BLUEBIRD
Inbound Email

Constituent Relationship Management Software

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 IBM Notes or iNotes into Bluebird.

     o   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.

     o   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. Theses screens allow you to manage the incoming emails.

     o   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.

     o   This list can be different from the Authorized Forwarder list.

How does it work?

- Each Senator has been assigned a CRM (Constituent Relationships Management) email address (**crm.senatorsuserid@nysenate.gov).** The Senator's account and staff members who are listed in the Authorized Forwarder's group can forward email from IBM Notes to this address.

- 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 list 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 area you can add Tags to the Contact Record and/or Keywords to the Activity.

- Once you are done with an email message clear it from the list so you can see what you have left to process.

Forwarding Emails into Bluebird

There are several methods that authorized forwarders can use to send emails into Bluebird.

- Through **IBM Notes**:

    - If a Senator's staff member HAS delegation access to the Senator's email (opens an additional tab within the staff member's email account) then the staff member WILL be able to use the Forward to Bluebird agent (see section titled **Forwarding Bulk Messages using the IBM Notes agent**).

    - If a Senator's staff member DOES NOT have delegation access to the Senator's email account, then the staff member will have to forward in email individually using the normal Forward option within their email account (see section titled **Forward Individual Messages**).

    - The Senator's staff member also has the option of signing into IBM Notes as the Senator and using either option of using the agent or individual forwarding to send email messages into Bluebird.

- Through **iNotes**:

    - No matter if you have delegation access or not, if the staff member is sending email into Bluebird through iNotes the only option available is through individually forwarding email.

Forwarding Individual Messages

1. From IBM Notes or iNotes, **select** or **open the individual message** that you want to forward.

2. Click **Forward** on the menu bar.

3. In the **To**: field, type the **CRM address for your Senator** (**crm.senatorsuserid@nysenate.gov**)

4. Click **Send**.

Forwarding Bulk Messages using the IBM Notes Agent

1. Select the **messages** you want to send.

2. Once the messages are selected, click **Actions** on the menu bar in the upper left hand corner of the screen.

3. Click **Forward to Bluebird** to run the Agent.

   If you do not see this option, make sure your contact record in Bluebird is in the Authorized Forwarders group AND that the Senator's contact record in Bluebird is in the Authorized Forwarders group AND that you have delegation access to the Senator's email if you are not signing in as him. If all three of these are correct and you still do not see the option call the **STS Helpline at extension 2011**.
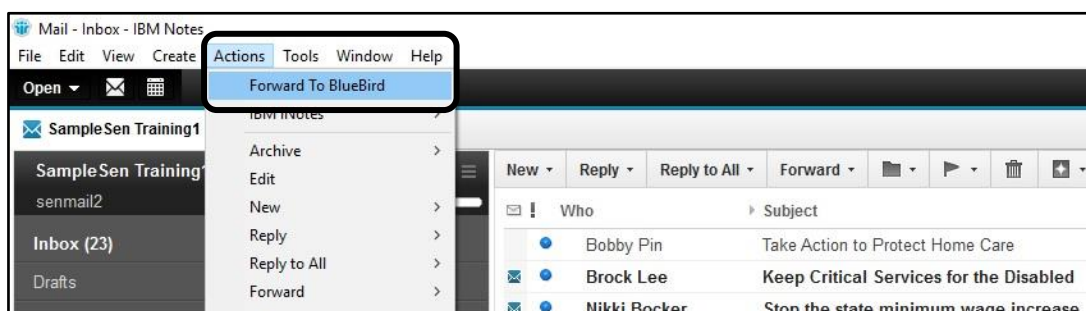

4. A message box will appear letting you know how many emails were successfully sent.

5. Click **OK**.

6. The emails that were sent to Bluebird will be marked with a blue circle to the left of the *Who* column. (This way you will know what emails were processed.)
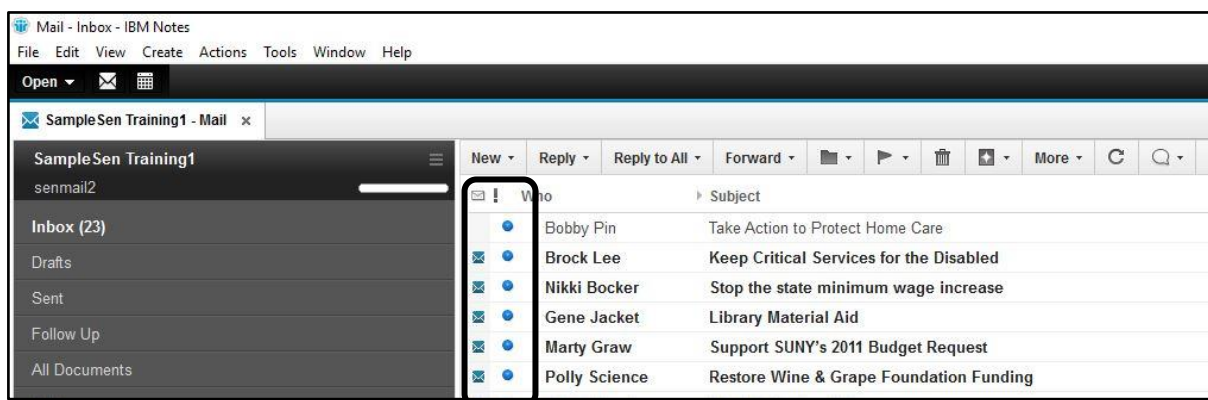
Sent to Bluebird View in IBM Notes

There is also a new view available in the Senator's IBM Notes account named *Sent to Bluebird*.

