

An Exact Software White Paper



Exact Event Manager

Email Response System

Exact Software
www.exactamerica.com
1.800.468.0834 Ext. 2650



Evidence shows that the faster an organization is able to identify and respond to client needs, the greater the probability that the organization will retain that customer's business and not lose them to a competitor.

Introduction

Exact Software is the pioneer of alert messaging software, an application technology that enables organizations to monitor and respond to critical, time-sensitive data in one or more front-office and back-office business applications and which automatically alerts staff members and updates corresponding application databases with the critical data.

Recent studies have shown that an organization's average response time to incoming email messages is three (3) days. With the explosive growth of customer relationship management (CRM) solutions, evidence shows that the faster an organization is able to identify and respond to client needs, the greater the probability that the organization will retain that customer's business and not lose them to a competitor.

In an effort to provide organizations with a single, enterprise-wide solution which can be used to monitor and respond to a vast amount of corporate data – regardless of where that data resides – Exact Software is introducing an *Email Response System* to its award-winning Exact Event Manager™ solution.

Exact Software offers the Email Response System (ERS) as a module within the Exact Event Manager application. ERS enables organizations to monitor and respond to the content of incoming email messages in much the same way as they currently use Exact Event Manager to monitor and respond to information within one or more application databases.

This document will briefly outline the manner in which the ERS is designed within the Exact Event Manager solution, and will address the capabilities and benefits of ERS to Exact Event Manager clients.

How the Email Response System Is Designed

To maximize the existing Exact Event Manager functionality of monitoring information in one or more relational databases while reading and processing email messages, Exact Software decided on the following design approach:

- Enable a client to specify which email accounts will be monitored by Exact Event Manager
- Have Exact Event Manager automatically take a copy of all email messages that are sent to those accounts and load them into a Microsoft Access database (leaving the original mail messages on the servers to which they were sent)
- Use Exact Event Manager's inherent capabilities to analyze and identify MS Access database records (email messages) to see if they meet certain criteria
- Use Exact Event Manager's fundamental response action capabilities to process and send alerts about those mail messages that meet pre-determined criteria

Email Data Available for Analysis

ERS is designed to enable clients to analyze and respond to any condition of data within any field of data associated to an incoming email message. Exact Event Manager can check every field for:

- one or more specific values
- one or more values that are similar to another value
- one or more values not contained in that field
- a date (or number) greater than, less than, or equal to a certain value
- blank/null, not blank/null

As well, email data that can be evaluated for these conditions include the following:

- “Send to” mailbox account name
- Message components, including:
 - attachment names
 - “cc” names
 - create date
 - sent date
 - received date
 - “from name”
 - “to name(s)”
 - subject
 - text (contained either in one or in multiple fields)

Benefits of Email Response System

Areas of benefit to Exact Event Manager clients include:

- Staff alerts based on email content
- Alternate device forwarding (“wireless support”)
- Tailored auto-responses to incoming email messages
- Email / Database Integration (Front-End)
- Email / Database Integration (Back-End)
- Web Forms Support

Staff Alerts Based On Email Content

Many organizations rely on one or more “catch-all” email accounts to receive information or inquiries from their client base. The most common example is the presence of an account called “info” as in info@exactsoftware.com which may be used to receive all general mail inquiries from customers, partners, and prospects alike.

Exact Event Manager includes the technology to send out alert messages via fax, pager, PDA, cell phone, and the web (in addition to email), organizations utilizing the ERS have the added ability to identify a critical email message and forward it.

Some organizations offer multiple addresses of this sort; there may be names such as *sales, finance, partners, support*, etc. that are used. Whichever email accounts are in use, it is probable that one (and sometimes more) individuals within an organization have been tasked with reviewing the messages that come into these accounts and acting on them as necessary. Unfortunately, this is often a task that has a lower priority than other work.

It is also inevitable that some of the messages sent to these accounts are of greater importance than others. Exact Event Manager ERS can be configured to review each and every message that comes in to these accounts, and, if they meet certain criteria, alert the appropriate staff member(s) via workflow, email (Exact Event Manager can forward the original message), fax, pager, PDA, cell phone, or web browser.

And, although some email systems do support some level of “auto-forwarding,” ERS offers two additional capabilities those systems do not. First, email auto-forwarding cannot perform the level of data analysis (or “data mining”) that Exact Event Manager does, thus other products lack the ability to precisely identify the conditions of individual incoming messages. Secondly, only ERS can forward an email to a different device – such as a pager – and this, as noted next, is critical to an organization’s ability to maintain timely contact with their clients.

Alternate Device Forwarding

Consider the following example:

An organization receives sales inquiries via an email account called *sales@mycompany.com*. It is the responsibility of a specific salesperson to monitor this account and follow-up with each inquiry as soon as it is received. Sometimes however, the salesperson is out of the office and is unable to review the incoming sales inquiries until some hours, even days later. These delays can result in a lost sale.

Because Exact Event Manager includes the technology to send out alert messages via fax, pager, PDA, cell phone, and the Internet in addition to email, organizations utilizing ERS have the added ability to identify a critical email message and forward it to a person via an alternate delivery method. This is a critical area of functionality, as it extends an organization’s ability to keep in close contact with their clients regardless of time of day or where any of their staff may be located.

