



# Bluebird Inbound Email

Senate Technology Services  
Helpline: 518-455-2011

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# What does Managing Inbound Emails mean?

This feature in Bluebird allows authorized office staff to forward emails from IBM Notes into Bluebird using a specialized email address (**crm.senatorsuserid@nysenate.gov**). Emails can be forwarded one a time or in bulk. Once forwarded these emails will then be associated to a contact record in Bluebird.

## Inbound Email Permissions

There are two additional permissions needed for managing Inbound Email:

- **Authorized Forwarder:** Allows you to forward email from Outlook into Bluebird.
  - The staff member and the Senator will need to each have a user record in Bluebird that contains their First Name, Last Name, and email address.
  - Each user record will need to be added to a Bluebird static group titled **Authorized Forwarders**.

**Note:** If an email is sent into Bluebird from someone who is not in the Authorized Forwarder group, the email will be rejected from the Bluebird Inbox and that person will receive an email in their email account stating that they are not permitted to send emails to Bluebird.

- **Manage Bluebird Inbox:** Allows someone access to the Inbox menu within Bluebird. This menu has links to the Matched and Unmatched screens along with the Reports screen. These screens allow you to manage the incoming emails.
  - This role works in conjunction with current Bluebird roles (i.e. Office Staff) and will be **administered by the Bluebird Office Administrator** via the Manager Users screen.
  - This list can be different from the Authorized Forwarder list.

## How does it work?

- Once an email is sent to the Bluebird inbox, it is processed every two minutes. Large amounts of mail (10,000+ emails) may take a little while to fully process.
- The system will then try to match the email address of the incoming email to an existing Bluebird record. Based on the results the mail will be divided into two screens: Unmatched and Matched.
- Bluebird Office Administrators need to add the Manage Bluebird Inbox role to authorized staff members for them to be able to see the Unmatched and Matched screens within Bluebird.
- If an email is unmatched, you will be able to search to see if the record exists and if not you can choose to create a new record. Once you match or create a new record, the email then moves over to the Matched Message screen to be processed.
- Once an email is matched, an Inbound Email Activity is created in the contact record containing all of the information from the incoming email, including attachments. (**Reminder** – Activities can hold up to 5 attachments of 2 megabytes each.)
- From the Matched Messages screen you can update the contact record, add Tags to the contact record, and/or Keywords to the Activity.
- Once you are done with an email message, clear it from the Matched Messages screen so you can see what you have left to process.

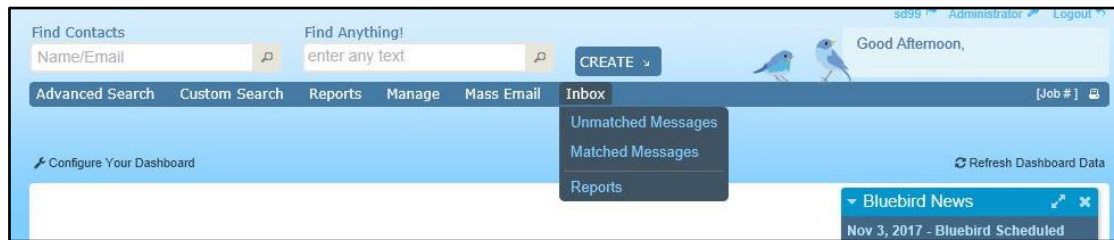
## Forwarding Emails into Bluebird

1. Open the **Senator's email** in Outlook
2. Select the **email(s)** you would like to send to Bluebird
3. **Move, Copy, or drag and drop** emails into the **Bluebird Inbound** folder
4. When Outlook has processed the email to Bluebird the email messages will be moved to the **Bluebird Processed** sub folder

**Note:** if the Bluebird Inbound folder is deleted by accident within Outlook, the folder should auto generate back, if for some reason this does not happen, call the STS Help Line x2011.

# Bluebird Inbox

Once emails have been forwarded from IBM Notes, they will go into the Bluebird Inbox.



