

SYNAMETRICS TECHNOLOGIES

Synametric Mail Junction

Mail Junction User's Guide

SYNAMETRICS TECHNOLOGIES, INC

Mail Junction User's Guide

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Introduction

Consolidate, Collaborate, Communicate

Mail Junction is an email management tool providing a single point of access to emails within an enterprise. It is a tool for organizing, distributing, and filtering incoming email messages and accurately and efficiently responding to them in a timely fashion.

Mail Junction allows you to monitor unlimited number of email accounts. Typically, you would let Mail Junction manage accounts that are shared by multiple individuals in your company, for example sales, support, marketing, etc. This provides a centralized mechanism to view, reply, and search messages sent to such accounts. In Mail Junction's speak such accounts are called "Managed Accounts".

With Mail Junction you can:

- ★ Consolidate – Gather emails to a central repository
- ★ Collaborate – Efficiently collaborate with clients and partners
- ★ Communicate – Track a complete thread of communication

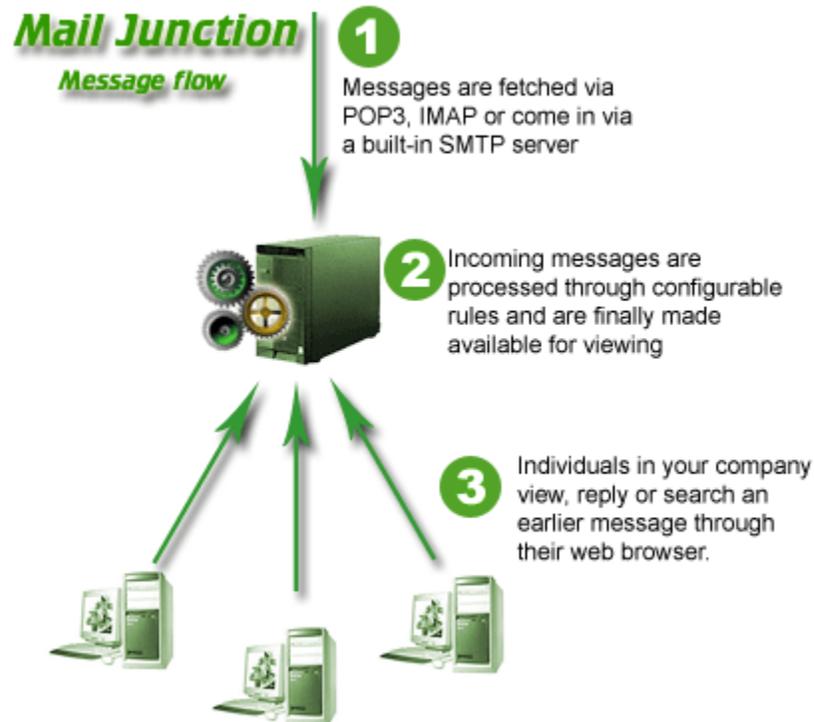
Message Flow

The following section explains how messages are handled by Mail Junction.

- ★ You decide which email addresses should be treated as managed accounts, for example sales@yourcompany.com and support@yourcompany.com
- ★ For every managed account you create a "Profile" in Mail Junction
- ★ Messages can be received from multiple channels, such as POP3, IMAP or SMTP

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- ★ Every message that is received by Mail Junction is first processed by customizable rules that can send auto-replies, delete or assign messages to users.



System Requirements

Mail Junction can be installed on any machine that meets the following criteria.

Operating System: Mail Junction can be installed on any of the following OS

- Windows NT 4
- Windows 2000
- Windows XP
- Windows 2003 and later
- Linux
- UNIX (Solaris, HP-UX, AIX and others)

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- Mac OS X
- BSD

Memory: 256 MB (512 MB recommended)

Hard Disk: 50 MB for installation

Approximately 1 GB for message storage. This can grow depending upon your incoming message rate

Installation

Mail Junction can be installed on several operating systems. Follow the section below that matches your operating environment.

