

# Email Inbox Automation

MobileERP Systems

[www.softrobot.biz](http://www.softrobot.biz)

[www.mobileerp.in](http://www.mobileerp.in)

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# 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**

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 range from small Kilobytes to large Megabytes, and even in hundred Megabytes.

## **WORKAROUND:**

**Archive Emails?**

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.

## **SOLUTION:**

**Detach Attachments to File System**

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 attachments 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. AI 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

08/04/2024 18:42:36 3435 7702

ERP GTD CRM DMM TMM OMS SDM SMS PMS CSS PLM SCM PPP MFG EPC IMS LMS EAM MMS QMS HCM TLM TOM PAY WAG PGM PA LEG

ScoreCard Create Edit Approve Print OnHold Approved Rejected Delegate Calendar Scheduler Timesheet WBS Gantt Resource Material Manpower Machinery B/O MTO MRP ROP KANBAN Today ToDo Kanban Ticket UnHold Lists Process Pipeline Progress Journey Dashboard Reports Alerts Meeting

Goals Initiate-Inform People Plan-Ask People Execute-Make Decision Control-Monitor Progress Analyse-Ask Systems Help

39. ERP Work Area Home Folder Camera Edit ECM: UnApproved / Approved / Rejected

Uploads Chatter Meetings Emails Ticket Hold Page Checklist Drill Status Log Portal Share

Filed Reply Due Deleted Unfiled Compose Sent

### Unfiled Emails

Search: Show entries: 10

From	Subject	Date
support@database mart.com	re: [075-2CF9990A-0088] Installation of PHP,IIS with classic asp,SqlServer2019(E -	29/11/2023 12:09:06
support@database mart.com	Database Mart LLC Order Confirmation -	28/11/2023 11:55:00
billing@database mart.com	Invoice 594140 Payment Confirmation -	28/11/2023 11:55:05
sales@database mart.com	Database Mart LLC Cancellation Request Confirmation -	28/11/2023 12:00:42
support@database mart.com	Introducing Our New Customer Console for New Orders -	27/11/2023 07:52:01
billing@database mart.com	Database Mart LLC Customer Invoice -	31/10/2023 19:32:34

# Open Email and do filing

08/04/2024 18:45:37 3435 7702 7 0 2 1

IMPLEMENT

ERP GTD CRM DMM TMM OMS SDM SMS PMS CSS PLM SCM PPP MFG EPC IMS LMS EAM MMS OMS HCM TLM TOM PAY WAG PGM PA LEG

ScoreCard Create Edit Approve Print OnHold Approved Rejected Delegate Calendar Scheduler Timesheet WBS Gantt Resource Material Manpower Machinery S/O MTO MTS MRP ROP KANBAN Today ToDo Kanban Ticket UnHold Lists Process Pipeline Progress Journey Dashboard Reports Alerts Meet

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39. ERP Work Area Home Folder Camera Edit ECM: UnApproved / Approved / Rejected

Uploads Chatter Meetings Emails Ticket Hold Page Checklist Drill Status Log Portal Share

Filed Reply Due Deleted Unfiled Compose Sent

File this Email:

Document  
ERP

Project Job  
0

Activity  
Meeting

Visibility  
Public

Action  
Filed without Reminder

Reply Due On:  
08-04-2024 File this email

From: support@datasemart.com - 29/11/2023 12:09:06  
To: dolly@paramountlimited.com  
Cc:  
Bcc:

Sub: re: [075-2CF9990A-0088] Installation of PHP,IIS with classic asp,SqlServer2019(Express Edition)

Dear customer,

Your request is well received and a ticket with a number [075-2CF9990A-0088] has been created and prioritized in the queue. Please keep the ticket number for your records and include it in the subject line (including brackets) of all related emails in the future.