1. In the navigation pane, click the **plus sign** in front of Views to display the Sent to Bluebird View option.
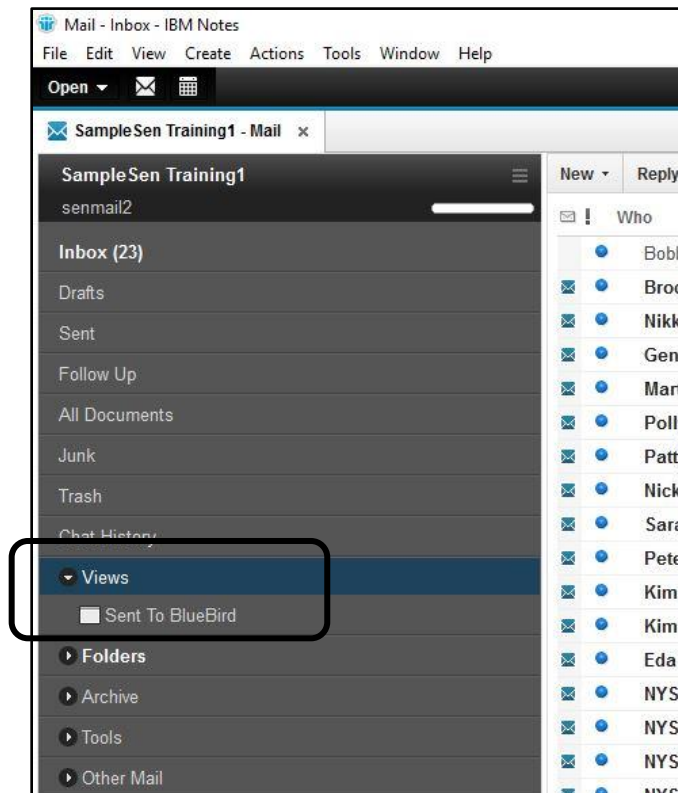
2. Click the **Sent to Bluebird** option to see all of the messages that have been forwarded to Bluebird.

3. When done with this view, click **Inbox** in the navigation pane to return to the IBM Notes Inbox.

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**.
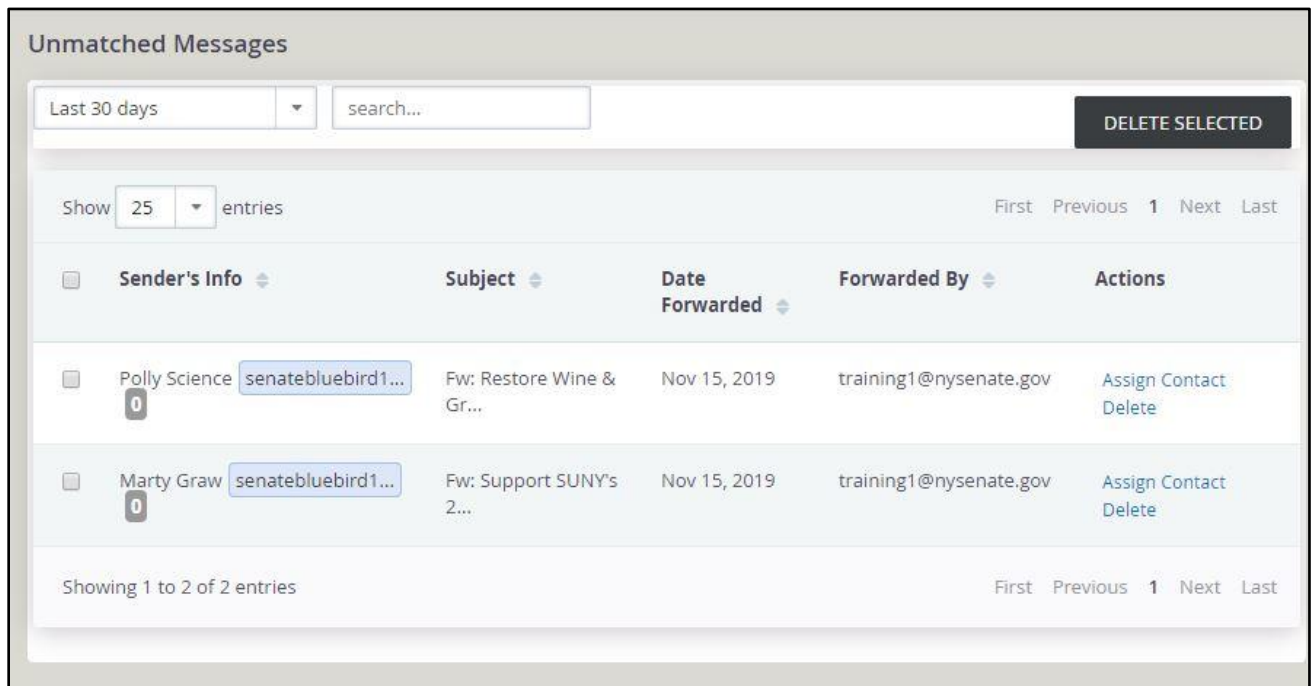
This screen displays the following information and options:

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.

