



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 Senators Outlook email into Bluebird. Emails can be forwarded one a time or in bulk. Once forwarded these emails will then be accessible in bluebird.

Inbound Email Role

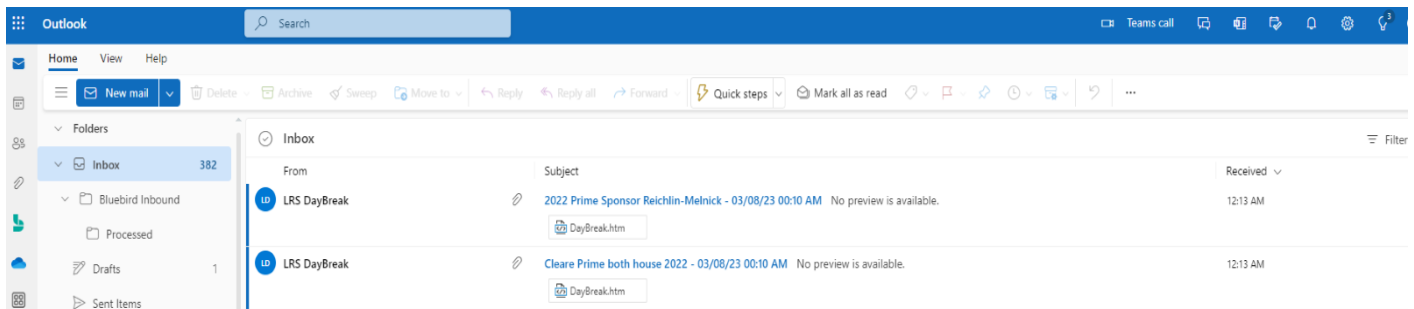
- **Manage Bluebird Inbox:** Allows someone access to the Inbox menu within Bluebird. This menu has links to the Matched and Unmatched screens along with the Reports screen. These screens allow you to manage the incoming emails.
 - This role works in conjunction with current Bluebird roles (i.e. Office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

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 Outlook, 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.

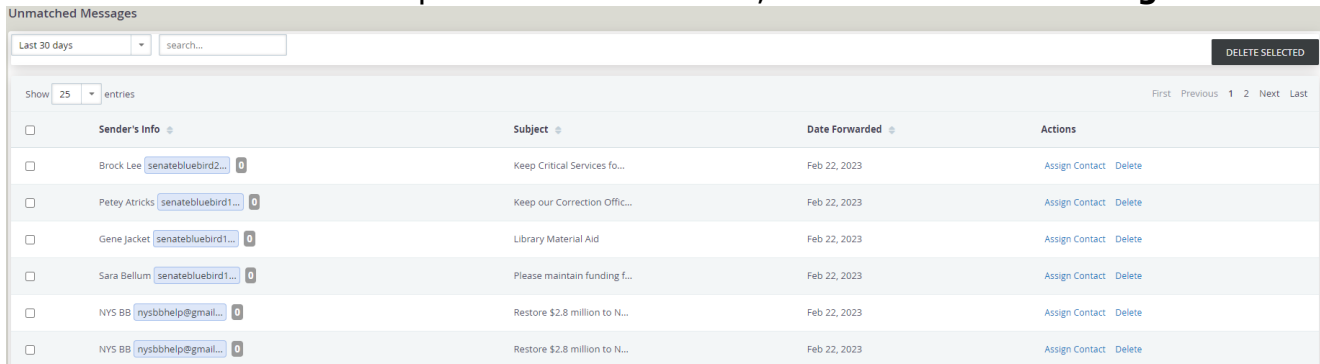
Note: Once you "matched" a record from the unmatched screen, the email then moves over the Matched Messages list to be processed.

- **Matched 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**.



The screenshot shows the 'Unmatched Messages' interface. At the top, there is a filter dropdown set to 'Last 30 days' and a search box. A 'DELETE SELECTED' button is in the top right. Below the filter is a 'Show 25 entries' indicator and pagination links (First, Previous, 1, 2, Next, Last). The main table has four columns: 'Sender's Info', 'Subject', 'Date Forwarded', and 'Actions'. Each row includes a checkbox, the sender's name and email (with a record count icon), the subject line, the date forwarded, and 'Assign Contact' and 'Delete' links.