From here, the program checks to see if an email address already exists and then separates the messages into two screens:

- **Unmatched Messages:** If an email address isn't found or if the same email address is found on multiple records, the message will be placed in the unmatched messages screen. From here you will be able to:
  - View the multiple records it may have found and choose what person to assign the activity to.
  - View the email and search for a different person all together.
  - View the email and choose to create a new record.
  - Delete the email from the Bluebird Inbox.

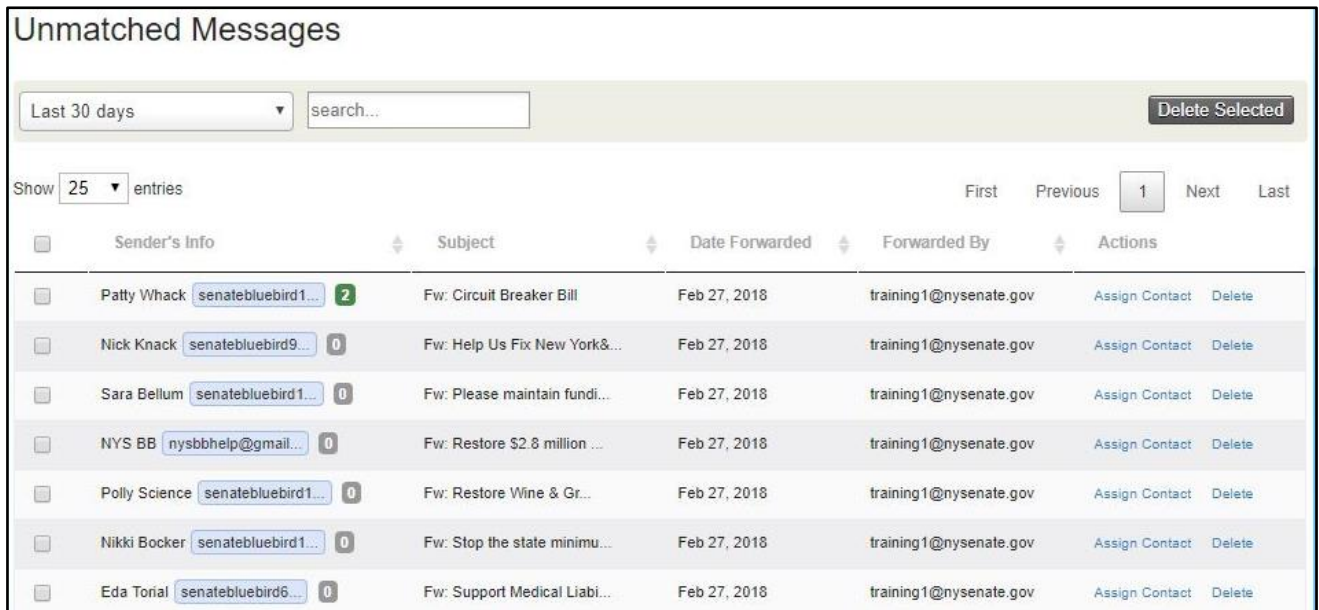
**Note:** Once you "matched" a record from the unmatched screen, the email then moves over the Matched Messages list to be processed.

- **Matches Messages:** If an email is matched, an Activity is automatically created on the contact's Bluebird record. From here you will be able to:
  - Reassign the Activity to another contact record
  - Add a Tag to the contact record and/or activity
  - Change the Status of Activity and/or Assign the Activity to a staff person
  - Delete the Activity containing the email from Bluebird

**Note:** When done processing the Matched messages, **remove** them from the list so you will only see the messages you need to still work with.

# Unmatched Messages

From the Bluebird Inbox option on the main menu, click **Unmatched Messages**.



