

How to set up Mailbox Scraping and Mailbox Scraping Rules

Webinar: [Mailbox Rules and Scraping](#)

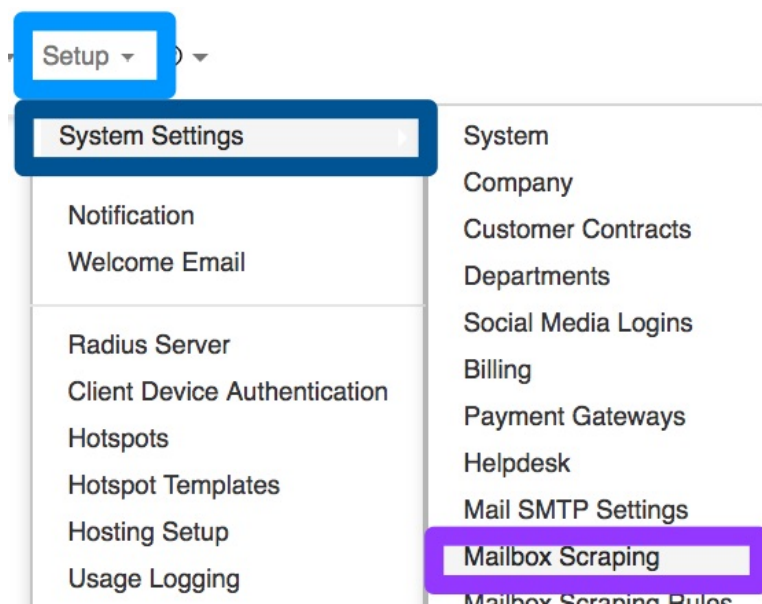
1. Introduction

This feature allows you to capture client emails to your company email address (example: support, accounts or sales mailbox's) and either generate a helpdesk ticket or generate a sales lead. Mailbox Rules are set up to take specific action on certain Email Addresses and Email Subject Lines.

Important: If a Sales Lead or Helpdesk Ticket is generated it sends out a notification to let the receiver know about the action. If the receiving mailbox has an autoreply set up or a similar helpdesk ticket system and sends out reply notifications it could cause back and forth emails to be sent and resulting in multiple tickets being opened. To prevent this you will have to add a Mailbox Scraping Rule for the mailbox the auto replies are originating from.

2. Mailboxes

To find your mailbox(es), go to “[Setup](#)” – “[System Settings](#)” and then click on the “[Mailbox Scraping](#)” option.



On the following screen, you will be able to **add** new mailboxes, view a **list** of all mailboxes and **edit** or **delete** existing mailboxes.

Mailbox Scrapping Setup

Show 10 Rows

Add Mailbox

Refresh

Search:

Name	Mailbox Type	Username	Type	Delete After Read	Action if Unmatched	Last Checked	Active	
Support	Generate Helpdesk Tickets		imap	Yes	Ticket	2018-04-23 14:38:35 <small>(2 months ago)</small>	Yes	<div><div></div><div></div><div></div></div>
Accounts	Generate Helpdesk Tickets		imap	Yes	Ticket	2018-04-23 14:38:35 <small>(2 months ago)</small>	Yes	<div><div></div><div></div><div></div></div>
Sales	Generate Sales Leads		imap	Yes	Ticket	2018-04-23 14:38:36 <small>(2 months ago)</small>	Yes	<div><div></div><div></div><div></div></div>

Showing 1 to 3 of 3 entries

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2.1. Add a Mailbox

Click on the “**Add Mailbox**” button and then complete your mailbox details.

