Email management with Policy Patrol

Policy Patrol includes many email management features, including customized auto replies, automated follow-up, auto forwarding/copying and list management. This document describes how to configure these email management features in Policy Patrol.

Policy Patrol can be configured to send auto replies when emails with certain words are found in the subject and/or body and/or the email is received in a specified mailbox. For instance, you can configure Policy Patrol to send an auto-reply with frequently asked questions when your customers send an email to sales@yourcompany.com. Alternatively, you might have a web form on your website where customers can request more information about your product. In this case you can configure Policy Patrol to automatically send an email with the product brochure attached. Note that if you are going to use auto replies for web forms, you must configure the web form to be sent with the customer email address as the From: address. The auto replies can be formatted in HTML and can include merge fields (such as the name of the customer) and attachments.

Auto replies can be configured from Enterprise rules or from Additional tools > Auto replies. The Enterprise rules allow you to create more advanced auto replies, using automated follow up and triggering on words in the subject and body as well as email address. Note that in order to create Enterprise rules you require the Policy Patrol Enterprise edition.

Feature	Auto replies	Enterprise rules
Automated follow up		✓
Auto reply for ex employees	✓	
Trigger on subject/body		✓
Trigger on email address	✓	✓

Auto replies

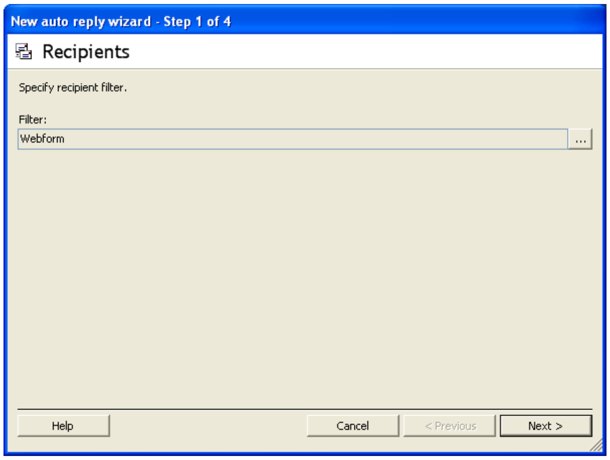
Policy Patrol includes the possibility to configure auto replies. This allows you to send auto replies to web forms and information requests, but also to send auto replies when messages are sent to email addresses of ex employees. To configure a new auto reply:

1. Go to **Settings** > **Auto replies**. Click **New**.

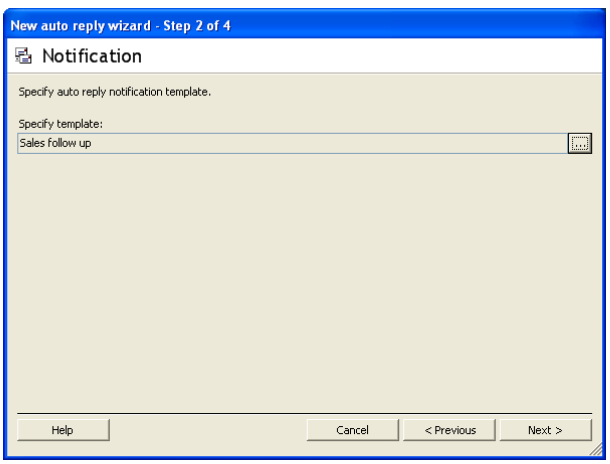
2. Click **Next** in the Welcome screen.

3. Select the recipient filter you wish the auto reply to trigger on by clicking on the **..** button. Select the filter from the list. If you wish to create a new filter, click **New**. Each time an email is received for an address in the filter, the auto reply will be sent. When you are done, click **OK**. Click **Next**.