Unmatched Messages						
Last 30 days		search...		Delete Selected		
Show 25 entries		First Previous 1 Next Last				
	Sender's Info	Subject	Date Forwarded	Forwarded By	Actions	
<input type="checkbox"/>	Patty Whack senatebluebird1... 2	Fw: Circuit Breaker Bill	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	Nick Knack senatebluebird9... 0	Fw: Help Us Fix New York&...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	Sara Bellum senatebluebird1... 0	Fw: Please maintain fundi...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	NYS BB nysbbhelp@gmail... 0	Fw: Restore \$2.8 million ...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	Polly Science senatebluebird1... 0	Fw: Restore Wine & Gr...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	Nikki Bocker senatebluebird1... 0	Fw: Stop the state minimu...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete
<input type="checkbox"/>	Eda Torial senatebluebird6... 0	Fw: Support Medical Liabi...	Feb 27, 2018	training1@nysenate.gov	Assign Contact	Delete

This screen displays the following information and options:

**Number of days** (right of Unmatched Messages): Number of days box will display only messages that were forwarded into Bluebird within the time frame selected.

**Search box** (Upper right): Allows you to search for specific emails.

**Sender's Info column:** Displays name and email address of sender and the number indicator which shows how many records matched the email address.

**Subject:** This is the subject from the sender's emails.

**Date Forwarded:** The date the message was sent into Bluebird.

**Forwarded By:** The IBM Notes account the email was forwarded from (i.e. Senator's or staff member.)

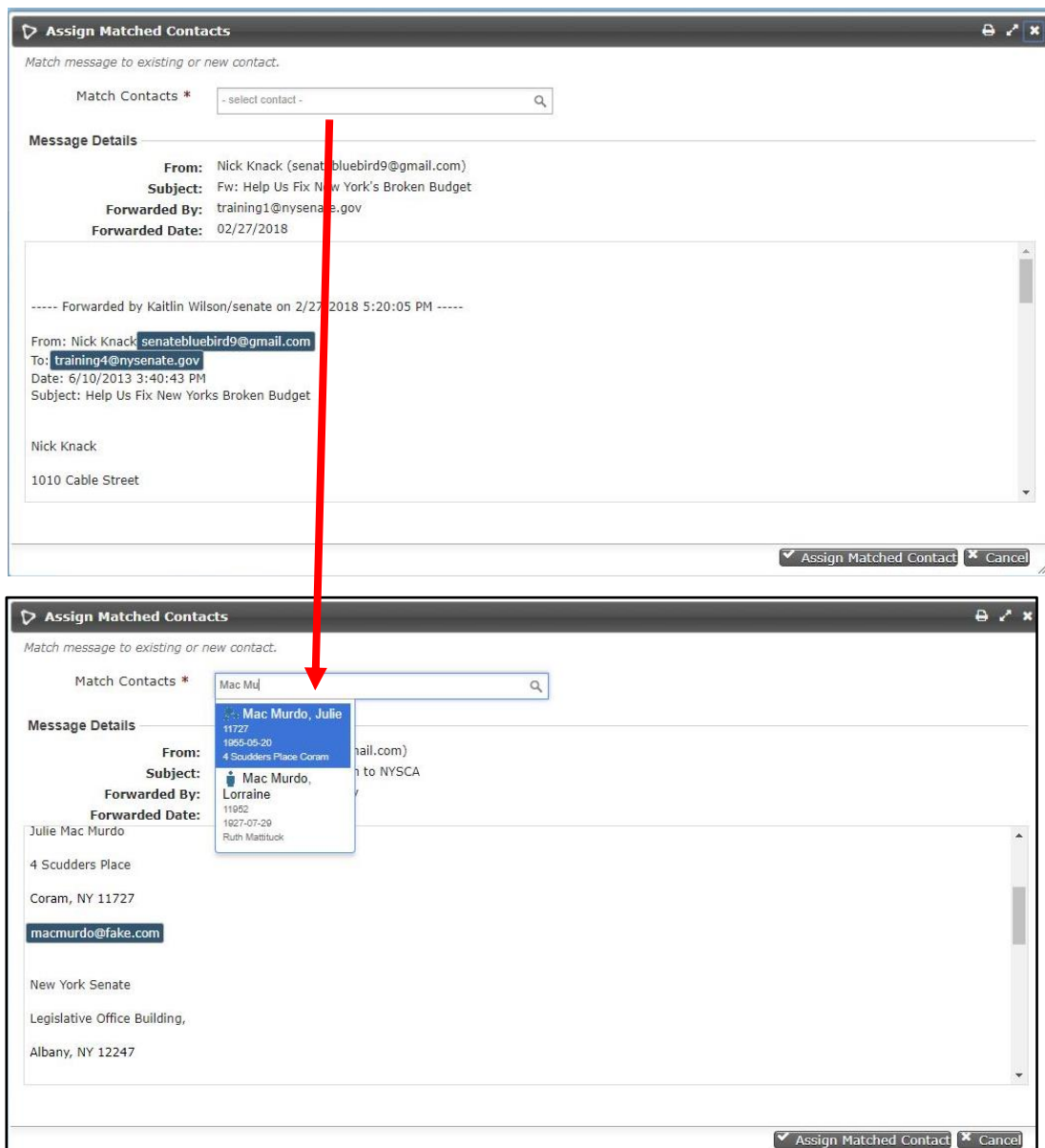
**Actions:** Use this area to Assign Contact or Delete the email from the Bluebird Inbox.

