Jim2 BUSINESS ENGINE ®

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Email
Jim2® Business Engine

Fact Sheet

Jim2 Business Engine email functionality is a major enhancement to the already powerful Jim2. It is designed to:

- Allow automatic job ticketing for incoming emails
- Capture all correspondence between you and your customers/suppliers, in one place
- Book sales orders automatically from your customers' emails, including website shopping carts
- Capture and track all internal emails
- Remove the possibility of lost or hidden emails by having global email folders
- Improve customer relationship management, and much more.

The significant feature of Email is that it is not focused on who sent/received an email or its 'status', but what that email is *related* to, and also what objects it is related to (Job, Quote, Purchase, CardFile, etc).
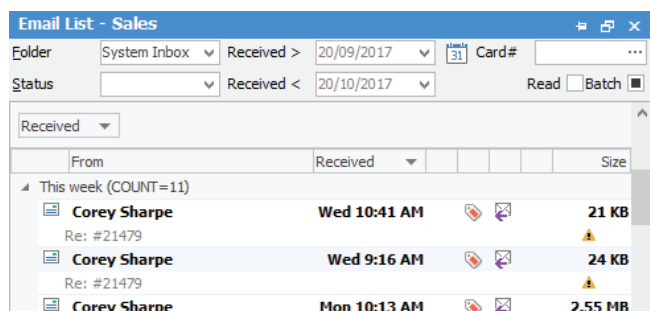
Email Folders

Email folders display both incoming and outgoing emails. Custom email folders can be created, and are used to display emails based on a certain criteria. For example, emails sent/received from a particular email address, tagged as 'Service', and unread – specific customer folders for ease of monitoring.

Email Archiving

To keep your database lean, archiving provides methods to be able to archive or delete emails based on easy to use archive rules.

Email Lists

Email Lists are based on an email folder. For example, your sales team can run a 'Sales' email list which will show only emails related to them, saving time by not having to sort through other departments' emails.

Most lists in Jim2 allow users to filter the list, to see objects containing unread emails. When you run a list such as a Job list, and the job in the list has an unread email associated with it, it will appear as bold in the list. You can also filter this list by unticking the 'Read' tick-box in the list header – no more missed emails.

Automated Job Creation

You can also run an email list that shows maintenance and consumable alerts. Receive an email from either a machine or FM Audit, Canon eMaintenance, Ricoh @Remote, or any other MPS Connector.

Jim2 email rules will identify the customer by the machine serial number. Depending on rules you set up, Jim2 will create a consumable job and tag it in a specific queue.

It is also possible to use rules to set up direct service calls, ie. a manufacturer sends an email booking a service job, and based on rules Jim2 can create a service job, trapping all correspondence – fully automating the process.

These features are perfect for quicker response times and 'just in time' consumable and service fulfilment. Nothing falls through the cracks – a more efficient and professional method.

Email Queues, Ticketing, and Help Desk

This very focused handling of email allows the creation of Email Queues, such as a Service Helpdesk or a Sales Enquiries queue.

In addition, emails sent from Jim2 can be related to any number of objects, and replies from that email are automatically related to, and can be viewed from within those objects.

For example, all emails sent and received in relation to a particular Job are displayed when viewing that Job, and jobs can be automatically created from an email, enabling a very comprehensive ticketing system.
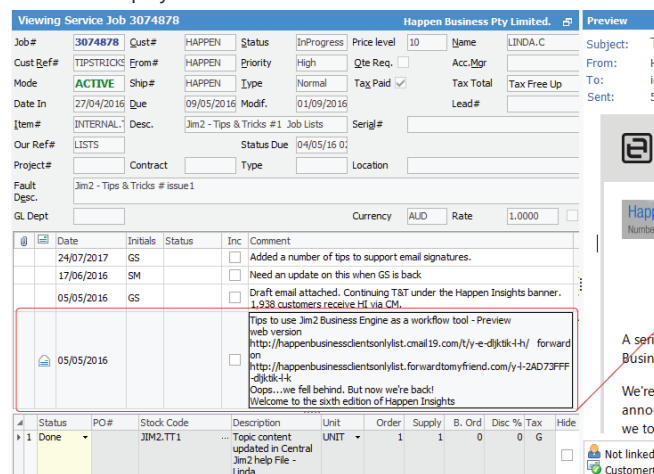
Email Security

Email Security allows you to control which users or security groups can access certain Email Folders.

When you create an Email Folder, it is not accessible from an Email List until security rights for that folder have been setup. By selecting this Email Folder via Email Security you can select which users or security groups have access.

Emails in the Jim2 Comments Grid

When an email has been tagged to a Jim2 object, you will find the email in the comments grid for that object. Emails will display with a grey background to show that they are an email. Clicking on the email will display it in the Email Preview window.

If the email was an outbound email, the user initials of the person who sent the email will appear in the grid. A paperclip icon in the grid indicates an email attachment.

Email Tokens

Email Tokens are used to automatically link incoming emails to the related object in Jim2. Whenever a 'New Related' email is sent, or an existing related email is replied to or forwarded, an Email Token is automatically added to the email subject. When an email is received containing a Token it will be automatically assigned to that object.

Email Rules

Email Rules are an extremely powerful and flexible method of actioning emails. Rules are applied to incoming emails as they are received, automating the process of linking to specific items and ensuring emails are stored against the correct Job, Quote, Invoice, etc.

Email Groups and Tags

Emails within Jim2 are normally 'tagged' to one or more Email Group. Tags can be automatically applied to emails when they are sent, or received, or manually applied at any time. Emails can be tagged to one or more group at the same time, for example both 'Service' and 'Sales'.Emails can also be moved or retagged from one Email Group to another.

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