Create new mailbox

✕

Mailbox Title

Mailbox Title

POP3 / IMAP url

mail.yourdomain.com

Port

110,143,993,995

Username

Username

Password

Password

Type

IMAP

SSL

NO

Delete After Read

NO

Action when Unmatched

Forward Message to Address below

Passthrough Forwarding Address

Passthrough Forwarding Address

- Yellow:** Here, you will give your mailbox a name i.e. Supports, Accounts or Sales etc.
- Orange:** This is where you add in the POP3 or IMAP URL that your mail server uses.
- Red:** This is where you specify the port that is used to log into the mailbox.
In this section, you will need to add the:
- This is the username for your mailbox (example: support@mail.com)
 - This is where you type in the password for the mailbox.
- Purple:** Here you will specify the type of protocol your mailbox will use.
In this section, you will specify if your mailbox uses SSL or not.
- Light Blue:** Note that the ports will differ depending on if SSL is switched on or not. (Usually: POP3 with SSL: 110 | POP3 without SSL: 995 | IMAP with SSL 993 | IMAP without SSL: 143).
- Dark Blue:** This is where you specify if it should remove the emails from the Mailbox itself. Note that it will still be on HeroTill as a Ticket or Sales Lead but it will be removed in the inbox itself.
This is where you specify what you want the system to do if the email does not exist on HeroTill for a customer. There are four options to choose from:
- Forward Message to Address below
 - Ignore the Message
 - Create a Ticket with no Customer assigned
 - Delete the Message
- Dark Green:**
- Light Green:** This is where you can specify an email address that HeroTill will forward the mail to.

Excluded Domains	<div>Excluded email domain names</div> <div>List of domain names to exclude from processing. Use a comma to separate multiple domain names</div>
Active	<div><input checked="" type="checkbox"/> YES <input type="checkbox"/></div> <div>Stipulates weather the cron-job will fetch this mailbox when selecting mailbox's to scrape.</div>
Start Date	<div>YYYY-MM-DD</div> <div>The first Date that we should start checking mails from.</div>
Mailbox Type	<div>Generate Helpdesk Tickets</div>
Default Helpdesk Ticket Department	<div>Accounts</div>
Default Helpdesk Ticket Category	<div>Client Request</div>
Default Helpdesk Ticket User	<div>No Assignee</div>
Use Priority Rules?	<div><input type="checkbox"/> <input checked="" type="checkbox"/> NO</div>
Default Helpdesk Ticket Priority	<div>Critical</div>

Close

Check

Create

Grey:	This is where you specify the list of domain names to exclude from processing. Use a comma to separate multiple domain names
Black:	This is where you specify if the Mailbox will process incoming mail (Stipulates weather the cronjob will fetch this mailbox when selecting mailbox's to scrape).
Brown:	This is the first Date that we should start checking emails from.
Green:	<p>This is where you select what you want the mailbox to generate. Options are:</p> <ul style="list-style-type: none">• Generate Helpdesk Tickets• Generate Sales Leads
Dark Blue:	This is where you specify the default helpdesk department for the mailbox. Note that the Helpdesk should be set up on HeroTill for any Mailbox Type. Click here for a guide on how to set up the Helpdesk Module.
Light Blue:	This is where you specify the default ticket category. Note that the Helpdesk should be set up on HeroTill for any Mailbox Type. Click here for a guide on how to set up the Helpdesk Module.
Purple:	<p>This is where you specify the default Admin User. If the Mailbox is set up to generate helpdesk tickets it will automatically assign the ticket to the specified admin user. If the Mailbox is set up to generate Sales Leads it will automatically assign the ticket to the specified admin user.</p> <p>This is where you set the default ticket priority on the mailbox. Default is:</p> <ul style="list-style-type: none">• Normal
Pink:	<ul style="list-style-type: none">• Low• High• Critical
Orange:	This is where you can specify an email address that HeroTill will forward the mail to.

After adding all the mailbox details, click on the “**Check**” button.