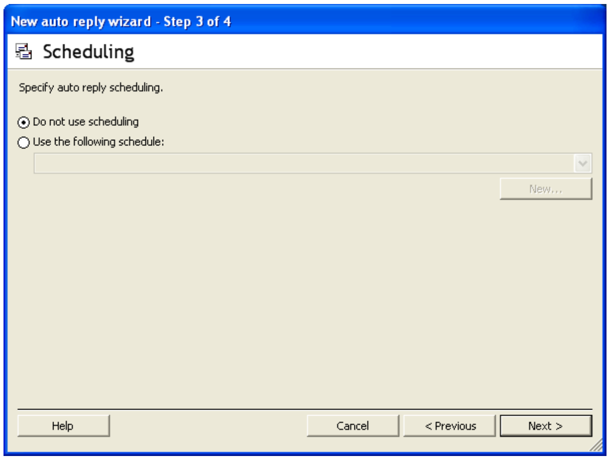
   Note: Each recipient must be listed as a licensed user in **Settings** > **Users**.

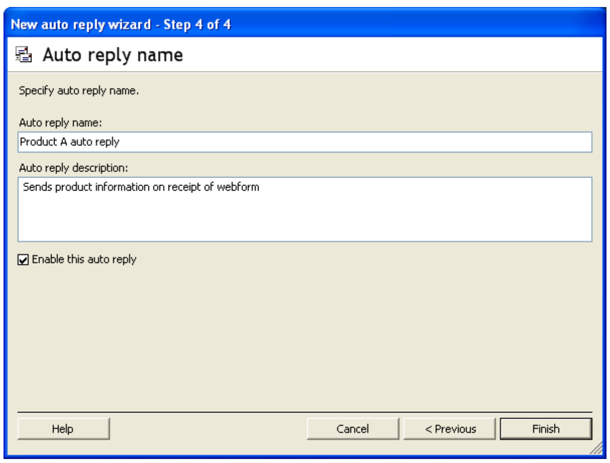
4. Select the notification template to be used for the auto reply by clicking on the **..** button. Select the template from the list. If you wish to create a new template, click **New**. When you are done, click **OK**. Click **Next**.

5. Specify whether you wish to use scheduling. If you do not wish to use scheduling, select **Do not use scheduling**. If you wish to schedule the auto replies, select **Use the following schedule** and select the schedule from the list. If you wish to create a new schedule, click on the **New** button. Click **Next**.



6. Enter a name and description for the auto reply. If you wish the auto reply to be enabled, leave the option **Enable this auto reply** ticked. Click **Finish**.



To edit the auto reply, select the auto reply in the list and click on the **Properties** button. To delete the auto reply, select the auto reply in the list and click on the **Delete** button. If you wish to rename the auto reply, select the auto reply in the list, right-click and choose **Rename**.

Enterprise rules

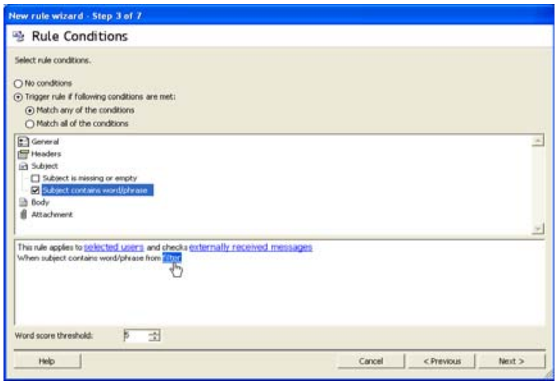
To configure an auto reply:

1. Go to **Rules** > **<folder name>** and click on **New**.

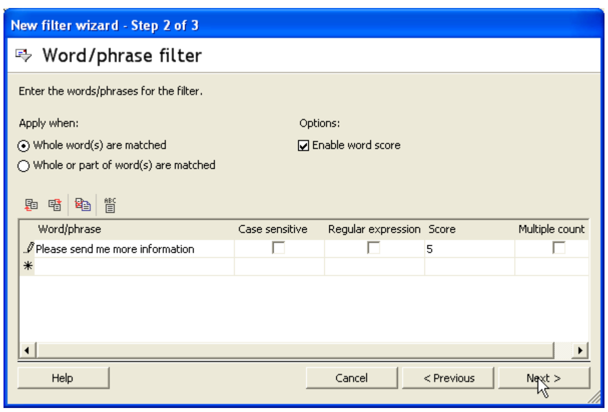
2. Select the users for the rule. If the rule applies to a certain mailbox, for instance sales@yourcompany.com, select this mailbox. If it applies to all mailboxes, select **All users**. Click **Next**.

