**Understanding Email Automation in LegCRM**

**Summary**

If an email message subject line is mapped to an issue and there is a reply template saved for that issue (and pro/con position), then (a) the reply will be automatically loaded when the email message is opened and (b) the message can also be “swept” from the inbox without opening it – reply will be sent and the message recorded for the constituent. If a message with a mapped subject line is “swept” but there is no reply template saved for the subject line (and pro/con position), it will be recorded as having been received and no reply will be sent.

**Subject line mapping**

Reply automation is based on email subject line mapping. Subject lines can be mapped to issues. A mapping also includes a “Pro/Con” position as to the issue.

Issues can be created in two ways: Directly, through the main interface – click the document icon. Or in the email reply interface, from an incoming email subject line -- click the ‘+’ button.

Subject line mappings can be created in two ways: Directly, through the Subjects folder within email. Or, in the email reply interface, by checking “Map” when replying to or archiving a message. If a message is replied to without saving or loading a reply template, the “Confirm” dialog with “Map” option is not presented. The “Confirm” dialog is presented only when either (a) a message is directly archived without replying; or (b) a standard reply is either loaded or saved for the message; or (c) the subject line has already been grouped as mapped. In case (c), it is not necessary to click map again: The dialog is presented to alert the user that they are replying to multiple messages at once.

When a new issue arrives in the inbox, LegCRM checks for the most recent subject line mapping and assigns an issue and pro-con to the message based on that mapping, provided that the mapping has not expired. Mappings expire according to the forget interval set in email controls. The assigned issue and pro-con are saved on the message record in the database and if a new mapping is stored for the same subject line (or a wild card subject line that covers the subject line), they are updated immediately. Similarly, if a mapping is deleted, messages with the mapped subject will be remapped according to any applicable unexpired mapping, or if none, will be unmapped (mapped issue set to 0 and pro-con set to empty string). *Note that the expiration of a subject line mapping does not trigger a remapping of messages, so that if a message in the inbox is allowed to age past the mapping expiration interval, sweeps may pick up expired mappings.*

Subject line mappings are case and accent sensitive. One can create a case-insensitive mapping by using character classes in the Subjects creation dialog in the Subjects folder.

**Presentation of mapped subject lines in the inbox**

Messages that have a mapped subject line will always be presented in the Advocacy tab (unless they are assigned to a staff member, in which case they appear in Assigned or Ready).

Messages, even messages with the same subject line, will have their own line in the inbox unless and until their subject line is mapped.

Messages with a mapped subject line will be grouped by subject line in normal inbox view and marked as “Mapped”. Note that if a wild card subject line mapping matches multiple subject lines in the inbox, the messages mapped will not be grouped all together. They will be grouped by their own subjects, although all map to the same issue. This is a safety feature to allow the user to avoid inadvertent sweep of messages grouped by an overbroad wild card mapping. The user can always switch to an ungrouped view of messages by clicking the “1” button and toggle back to grouped by clicking “n”.

If a user starts a reply to a message, but does not go through and send it, the message will never again be grouped. The draft reply (automatically within 5 seconds after a keystroke) will be available to send for that individual message only. When messages with the same subject line are grouped and the user scrolls through the messages within that subject line grouping, a draft reply is associated with the particular message that the user is presently viewing if and only if the user types a keystroke while viewing that message.

**Use of Reply Templates**

When a user is in the reply editor, they have the option of saving their current reply as a reply template. The reply template will be associated with the issue and pro-con combination currently displayed in the editor. If there is already a saved reply template for that combination, they will have the option of loading the template. The save and load buttons flash green when they are enabled. *Saved templates can only be created in the reply editor, but* previously created templates can be browsed, updated and/or deleted in the Saved folder.

**Sweeping**

Messages are sweepable if there is a mapped issue for the message (based on subject line only) and there has been no individual action on the message like beginning a draft reply or individually altering the assigned issue. Sweepable messages are grouped by subject line when the inbox is in grouped mode. (Grouped is the default presentation mode -- click “1” to ungroup.) Sweeped messages are also highlighted in bold and bear the legend “Mapped”, even in ungrouped mode.

When there are sweepable messages in the inbox the Sweep button (green >>) is activated. The sweep button will act on sweepable messages as follows: If there is an applicable reply template (for the mapped issue and pro/con combination), it will send the reply and archive the messages to the mapped issue. If there is no corresponding saved reply template or a blank trained reply template, it will just archive the issues.