Microsoft Windows

1. To install Mail Junction double-click the setup.exe that you downloaded from Synametrics' website
2. Follow the instruction on the screen to install the program

**YOU DO NOT
HAVE TO
REBOOT THE
MACHINE
AFTER
INSTALLATION**

Once the installation is over, a new Service called Mail Junction will be added to your Windows environment. This service will automatically be started towards the end of the installation process.

Note: All files for Mail Junction are installed in the directory that you chose during installation. Necessary changes are made to Windows Registry so that it can run Mail Junction as a service. Besides this, no other Registry change is made by the Installation and no DLLs are copied to your Windows System folder.

Unix and Linux

The following instruction apply for all distributions of Linux and UNIX operating system as well as Mac OS X

1. Login as "root"
2. Extract the installation script from the TAR file using the following command
tar -xf MailJunctionXXX.tar – here XXX stands for your OS

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3. Run the install.sh script. You might have to change the permission of this script to executable using the following command.
chmod +x install.sh
4. Select a folder where the files will be installed

Once the installation is over necessary files will be copied to /etc/init.d directory that will start Mail Junction when machine boots up. All other files will be copied to the location that you chose during setup.

Stopping and Starting Mail Junction

Windows

1. Open Windows Control Panel
2. Click on Administration Tools
3. Click on Services
4. Locate Mail Junction and change the running mode

Linux and UNIX

Use the following command to start

```
/etc/init.d/mailjunction start
```

To stop the service use

```
/etc/init.d/mailjunction stop
```

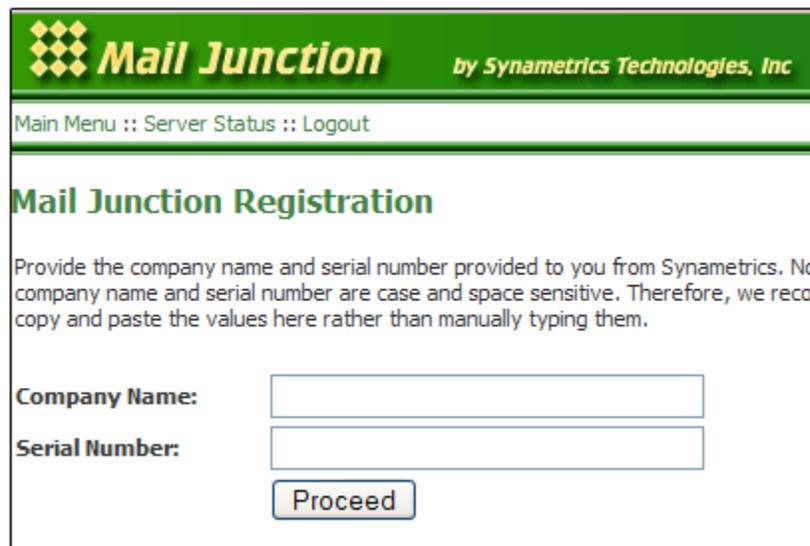
Configuration

Mail Junctions comes with a built-in web server that, by default, listens on port 9500. After installation you can use any browser, running either on the same machine where Mail Junction is installed or any other machine, to connect to Mail Junctions.

Connecting from a browser

Assume Mail Junction is running on a machine whose IP Address is 192.168.1.10. Type the following URL in your browser.

http://192.168.1.10:9500



The screenshot shows the Mail Junction web interface. At the top is a green header with the Mail Junction logo and the text "by Synametrics Technologies, Inc". Below the header is a navigation bar with links for "Main Menu", "Server Status", and "Logout". The main content area is titled "Mail Junction Registration" and contains a registration form. The form includes two text input fields labeled "Company Name:" and "Serial Number:", and a "Proceed" button. A note above the form states: "Provide the company name and serial number provided to you from Synametrics. Note that company name and serial number are case and space sensitive. Therefore, we recommend you copy and paste the values here rather than manually typing them."