**Delete** (Above the Search box and in the lower right corner of the screen): Use this option to delete multiple emails from the Bluebird Inbox.

# Assigning Contacts

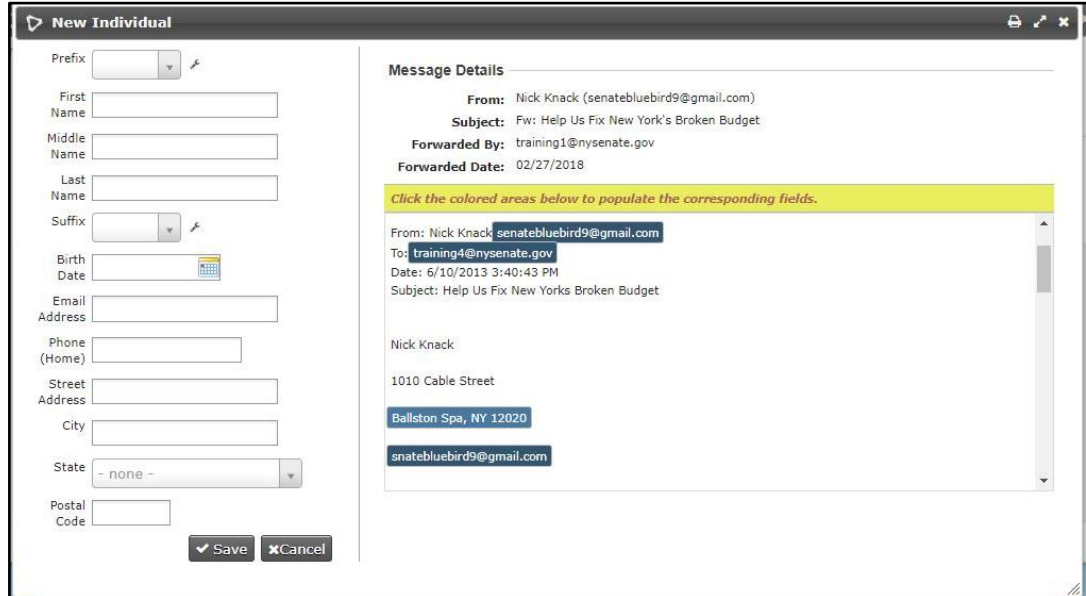
Use the Assign Contact option to match an email address to an existing record or to create a new contact record. You will always want to search to see if the contact record already exists in Bluebird before adding a new one.

1. Click **Assign Contact** across from the email that you want to match.
2. Click in the **Match Contact** box. *If you know the contact is in the system* start typing the last name of the contact. The autofill box will appear with the matching names, select the one you are looking for. If the selected contact has an email address, it will appear in the email box.