<input type="checkbox"/>	Sender's Info	Subject	Date Forwarded	Actions
<input type="checkbox"/>	Brock Lee senatebluebird2... 0	Keep Critical Services fo...	Feb 22, 2023	Assign Contact Delete
<input type="checkbox"/>	Petey Atricks senatebluebird1... 0	Keep our Correction Offic...	Feb 22, 2023	Assign Contact Delete
<input type="checkbox"/>	Gene Jacket senatebluebird1... 0	Library Material Aid	Feb 22, 2023	Assign Contact Delete
<input type="checkbox"/>	Sara Bellum senatebluebird1... 0	Please maintain funding f...	Feb 22, 2023	Assign Contact Delete
<input type="checkbox"/>	NYS BB nysbbhelp@gmail... 0	Restore \$2.8 million to N...	Feb 22, 2023	Assign Contact Delete
<input type="checkbox"/>	NYS BB nysbbhelp@gmail... 0	Restore \$2.8 million to N...	Feb 22, 2023	Assign Contact Delete

This screen displays the following information and options:

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

Search box (Upper left): 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.

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.

Assign Matched Contacts

Match message to existing or new contact.

Match Contacts *

Message Details

From: Brock Lee (senatebluebird2@gmail.com)
Subject: Keep Critical Services for the Disabled
Email Date: 06/10/2013
Forwarded By:
Forwarded Date: 02/22/2023

Brock Lee

210 Case Lane

Troy, NY 12180

Assign Matched Contacts

Match message to existing or new contact.

Match Contacts *

Message Details

From: Lee, Brock
senatebluebird2@gmail.com
12180
210 Case Lane Troy

senatebluebird2@gmail.com 12180 210 Case Lane Troy

Subject: Keep Critical Services for the Disabled
Email Date: 06/10/2013
Forwarded By:
Forwarded Date: 02/22/2023

Brock Lee

210 Case Lane

Troy, NY 12180

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

New Individual

Prefix

First Name

Middle Name

Last Name

Suffix

Birth Date

Email Address

Phone (Home)

Street Address

City

State

Postal Code

Birth Date

State

SAVE

CANCEL

Message Details

From: Petey Atricks (senatebluebird11@gmail.com)

Subject: Keep our Correction Officers on the job!

Email Date: 06/10/2013

Forwarded By:

Forwarded Date: 02/22/2023

Date:

Petey Atricks

130 Inside Drive

Lake Placid, NY 12946

Senatebluebird11@gmail.com

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.

Assign Matched Contacts

Match message to existing or new contact.

Match Contacts *

Atricks, Petey

Matched To:

Atricks, Petey

senatebluebird11@gmail.com

phone

Message Details

From: Petey Atricks (senatebluebird11@gmail.com)

Subject: Keep our Correction Officers on the job!

Email Date: 06/10/2013

Forwarded By:

Forwarded Date: 02/22/2023

Petey Atricks

130 Inside Drive

Lake Placid, NY 12946

Senatebluebird11@gmail.com

CANCEL

ASSIGN MATCHED CONTACT

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**.

Matched Messages

Last 30 days search...

PROCESS CLEAR DELETE

Show 25 entries First Previous 1 Next Last

	Sender Info	Subject	Last Updated	Actions
<input type="checkbox"/>	Lee, Brock M	Keep Critical Services fo...	Mar 08, 2023	Process Clear Delete
<input type="checkbox"/>	Graw, Marty A	=?Windows-1252?Q?Support_...	Feb 22, 2023	Process Clear Delete
<input type="checkbox"/>	Whack, Patty A	Circuit Breaker Bill	Feb 22, 2023	Process Clear Delete

Showing 1 to 3 of 3 entries First Previous 1 Next Last

Number of days: the number of days box will display only those messages that were forwarded into Bluebird within the time frame selected.

Search box: 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

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.

Nick Knack

1010 Cable Street, Ballston Spa, NY 12020
| snatebluebird9@gmail.com | Contact ID: 4384

ACTIONS

EDIT

LAYOUT: DEFAULT: INDIVIDUAL

Summary

+ New Activity

Activities

1

Cases

0

Mailings

0

Relationships

0

Groups

0

Notes

0

Tags

0

Website Profile

Website Activity

Website Tags

Change Log

5

Filter by Activity

Include

- all activity type(s) -

Exclude

- no types excluded -

Date

- any -

Status

- any -

Show

25

entries

First

Previous

1

Next

Last

Type	Subject	Added By	With	Assigned	Date	Status
Inbound Email	=?Windows-1252?Q?Help_Us_Fix_New_York=92s_Broken_Budget?=@	Administrator, Bluebird	Knack, Nick	n/a	June 10th, 2013 12:00 AM	Completed