Tailored Auto-Responses

Because Exact Event Manager can analyze an incoming email message and then execute any number of corresponding alerts, one of the key capabilities of ERS is to act as an auto-response system to reply and acknowledge specific incoming messages. Among the capabilities of the auto-reply function are:

Exact Event Manager now offers the unique capability to analyze conditions (and execute corresponding responses) based on conditions between incoming email messages and information in application databases.

- To acknowledge receipt of the mail message
- To provide the message sender with more detailed information regarding who will be handling their request and how to contact them
- To automatically send the message originator requested information, such as product literature (in response to an RFI), technical documentation or news flashes (in response to a standard support inquiry), or standard forms (in response to a registration request)

And, if desired, ERS may send the return response via any of its standard delivery means, including creating an Exact Synergy Enterprise workflow, mail, fax, FTP, or Webcast.

Email / Database Integration (Front-End)

One of the unique capabilities of Exact Event Manager is to analyze conditions of data across multiple application databases (e.g., conditions that exist between a CRM application and a financial application). With the advent of ERS, Exact Event Manager now offers the unique capability to analyze conditions (and execute corresponding responses) based on conditions between incoming email messages and information in application databases.

Consider the following scenario:

An organization uses an HR application to keep track of who is currently “in” or “out” of the office. Whenever an employee enters or leaves the office, they go into the HR application and signify whether they are in or out. This same organization has a number of successful sales representatives who receive numerous inquiries as well as close a lot of business via electronic mail.

With ERS, Exact Event Manager can monitor an incoming mail message, determine whom the message is being sent to, and cross-check that person’s availability within the HR application. If the recipient is “in” the office, ERS takes no action. If the message recipient is “out” of the office however, Exact Event Manager automatically pages the salesrep to alert them to the potential sales opportunity.

The ability to link incoming mail messages to information in application databases is nothing short of critical. Emails from clients can be linked to their corresponding contact

To further extend the Email Response System, Exact Event Manager offers support of Web Forms.

data records and evaluated for criticality. Support-related emails can immediately be matched to corresponding maintenance contract records to ensure that the client is entitled to receive support services. And, payment-related emails can be correlated to information in a financial database to judge the urgency of the incoming message.

Most importantly, this front-end integration can be accomplished without actually moving data anywhere; integration is all performed at the time that Exact Event Manager does its analysis.

Email / Database Integration (Back-End)

Although Exact Event Manager does not have to “move” data in order to analyze it, there are many instances where the information contained in an email needs to be inserted (or added) to an application database. For example:

- Incoming email support calls added to Exact Synergy Enterprise
- Incoming sales inquiries for a client added as “diary notes” to their existing contact record in Exact Synergy Enterprise

Using Exact Event Manager’s inherent “automated response action” capability, an organization can configure ERS to automatically execute an action that adds or updates records in an application’s database as the result of content that is detected in a incoming mail message. The methods by which the Exact Event Manager ERS can add or update records in an application database are as follows:

- executing one or more site-specific programs
- executing SQL statements and/or Stored Procedures
- transferring pertinent data from the email message to an external file

All of these actions have access to the data contained within the incoming mail message and thus are able to transfer that data from the message to the corresponding application database. Also note that Exact Event Manager keeps a complete audit trail of all application updates executed as the result of incoming mail messages.

Web Forms Support

To further extend the Email Response System, Exact Event Manager offers support of Web forms. Web forms are pre-designed (html) forms that act like mail messages, but instead of providing one large, free-format text field for the message content, Web forms offer individual, specialized “fields” for data entry.

Web forms are often used for such things as email customer support requests (so that the sender can fill out pertinent details about their problem), registration forms, and even for requests for information (so the recipient knows what information the sender is requesting). From an ERS perspective, Web forms are treated exactly like regular email messages with the exception that instead of one large message content field, ERS provides individual fields for each data element on the web form.

Web forms are not only useful for an organization to help them receive more precise information from their clients, but are useful from an ERS point of view because they allow for more precise and more efficient data mining. Although ERS can equally review data in a unformatted mail message as in a Web form, it is undeniable that both the sophistication of the analysis as well as the speed of analysis will be greatly improved if Web forms are utilized.

Note also that email templates will work in much the same way as Web forms; by segregating individual fields of data into separate elements, ERS will be able to perform more sophisticated and more efficient message analysis.

Supported Email Protocols

Exact Event Manager ERS integrates with virtually all email protocols (including MAPI, MHS, Vim, Vines, and SMTP).

About Exact Software

Established in 1984, Exact Software is one of the world's leading providers of business software solutions. Its integrated solutions comprise traditional Enterprise Resource Planning (ERP) as well as related software solutions such as Human Resource Management (HRM), Customer Relationship Management (CRM), Project Management, Business Intelligence/Analytics (BI/BA), and Electronic Workflow. Exact is headquartered in Delft, the Netherlands and has offices in Europe, the Middle East, North and South America, Asia, Australia and Africa. With over 2,700 employees, subsidiaries in more than 40 countries, solutions available in 40 languages, Exact currently serves customers in more than 125 countries across all five continents. Exact Holding N.V. (EXACT) has been listed on Eurolist by Euronext Amsterdam since June 1999.

Exact Software and Synergy are trademarks or registered trademarks of Exact Holding N.V. and/or its subsidiaries in the U.S. and/or other countries. ©2008 Exact Software, Inc., MASXXX, 1/09