3. Select the rule direction of the messages that should generate the auto reply. For instance if you wish to send an auto reply to customers who send an email to sales@yourcompany.com, you must select **Externally received**. Click **Next**.

4. Now specify the conditions for the rule. If the rule should always trigger when a message is received, select **No conditions**. If the rule should only trigger when for instance the subject or body contains a certain word or phrase, select **Trigger rule if following conditions are met**. Now select **Subject contains word/phrase from filter** and/or **Body contains word/phrase from filter**. Note that if you want the rule to trigger when the words in the body filter are found in the body and the words in the subject filter are found in the subject, you must select the option **Match all of the conditions**. Click on the links in the description.

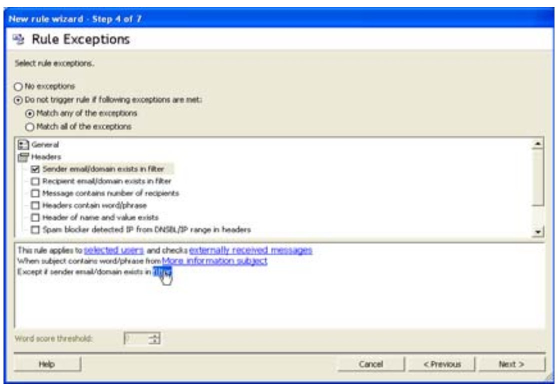


Click **New** to create a new word/phrase filter. Select **Word/Phrase filter** and click **Next**. Enter the words that Policy Patrol must find in the body or subject and specify the appropriate score for each word or phrase. For instance, if you wish an auto reply to be sent when the email subject contains the words 'Please send me more information', enter this phrase and give it a word score of 5. Click **Next**. Give the filter a name and description and click **Finish**.



Select the filter in the list and click **OK**. Now enter the word score threshold, i.e. the total word score for the email message that should trigger the rule. If the total score of words/phrases found in an email is equal to or above the word score threshold, the rule will trigger. For instance, if the email message contains the phrase ‘Please send me more information’ which is attributed a word score of 5 and the rule has a word score threshold of 5, the rule will trigger. If you select to check word/phrase filters for subject and body, you must enter a total word score threshold for the subject and body. For instance, if you want the rule to trigger for email messages with ‘Please send me more information’ in the body and ‘Product A information request’ in the subject, and each phrase is attributed a word score of 5, the rule word score threshold should be set to 10. Click **Next**.

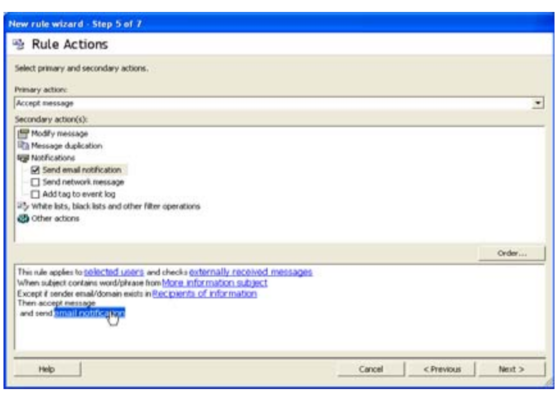
5. In this step you can specify any exceptions for the rule. For instance you might want to avoid sending the information email more than once to the same customer (to avoid bothering the customer or to avoid triggering an auto reply loop). To do this, select **Do not trigger rule if following exceptions are met**, expand **Headers** and tick the option **Sender email/domain exists in filter**. Click on the filter link. Create a new email address/domain filter by clicking **New**. Leave the list bank and click **Next**. Enter a name for the filter, for instance ‘Information Requesters’. Click **Finish**. Select the filter from the list and click **OK**. Later you will configure Policy Patrol to add auto reply recipients to this filter. Click **Next**.