Mail Junction will prompt you for registration information the first time you try to connect through a browser. This registration process includes Company Name and Serial Number, which is sent to you via email when you purchase or download the product for trial use.

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Once registration is successfully completed you will come to the main menu, which is shown in the image below.



Logging in

The login screen is displayed the first time you establish connection with Mail Junction. There are two types of users in Mail Junction

- Administrators
- Normal Users

The type of user is determined from the user id used to log in. In order to log in as an administrator, you must use “admin” as the login ID. The default password for the admin account is “letmein”. We strongly recommend that you change this password after signing in the first time.

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Default user id and password for the admin account:

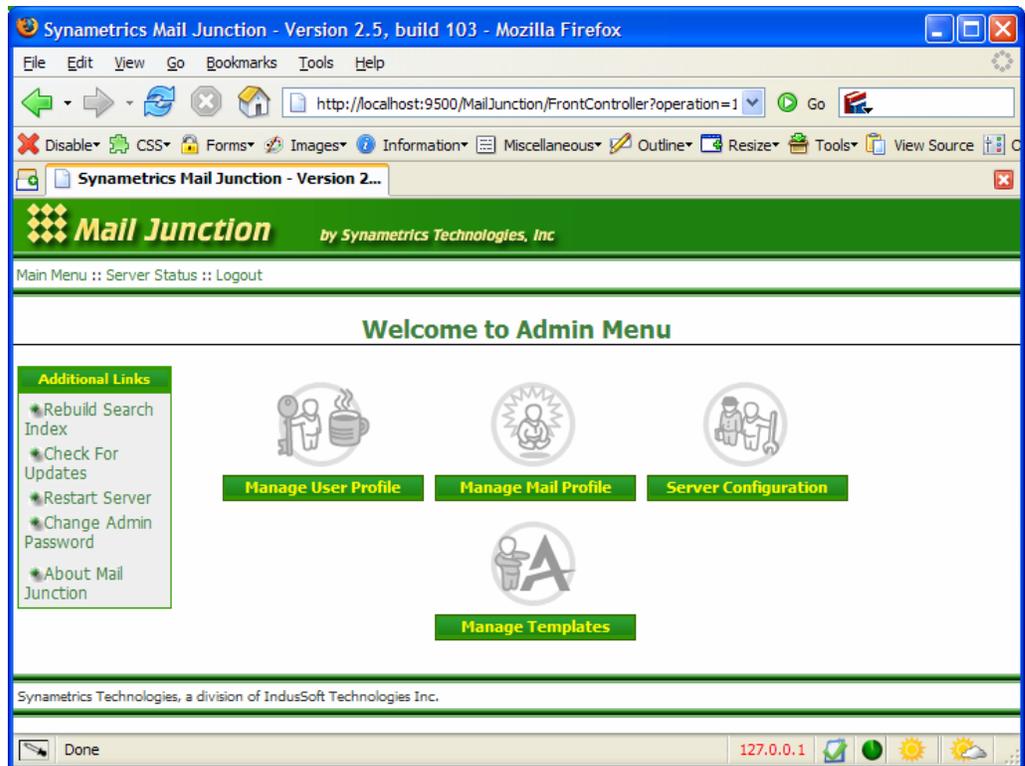
User ID: admin

Password: letmein

Once logged in as an administrator, you can create accounts for normal users.

Main Menu

Following screens show the main menu screen. This is used as a front door to other options.



Preparing Mail Junction

Mail Junction connects to your corporate email server to fetch messages. Therefore, you need to create user accounts on your corporate email server for connection purposes.

Let us say you want to monitor the “sales” account. Use the following steps to create an account on your email server.

1. Create a new account using “mjsales” as a user id
2. Forward all messages received to “sales” to “mjsales”. Refer to the documentation for your email server on how to forward messages to a different account.

