes (') or ampersands (&).
- * **Logo Image:** To upload an image, click on the browse button. This will open a window asking you to select a file from your computer and will automatically enter it into the logo field.

NOTE: All graphics must be in JPG or GIF format. Recommended image size should not exceed 100 pixels wide or 63 pixels in height.

- * **Header Color 1:** Enter a HEX number (including the "#" sign) that you would like displayed in the top section where the main topics are located. Standard text color for main topics is white (Example: #FFFFFF).
- * **Header Color 2:** Enter a HEX number (including the "#" sign) that you would like displayed in the subtopic section

(under header color 1) or click on the Color Icon to automatically select a color.

- * Contact Email: Represents the email address where support or other general contact questions should be addressed. For example, this email is displayed in the Suggestions/Comments form.
- * Number of Rows in Lists: Enter a number from 0 to 100. This will limit the number of emails or list items shown at one time which will help to reduce the download time once lists grow large. Using a 0 or blank field will result in NO limitations.
- * Delay Between Screen Refreshes: Select how often you want the screen to refresh after eMail Manager has received new emails. A drop-down menu is provided.

2. Sections Setup (Super Admin only)

2.1. Definition:

A “Section” in eMail Manager is the particular partition for one customer or department. For example, if you have multiple customers using eMail Manager, you would set up a section for each customer before proceeding to set up the rest of the system.

ⓘ NOTE: A default section comes with each eMail Manager system. If you plan to only have one section, you do not need to create additional sections outside of the default.

Sections can only be created by Super Administrators.

2.2. Importance of Setup:

Setting up a section – regardless of whether it is one or more – is like setting up your account in eMail Manager. It provides the software with identification information to help properly process emails and requests to your account.

Without this setup, information will not get forwarded to the correct customer.

2.3. Setup Instructions:

Navigation: Setup > Sections

Click on the Sections link.

Click on the Add New Section button at the top right of the page.

Complete the form as follows:

- * Active?: Signifies whether the account is active or not. The default setting is Active.
- * Name: Type the name of the Section. Please avoid using any special characters such as stars (*), apostrophes (') or ampersands (&).
- * Quota: This is the amount of space in MB allowed for your account. If you are creating more than one section, you can divide up the space any way that you want, as long as the total MB for all sections does not exceed your package quota.

ⓘ NOTE: Not sure what your quota is? Just click on the Maintenance link at the top of the page. You'll see system statistics that include your total package quota.

- * ID Label: Enter the ID letters that should appear in front of the tracking number for each email. For instance, if the

section name is “WidgetWeb”, the ID Label could be WWEB. The only criteria for ID labels is that they be three to eight (3-8) letters in length. No numbers are allowed, as this would interfere in the tracking number.

- Sort Folder Emails: Emails will default to a particular sorting pattern based either on status or IDS. Click the radio button next to the default pattern you prefer.
- Link Logo to URL: If you would like the logo in your brand to go to a particular website, enter the URL address here. You must enter “http://” before the address. This DOES NOT need to be configured for your system to run, but it is a great navigation tool.
- Reply Email Prefix: When replying to an email, this prefix will show before each sentence of the original email to identify it as the original content. The most common prefix used is “>>”.
- Time Tracking: Mark this checkbox to enable automated calculation of time spent addressing each email. Users will still be able to enter time by hand to overwrite automated calculations. Time is tracked from the moment a user opens the email and performs an action and then updates the system.

Leaving the checkbox “unchecked” will keep time tracking disabled.
- Send Attachments: Mark this checkbox if you would like users to have the ability to send email attachments. Leaving this box unchecked will disable the attachment feature.
- Show Reference: Mark this checkbox if you would like to be able to add a reference to each email. References are displayed in the email list view and can be added when viewing the email.
- Display Thread Most Recent First: Mark this checkbox to show the most recent action for that email at the top of the page.
- Time Offset: Adjusts the time shown from the original server time (Mountain time). The display time shows where the time is currently set. To increase the time by one hour, enter “1”. To decrease the time by 2 hours enter “-2”.

- Section Preferences: You can add additional branding for each section. See Site Preferences for an explanation of each field. **ⓘ NOTE:** Changing these values will overwrite settings in Site Preferences.

3. Create Email Accounts (Admin and Super Admin only)

3.1. Definition:

Configures your system to read emails from various POP accounts. If you plan to have multiple folders, you only need one POP account to read them from.

3.2. Importance of Setup:

Accounts must be configured in order to receive incoming email and disperse them into their appropriate folders.

This must be done before setting up folders.

3.3. How to Setup:

Navigation: Maintenance > Email Accounts

Click on the Maintenance link at the top of the eMail Manager page.

Click on the Email Accounts link.

Click on the Add New Account button at the top right of the page.