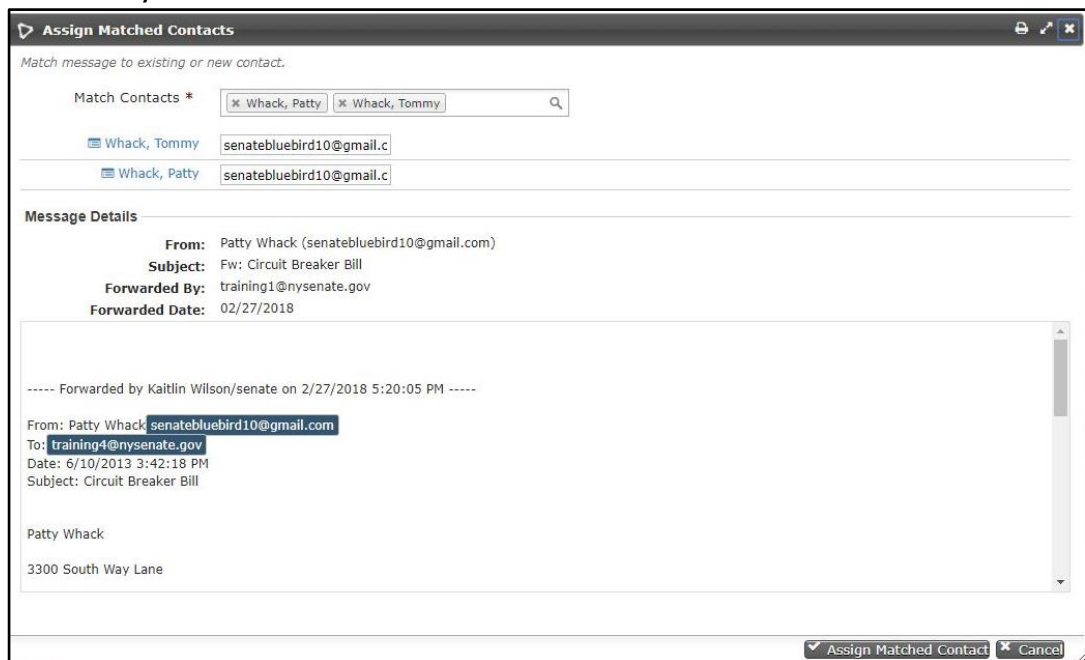




3. If the person is not already in the Bluebird database then you need to create a record for this person. Click in the **Matched Contact** box and then click on **New Individual**, the New Individual box appears. **Fill in desired information**. Click **Save** when finished.



4. After hitting save the email will be matched to the New Individual record you just entered. You will see the name appear in Match Contact. Click on **Assign Matched Contact** to confirm and save the activity to the record. At this point the Inbound Email activity is created and matched with the record.



**Note: Clicking any of these highlighted fields** will automatically populate that information into the corresponding fields in the contact information on the left.

## Deleting Messages from Unmatched Messages

Deleting a record will remove it from the Bluebird Inbox and no information will be added to Bluebird for this contact.

You can delete a single message or multiple messages at the same time.

- If deleting an individual email, click **Delete** across from the email that you want to remove. When the prompt appears, click **Delete**.
- If deleting multiple emails, select the boxes to the left of the **desired emails** and then click the **Delete button** at the bottom of the screen or above the Search box. When the prompt appears, click **Delete**.

# Matched Messages

Matched Messages are messages where there is already a contact record in Bluebird that contains the same email address of the message that was forwarded into the Bluebird Inbox.

From the **Inbox** option on the main menu, click **Matched Messages**.

The screenshot shows the 'Matched Messages' interface. At the top, there is a filter dropdown set to 'Last 30 days' and a search box. To the right are buttons for 'Process', 'Clear', and 'Delete'. Below the filter is a 'Show 25 entries' dropdown. The main area is a table with the following columns: Matched Info, Subject, Matched Date, Forwarded By, and Actions. There are two rows of data. The first row shows a message from 'Atricks, Petey' with subject 'Fw: Keep our Correction O...', dated 'Feb 27, 2018', forwarded by 'training1@nysenate.gov'. The second row shows a message from 'Jacket, Gene' with subject 'Fw: Library Material Aid', dated 'Feb 27, 2018', forwarded by 'training1@nysenate.gov'. Each row has 'Process', 'Clear', and 'Delete' buttons in the Actions column. At the bottom, it says 'Showing 1 to 2 of 2 entries' and has pagination controls for 'First', 'Previous', '1', 'Next', and 'Last'.