Commonly, one of our support staff will update you with the progress within the next 2-3 hours. We would like to strongly recommend you contact us at

Give proper planned reply date

# Email gets attached to ERP Document under Filed Category

The screenshot displays the ERP system's main interface. At the top, a navigation bar includes various modules such as ERP, CRM, DMM, TMM, OMS, SDM, SMS, PMS, CSS, PLM, SCM, PPP, MFG, EPC, IMS, LMS, EAM, MMS, QMS, HCM, TLM, TOM, PAY, WAG, PGM, PA, and LEG. Below this is a secondary navigation bar with icons for ScoreCard, Create, Edit, Approve, Print, OnHold, Approved, Rejected, Delegate, Calendar, Scheduler, Timesheet, WBS, Gantt, Resource, Material, Manpower, Machinery, B/O, MTO, MTS, MRP, ROP, KANBAN, Today, ToDo, Kanban, Ticket, UnHold, Lists, Process, Pipeline, Progress, Journey, Dashboard, Reports, Alerts, and Meeting.

The main content area shows the '39. ERP Work Area' with tabs for Home, Folder, Camera, and Edit. A breadcrumb trail indicates the current location: 'ECM: UnApproved / Approved / Rejected'. Below this is a navigation menu with options like Uploads, Chatter, Meetings, Emails, Ticket, Hold, Page, Checklist, Drill, Status, Log, Portal, and Share. A secondary menu includes Filed, Reply Due, Deleted, Unfiled, Compose, and Sent.

The 'Filed Emails' section features a search bar and a 'Show entries: 10' dropdown. A table lists the email entries:

From	Subject	Date
support@datasemart.com	re: [075-2CF9990A-0088] Installation of PHP,IIS with classic asp,SqlServer2019(E -	29/11/2023 12:09:06

Below the table, it indicates 'Showing 1 to 1 of 1 entries' and provides navigation buttons for 'Prev', '1', and 'Next'.

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

04/04/2024 16:09:48 3629 7702 148

## My Daily Briefing Pending Work due as on 04/04/2024

Emails	Meetings	Tasks	Tickets	Holds	Reminders	Messages	Work
<b>To Answer</b> <a href="#">All Emails</a>	<b>To Attend</b> <a href="#">All Meetings</a>	<b>To Do</b> <a href="#">All Tasks</a>	<b>To Close</b> <a href="#">All Tickets</a>	<b>To UnHold</b> <a href="#">All Holds</a>	<b>To Act</b> <a href="#">All Alerts</a>	<b>To Read</b> <a href="#">All Chats</a>	<b>To Initiate</b> <a href="#">All Work</a>
17565. 28/11/2023 19:08:21 >Basic Dedicated SSD Serve Database Mart LLC	88.Venue: HO 4th Floor Conference Room TIME: 11:26 End	723.SCM Procurement/Internal <b>6 6 Process</b> <b>Design Basis</b> MR FOR Civil Contour Survey Work MR-PL: 640 personId: 58 - Delay: 0 days	203.CTC REPORT CHECKING Komal Rana End	55.PL/632 HRRL: Rev. 0 Greeshma Mishrad 63.CTC REPORT CHECKING ASHISH G. KANTAWALAd End	End	Ledger Vouchers <a href="#">261 messages</a> LastMsg PAYMENTS <a href="#">42 messages</a> LastMsg BankBook for Reconciliation <a href="#">261 messages</a> LastMsg PURCHASE BILL/MIR <a href="#">43 messages</a> LastMsg PURCHASE	<a href="#">My Leave</a> <a href="#">My Attendance</a> <a href="#">My Timesheet</a> My SelfService ERP <a href="#">Add/Approve</a> <a href="#">Discuss</a> DESIGN <a href="#">Add/Approve</a> Master DEVELOP <a href="#">Add/Approve</a> Master TESTPROCESS <a href="#">Add/Approve</a>
17567. 29/11/2023 12:55:25 >[075-2CF9990A-0088] Insta support@datasemart. End		2725.SCM Purchase <b>6 6 Process</b> <b>Design Basis</b> UNAPPROVED PO RECEIVED AGAINST MR.					

