

Close Support Email Responder



Installation Guide and Administration Manual

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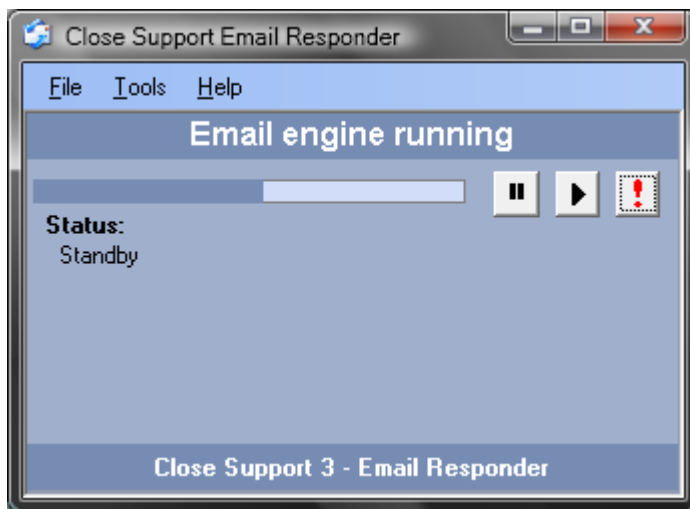
Table of Contents

Part I Features	2
Part II Installation	2
Part III Setup	3
1 General Tab	4
2 Auto-response Tab	5
3 SMTP Tab	6
4 POP3 Tab	9
5 Service Desk Email settings	10
Part IV Operation	11
Part V Resolving errors	12
1 One or more emails not processed	12
2 Identifying a rogue email	12
3 Turn on logging for error diagnosis	13

1 Features

The optional Email Responder is a Windows application that automatically handles support requests sent by email. On receipt of a new request, a Call record is created, the duty analyst receives an email alert and the customer is informed of the Call reference number. The description of the newly created Call comes from the subject line of the email and the email contents are transferred into the Call details. The content of emails received about existing Calls are automatically added to Call History and notification sent to the assigned analyst. Your customers are able to communicate easily with your service desk, raising their satisfaction and reducing your costs.

- Automatic email responses
- Manage incoming email support requests
- Auto-create support calls
- Auto-notify customer
- Auto-notify duty analyst
- Attached documents transferred to call record



Typically the Email Responder is installed on a single PC. When running it will check for and process emails at pre-determined intervals.

The system works optimally when a central email account is monitored and that same account is used to send email from the Email Responder and from all instances of the Service Desk.

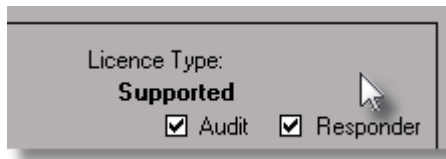
2 Installation

Pre-requisites

Firstly you must install the Close Support Service Desk on the PC that is to host the Email Responder. This is necessary to ensure that supporting files exist and have been tested by launching the Service Desk. The Service Desk User Guide and Administration Manual includes instructions for installing the Service Desk. You can download the manual from here: <http://www.closefitsoftware.com/download.htm>

After installing the Service Desk, launch it and connect to your shared database as described in the Service Desk User Guide. Also click on Help, About Close Support Service Desk and confirm that

you have a valid full or evaluation licence for the Email Responder:



Installing the Email Responder

Download the Email Responder installation file, csser_setup.exe, from here:
<http://www.closefitsoftware.com/download.htm>

Locate the file on your system and open it (double-click or right-click and select open). Follow the on-screen installation instructions.

The software will be installed to the Common Application Data folder. For Windows XP this is normally C:\Documents and Settings\All Users\Application Data\CFS\Close Support\. For Windows Vista and Windows 7 the Common Application Data folder is normally C:\ProgramData\CFS\Close Support\.

Please wait for the installation to complete. Depending on your system requirements this can take two or three minutes.