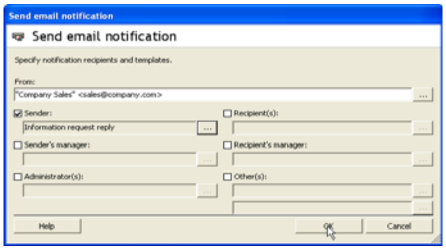
6. In Actions select **Accept message** as the primary action. Now configure the secondary actions:

Send email notification

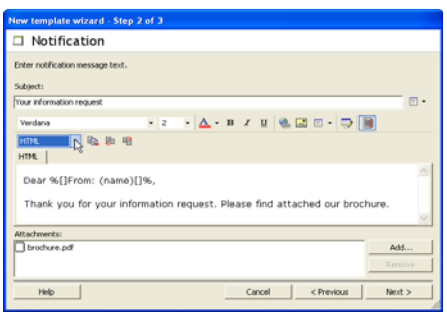
Expand **Notifications**, tick the option **Send email notification** and click on the link in the description.



In the From: field enter the from address for the notification message. If you wish a display name to appear in the notification message, enter “display name” <email address>, for instance: `"John Doe" <John.Doe@company.com>`. Tick **Sender** and click on the **...** button.



Click **New** to create a new template. Select **Notification template** and click **Next**. Enter a subject and text for the message. You can personalize the message by addressing it to the sender. To insert the sender name merge field, click on the **Insert field** button in the toolbar and select **Message** > **From: (name)**. This field will automatically be replaced with the sender’s name. You can also include the original email message by choosing **Insert field** > **Message** > **Original message**. Optionally you can attach a file by clicking on **Add**. You can edit the HTML source by clicking on the toolbar button **Edit HTML source**. If you also want to include a plain text version of the message, you can copy the content from the HTML tab to the Plain tab by clicking on the **Copy to..** icon in the toolbar. If you only want to send your message in HTML, select HTML from the drop-down box. Click **Next**.



Enter a name and description for the template and click **Finish**. Now select the new template from the list and click **OK**. Click **Next**.

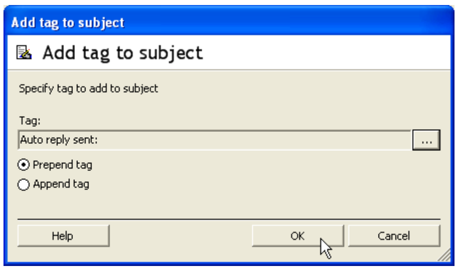
Add sender to filter

If you want to avoid sending customers the same auto reply multiple times, you must add the sender address to the filter ‘Information Requesters’ that you created earlier (and selected as an exception to the rule). To do this, expand **White lists, black lists and other filter operations** and select the option **Add sender address to filter**. Click on the filter link and browse to the filter ‘Information Requesters’. Make sure that **Add email address** is selected and click **OK**. Policy Patrol will now add the sender’s email address to the filter when it sends an auto reply. If you selected the ‘Information Requesters’ filter as an

Exception, Policy Patrol will never send the auto reply more than once to the same customer.

Add a tag

Optionally, to indicate that the message was processed by Policy Patrol you can configure a tag to be added to the email subject, for instance: 'Auto reply sent:'. This will enable you to easily see whether Policy Patrol has processed the message. To do this, expand **Modify message** and select the option **Add tag to subject**. Click on **...** and click **New** to create a new tag. Select **Tag template** and enter the text for the tag. Click **Next**. Enter a name and description for the tag and click **Finish**. Select the newly created tag and click **OK**. Click **OK** again.

