Incoming email and Website Integration Guide

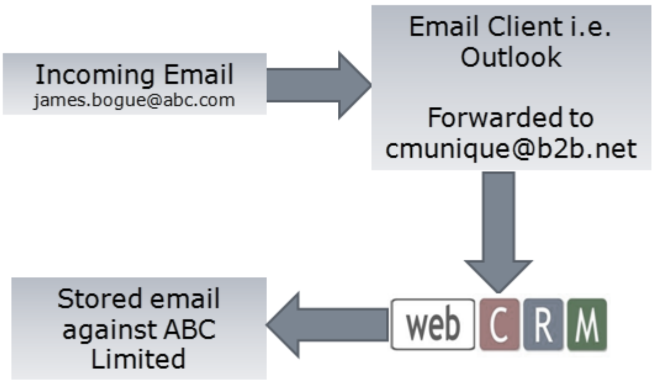
Contents

Introduction

This information assumes you have subscribed to our **Inbound email + Website Integration module**. If you have not subscribed to this module, you will need to do so before following these instructions. You can subscribe by selecting this option in the Main Menu item Configuration and then License.

Inbound Email

webCRM allows you store incoming emails, and the attachments, directly into the system and will attach them to the correct organisation by email address.

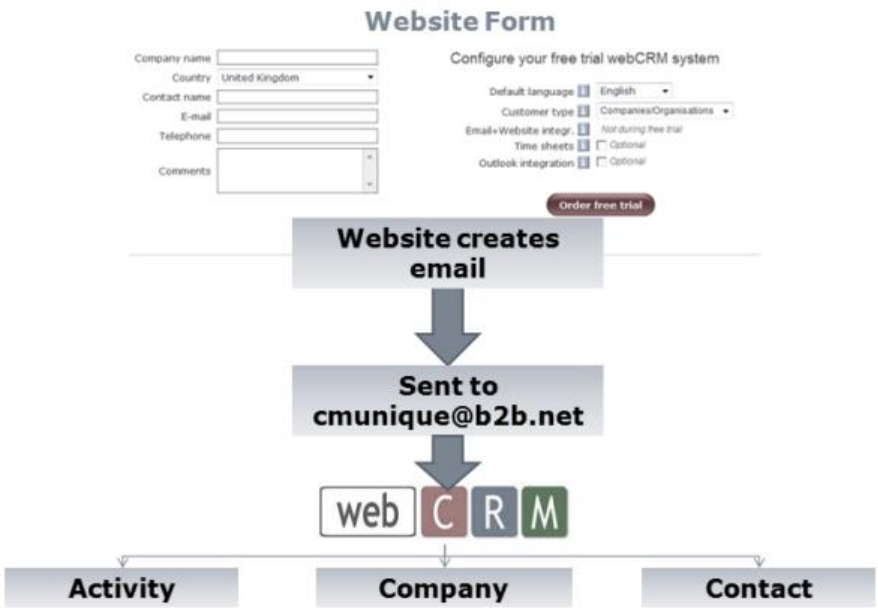


This is achieved by simply forwarded all or by rule emails that arrive into your email client to a unique email address that belongs to your webCRM system.

To find out how to configure this module please consult the Inbound Email Configuration section.

Website Integration

The Website integration module allows information entered onto say the main enquiry form on your website to be imported into webCRM and a record created or updated.



As you will see from the diagram:

Step 1: The prospect fills in the web form.

Step2: When the prospect orders or submits the form an email is created containing the information to webCRM

Step 3 : webCRM creates, in this example a Company , Contact and Activity record for this prospect. The information created from the website form can contain any of the above information so long as there is a corresponding system or custom field.

Inbound Email Configuration

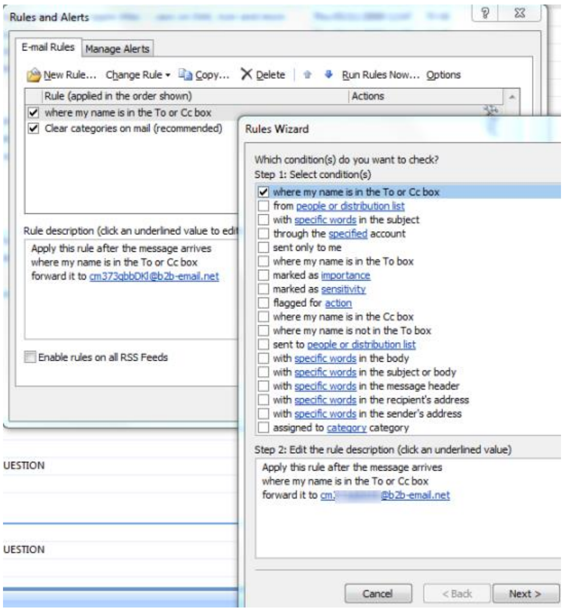
The configuration of inbound email is very simple:

Step 1: On the webCRM Main Menu you will find the following button:

In the incoming email module you will find a unique email address for your webCRM system as below. The email address will be something like cmxxxxxxx@b2b-email.net.