Profiles

Profiles in Mail Junction hold information about Users and Mail Accounts. There are two types of Profiles

- ★ Mail Profile
- ★ User Profile

Mail Profile

Mail Profile, as the name suggests, holds information related to an email account. Typically you would create one mail profile for every email account you want to manage. For example, you can create profiles for sales, support, marketing and other accounts which are usually handled by multiple people in your company. Consider the following scenario.

Five individuals, Mary, John, Michael, Jenny and Mark, in your company handle all emails sent to sales@yourcompany.com. In a typical email system all five individual would get the message in their INBOX. If John sends a reply back to the original sender, he has to notify other members on the team either manually, or CCing them on the reply, which could be tedious and error prone. Any other member can potentially reply to the sender not realizing that Mark has already sent a reply. Mail Junction provides a consolidated view of all emails that come to the sales account. When somebody replies everyone will know right away that a reply has been made.

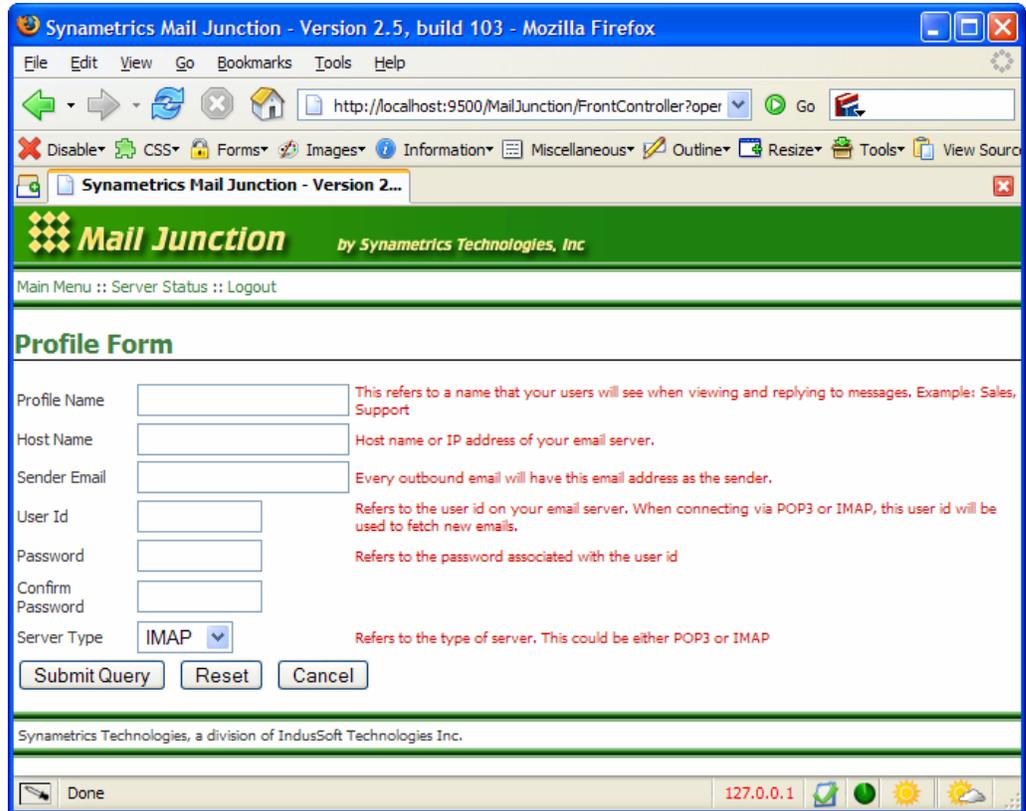
Mail Junction can connect to your corporate POP3 or IMAP server to fetch emails.

There is no limit on how many profiles you create in Mail Junction

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Adding new Mail Profile

To add a new profile click on Mail Menu → Manage Mail Profiles → Add New Profile, this brings up the following screen.