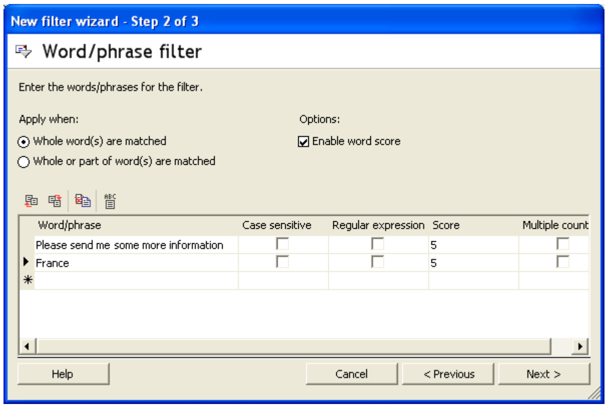


7. Select no scheduling and click **Next**.

8. Enter a name and description for the rule and click **Finish**.

Different auto replies depending on web form fields

You can also configure Policy Patrol to send different auto replies depending on the answers provided in a web form, for instance to send auto replies in different languages depending on the country of the customer or to include different contact details depending on the customer's state. To do this, follow the same steps as described above. When you create your word/phrase filter with words that must be present in the email to trigger the auto reply, you can enter multiple words/phrases. For instance, you might want to send French customers an auto reply in French. In this case you must create a rule that searches for emails with 'Please send me some more information' and 'France' in the body of the email. Give each word/phrase a score. Remember that you must now enter the total score that should trigger the rule in the conditions tab. For instance, for the example below, the word score threshold should be 10, i.e. Policy Patrol will send the auto reply when both phrases are found in the message. If you also want to send a French reply to Canadian customers, enter 'Canada' in the word/phrase filter and give it a score of 5. Leave the word score threshold set to 10. This means that Policy Patrol will send the French auto reply if the word 'France' or 'Canada' is found in the web form.



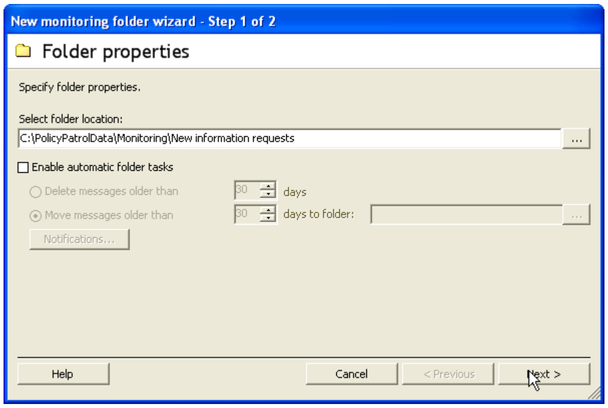
If you wish to send some customers a customized auto reply and the rest a generic auto reply, this can be accomplished by ordering rules and de-selecting the option **Process following rules** in the **Description** tab. For instance if you have a web form and you wish to send French and Italian customers a reply in the local language and the rest of the customers a reply in English, you can create three rules: One that sends a French notification message if the words 'Information request' and 'France' are found in the web form, one that sends an Italian notification message if the words 'Information request' and 'Italy' are found in the web form and one that sends an English notification message if the word 'Information request' is found in the web form. Then open the properties of the Italian and French rules and go to the **Description** tab. De-select the option **Process following rules**. Now order the Italian and French rules above the English notification rule. Policy Patrol will now only send the Italian or French auto reply to the web forms that include Italy or France. All other web forms will trigger the English reply.

ⓘ Tip: You can first create one rule and then make a copy of the rule by right-clicking the rule and selecting **Duplicate**. The duplicate rule will have the name Copy of <original rule name>. You can then edit the conditions and select a different template to be sent.

Automated follow up

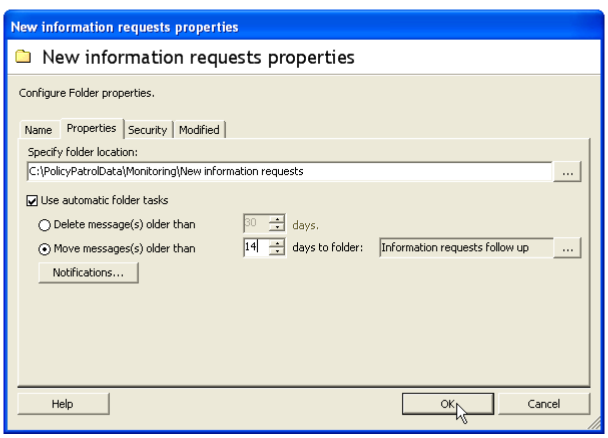
Policy Patrol can also be configured to send an automated follow up, for instance two weeks after the customer has requested additional information, Policy Patrol can send a follow-up message to see if the customer requires any further assistance. This can be very useful for lead management. To do this follow the next steps:

