Email Inbox Automation

MobileERP Systems
www.softrobot.biz
www.mobileerp.in

April 2024

MobileERP EMAIL Automation System

Why file incoming emails with ERP Records in database instead of unreliable email servers?.- You can store, find & use important emails for years if filed in ERP. Only MobileERP has this important feature.

PROBLEM:

Mailbox size restriction

WORKAROUND:

Archive Emails?

SOLUTION:

Detach Attachments to File System Most e-mail accounts include a mailbox or account storage limit. In fact, in 90% of the case, this limit is breached primarily by the presence of attachments. In particular, this can ranging from small Kilobytes to large Megabytes, and even in hundred Megabytes.

Moreover, over time, the Sent Items folder is accumulated with redundant attachments.

Because a copy of each message that you send is saved underneath it. As a result, this not only fills up the recipient's mailbox, but also increases the file size of Outlook data file and mailbox.

Nevertheless, the world's most popular email client

– Microsoft Outlook is still devoid of an effective
mechanism for mailbox/Outlook PST size optimization.



Remove Email pollution from ur company

Why Incoming Email Filing in ERP is Required?

Problems and Solutions:

- 1. Reduce Search time: If Employees file incoming emails into ERP Documents that results into reduction in delays in finding and replying emails.
- 2. Reminds to reply on time: If Employees put proper reply date on email while filing, then Daily Briefing System can give them reminder and they never forget to answer that email on time. This improves your company image.
- 3. Reduce cc/bcc etc. Duplication and Forwards: Email Filing also helps to share emails with other team members without forwarding emails in ERP. This reduces workload on email server. This reduces email pollution.
- **4. Follow-Up Actions**: Based on email content, SoftRobot suggests follow-up actions. Whether it's scheduling a meeting, setting reminders, or prioritizing tasks, tickets, holds. It assists in organizing your workflow.
- 5. Provides Security from Email Theft, Delete or wrong information sharing to competitors: Employees delete emails when they leave company or hide some information from their managers. Some also send critical info to your competitors or outside people like press which can damage your business. Incoming email filing is done on central ERP Server and employees has no means to delete email or its attachements due to central storage.
- **6.** Summarizing Email Threads: SoftRobot extracts key information from lengthy email conversations and provides concise summaries. This helps you quickly grasp the main points without reading through entire threads.
- 7. Helps in Legal battle: Once emails are filed along with its Project, Order or Party accounts then you will get entire trail on emails by party, by project, by dates, by employees etc.
- 8. Al based Auto Responding system can Drafting and send Email Responses: SoftRobot can help you compose email replies that sound like you. It analyzes context and suggests appropriate language, saving you time and ensuring effective communication communicated without human intervention.
- **9.** Rule based email for payment reminders or on action are already helping your employees in sending and filing emails. Auto filing of emails help your employees to do less work.

Incoming Email Automation Benefits

Incoming email automation is crucial for efficient communication and streamlined processes. Here are the key reasons why it is necessary:

Time Savings:

- Automating incoming emails frees up valuable time for other tasks.
- Repetitive actions like sorting, categorizing, and forwarding can be handled automatically.

Consistent Responses:

- Automation ensures consistent and timely replies to incoming emails.
- Customers and clients receive prompt and accurate information.

Workflow Efficiency:

- Automated rules can route emails to the right departments or individuals.
- Prioritization and assignment become seamless.

Customer Experience:

- Quick responses enhance customer satisfaction.
- Automation helps manage inquiries, complaints, and requests effectively.