Create new mailbox



Mailbox Title	<input type="text" value="Mailbox Title"/>
POP3 / IMAP url	<input type="text" value="mail.yourdomain.com"/>
Port	<input type="text" value="110,143,993,995"/>
Username	<input type="text" value="Username"/>
Password	<input type="password" value="Password"/>
Type	<input type="text" value="IMAP"/>
SSL	<input type="checkbox"/> NO
Delete After Read	<input type="checkbox"/> NO
Action when Unmatched	<input type="text" value="Forward Message to Address below"/>
Passthrough Forwarding Address	<input type="text" value="Passthrough Forwarding Address"/>
Excluded Domains	<input type="text" value="Excluded email domain names"/> <small>List of domain names to exclude from processing. Use a comma to separate multiple domain names</small>
Active	<input checked="" type="checkbox"/> YES <small>Stipulates weather the cron-job will fetch this mailbox when selecting mailbox's to scrape.</small>
Start Date	<input type="text" value="YYYY-MM-DD"/> <small>The first Date that we should start checking mails from.</small>
Mailbox Type	<input type="text" value="Generate Helpdesk Tickets"/>
Default Helpdesk Ticket Department	<input type="text" value="Accounts"/>
Default Helpdesk Ticket Category	<input type="text" value="Client Request"/>
Default Helpdesk Ticket User	<input type="text" value="No Assignee"/>
Use Priority Rules?	<input type="checkbox"/> NO
Default Helpdesk Ticket Priority	<input type="text" value="Critical"/>

Close

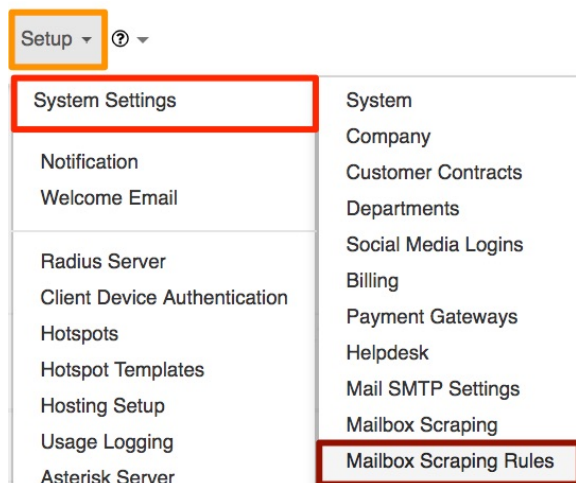
Check

Create

If the mailbox test is successful, then you will be able to click on the “**Create**” button.

3. Mailbox Rules

To find a list of all your mailbox rules, or to create new mailbox rules, go to “**Setup**” – “**System Settings**” and then click on the “**Mailbox Scraping Rules**” option.



On the following screen, you will be able to **add** new mailboxes, view a **list** of all mailboxes and **edit**, **disable** or **delete** existing mailbox scraping rules.

3.1. Add a Mailbox

To add a mailbox, click on the “**Add Mailbox**” button and then complete all the mailbox rule details.

Add a new Mailbox Processing Rule

Rule Name

Rule Name

Match on Email Address

Yes

Email Address

Email Address

Match on Subject Line

No

Action if Matched

Process Mail

Cancel

Add Rule

Import

Export Columns CSV

Export Columns Excel

Show / Hide Columns

+

Add

↺

Refresh

Rule Description	Matching Email	Matching Subject Line	Action	Matched
test			Process	
SMS Replies			Process	