1. Create a new Monitoring folder by right-clicking on Monitoring and selecting **New folder**. Click on the **...** button and browse to C:\PolicyPatrolData\Monitoring. Click on the button **Make new folder**. Enter a name for the new folder, e.g. 'New information requests'. Click **Next**. Provide a name for the folder, for instance 'New information requests'. Click **Finish**.



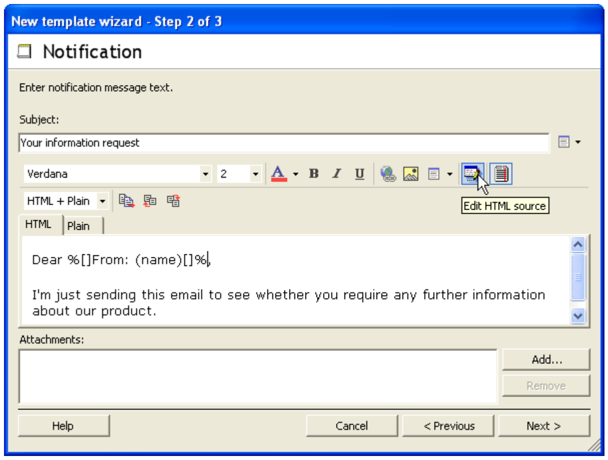
2. Create another Monitoring folder by right-clicking on Monitoring and selecting **New folder**. Click on the **...** button and browse to C:\PolicyPatrolData\Monitoring. Click on the button **Make new folder**. Enter a name for the new folder, e.g. 'Information requests follow up'. Click **Next**. Provide a name for the folder, for instance 'Information requests follow up'. Click **Finish**.

3. Right-click the Monitoring folder 'New information requests' and select **Properties**. Go to the Properties tab and tick the option **Use automatic folder tasks**. Select **Move messages older than** and enter the number of days after which you wish to send the follow up message. For instance if you wish to send a follow up message after two weeks, enter14 days. Select the 'Information requests follow up' folder to move the messages to.

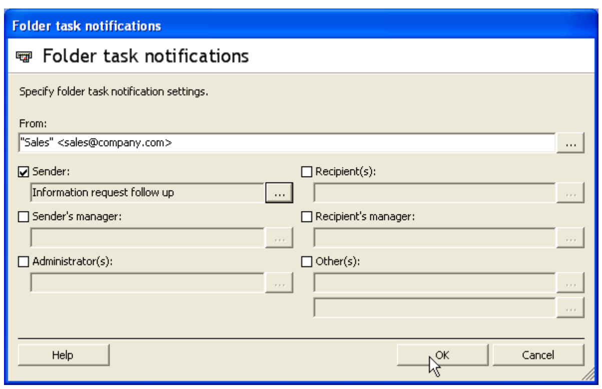


Click on the **Notifications** button. In the From: field enter the from address for the follow up notification message. If you wish a display name to appear in the notification message, enter "display name" <email address>, for instance: `"John Doe" <John.Doe@company.com>.` Tick **Sender** and click on the **...** button.