Step 2: Copy this address

General inbound emails (not website emails) are automatically processed every time the start page is displayed. Auto processed inbound emails are listed once.



Step 3: In your email client, in our example Outlook you may then set up a rule to forward all or a filtered selection of incoming emails to the webCRM email address.

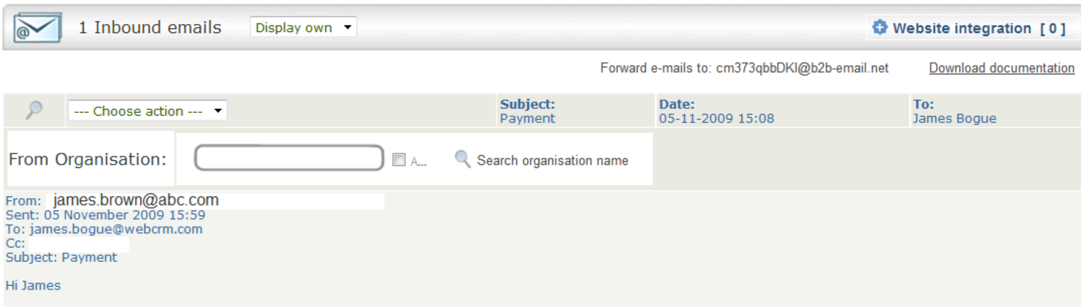
With Outlook and other email clients you may setup a variety of filters and therefore exclude any emails that you do not want to be forwarded to webCRM. This may include internal or personal emails.

How webCRM stores incoming emails

webCRM will look at the incoming email and identify the original senders email address i.e. john.brown@abc.com. If the email exists more than once, which is only possible in the B2B version of webCRM then it will save the email against the earliest record. Please note that Incoming Emails are stored with attachments automatically.

If the email does not exist the email will be stored in the incoming email module and can be deleted or manually stored against an organisation or person for the b2c version.

The following screen shows an example:



By searching the Organisation or Person you can then select and save the email to that record.

By clicking the ---Choose action--- field you may delete the email if you do not want to store the email. You can also delete all the emails if you scroll to the bottom of the screen.

Reply:

You can enter the special email address for the webCRM system in the "Cc" or "Bcc" field if you send a new email or reply to an email from your own Outlook (or whatever email client you use), The automatic identification requires that the first email address in the "To" field of the email is the email address of someone who already is created in the webCRM system. The system will attempt to automatically identify and save the email as an inbound email - although it strictly speaking is an outbound email. This is why all outbound emails in general should be sent directly from your webCRM system.

Forcing a particular recipient

You can force the webCRM system to override the automatic identification. You do this by adding text to the subject line of the email.

Example: Add organisation and person name:
Email subject = New contract//CityBank,Peter Blanchet

You do not have to enter the organisation and person names in full. It is sufficient to enter the names partly as long as you enter enough for the webCRM System to uniquely recognize the organisation and person.

Note: This option is not applicable for the special Person version as there are no organisations.

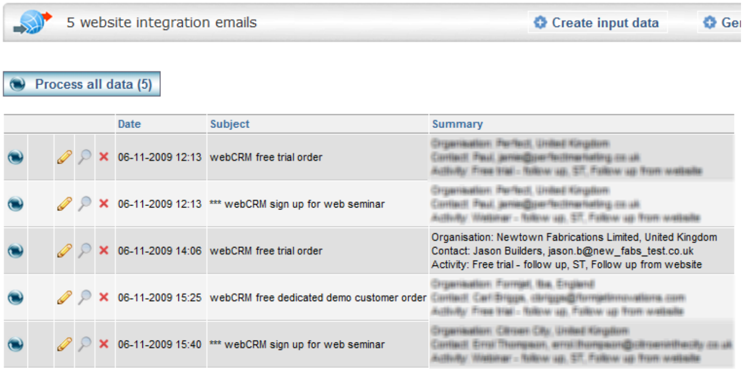
Example: Add person email address:
Email subject = New contract//pebl@citybankcorp.com

Processing Website Integration emails

Enquiries or information from your website ready for processing are referred to as website integration emails and can be accessed from the Main Menu.