Showing 1 to 2 of 2 entries

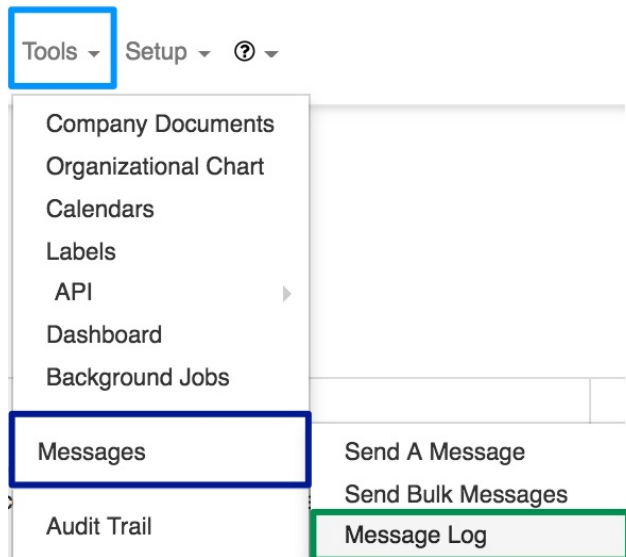
Previous1Next

- Purple:** This is where you add a name for your rule.
- Pink:** In this section, you specify whether or not it should be matched on an email address.
- Red:** Here you can specify which email address the rule should take action on. Please note that this will only show if you have “**Match on Email Address**” marked as “**Yes**”.
- Orange:** In this section, you will be able to specify the subject line for the rule to take action on. Please note that this will show if you have “**Match on Email Address**” marked as “**Yes**”.
- Here you will need to specify which action should take place if the mail matched on the Email Address or the Subject Line. The different actions are:
- Process Mail
 - Forward Mail
 - Ignore Mail
 - Delete Mail
- Brown:** If you have selected Forward Mail it will ask you to specify a Forwarding Email Address.

After adding all the details, click on the “**Add Rule**” button.

4. Message Log

The message log refers to all messages that have been sent from HeroTill. To find the message log, go to “**Tools**” – “**Messages**” and then click on the “**Message Log**” option.



You will now see the following page:

Message Log

All Types | All States | All Users | All Account Types | All Customers | All Customers | April 24, 2018 - April 24, 2018 | Refresh

Show 15 Rows

Search:

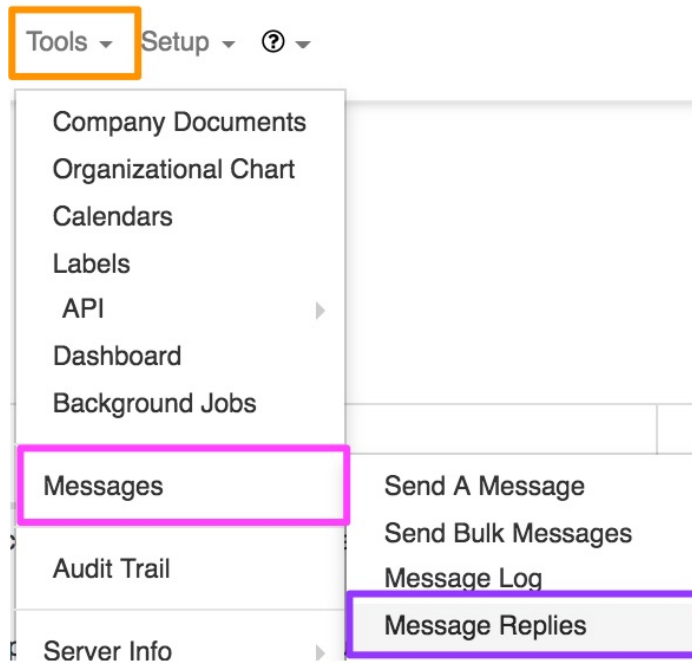
Copy Columns Clipboard | Export Columns CSV | Export Columns Excel | Show / Hide Columns

Status	Type	Date	Customer	Username	To	Subject	User
Delivered	Email	2018-04-24 11:13:08				Helpdesk Ticket #44850 has been assigned to you	Shamirha Nigam
Delivered	Email	2018-04-24 11:13:07				Helpdesk Ticket #59681 has been assigned to you	
Delivered	Email	2018-04-24 11:12:04				Network device changed	

On this screen, you will be able to see the message **type**, **status** and **date** as well as the **customer** or **email** address the mail has been sent to. You can also filter your list to see only certain **message types**, different **states** such as delivered or failed, messages sent from specific **admin users** or to view all messages sent to a specific **customer** or to view messages sent in a certain **time frame**. You will also be able to **view** the message that has been sent to the customer or **resend** the message if need be.

5. Message Replies

To view a list of all message replies, go to **"Tools"** - **"Messages"** and then click on the **"Message Replies"** option.