The screenshot shows a web browser window titled "Synametrics Mail Junction - Version 2.5, build 103 - Mozilla Firefox". The address bar shows "http://localhost:9500/MailJunction/FrontController?oper". The page header includes the "Mail Junction" logo and "by Synametrics Technologies, Inc". Below the header is a navigation menu with "Main Menu :: Server Status :: Logout". The main content area is titled "Profile Form" and contains the following fields and descriptions:

- Profile Name:** This refers to a name that your users will see when viewing and replying to messages. Example: Sales, Support
- Host Name:** Host name or IP address of your email server.
- Sender Email:** Every outbound email will have this email address as the sender.
- User Id:** Refers to the user id on your email server. When connecting via POP3 or IMAP, this user id will be used to fetch new emails.
- Password:** Refers to the password associated with the user id
- Confirm Password:** (No description provided)
- Server Type:** IMAP (selected). Refers to the type of server. This could be either POP3 or IMAP

At the bottom of the form are three buttons: "Submit Query", "Reset", and "Cancel". The footer of the page reads "Synametrics Technologies, a division of IndusSoft Technologies Inc." The browser status bar shows "Done" and the IP address "127.0.0.1".

Fields on this screen are described in the table below.

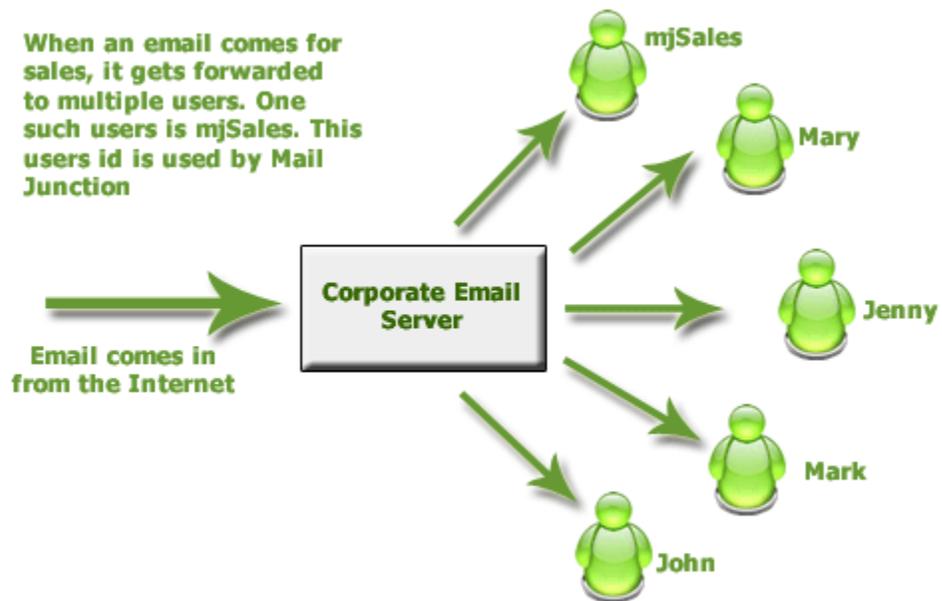
Fields	Description
Profile Name	This refers to a name that your users will see when viewing and replying to messages. Example: Sales, Support, etc.
Host Name	Host name or IP address of your email server.
Sender Email	Every outbound email will have this email address as the sender. An example would be sales@yourcompany.com
User ID	Refers to the user id on your email server. When connecting via POP3 or IMAP, this user id will be used to fetch new emails.
Password	Refers to the password associated with user id

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Server Type	This could either be IMAP or POP3
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Configuring your email server for a Mail Profile

Mail Junction fetches email messages from your corporate email server. Let's assume you wish to manage your sales account through Mail Junction. Usually more than one employee in an organization receives emails for sales and to set this up administrators use the forwarding mechanism on their email server. We recommend that you use the same forwarding mechanism for Mail Junction. Therefore, create a user specifically for Mail Junction and forward all messages sent to sales to this user. Then, create a Mail Profile in Mail Junction that monitors this newly created account. The following image displays this concept visually.



Once your server is setup like this, you put mjSales as the user id in Mail Junction's Profile.