1. Click **Assign Contact** across from the email that you want to match.

2. Click in the **Matched Contacts** box and type the name of the record. If no records are listed, this means the record is not in the system. You can add a record by clicking on the New Individual link. If a name appears, this means they are already in Bluebird, in which case you most likely only have to assign the email address to that record.

3. The New Individual screen will appear which will allow you to add information about the constituent, such as First and Last name, address, and date of birth. Clicking any of these highlighted fields on the right will automatically populate that information into the corresponding fields on the left side of the screen. Click **Save**. The screen will refresh and the matched contacts should now appear in the Matched Contacts box.

4. If multiple existing contacts are found, Bluebird will automatically add them into the Matched Contacts box. If you need to remove any of these contacts, click on the **X** next to their name.

5. If necessary, add the email address for the contact record(s) if it is not already filled in.

6. Click **Assign Matched Contact** once all of the information is filled in. This will add the record to Bluebird and assign them an email address as long as one was provided.

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 Message**.

- 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 **Continue**.

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.

Click the **Inbox** menu off of the main navigation menu, and then click **Matched Messages**.

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.)

Matched 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 line of the email.

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

Last Updated: The date the message was last touched within Bluebird by staff.

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

Process: Use this option to:

- o Reassign an activity to a different contact record

- o Add tag(s) to a contact record and/or an activity

- o Add the contact record to a group (i.e. for a future mass email)

- o 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.

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.

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.

3. Click the **Select Assignee** box and type in (or Auto-fill in) the **Last Name** of the record you want to reassign the inbound email activity to. This is an autofill box, once the name appears, **click on it.**

4. If no matching record is found, click the **New Individual** and fill in the desired information. Click **Save**.

5. When done, click **Update** to refresh the screen with the reassigned record.

6. Once the new name appears next to the email, you may continue to **process** the email in the normal fashion.

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 Contact** or **Tag Activity** based on what you would like to do.

- 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.

- When done, click **Update & Clear** 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.

- 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 **Continue**.

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 **Continue**.
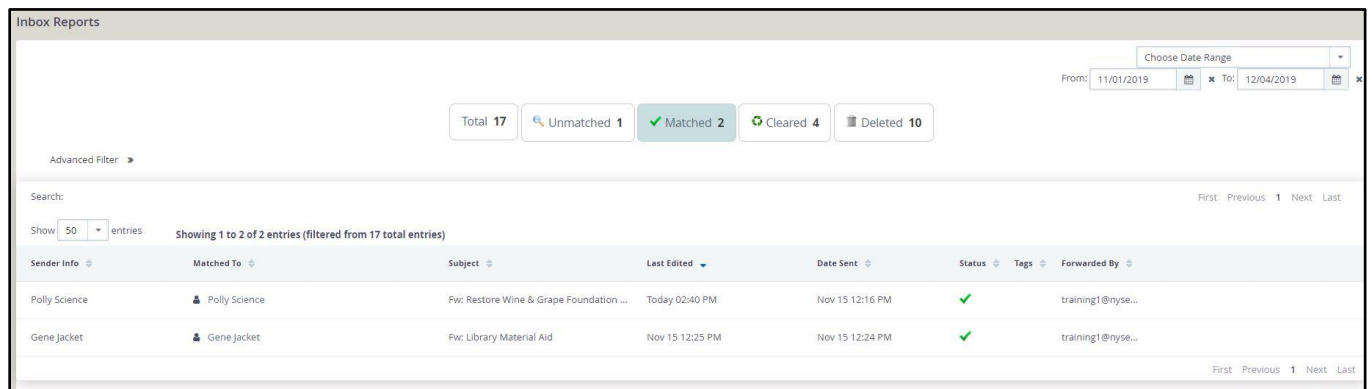
Reports

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.

Sender Info	Matched To	Subject	Last Edited	Date Sent	Status	Tags	Forwarded By
Polly Science	Polly Science	Fw: Restore Wine & Grape Foundation ...	Today 02:40 PM	Nov 15 12:16 PM	✔		training1@nyse...
Gene Jacket	Gene Jacket	Fw: Library Material Aid	Nov 15 12:25 PM	Nov 15 12:24 PM	✔		training1@nyse...

Inbox Reports — Total 17, Unmatched 1, Matched 2, Cleared 4, Deleted 10. Showing 1 to 2 of 2 entries (filtered from 17 total entries).