You will now see the following screen:

Message Replies

All Customers

All Types

Refresh

Show 15 Rows

Search:

Copy Columns Clipboard

Export Columns CSV

Export Columns Excel

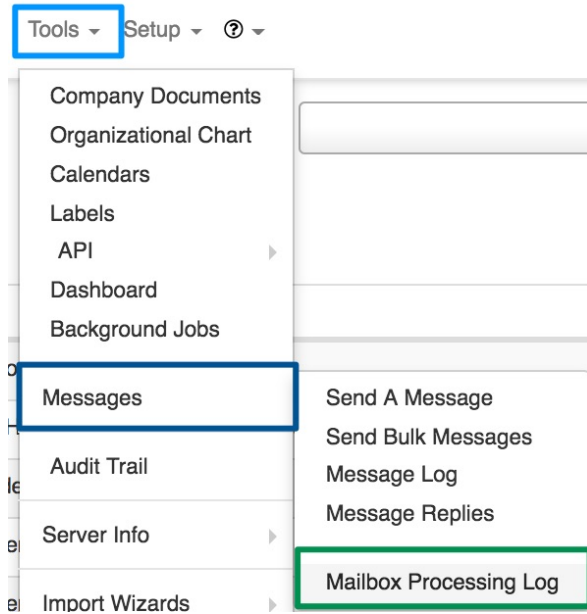
Show / Hide Columns

Reply Type	Reply Date	Reply Message	Reply Source	Original Date	Original Message	Customer	Username	Topup	Accounting Code	
SMS	2018-04-24 07:08:41	2GB		2018-04-24 07:07:48	35.1 GB of 35 GB used [redacted] has been capped reply to this sms with topup size required to topup automatically, eg. 1GB,2GB,5GB etc	[redacted]	[redacted]	2GB	CAP003	
SMS	2018-04-24 06:48:02	Adf 5 Gb		2018-04-23 18:51:15	20 GB of 20 GB used [redacted] has been capped reply to this sms with topup size required to topup automatically, eg. 1GB,2GB,5GB etc	[redacted]	[redacted]	5GB	BIO001	
SMS	2018-04-24 06:26:48	5GB		2018-04-23 18:47:06	35 GB of 35 GB used [redacted] has been capped reply to this sms with topup size required to topup automatically, eg. 1GB,2GB,5GB etc	[redacted]	[redacted]	5GB	CHA002	

On this screen, you will be able to view the **reply details**, the **original message details** and the **customer details**. You will also be able to filter the list to view certain **message types**, view all messages sent from a specific **customer** or **view** the messages sent.

6. View Mailbox Processing Log

The Mailbox Processing Log refers to all incoming messages. To view this log, go to **“Tools”** – **“Messages”** and then click on the **“Mailbox Processing Log”** option.



You will now see the following page:

Mailbox Processing Log

Processed April 24, 2018 - April 24, 2018 Rules Refresh

Show 15 Rows Search: Copy Columns Clipboard Export Columns CSV Export Columns Excel Show / Hide Columns

Date	From	Customer	Ticket	Subject	Status
2018-04-24 11:47:26	herotel@herotel.com		#59695	Latest Scoop - Ubiquiti UniFi Video	Created a New Ticket
2018-04-24 11:23:13	herotel@herotel.com	herotel@herotel.com	#59317	Re: Your Helpdesk ticket has been updated	Received Reply to Ticket
2018-04-24 11:20:41	herotel@herotel.com	herotel@herotel.com	#59686	Re: Helpdesk ticket #59597 submitted	Created a New Ticket
2018-04-24 10:57:19	herotel@herotel.com			Internet service Application	Created a New Sales Lead

From this screen, you will be able to see the **message details** as well as filter the list for specific **customers**, message **states** or view all messages in a specific **time frame**.

The buttons found on the right-hand side of the screen has the following functions:



This button will allow you to view the email.



Click on this button to download the email.



Click this button to link the email address to a customer. Note that this will show regardless if the email address is linked to a customer or not.



Click this button to view the helpdesk ticket. Note that in some cases a helpdesk ticket will not be created (example: Sales Leads or if it is forward to another email address).



This button will take you to the customer profile.



Click this button to quickly set up a mailbox rule.