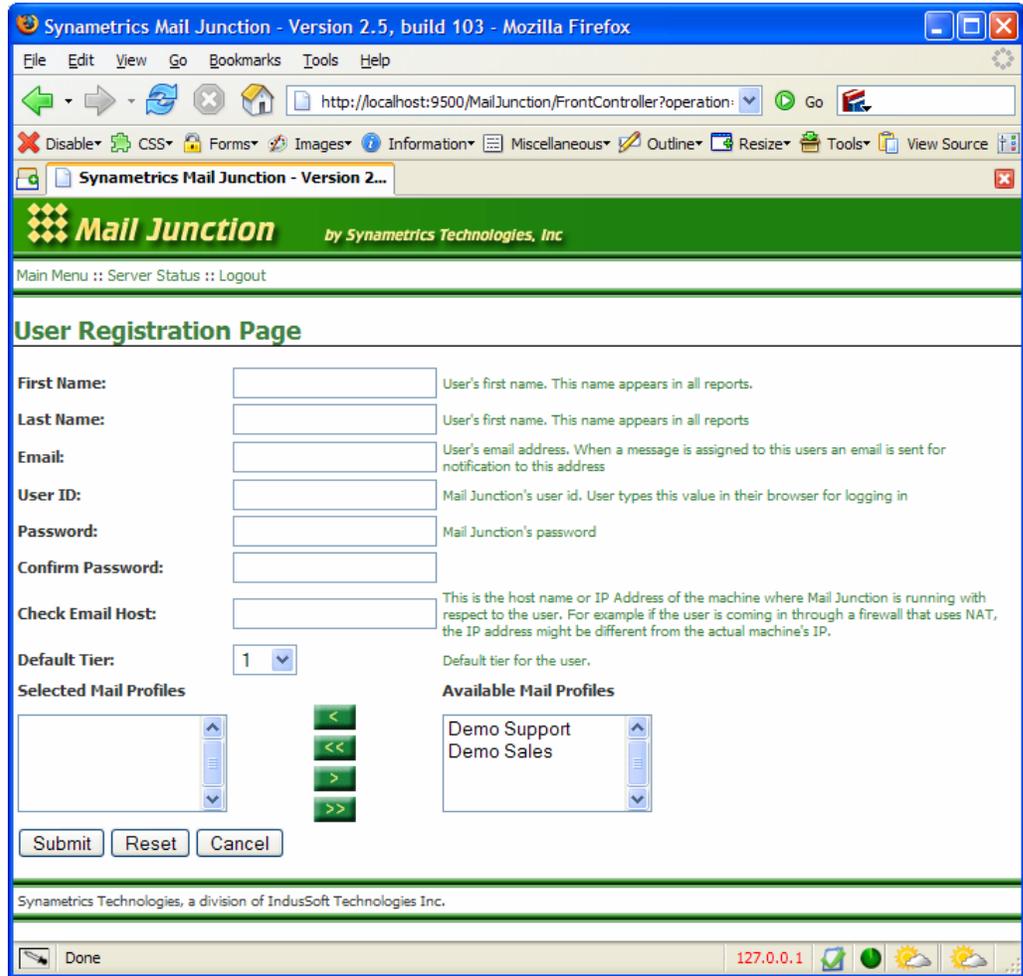
User Profile

User Profiles manages information about users in the system. Every user in Mail Junction is associated with a profile and holds information like user's name, email address and the user id/password combination for that user.

Adding New User Profile

To add a new user profile click on Main Menu → Manage User Profiles → Add New User. The screen looks like the image show below.

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Fields on this screen are described in the table below.

Fields	Description
First Name	User's first name
Last Name	User's last name
Email	User's email address. Mail Junction can send notifications to users. Notifications to this user will be sent to the address mentioned below.