On the next screen you will see on the right hand side of the screen the website integration button. The numbers shows how many integration emails have been received and are ready to be processed.

By clicking this button you will see the following screen:



From this screen you can:

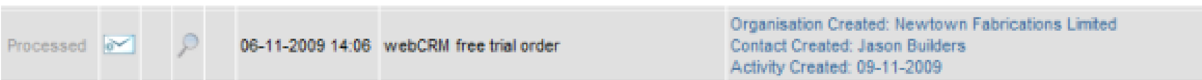
- Process all the emails in one go
- Process an email one at a time
- Edit an email then process
- Delete an email
- Send an email

You may want to edit an email to:

- Allocate to a particular account manager or territory
- Correct any mistakes or errors prior to processing
- Add any information that was not entered in the web form

Once you are ready to process the emails either click the 'Process all data' at the top f the screen or click the

button to process each individual email. Once you process the email you may send a return email or remove from the list.



Website Integration - Technical Guide

The following instructions are intended for those responsible for developing your website and/or creating the formatted text as below.

webCRM Modules and Fields

Data can be created or updated in the following webCRM modules:

- Organisations (Not in Person Version)
- Persons

Data can be updated only in the following webCRM modules:

- Activities
- Opps/Del

Within webCRM there are the following field types:

- System Fields
- Custom Fields (15 Fields per section)
- Extra Custom Fields (Organisations and Persons in B2C only)

Custom fields can be the following Types:

- Text (50 Characters)
- Date (dd-mm-yyy format)
- Positive Integer
- Checkbox
- List (Selectable List 1 item)
- Multi-Select List (Selectable List , Multiple Items)
- WebLink (ID or full URL up to 50 Characters)

Please note that when specifying data on the website form for a list or Multi-Select field this must be exactly the same description or in the case of a Multi-Select field the Unique identifier number. This is covered in more detail in the next section.

webCRM Data Fields

Data for checkboxes

For data of type Checkbox the possible data values are: "Yes" (checked) or "No" (not checked)

Data for pick lists

For data of type Pick list, the text must exactly match (case sensitive) one of the possible existing Pick list values already defined.

Data for Territory can be submitted by Territory Name or Territory Number as defined in Configuration/Drop down lists/Organisations or Contacts.

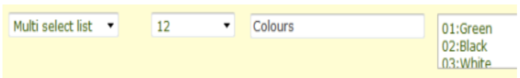
Data with multiple lines of text

For address and comments data fields with multiple lines of text, each line of text must be separated by the 4 characters: |CR| (vertical bar, C, R, vertical bar). The
 tag cannot be used instead.

Multi select lists (Custom fields of type Multi select list)

It is possible to import the actual text value or the number associated with the text value. The text value must exactly match (case sensitive) one of the possible values defined for the multi select list. Import of none-existing values are ignored

Examples:



+1,8 will add values "01" and "08"
+green,blue will add values green and blue
+green,8 will add values green and "08"
-2,03,11 will remove values "02","03" and "11"
-black,white,yellow will remove values black, white and yellow
-black,3,yellow will remove values black,"03" and yellow
1,8,11 will delete all existing values and add values "1", "8" and "11"
green,blue,yellow will delete all existing values and add values green,blue and yellow.

All the correct descriptions for pick lists and multi select lists can be found in the following sections with webCRM from the Configuration Menu:

- Custom Fields
- Drop Down Lists

Data Format for import to webCRM

Email TO address:

In the webCRM Main Menu click the menu item named "Email". You will see an email address in the upper right hand corner of the screen: Example: cm123abcde@b2b-email.net

Send the specially formatted data as instructed below to that email address.

Email subject:

The email subject line must start with this text: /*/AUTO/*/

Any text following /*/AUTO/*/ in the subject line will be ignored by the auto process.

General text format:

```
Start:DateTime
… data for DateTime and auto processing
End
Start:Organisation
… data for Organisation
End
Start:Person
… data for Person
End
Start:Activity
… data for Activity
End
Start:OpportunityDelivery
… data for OpportunityDelivery ( = Opportunity or Delivery )
End
```

All of the sections are mandatory and the order of the sections must always be as described. Data for a section can be omitted if no data is to be created or updated. However, the Start/End lines must always be included. If data for DateTime is omitted, the current time when the data is imported to the webCRM system is used instead.