Employee clicks email to reply



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

The screenshot displays the 'Compose Draft mail' interface within an ERP system. The top navigation bar includes 'Home', 'Folder', 'Camera', and 'Edit' buttons. The main menu features 'Uploads', 'Chatter', 'Meetings', 'Emails', 'Ticket', 'Hold', 'Page', 'Checklist', 'Drill', 'Status', 'Log', 'Portal', and 'Share'. A secondary menu shows 'Filed', 'Reply Due', 'Deleted', 'Unfiled', 'Compose', and 'Sent'. The 'Compose Draft mail' breadcrumb trail is 'Compose Draft mail > File & Save > Attach > Send'. The email form includes fields for 'To:', 'Cc:', 'Bcc:', and 'Subject: NIL'. A rich text editor with a menu (File, Edit, View, Insert, Format) and formatting options (Paragraph, Bold, Italic, Bulleted List, Numbered List, Indent, Outdent) is present. The text area contains 'NIL'. An 'Attached Files List' section is visible with a 'Send Email' button. A 'Chat' window is partially visible at the bottom right.

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

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

The screenshot displays the MobileERP interface with a navigation sidebar on the left and a main content area. The sidebar includes sections for 'ECM ENTERPRISE CONTENT MGMT', 'DRS DAILY REPORTING SYSTEM', 'DSS DEPARTMENT SELF SERVICE', and 'TSS TRAVEL SELF SERVICE'. The main content area is titled 'Unfiled Emails' and shows a list of 10 email entries. The interface also features a 'Compose' button, a search bar, and a list of folders on the right side.

**MobileERP** 08/04/2024 18:53:47 3435 7702 7 0 2 0 0

637 ASHISH G. KANTAWALA  
Computer Department  
FY: 2425 - 08/04/2024

ECM ENTERPRISE CONTENT MGMT

- My Mailbox 7702
- My Messages 7
- My Documents 0
- My Meetings 0
- My Alerts 2

DRS DAILY REPORTING SYSTEM

- My Timesheet 14
- My Attendance
- My Dailyreport
- Timelog

DSS DEPARTMENT SELF SERVICE

- My Payment Request
- My Manpower Req

TSS TRAVEL SELF SERVICE

- Travel Request

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**Compose**

Folderwise

- Unfiled 7688
- Filed 17
- Filed Reply Due 4
- Reply Sent 0
- Deleted 0
- Backup 4

Documentwise

- Erp 5
- Design 0
- Develop 0
- Testprocess 0

Jobwise

- Bpcl - 607 0
- Hrrl - 632 0
- Lupec - 640 0
- Ongc - 637 0
- Cpcl - 638 0
- Oil - 624 0
- Gail - 643 0
- Bag - 639 0
- Cpcl - 612OLD 0

**Unfiled Emails**

Search: Show

From	Subject
support@database mart.com	Database Mart LLC Order Confirmation -
billing@database mart.com	Invoice 594140 Payment Confirmation -
sales@database mart.com	Database Mart LLC Cancellation Request Confirmation -
support@database mart.com	Introducing Our New Customer Console for New Orders -
billing@database mart.com	Database Mart LLC Customer Invoice -
support@database mart.com	Invoice #587013 will be charged automatically on Nov. 7, 2023 -
billing@database mart.com	Credit Card Payment Confirmation on Invoice 587013 -
billing@database mart.com	Database Mart LLC Customer Invoice -
support@database mart.com	Invoice #577244 will be charged automatically on Oct. 7, 2023 -
billing@database mart.com	Credit Card Payment Confirmation on Invoice 577244 -

Showing 1 to 10 of 7688 entries

Prev 1 2 3 4 5 ... 769 Next

**Activitywise**

- Air Ticket Booking 0
- Book 0
- Data Backup/Restore 0
- Inquiry Updation In E 0
- Market Analysis 0
- Market Reports 0
- Meeting 15
- Official Tour 0
- Other Than S/W Dev. 0
- Payroll Processing 0
- Refrence Study 0
- Reports 0
- Software Developer 0
- User Support 0