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User ID	Mail Junction's user id. User types this value in Mail Junctions login screen
Password	Mail Junction's password. User types this value in Mail Junction login screen.
Check email host	This is the host name or IP address of the machine where Mail Junction is running with respect to the user. For example if the user is coming in through a firewall that uses NAT, the IP address might be different from the actual machine's IP.
Default tier	This is the default tier for a user. Refer to the description related to tiers below.
Selected mail profiles	This list box displays the mail profile that currently associated with this user. To associate mail profiles to a user profile, move the profile names from "available" list to "selected" list.

User Tiers

Tiers in User Profile are similar to levels. For example, you can divide your users into multiple groups. Let's call them tier 1, tier 2 and tier 3. By default every message is answered by tier 1 users. If for any reason it cannot be answered by those users, they can escalate the matter to tier 2.

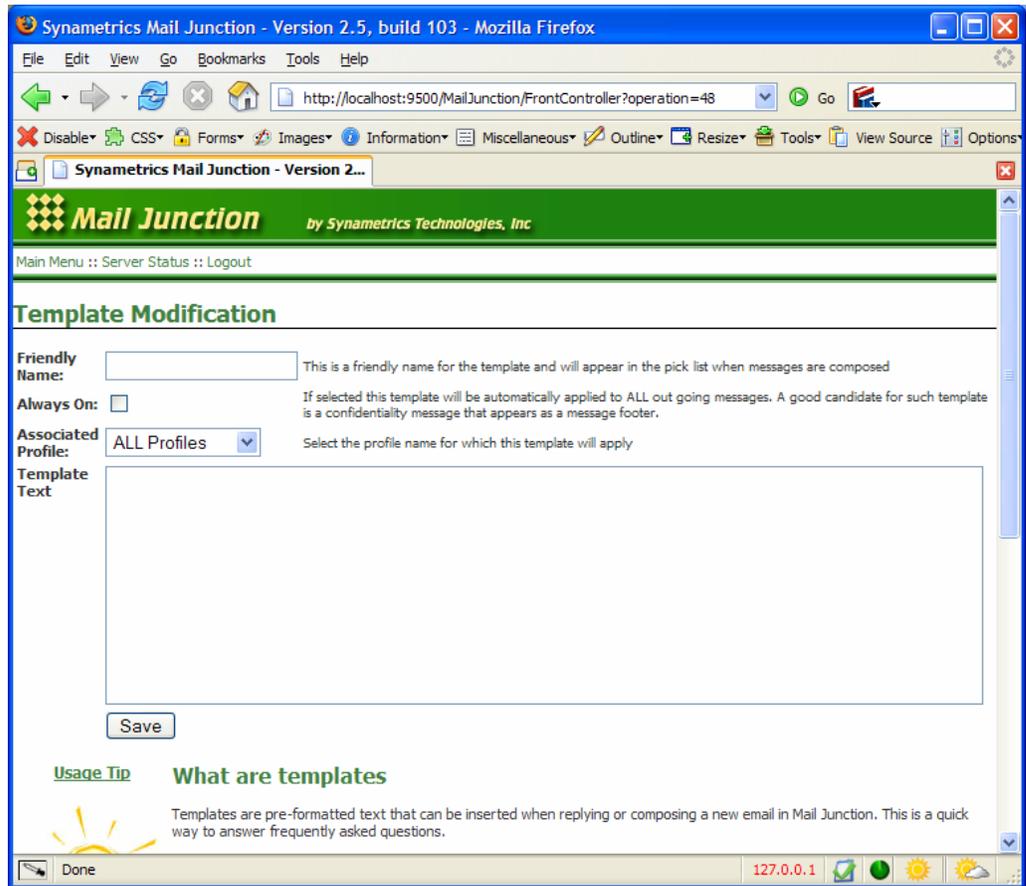
Templates

Templates are predetermined answers for commonly asked questions, such as product information and pricing. Users can quickly apply these templates to any outbound message instead of writing a message from scratch.

Adding Templates

To add a new template click Main Menu → Manage Templates → Add new template. The following image displays the screen for a new template.