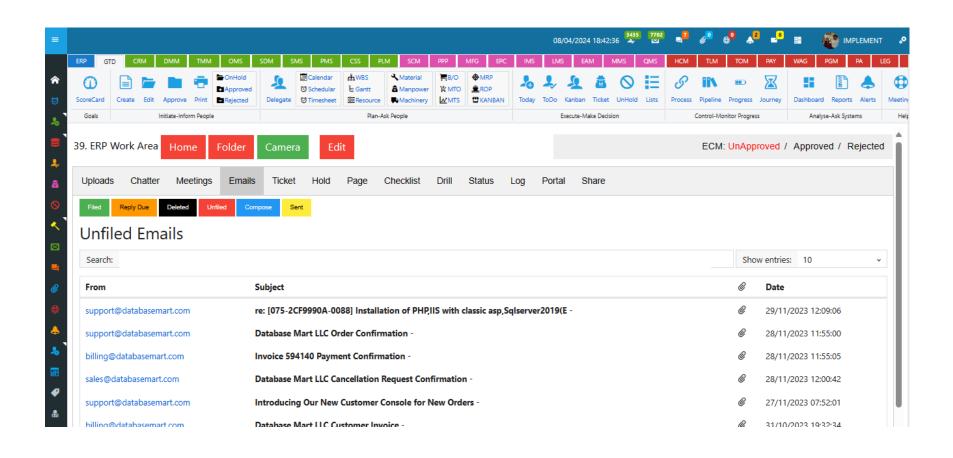
• Data Capture:

- Automation extracts relevant data from incoming emails.
- It populates databases, CRM systems, or other tools.

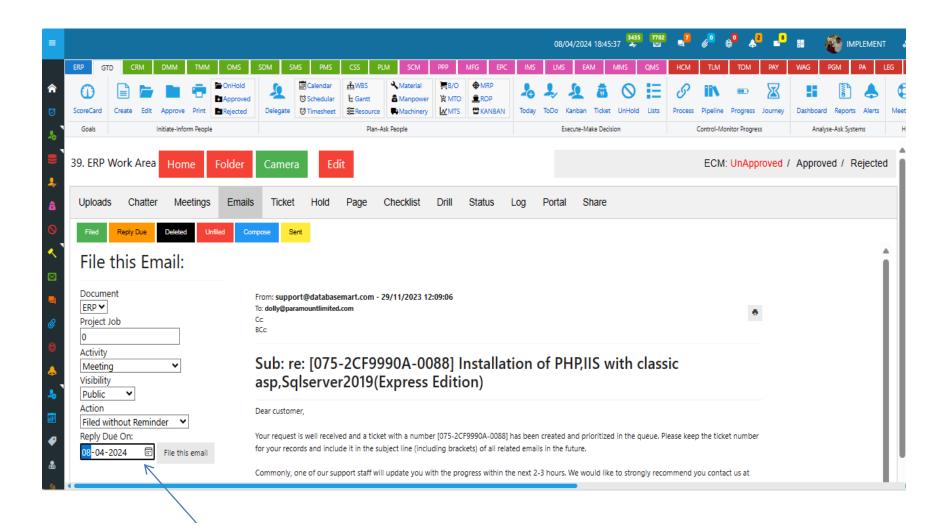
Personalization:

- Automation allows customization based on sender, subject, or content.
- Personalized responses improve engagement.
- In summary, incoming email automation streamlines processes, improves customer service, reduces theft, increases security and optimizes workflow efficiency