Matched Info	Subject	Matched Date	Forwarded By	Actions
Atricks, Petey <b>A</b>	Fw: Keep our Correction O...	Feb 27, 2018	training1@nysenate.gov	Process Clear Delete
Jacket, Gene <b>A</b>	Fw: Library Material Aid	Feb 27, 2018	training1@nysenate.gov	Process Clear Delete

This screen displays the following information and options:

**Number of days** (to the right of Matched Messages): the number of days box will display only those messages that were forwarded into Bluebird within the time frame selected.

**Search box** (Upper right): This box will help you find specific emails quickly. (You can also sort on any of the columns, except for Actions, simply by clicking on the name of the column.)

**Icon:** Lets you know if this is an individual contact or an organization

**Sender's Info:** Displays the name of the original sender

- If there is an **A** next to the name it means Bluebird "automatically" found a matching record.
- If there is an **M** next to the name it means that this was a "manual" match. Meaning it started off at the Unmatched screen and was processed by a staff member and then moved to the Matched Area.

**Subject:** Displays the original subject

**Attachments column:** An icon of a pushpin will appear if the message has an attachment. You can view the attachments on the Activity screen.

**Date Forwarded:** The date the message was forwarded into Bluebird

**Forwarded By:** The IBM Notes Account the email was forwarded from (i.e. Senator's or staff member.)

**Process:** Use this option to:

- Reassign an activity to a different Contact record
- Add Tag(s) to a Contact record and/or an Activity
- Update the status of an Activity or to assign it to a staff person

**Clear:** Use this option to remove the emails that you have processed from the Matched Messages screen. **Removing messages makes it easier to see the messages that still need to be reviewed.**

**Delete:** Use this option when you want to delete any Inbound Email Activities that have already been processed in Bluebird.

Note: Once a message appears on the Matched Message screen an Activity type of Inbound Email has already been created within the contact's record.

Mr. Nick Knack

Actions Edit

+ New Activity

Filter by Activity

Include: - all activity type(s) Exclude: - select activity typ Date: - any - Status: - any -

Show 25 entries

First Previous 1 Next Last

Type	Subject	Added By	With	Assigned	Date	Status	
Inbound Email	Fw: Help Us Fix New York's Broken Budget	Training1, Senator	Knack, Nick	Grimaldi, Roseanna C.;	September 11th, 2017 3:52 PM	Scheduled	View Edit more ▶
Letter (outgoing)		class5@nysenate.gov	Knack, Nick	n/a	September 6th, 2017 3:20 PM	Scheduled	View Edit more ▶
Inbound Email	Fw: Help Us Fix New York's Broken Budget	Training1, Senator	Knack, Nick	n/a	September 6th, 2017 1:20 PM	Completed	View Edit more ▶

# Reassigning an Activity to another Contact

If a message was matched to the wrong contact record you can take steps to remove the Activity from the wrong record and reassign it to the correct record.

**Process**

Reassign Contact | Tag Contact | Add to Group(s) | Tag Activity | Edit Activity

Select Assignee: - none -

Current Match: Mr. Petey Atricks

Email: senatebluebird11@gmail.c

**Petey Atricks: Fw: Keep our Correction Officers on the job!**

**From:** Petey Atricks (senatebluebird11@gmail.com)  
**Subject:** Fw: Keep our Correction Officers on the job!  
**Forwarded By:** training1@nysenate.gov  
**Forwarded Date:** 02/27/2018  
**Matched To:** Mr. Petey Atricks

----- Forwarded by Kaitlin Wilson/senate on 2/27/2018 5:20:05 PM -----

**From:** Petey Atricks senatebluebird11@gmail.com  
**To:** training4@nysenate.gov  
**Date:** 6/10/2013 3:37:16 PM  
**Subject:** Keep our Correction Officers on the job!