When the installation has completed click Finish

The installation creates a shortcut on your desktop to the Close Support Email Responder and a shortcut in the Close Support 3 folder on your Start menu. When you have completed the configuration and testing we recommend placing a copy of the shortcut in the Startup folder so that the Email Responder runs when Windows starts.

3 Setup

The Email Responder allows you to set one workstation to monitor a POP3 mail account for incoming emails and automatically take the appropriate action. The mail account to be monitored can be any POP3 compliant service such as an MS Exchange account or an Internet based service. An SMTP service is used by the Email Responder to send emails for instance to inform the default analyst that a new Call has been created. When initially setting up the Email Responder you will need to know the connection and authorisation details for your chosen POP3 and SMTP accounts. You will also need to give careful consideration to the other settings and default messages.

When setting up the Email Responder for the first time it is recommended that the POP3 inbox is emptied of all emails. This will prevent help calls being inadvertently created.

Having installed the Responder, launch it and click on Tools, Options and follow the instructions for each tab:

- [General Tab](#)
- [Auto-response Tab](#)
- [SMTP Tab](#)
- [POP3 Tab](#)

When all settings are as you require click on Save and Close. The Email Engine will be displayed and start to monitor the account for new emails.

3.1 General Tab

Options

General Auto-response SMTP (outbound) POP3 (inbound)

These settings are used when emails are created by the Service Desk and the Email Responder

Prefix to Call ID in subject line:

Insert email delimiter

Email delimiter:

Select one or more of these options to create a file of debug messages in the install folder. The file name is emh_debug.txt. If left on, the file can become very large. It is recommended that you only enable debugging on advice from Close Fit Software.

Enable debugging of the monitoring process

Enable debugging of the new mail process

Write email content to the debugging file for analysis

Replace CHR(10) with vbCrLf

Save and Close

Prefix to Call ID in subject line

On the General tab you can set the value of the email subject line prefix. This prefix is automatically added to the subject line of all emails sent by the Email Responder and the Service Desk. The prefix is followed by the Call number and then the Call Description. Using the prefix in the screenshot above as an example let's say that a customer sends an email to your support email account with the subject line "Forgotten Password - please help". Emails sent from the Email Responder and the Service desk relating to the Call will have the subject line "Helpdesk Call No: 9999 - Forgotten Password - please help". The Email Responder uses the prefix and the Call number to recognise when an email relates to an existing Call so that it can take the appropriate action. Any email received by the Email Responder that does not have the prefix in the subject line will create a new Call.

Email delimiter

By inserting an email delimiter into emails sent by the Service Desk and Email Responder, the application can limit the duplication of information in Call History.

Debugging options

The remainder of the options on the General tab are for debugging purposes. The Close Fit Software support team will advise when these may need to be used. For now leave all checkboxes clear as shown above. For further information see [Turn on logging for error diagnosis](#).

3.2 Auto-response Tab

Options

General Auto-response SMTP (outbound) POP3 (inbound)

Monitoring Interval (secs): 60 Process once and exit:

Save attachments: to: C:\Users\Public\Documents\Close Support\

Forward attachments:

Auto reply to new Call

Reply message:

Thank you for submitting your support request. We aim to respond to all requests within one business hour. If you need to provide any further information please reply to this email.

Auto notify new Call to email address(es): supportteam@closetupport.net

Message:

New Call received.

Auto reply to message about existing Call

Reply message:

Thank you for providing further information to help us with this support issue. The details have been added to the Call record.

Auto notify analyst when message arrives about existing Call

Message:

New information received.

Save and Close

On the Auto-response tab you set the options that control the responses of the Email Responder to incoming emails:

- Monitoring Interval: The number of seconds between the automatic checks for new emails.
- Process once and exit: Not normally used.
- Save attachments: Attachments on incoming emails can be save to your file system and automatically linked to the Call created by or related to the email. It is important that this location is available to all users of Close Support Service Desk.
- Forward attachments: When set the "Auto notify" emails sent to the analyst will include attachments.