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Fields on this screen are described in the table below.

Fields	Description
Friendly Name	This is a friendly name for the template and will appear in the pick list when messages are composed
Always On	If selected, this template will be automatically applied to ALL out going messages. A good candidate for such template is a confidentiality message that appears as message footer.
Associated Profile	Select the profile name for which this template will apply
Template Text	This is the text of the template. This text uses variables that get replaced at run time. Refer to the new template page for a description of these variables.

Message Filtering

Message filtering in Mail Junction provides a mechanism to intercept incoming messages, search content and take action based on some predefined rules. Using message filtering you can:

- ★ Block certain senders
- ★ Assign tickets to certain users within your company
- ★ Change the status of a message
- ★ Change the profile of a message

Email messages are typically divided into different parts such as Subject, Attachments, Body, Headers, etc. For example, you can look for attachments in the message and take appropriate action based on it. Below is a list of different filters available in the program.

- ★ Subject
- ★ Sender
- ★ Attachment
- ★ Body
- ★ Header

Filter Action

Every filter is associated with an action that defines what you want to do when a filter matches with an incoming message.

Adding Filter Rules

Follow the steps below to add a new filter.

1. Log into the admin console
2. Click on “Manage Mail Profiles”
3. Click “View/Edit” under the “Filter Rule” column for the desired profile

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4. Select the type of rule you wish to add and click “View/Edit”
5. Click “Add New Rule”. Follow instructions on the screen to complete the process.

Example Filter

Example 1

Let us say you need to delete every email where the subject line contains the word “Spam”. Follow the steps below to add such filter.

1. Click “View/Edit” next to subject filter and click “Add New Filter”
2. In the “Search For” field type “spam”
3. Select “No” for match case
4. Select the check box for “Change status to:”
5. Pick “Delete” from the drop down list box
6. Click “Create Rule” button.

Example 2

Let us say you need to assign a ticket to a particular user if the body of the message contains “Boston” or “New York” Follow the steps below to add such a filter.

1. Click “View/Edit” next to body filter and click “Add New Filter”
2. In the “Search For” field, type `(Boston|New York)`. This is value is specified in Regular Expression. Refer to our Synametrics website for more information about regular expressions.
3. Select the check box for “Assign ticket to”
4. Pick the desired user name from the list
5. Click “Create Rule” button.

Backup and Maintenance

Synametrics Mail Junction installs every file in the installation folder. No DLLs or configuration files are stored anywhere else. Making it very easy to backup, restore and move the files from one machine to another.

Following folders are created on the system under the directory where Mail Junction is installed.

config	All configuration files are stored in this folder.
msgRepository	This folder contains all messages received by the system
patches	This folder is used as a temporary download area when new files are downloaded to your system
reports	This folder holds data for reports. One file is created every day.
webfront	This folder holds files necessary for admin console
logs	Diagnostic log files are stored in this folder
lib	Runtime libraries are stored in this folder

Backup

Although we recommend that you backup the entire folder where Mail Junction is installed, if space becomes a problem we suggest you backup following directories at the very least.

- Config
- msgRepository
- reports

Moving the installation from one machine to another

If you are moving the installation to a machine running a compatible operating system, you do NOT have to go through the installation process again. Simply copy the entire folder for Mail Junction from the older machine to the newer machine and run the “InstallMailJunctionService.bat” script, which is used to start the program as Windows Service.

Examples 1

Moving the installation from a Windows NT 4.0 machine to Windows 2003.

1. Copy the entire folder for Mail Junction from the older machine to the new machine
2. Run “InstallMailJunctionService.bat”. This configures Mail Junction to run as Windows Service.

Example 2

Moving from a Windows machine to Linux

1. Install the program on Linux. A simple file copy through FTP will NOT work
2. After installation FTP the contents of following folders to Linux
 - a. msgRepository
 - b. reports
 - c. logs
3. Copy every file except “MailJunctionConfig.xml” and “wrapper.conf” from the config directory.