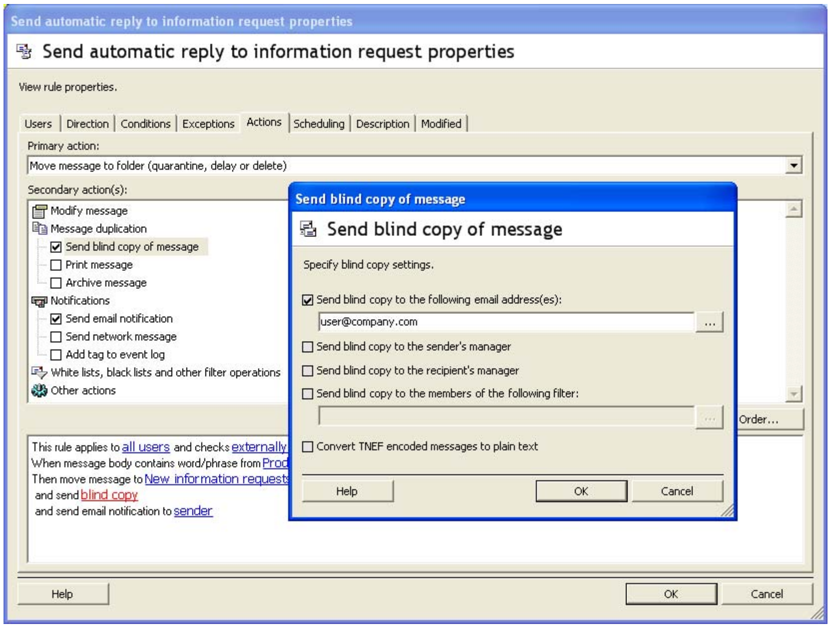
Click **New** to create a new template. Select **Notification template** and click **Next**. Enter a subject and text for the message. You can personalize the message by addressing it to the sender. To insert the sender name merge field, click on the **Insert field** button in the toolbar and select **Message** > **From: (name)**. This field will automatically be replaced with the sender's name. Optionally you can attach a file by clicking on **Add**. You can edit the HTML source by clicking on the toolbar button **Edit HTML source**. If you also want to include a plain text version of the message, you can copy the content from the HTML tab to the Plain tab by clicking on the **Copy to..** icon in the toolbar. If you only want to send your message in HTML, select HTML from the drop-down box. Click **Next**.



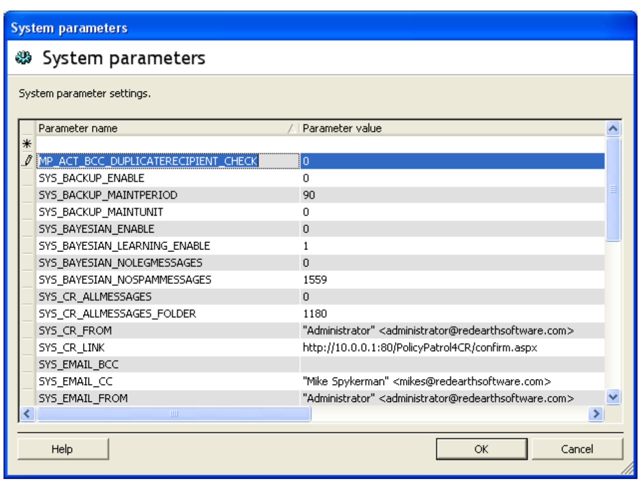
Enter a name and description for the template and click **Finish**. Now select the new template from the list and click **OK**. Click **OK** to save the changes.



4. Now follow the same steps to create an auto reply rule as described in the Auto replies paragraph. In step 6, instead of selecting Accept message, select **Move message to folder** and select the folder ‘New information requests’. Click **OK**. What will happen now is that new information requests will remain in quarantine for 14 days, after which a follow-up email will be sent and the messages are moved to the folder ‘Information requests follow up’. You can still select the secondary action **Send email notification**. This notification will be sent as soon as the message is received.