- Auto reply to new Call: When set the sender of an email that creates a Call will receive a response from the Email Responder to inform them of the Call number assigned to their request. You can also define the message used in that email.
- Auto notify new Call: Forward on to the specified email address details of the new Call. You can send to multiple email addresses, just separate them with a semi-colon.
- Auto reply to message about existing Call: When set the sender of an email about an existing Call receives a reassurance reply that their message has been received.
- Auto notify analyst when message arrives about existing Call: When set the Analyst dealing with a Call will receive a copy of any incoming emails relating to that Call. Emails sent from the analyst are not notified. It is therefore possible for the analyst to communicate with the customer fully by email with all activity captured in Close Support. To achieve this all the analyst needs to do is CC all their emails to the Email Responder email address.

3.3 SMTP Tab

Options

General Auto-response SMTP (outbound) POP3 (inbound)

Account settings for sending email messages:

Server: mail.closesupport.net

Port: 25

Use SSL

Enable Logging

Log file:

Authenticate

Account name: helpdesk@closesupport.net

Password: *****

From Address: helpdesk@closesupport.net

Reply Address:

Bcc Address:

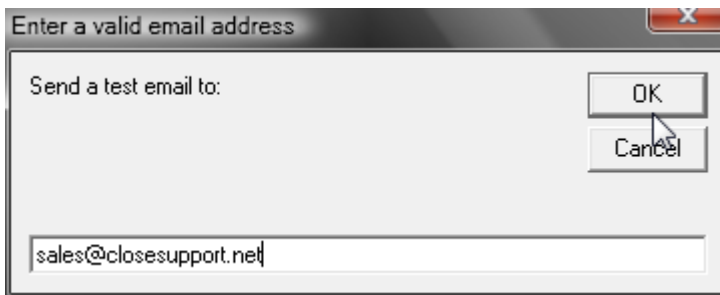
Send test email

Save and Close

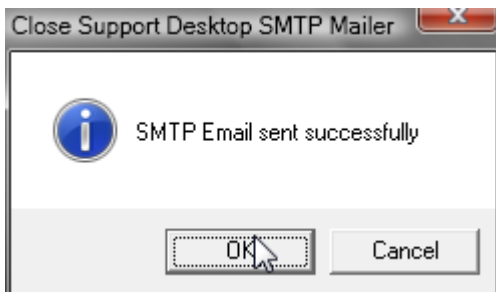
The SMTP tab has the settings for connecting to your mail server to send emails. Check with your mail administrator or service provider for details. The mail server can be online (as shown in the screenshot) or internal.

- Server: The domain name of your email server. When using an internal mail server such as MS Exchange this will probably be the computer name of the server.
- Port: The port used for SMTP traffic. Default is 25.
- Use SSL: Select if your mail server is using secure SMTP.
- Enable logging: Select to switch on logging of the SMTP process.
- Log file: Enter the name of the text file to be used. Example: C:\smtp_log.txt
- Authenticate: Select to enter an account name and password.
- Account name: The email address or account name.
- Password: The password for the account.
- From Address: Most mail servers require this to be the same as account email address.
- Reply Address: Leave blank unless you want responses to the email to go to a different email address.
- Bcc Address: If this is provided all emails sent by the Email Responder will be blind copied to this address. This facility can be useful as the Email Responder does not keep copies of sent emails.