Every ERP Document will show your Unfiled Email Inbox

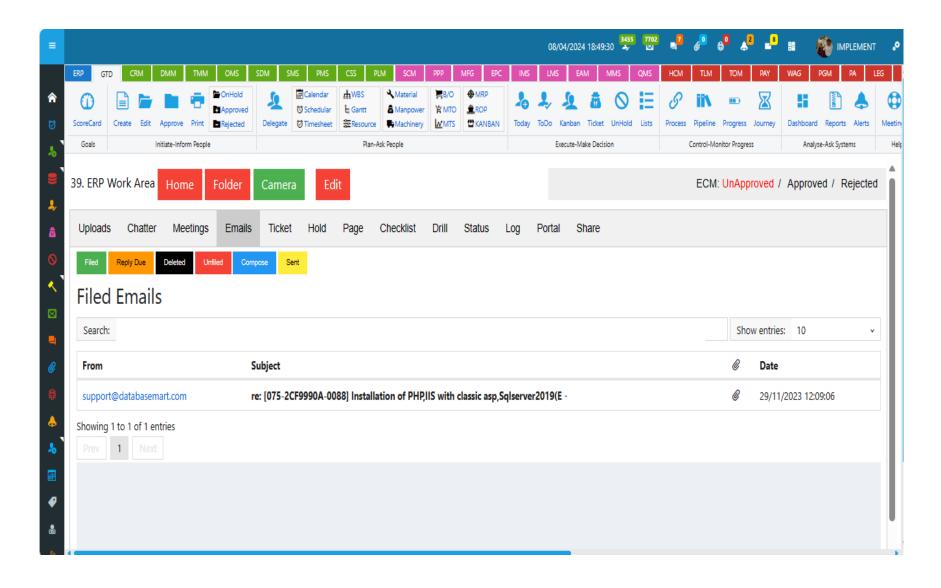


Open Email and do filing

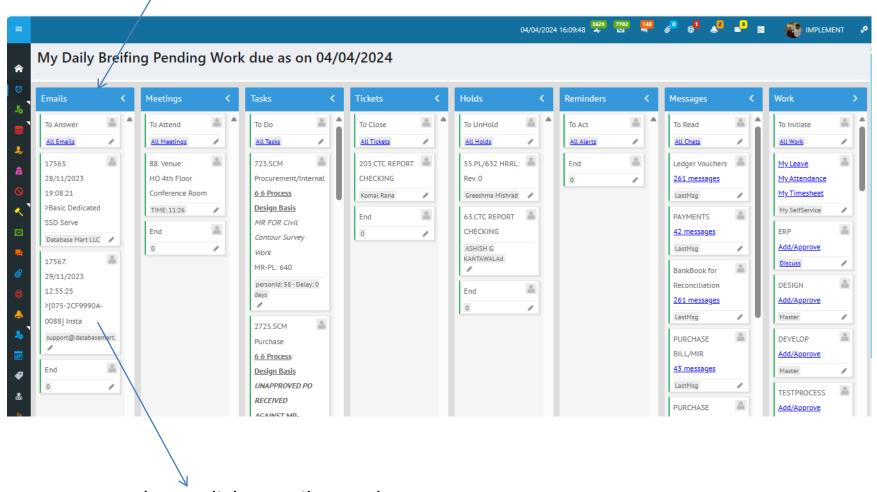


Give proper planned reply date

Email gets attached to ERP Document under Filed Category

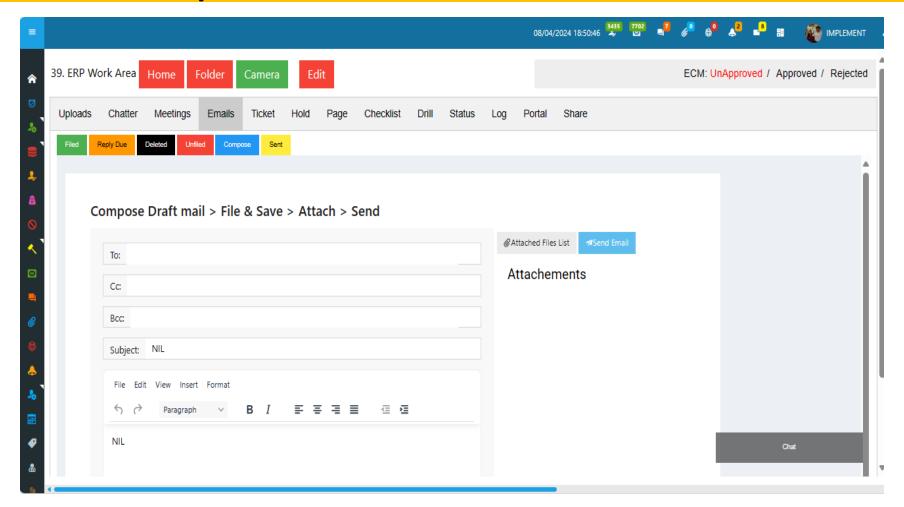


Employees check Emails to reply in daily briefing as filed with planned to do date in previous screen



Employee clicks email to reply

Email sent with auto response or manual response based on ERP LOGIC



Sent Email is also filed in ERP Documents Database for further reference

You can Search Filed Emails Folderwise, Documentwise, Jobwise, Activitywise etc.