The email body text can be in html format. In this case the
 tag can be used as new line characters instead of characters 10+13 (CR+LF). However no other tag types are permitted in that part of the body text which includes the formatted text.

New lines are not always 100% realiable in emails. So at the end of each line we recommend that you in addition to the normal new line characters also add these 3 characters: [\]

This will be interpreted as new line

Special for the Person version

The Organisation section must be included anyway. The Organisation and Division names are used only if an Organisation name is assigned in Configuration/Other settings. Other data fields in the Organisation section are used and will be saved as Person-data.

Create or Update

You determine the create/update method by a value 0, 1 or 2.

A:99:<Value>

<Value> = 0 Update existing data item, create if no match found for existing data. (default)

<Value> = 1 Always create a new data item

<Value> = 2 Update existing (ignore data when no match found for existing data)

Hint: Since the automatic data processing ignores any text preceding the "Start:DateTime" section it is possible to add readable text at the beginning of the email body. This is useful as a user can read this information before accepting the data into webCRM.

Example from Start to Finish

Above is a website form. The objective is to send the information to webCRM and create the following:

- Organisation
- Person
- Activity

The information that the website sends to webCRM should be in the format to the right.

Again the description of items in fields within webCRM much be an exact match to the webform.

The form in webCRM below shows a new organisation with a person and activity record created.

```
Organisation: Newtown Fabrications Limited, United
Kingdom
Contact: Jason Builders, jason.b@new_fabs_test.co.uk
Activity: Free trial - follow up, ST, Follow up from
website
||*||
Organisation:Newtown Fabrications Limited
Person: jason.b@new_fabs_test.co.uk
Comment:Evaluating for use with sales Team and
Marketing, 6-11-2009 15:06
Start:DateTime
A:01:2009
A:02:11
A:03:6
A:04:15
A:05:6
A:06:37
A:07:-1
A:90:0
End
Start:Organisation
A:01:Newtown Fabrications Limited
E:02:
A:02:
A:03:
A:04:
A:05:United Kingdom
A:09:Customer
A:10:Lead
A:13:ST
A:15:44
A:30:Evaluating for use with sales Team and
Marketing|CR||CR
End
Start:Person
A:01:Jason Builders
A:02:jason.b@new_fabs_test.co.uk
A:03:014569 49499494
End
Start:Activity
A:01:1
A:02:3
A:03:Free trial - follow up
A:04:ST
A:05:Follow up from website
A:06:CRM
A:07:*
A:30:Free trial system: 6-11-2009 15:06|CR|UK --- 2
users|CR|Evaluating for use with sales Team and
Marketing|CR||CR|
End
```

List of fields

Date and Time

Field:Example	Description
Start:DateTime	Start section
A:01:2008	Year YYYY
A:02:1	Month
A:03:8	Day
A:04:14	Hour (24 hours)
A:05:	52 Minutes
A:06:	19 Seconds
A:07:-1	GMT zone (-12 to 12)
End	End section

Organisation

Field:Example	Description
Start:Organisation	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:Newfab	Organisation name
A:31:South Division	name (Person)
A:02:8 Highstreet|CR|River House	Address
A:03:IPC 1408	Postcode
A:04:Newtown	City
A:05:United Kingdom	Country
A:06:0216754323	Telephone (Tel. 2 for B2C version)
A:07:0725653426	Fax
A:08: www.newfabcorp.net	www
A:09:Customer	Type
A:10:Identified Status	Status
A:11:Manufacturing	Industry (Not Person Version)
A:12:Large potential	Alert Text
A:13:JR Owner	Responsible 1 User Initials
A:14:EM Owner2 b2bCRM user initials	Responsible 2 User Initials
A:15:44	Territory number
A:16:Kent	State
A:30:Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:Green	Custom field 2
C:03:123	Custom field 3
C:04:178	Custom field 4
C:05:1273	Custom field 5
C:06:16278	Custom field 6
C:07:999	Custom field 7
C:08:Test1	Custom field 8
C:09:Test6	Custom field 9
C:10:Test2	Custom field 10
C:11:Test3	Custom field 11
C:12:Test4	Custom field 12
C:13:Test5	Custom field 13
C:14:Test6	Custom field 14
C:15:Test	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
E:01:aaaaaaaaa	Extra Custom Field 1
E:02:bbbbb	Extra Custom Field 2
E:03:123	Extra Custom Field 3
E:04:678	Extra Custom Field 4
E:05:1357	Extra Custom Field 5
E:06:2468	Extra Custom Field 6
E:07:hhhhhhhh	Extra Custom Field 7
E:08:kkkkkkkk	Extra Custom Field 8
End	End section