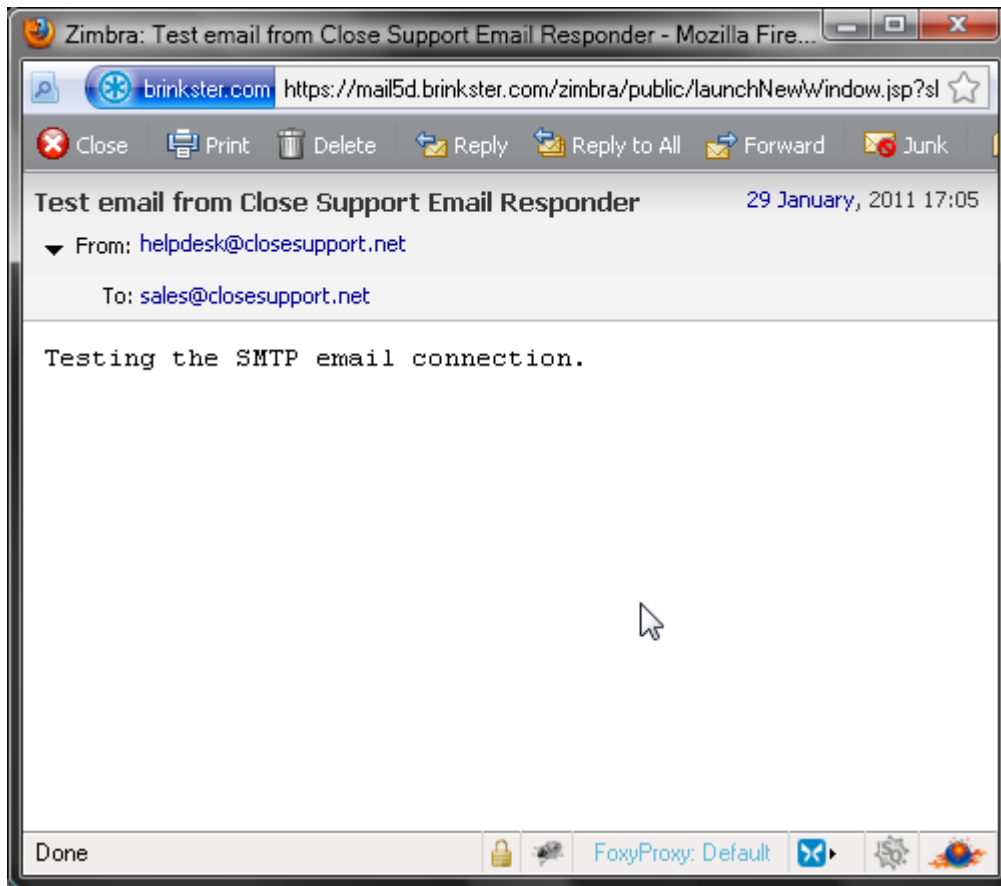
With all items set as required it is time to test. Click on Send test email, enter a valid email address and click OK:



If all is ok you will get this response:



and the email arrives at its destination:



If you get an error message you should enable logging and try again, assessing the specified file for errors and make the required correction to the settings.

3.4 POP3 Tab

Options

General Auto-response SMTP (outbound) POP3 (inbound)

Account details for collecting email messages

Authentication: Regular

Account name: helpdesk@closeupport

Password: xxxxxxx

Server Name: mail.closeupport.net

Port Number: 110

Use SSL:

Timeout: 30

Enable Logging:

Log File Path:

Test connection

Force check of all messages: Use Force check in case of problems picking up new emails to process.

Email addresses to be monitored:

Only emails sent to the specified address(es) will be monitored. Separate multiple email addresses with a semi-colon. Leave blank to monitor and action all emails delivered to the POP3 account.

Save and Close

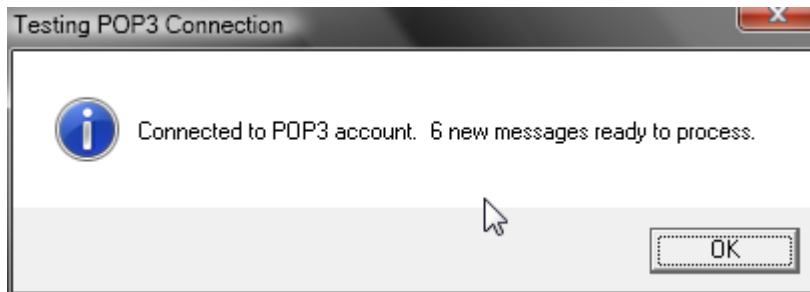
The POP3 tab has the settings for connecting to your mail server to receive emails. Check with your mail administrator or service provider for details. The mail server can be online (as shown in the screenshot) or internal.