Complete the form as follows:

- * Mail Host: The name of the incoming and outgoing mail server. Your ISP or Network administrator would have assigned this upon creating your Mail Server account.
- * Mail Host Type: You will need to know the type of mail server this account will use (POP3 or IMAP). The POP3 protocol is used only as a delivery mechanism between a mail client and a mail server (post office). An IMAP is an Internet protocol for accessing messages that are stored on a server. Check with your ISP or Network Administrator if you're not sure which one your account uses.
- Port: The server port number for a directory server. Enter 110 (for POP3) or 143 (for IMAP).
- * Account Username: The account username that was assigned for the Mail Server.
- * Account Password: The account password that was assigned for the Mail Server.
- * Delete Messages From Server: Mark this checkbox to delete messages from the mail server.
- * Active?: Mark this checkbox to activate the account.
- Force email into Folder: This allows users to force any email from this account into a specific folder - IGNORING IDS

numbers for emails not within the folder and any folder associated emails. This is best used for individual POP accounts and NOT role-based emails.

WARNING: Forcing email into a folder will overwrite rules and preclude incoming email from being threaded properly if the original email is moved to a different folder. It is best to steer email into folders by using the Folders Associated Email or by using Rules.

- **SPAM Handling:** To activate the SPAM filter, select an action from the drop-down menu. To de-active the filter, select "Do Nothing."

Unsolicited email (aka SPAM) identification is provided by the SpamAssassin mail filter. Using a wide range of tests on the header, body and text of the email, SpamAssassin assigns a number on a scale of 1 to 10. Emails receiving a 5 or above, as a standard, are considered Spam. However, if you find that incorrect emails are being sent to your Spam folder (or other action selected), you may want to increase the rating. The higher the rating the more likely it is that the email is Spam.

ⓘ NOTE: It is NOT recommended that you automatically delete Spam messages because you may lose legitimate emails.

4. Create Users (Admin and Super Admin only)

4.1. Definition:

This is where you create users and assign access rights. You can configure this before or after you have created Folders. In addition to providing access, user information is utilized in the tracking area to identify who is performing what action.

4.2. Importance of Setup:

Users cannot access the system until their user account has been setup.

4.3. How to Setup:

Navigation: Maintenance > User Administration

Click on the Maintenance link at the top of the eMail Manager page.

Click on the User Administration link.

Click on the Add New User button at the top right of the page.

Complete the form as follows:

- * Username: Enter the username. This will be their login name when accessing the system (maximum 10 characters – can be alpha-numeric).
- * Password: Enter the password of the user. This will be their login password when accessing the system (maximum 10 characters – can be alpha-numeric).
- * First Name: Enter the users first name.
- * Last Name: Enter the users last name.
- * Email: Enter the users email address.
- * Email Alert: Mark this checkbox if users would like to be notified via a pop up window when an email arrives into a folder.
- * Signature: Signature files can be added to appear in any new emails and replies that this user will add.
- * Active?: Signifies whether the user account is active or not. The default setting is Active.
- * Assign Access Rights:
 - Type:
 - *View Only*: read emails only
 - *User*: read, respond to and send new emails

- *Administrator*: read and respond to emails, plus all maintenance functions
 - *Super Administrator*: read and respond to emails, plus all maintenance functions and all setup functions.
- Associated Folders: Select which folders the user will have access to. To select more than one folder, hold the CTRL key when clicking on each folder.

ⓘ NOTE: Administrators and Super Administrators will default to all folders.

ⓘ NOTE: If you have not yet created folders, you can skip this section and assign users to folders when creating the Email Folder described in Section 5.

5. Add Email Folders

5.1. Definition:

Email folders are directories where you can read specific email accounts (POP account or Alias) assigned to that folder.

5.2. Importance of Setup:

Even though you have set up the email account, you must still create the folder to which the email account will be forwarded. This is especially important if you have multiple aliases applied to the same POP account.

5.3. How to Setup:

Navigation: Maintenance > Folder Administration

Click on the Maintenance link at the top of the eMail Manager page.

Click on the Folder Administration link.

Click on the Add New Folder button at the top right of the page.

Complete the following required form fields as follows:

- * Folder Name: Enter the folder display name. This is what will be shown in the folder list.
- Associated Email: This is the associated email the folder will be receiving. The POP account(s) you set up in the previous section should be set up to receive this POP email or associated aliases.

ⓘ NOTE: In order to create a new folder, the associated email field IS NOT required. This was done to accommodate folders that would not receive incoming email, but only be a repository from other folders (e.g. if you moved an email to a folder or set up a quarantine folder for Virus Protection.).

You must add an associated email if you want to use the Forward Incoming Email, Distribution Email List and Autoresponder functions discussed below.

- Regular Expression: This allows you to specify all possible variants of an incoming email address so that it may perform a match. To implement, mark the checkbox and enter the expressions in the Associated Email field. Here are some examples of how they can be used:

- To capture emails starting with the word "testing" you would enter
^testing.
- To capture emails ending with the word "testing", enter
testing\$.
- To capture emails that had the words "jon" or "mary" you would type
jon|mary.
- To capture emails beginning with "jon" or "mary" you would type
^(jon|mary).
- To capture emails ending with "jon" or "mary" you would type
(jon|mary)\$
- **Assign Access Rights:** This designates who (in your list of users) has access to view and/or respond to emails in this folder. From the drop down menu select one or more users. To select multiple users, hold down the CTRL key while clicking on each user name.