Person

Field:Example	Description
Start:Person	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:Peter Blanchet	Full Name
A:31:Peter	First name
A:32:Blanchet	Last Name
A:33:Harry	Middle Name
A:02:pebl@citybankcorp.com	Email
A:36:No	Block mass email
A:03:0203 456789	Direct Telephone
A:05:Director	Person Title
A:04:07754324523	Mobile Telephone
A:06:Mr	Salutation
A:30:Some text here|CR|with 2 line	Comment
A:08: 11111	www
A:09:Customer	Type
A:10:Identified Status	Status
A:11:Manufacturing	Industry (Not Person Version)
A:12:Large potential	Alert Text
A:13:JR Owner	Responsible 1 User Initials
A:14:EM Owner2 b2bCRM user initials	Responsible 2 User Initials
A:15:44	Territory number
A:16:Kent	State
A:30:Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:Green	Custom field 2
C:03:123	Custom field 3
C:04:178	Custom field 4
C:05:1273	Custom field 5
C:06:16278	Custom field 6
C:07:999	Custom field 7
C:08:Test1	Custom field 8
C:09:Test6	Custom field 9
C:10:Test2	Custom field 10
C:11:Test3	Custom field 11
C:12:Test4	Custom field 12
C:13:Test5	Custom field 13
C:14:Test6	Custom field 14
C:15:Test	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
F:01:Yes	Checkbox 1
F:02:Yes	Checkbox 2
F:03:Yes	Checkbox 3
F:04:Yes	Checkbox 4
F:05:No	Checkbox 5
F:06:Yes	Checkbox 6
F:07:Yes	Checkbox 7
F:08:No	Checkbox 8
F:09:Yes	Checkbox 9
F:10:Yes	Checkbox 10
End	End section

Activity

Field:Example	Description
Start:Activity	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:01:0	Status 0: Planned (default) 2: Ongoing 3: Completed
A:02:3	Due date (days forward from today)
A:03:Send Proposal	Activity Action
A:04:JR	Responsible
A:05:From our website	Description
A:06:P45D	Product
A:07:(* = same as in Person section)	* Customer contact name or email
A:30: Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:Green	Custom field 2
C:03:123	Custom field 3
C:04:178	Custom field 4
C:05:1273	Custom field 5
C:06:16278	Custom field 6
C:07:999	Custom field 7
C:08:Test1	Custom field 8
C:09:Test6	Custom field 9
C:10:Test2	Custom field 10
C:11:Test3	Custom field 11
C:12:Test4	Custom field 12
C:13:Test5	Custom field 13
C:14:Test6	Custom field 14
C:15:Test	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
End	End section

Opportunity/Delivery

Field:Example	Description
Start:OpportunityDelivery	Start section
A:99:0	Create/Update mode (0, 1 or 2)
A:98:0	0:Opportunity (default) 1:Delivery
A:01:82311	Opportunity/Delivery Number (at create only)
A:02:3	* = auto numbering (only when enabled in b2bCRM)
A:03:JR	Responsible
A:04:P45D	Product
A:05:5000	Value/Amount (Integer)
A:06:3	Opportunity Level 1-12 N/A for Delivery
A:07:e-commerce order	Description
A:08:05	Currency - unique curency id number
A:09:*	Customer contact name (*=same as in Person data)
A:10:M123	Opportunity search 1 data
A:11:CCB	Opportunity search 1 data
A:12:0	Order date / Expected date. Number of days from today (0=default)
A:30: Some text here|CR|with 2 lines	Comment
C:01:1,2	Custom field 1
C:02:Green	Custom field 2
C:03:123	Custom field 3
C:04:178	Custom field 4
C:05:1273	Custom field 5
C:06:16278	Custom field 6
C:07:999	Custom field 7
C:08:Test1	Custom field 8
C:09:Test6	Custom field 9
C:10:Test2	Custom field 10
C:11:Test3	Custom field 11
C:12:Test4	Custom field 12
C:13:Test5	Custom field 13
C:14:Test6	Custom field 14
C:15:Test	Custom field 15
C:16:aaaaaaaaa	Custom Memo Field
End	End section