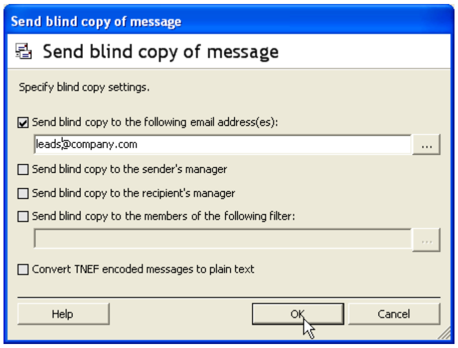
5. Note that by selecting the move to folder option, the information requests will effectively be quarantined and you will not receive the web form in your inbox. If you wish to receive a copy of the information request as soon as it arrives, you can select the secondary action **Send blind copy** and enter an email address. Note: if you enter the same email address as the original recipient email, you must set the following system parameter in order to receive the email (otherwise Policy Patrol will consider the email a duplicate message and will not deliver the blind copy): Go to **<server name>** > **Advanced** > **System parameters**. Enter `MP_ACT_BCC_DUPLICATERECIPIENT_CHECK` in the name and enter `0` as the value.



Auto forwarding/copying

If an email or web form with certain values is received, Policy Patrol can automatically forward the message or send a blind copy to another recipient. For instance if your company receives a lead from a certain city or state, you could configure Policy Patrol to automatically send a copy or forward the email to a local representative.

To automatically send a copy, follow the same steps as described for configuring auto replies. In Step 6, instead of (or in addition to) the secondary action **Send email notification**, select **Send blind copy**. Specify the email address that should receive a blind copy.



Alternatively you can forward the message to another recipient by selecting the primary action **Redirect**. Click on the redirect link in the description and enter the email address to forward the message to. Click **OK**.

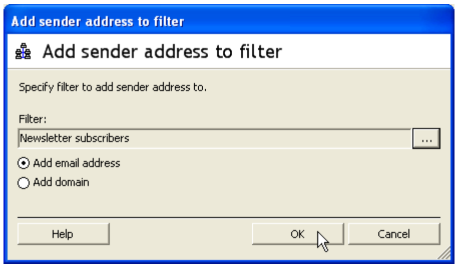
List management

Policy Patrol can also be used for newsletter list management. For instance you might have a newsletter that customers can subscribe to by filling out a web form. Policy Patrol can automatically add the sender's email address to a newsletter subscribers list. To unsubscribe from the list, you could request an email to be sent to a specific mailbox with 'unsubscribe' in the subject. Upon receipt of the email, Policy Patrol can then automatically remove the sender's email address from the list. To configure this follow the next steps:

1. Create your subscribe rule

Follow the steps as described in the Auto replies paragraph. In step 6, instead of (or in addition to) the secondary action **Send email notification**, select **Add sender address to filter** (in White lists, Black lists and other filter operations). Click on the filter link in the description and click on …. Select a folder and click **New** to create a new filter. Select **Email address/domain** filter and click **Next**. Do not enter any addresses and click **Next**. Enter a name for the filter, e.g. 'Newsletter subscribers'.

Click **Finish**. Select the filter in the list and click **OK**. Make sure that **Add email address** is selected and click **OK** again. Now Policy Patrol will automatically add senders' email addresses to the newsletter subscribers list.



2. Create your unsubscribe rule

Follow the steps as described in the Auto replies paragraph. In step 4 (conditions), you can for instance search for the word 'unsubscribe' in the subject. In step 6, instead of the secondary action **Send email notification**, select **Remove sender address from filter** (in White lists, Black lists and other filter operations). Click on the filter link in the description and select the subscribers filter in the list, e.g. 'Newsletter subscribers' and click **OK**. Make sure that **Remove email address** is selected and click **OK** again. Now Policy Patrol will automatically remove the senders' email addresses from the newsletter subscribers list.

Licensing

If you wish to make use of Policy Patrol's email management features, you require the Policy Patrol Enterprise edition. If you are only going to use Policy Patrol for email management, you just need to purchase a license for the mailboxes that you will be managing email for. Policy Patrol Enterprise pricing starts at 10 users.

More information

⇒ For more information on how to configure Policy Patrol, please consult the program help or download the product manual from: http://www.policypatrol.com/download.htm.

⇒ For more information on how to configure word/phrase filtering in Policy Patrol: http://www.policypatrol.com/docs/PP4-WordFiltering.pdf.

⇒ If you still have questions after reading this document, please consult our online knowledge base at http://www.redearthsoftware.com/kb.asp.

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