Petey Atricks

130 Inside Drive

Update Update and Clear Clear Cancel

1. From the Matched Messages screen, click **Process** across from the email that needs to be reassigned.
2. Make sure the **Reassign Contact tab** is selected on the right. (Under the **search button** you will see who the email is *currently matched to*.)
3. Click the **Find Contact** tab and type in (or Auto-fill in) the **First Name** and **Last Name** fields.
4. Click **Search**.
5. Under the results area, select the correct record(s) by **clicking the check box(es)**.
6. If no matching record is found, click the **Add Contact tab** and fill in the desired information.
7. When done, click **Update & Clear** to move this activity to the new contact record and to remove it from the Matched Messages screen.

## Adding Tags

You can add Tags to a single email or to multiple emails from the Matched Messages screen.

- If adding Tags to an individual email, click **Process** across from the email that you want to add the tag to and then click the **Tag tab**.
- If adding to multiple emails, select the boxes to the left of the **desired emails** and then click the **Process button** at the bottom of the screen or above the Search box.

You can add tags to the contact record (**Tag Contact**) and the activity (**Tag Activity**) from within the Process screen.

1. Click either the **Tag Contact** or **Tag Activity** tab.
  - Click in the Keywords box and begin typing the **desired keyword**. (*a minimum of 3 characters* need to be entered before a list of existing Keywords will appear. If the Keyword you are entering does not exist, the list will only display what you typed.) Click the **desired keyword** from the dropdown list.
  - Select the desired Issue Code(s) - (Tag Contact only)
  - Type the **desired Position** - (**Tag Contact only**)
2. When done, click **Update & Clear** to move this activity to the new contact record and to remove it from the Matched Messages screen.

## Clearing Messages from Matched Messages

Email messages will remain on the Matched Messages screen until you clear them. (This does not affect the Activity; it only removes the emails from the Matched Messages screen.) **Removing messages makes it easier to see the messages that still need to be reviewed.**

You can clear a single email or multiple emails

- If clearing a single email, click **Clear** across from the email that you want to remove. When the prompt appears, click **Clear**.
- If clearing multiple emails, select the boxes to the left of the **desired emails** and then click the **Clear button** at the bottom of the screen or above the Search box. When the prompt appears, click **Clear**.

## Deleting Messages from Matched Messages

Use this option if you do not want to have this email in Bluebird. This option will delete the Activity that was added to the contact's record and the email will be removed from the matched message screen.

You can delete a single email or multiple emails.

- If deleting a single email, click **Delete** across from the email that you want to remove. When the prompt appears, click **Delete**.
- If deleting multiple emails, select the boxes to the left of the **desired emails** and then click the **Delete button** at the bottom of the screen or above the Search box. When the prompt appears, click **Delete**.

# Reports

The Inbox Report show the statistics of the emails that have been forwarded into Bluebird from IBM Notes.

**Number of days** (to the right of Inbox Report): the number of days box will display only those messages that were edited within the time frame selected.

**Header option:** You can click on any of the options in the header area to display only those messages.

**Search:** You can narrow down the selection by using the Search box in the upper right hand corner of the screen. For instance, if you only want to see the messages that were forwarded by a specific staff member or messages with a similar subject.

**Column headings:** You can sort the emails by any of the columns by clicking the heading.

Inbox Reports 

Last 30 days

Total 21

Unmatched 11

Matched 2

Cleared 0

Deleted 8

First

Previous

1

Next

Last

Show 

50

 entries

Showing 1 to 21 of 21 entries

Sender Info	Matched To	Subject	Last Edited	Date Sent	Status	Tags	Forwarded By
nysbbhelp@gmail.com		Fw: Restore \$2.8 million to NYSCA	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
nysbbhelp@gmail.com		Fw: Restore \$2.8 million to NYSCA	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
nysbbhelp@gmail.com		Fw: Restore \$2.8 million to NYSCA	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
Mr. Petey Atricks	Mr. Petey Atricks	Fw: Keep our Correction Officers on the ...	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
senatebluebird15@gmail.com		Fw: Please maintain funding for the EPF!	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
senatebluebird9@gmail.com		Fw: Help Us Fix New York's Broken B...	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
senatebluebird10@gmail.com		Fw: Circuit Breaker Bill	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...
senatebluebird13@gmail.com		Fw: Support SUNY's 2011 Budget Requ...	Feb 27 05:21 PM	Feb 27 05:20 PM			training1@nyse...