NOTE: If you have not created any users for the system, you will not be able to assign access rights until you create the user.

5.4. Additional Configurations:

- **From Email for Replies:** If the "from" tag on the emails (as seen by recipients) is different than the Associated Email, you can add it here. If it is the same, leave this field blank.
- **Forward Incoming Email to:** The folder can be set up to automatically forward the incoming messages to a list of emails. To add more than one email, separate each by a comma (e.g. "tom@website.com,jane@website.com").
- **Distribution Email List:** This feature is similar to the Forward Incoming Email setting, however, it is a special type of forward. Incoming emails will forward to all the people in the distribution list, but the "From" field will be changed to the email of the folder and the email will be dispatched to each person in the list individually. Use this if you want to hide all forward (distribution) email addresses.
- **External "From Email" URL Link:** Used to link the "From" email address (when viewing an email) to an external website. The email address will be appended to the end of the URL you provide. This helps in feeding through emails

to external systems for more efficient utilization of data. For example, users may want to be able to click on an email "From" address to automatically pull up a user account from their ordering system to view the status of an order.

- Auto-Assign Category: Selection of a category will automatically assign all incoming emails to that specific category. You can change the category for each email individually at the top of the email detail page.
- Autoresponder Subject: (required if an Autoresponder Body is entered) An autoresponder is an email that is automatically sent to email senders when sending an email to the associated email. This is the subject line for the automatic email. Don't forget to add the body below.
- Autoresponder Body: (required if an Autoresponder Subject is entered) Enter the body of the autoresponder email. How you enter it in the text box is how it will appear to the user. All autoresponders are text based emails. Links and email addresses will not appear as a link. If you want to refer to a specific link (such as your Web Address) include the entire address (e.g. "http://www.yourwebaddress.com/").

6. Other Suggested Configurations

6.1. Categories (Admin and Super Admin only)

6.1.1. Definition:

Categories can be used to further organize emails within folders, primarily, for reporting purposes. For instance, if you had an Orders folder receiving email from orders@yourcompany.com, you may want to add categories to separate return requests from actual orders or from customer comments. You will then be able to run a Category Summary report detailing the number of emails in each category with a link to each one.

6.1.2. How to Setup:

Navigation: Maintenance > Category Administration

Click on the Maintenance link at the top of the eMail Manager page.

Click on the Category Administration link.

In the top right corner, you'll see an Add New button with a blank field. Enter the Category name and click on Add New.

6.2. Standard Replies (Admin and Super Admin only)

6.2.1. Definition:

Standard replies allow users to use generic responses as replies to emails. This is especially helpful if users are responding to the same questions that are asked frequently. Once the responses are added, they will be listed in a drop down menu when a user is responding to an email. The user would be able to edit the standard response if necessary.

6.2.2. How to Setup:

Navigation: Maintenance > Standard Replies

Click on the Maintenance link at the top of the eMail Manager page.

Click on the Standard Replies (or Replies) link.

Click on the Add New Reply button at the top right of the page.

Complete the form as follows:

- Title: Enter the reply title. This will display in the drop down menu for the user to choose from.
- Content: Enter the content of the email. Remember, emails are sent in text format, so what is entered here is exactly how it will appear to the user.
- Used In: Select which action the standard reply should be used for: replies, notes, or forwards.
- Associated Folders: Select the associated folders the should appear in. To select more than one folder, hold the CTRL key when clicking on each folder.
ⓘ NOTE: You can select one or more folders. The reply will ONLY be displayed in the drop down menu for the folders you select here.

6.3. Virus Scanner Setup (Admin and Super Admin only)

6.3.1. Definition:

eMail Manager supports both Virus Detection and Attachment Sanitization security features. Virus Detection scans the email for any questionable file attachments and allows you to select the method by which you want them handled. Attachment Sanitization scans the email for any “executable attachments” and makes them unexecutable requiring the user to save the attachment before it is launched. This allows the users PC virus protection software to scan their system for any problems. You can activate one or both features.

6.3.2. How to Setup:

Navigation: Maintenance > Virus Scanner Setup

Click on the Maintenance link at the top of the eMail Manager page.

Click on the Virus Scanner Setup (or Virus) link.

Activating Virus Detection:

- Activate: Mark the checkbox under Virus Detection. This activates the feature.
- Select a Disposition:
 - *Delete*: This will delete the email from the system. It WILL NOT show up in the Recover Emails section. These emails

are deleted completely from the system so that they do not infect the server, leaving no record of the email.

- *Move to Folder:* This will list all folders within the system and will allow you to select a folder that you want to send it to. That way, you can review the email and the attachment and make the decision to delete it. You may, for instance, want to set up a "Virus" folder and move emails to that folder.
- Specify Autoresponder: This email will be sent directly to users that have sent an email with an infected attachment. A default message has been supplied, but you can modify this message to suit your needs.

ⓘ NOTE: If you have selected the Delete option, it is recommended that you let your customers know that their email did not reach its destination and that they should send it again. You may want to include some links to virus protection websites as well.

- Activating Attachment Sanitization: Mark the checkbox under Attachment Sanitization. This activates the feature.