- Authentication: choose the required method for authenticating to your account. Options are: Regular; APOP; NTLM; MSN.
- Account name: The email address or account name.
- Password: The password for the account.
- Server Name: The domain name of your email server. When using an internal mail server such as MS Exchange this will probably be the computer name of the server.
- Port Number: The port used for POP3 traffic. Default is 110.
- Use SSL: Select if your mail server requires a secure connection.
- Timeout: The number of seconds that the Email Responder will wait for a successful connection to be made. A value of 30 is recommended.
- Enable logging: Select to switch on logging of the SMTP process.
- Log File Path: Enter the name of the text file to be used. Example: C:\pop3_log.txt
- Force check of all messages: It is normal for this setting to be unselected (as shown). The

topic [One or more emails not processed](#) describes the circumstance when Force check is used.

- Email addresses to be monitored: Normally left blank. If emails sent to multiple addresses are present in the account being monitored then you can specify here the email addresses that the Email Responder will process. The other emails will be ignored.

With all items set as required it is time to test. Click on Test connection. A successful connection will display a message showing the number of emails to be checked for processing:



If you get an error message you should enable logging and try again, assessing the specified file for errors and make the required correction to the settings.

3.5 Service Desk Email settings

For optimal operation of the Email Responder we recommend that the same SMTP account is used by the Email Responder and all instance of the Close Support Service Desk. This screenshot shows the Tools, Options, Workstation settings tab set with the shared SMTP account.

Options

Workstation settings | My Preferences | List Values | Working Time/Priorities | Shared Paths | **Email Settings** | Security | User Defined Fields

Paper Size: Select your default paper size for internal reports and print outs: A4

Email Settings

SMTP settings

Server: mail.closesupport.net | From Address: helpdesk@closesupport.net
Port: 25 | Use SSL: | Reply Address:
Authenticate: | Auth Method: Plain | Enable Logging: | Bcc Address:
Username: helpdesk@closesupport.net | Log file: C:\smtp_log.txt
Password: *****

Send test SMTP email

Remote Programs

You can define up to three remote programs. In these command line definitions use [computer] to represent the hardware item's computer name or IP address and [connection] to represent its Connection value. See the Remote Programs topic in F1 Help for more details.

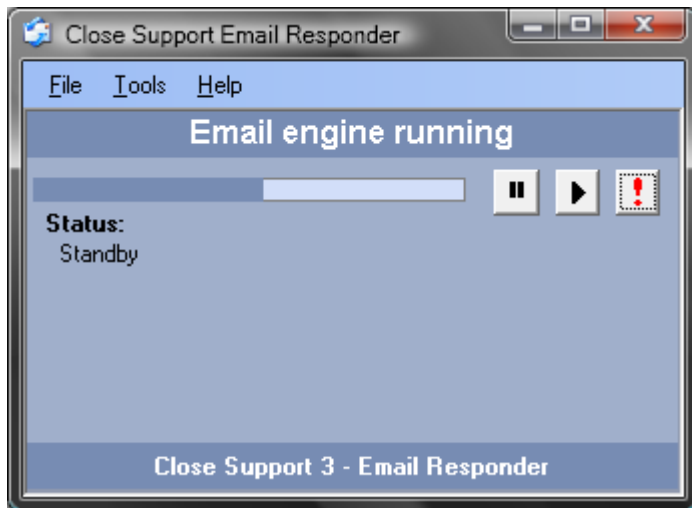
Desktop Viewer | Installed? | Command line:
Telnet | Installed? | Command line:
Dialup | Installed? | Command line:

Close

Please note that the email address on the Analyst's Close Support User record needs to remain as their own email address so that the Email Responder can send on user emails as specified in the [Auto-response Tab](#).