Showing 1 to 1 of 1 entries

First

Previous

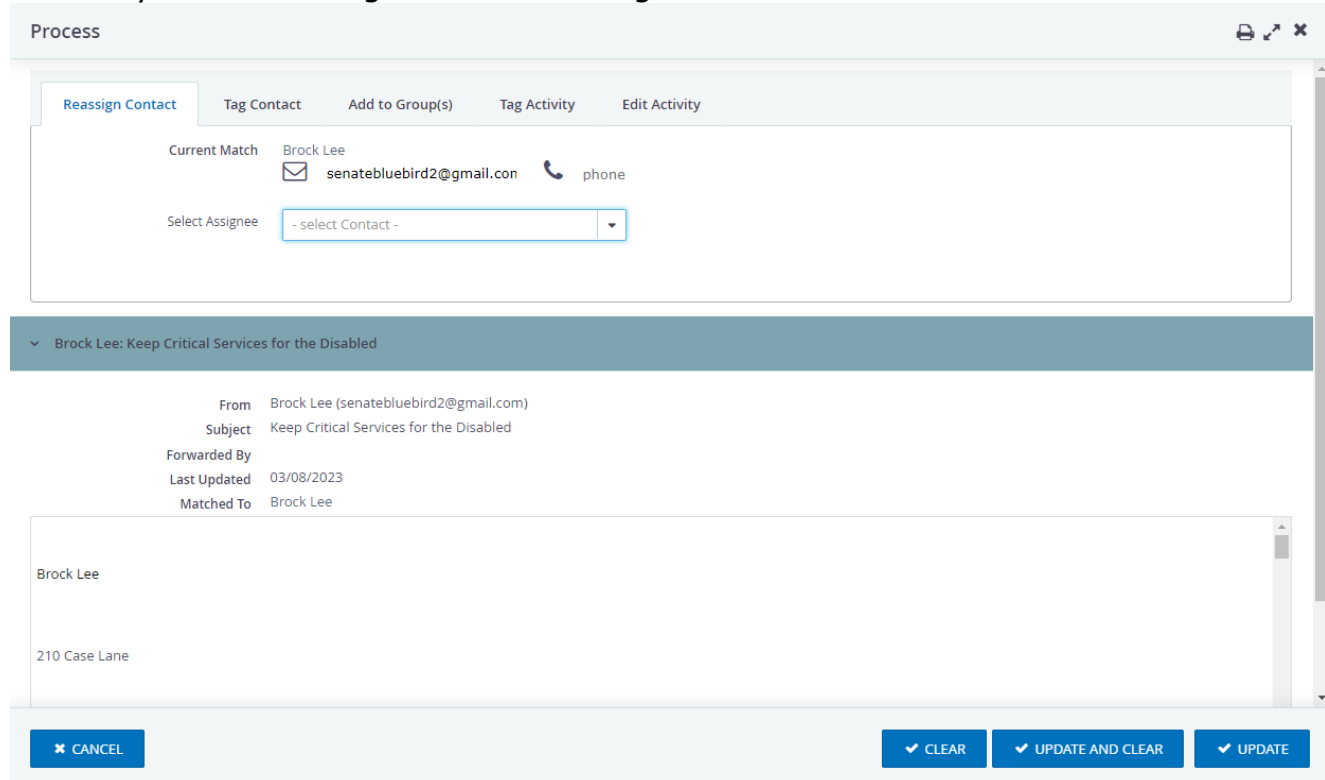
1

Next

Last

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 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 Outlook

Date Range (top right corner): 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.

Advanced Filters: You can narrow down the selection by a specific column and terms.

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

Inbox Reports							
				- any -			
Total 4074				Unmatched 88	Matched 34	Cleared 1037	Deleted 2915
Advanced Filter							
Search:							
First Previous 1 2 3 4 5 ... 82 Next Last							
Show 50 entries Showing 1 to 50 of 4,074 entries							
Sender Info	Matched To	Subject	Last Edited	Date Sent	Status	Tags	Forwarded By
Brock Lee	Brock Lee	Keep Critical Services for the Disabled	Today 09:00 AM	Jun 10, 2013	✓		N/A
Marty Graw	Marty Graw	=?Windows-1252?Q?Support_SUNY=92s_2011_B...	Feb 22 11:06 PM	Jun 10, 2013	✓		N/A
Patty Whack	Patty Whack	Circuit Breaker Bill	Feb 22 11:06 PM	Jun 10, 2013	✓		N/A
Nick Knack	Nick Knack	=?Windows-1252?Q?Help_US_Fix_New_York=92...	Feb 22 02:57 PM	Jun 10, 2013	✗		N/A
Ms. Julie Mac Murdo	Ms. Julie Mac Murdo	Restore \$2.8 million to NYSCA	Feb 22 02:57 PM	May 20, 2013	✓		N/A
Mrs. Tamara Hicks	Mrs. Tamara Hicks	Restore \$2.8 million to NYSCA	Feb 22 02:57 PM	May 20, 2013	✓		N/A
Marty Graw	Marty Graw	=?Windows-1252?Q?Support_SUNY=92s_2011_B...	Feb 22 02:55 PM	Jun 10, 2013	✓		N/A