4 Operation

Following successful install, setup and test you are ready to put the Email Responder into operation.



All you need to do is launch the Email Responder and let it process. The progress bar shows you the application moving towards the next run of the automatic process. The three buttons to the right of the progress bar let you pause, resume and process. Normally though you would just leave the Responder to repeatedly cycle through the process at regular intervals.

5 Resolving errors

5.1 One or more emails not processed

If the Email Responder does not process one or more emails and does not report an error it is possible that processing has got out of synch.

When the Email Responder checks messages in the monitored folder it starts at the most recent message and goes down the stack in reverse order of date received until it finds the first message that it has already processed (or until it reaches the bottom of the stack). It then starts to go back up the stack processing one message at a time.

The reason for adopting this approach is to reduce processing associated with trawling through all emails in the monitored folder. However there are some circumstances where the queue of messages can get out of synch. The most common is when messages are manually moved into the monitored folder.

There is a setting on Tools, Options, POP3 Settings called "Force check of all messages". When this option is selected then all emails in the monitored folder are checked to see if they need processing regardless of their position in the stack. When this option is selected it is recommended that the number of emails in the monitored folder is kept to one or two hundred at the most.

5.2 Identifying a rogue email

Sometimes it becomes necessary to identify which email is causing a processing error. If the Email Responder errors when processing the email queue you can use this technique to home in on the rogue email.

Step 1:

- Use an email client such as Outlook to access the email account that is monitored by the

Email Responder

- Create a sub folder
- Move all emails from the Inbox into the newly created sub folder

Step 2:

- Allow the Email Responder to process the empty Inbox. If the Responder processes without error proceed to Step 4.

Step 3:

- Open your database (CloseSupportBE.mdb or CloseSupportSQL)
- Open the table CS_EMAIL
- Delete any records in this table where the value for MailSystem is 'POP3' and the value for MsgStatus is not 'Read'
- Allow the Email Responder to process
- If the Responder processes without error proceed to Step 4 otherwise seek advice

Step 4:

- Move one email from the sub folder back to the Inbox
- Allow the Responder to process the email
- If the error occurs then you have found the rogue email, otherwise
- Carry on moving one email at a time from the sub folder to the Inbox, allowing the Responder to process each one.

5.3 Turn on logging for error diagnosis

There are various debugging options available when tracking down processing errors. The debugging and logging settings are all available through the Tools, Options menu.

POP3

You can log the process for connecting to the monitored email account and collecting emails. On the POP3 Settings tab check the Enable Logging box and provide a suitable location and filename for the log file - preferably with a .txt extension.

SMTP

If you are having problems sending emails you can log the process on the SMTP Settings tab. Check the Enable Logging option and provide a suitable filename - again with a .txt extension.

Responder Process

Emails collected by the Responder using its POP3 connection then need to be processed. This processing entails:

- Checking if the email is about an existing Call and then relating the email to that Call or creating a new Call
- Handling any attachments on the email
- Sending any emails to analysts as required by the options set.

There are three debugging options that can be set when tracking down issues with the Responder Process. The options are located on the Software Key tab. All debugging is written to the file emh_debug.txt located in the installation folder for the Email Responder. Note that this file is appended to by the debugging. It is always best to start with an empty file. You can do this by deleting or renaming any existing emh_debug.txt. It is also important to switch off debugging when finished.

The three debugging options are:

- The Monitoring Process - assessing the contents of the monitored email account to see if

any new emails have arrived and are ready to process.

- The New Mail Process - taking a new email and processing it and its attachments. Includes the creation of automated response emails.
- Write Email Content to the Debug File - If certain emails are causing issues this option allows the content of emails, as seen by the Responder, to be written out to the file.