

Last updated on Friday, January 18, 2013

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Email2DB

About Email2DB

Email2DB is an off-the-shelf third-party email parsing tool that is used in conjunction with Autotask's Add Ticket Email Service (ATES) to automatically create Autotask tickets from email messages.

Before you can set up Email2DB to create tickets in Autotask, you must set up the Add Ticket Email Service in Autotask. For more information on ATES, refer to [Add Ticket Email Service \(ATES\)](#).

In this chapter, we provide instructions for creating a system that will accept incoming emails to any Inbox and will automatically convert them to tickets in the Autotask system.

For all technical support related to the Email2DB product, contact email2db@parker-software.com. For any issues related to tickets not being created once setup is done in Email2DB contact [Autotask Customer Support](#).

Configuration Steps

To set up Email2DB:

- Enable and set up Add Ticket Email Service in Autotask. See [Add Ticket Email Service \(ATES\)](#).
- Purchase, download and install Email2DB. See ["Downloading and Installing Email2DB"](#) on page 4.
- Identify the mail server Email2DB will use to forward processed emails to Add Ticket Email Services. See ["Selecting the Mail Server to Use"](#) on page 7.
- Select the Inbox Folder Email2DB will monitor for tickets to forward to Add Ticket Email Services. See ["Selecting the Folder Email2DB Will Monitor"](#) on page 9.
- Create a trigger for emails to be forwarded to ATES, and configure the email to add the XML token that allows ATES to convert it to a new ticket. See ["Configuring the Email Sent to ATES"](#) on page 12.
- Finally, create an additional trigger to identify emails that are replies to already existing tickets, so they are converted to a Note and attached to the existing ticket, instead of creating a duplicate one. See ["Configuring Replies to Existing Tickets"](#) on page 17.

Downloading and Installing Email2DB

To purchase, download and install Email2DB, do the following:

1. Go to www.email2db.com. Select **Purchase > Buy Email2DB** on the top menu.
2. Select **Email2DB Professional Edition**, ensure the quantities for all other options are set to "-" and click **Order Now**.

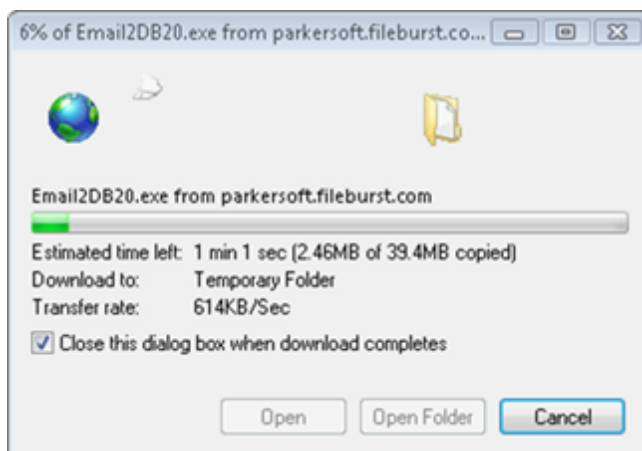
Complete the purchase information and payment options.

3. Once you have purchased the product, you will get an email link to download the product. When starting the download, click **Run**:



IMPORTANT NOTE: We recommend installing Email2DB on a computer (such as your Exchange server) that does NOT get turned off accidentally. **The Email2DB program must be left running at all times.** If the Email2DB host computer is turned off, incoming emails will not be processed and ticket creation will be delayed.

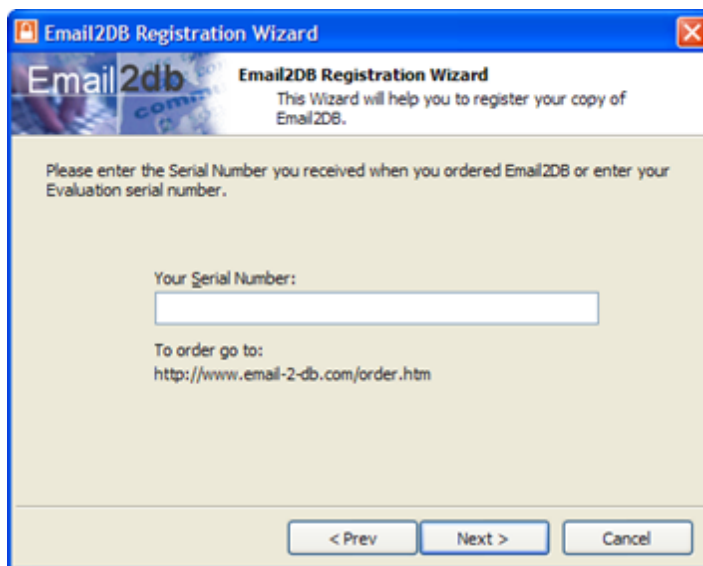
4. On the next step, make sure you uncheck (clear) the **Close this dialog box when download completes** checkbox:



5. If you get a security warning like the one below, click **Run** a second time.

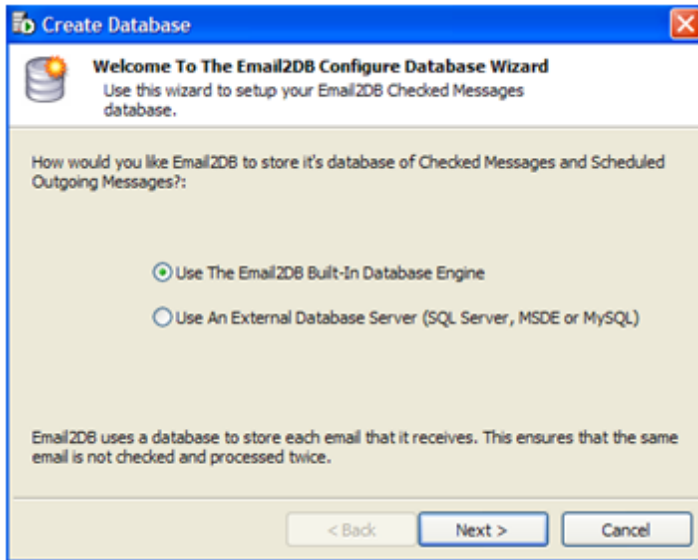


6. When the download is complete, the Installation Wizard will open. Click **Next** on all steps of the Installation wizard and agree to the license agreement. Complete the Product Registration page and complete the Installation Wizard.
7. Click **Run Email2DB now**.
8. Enter the serial number you obtained when you bought the software.



Then click **Next**.

9. The Email2DB Configure Database Wizard opens.

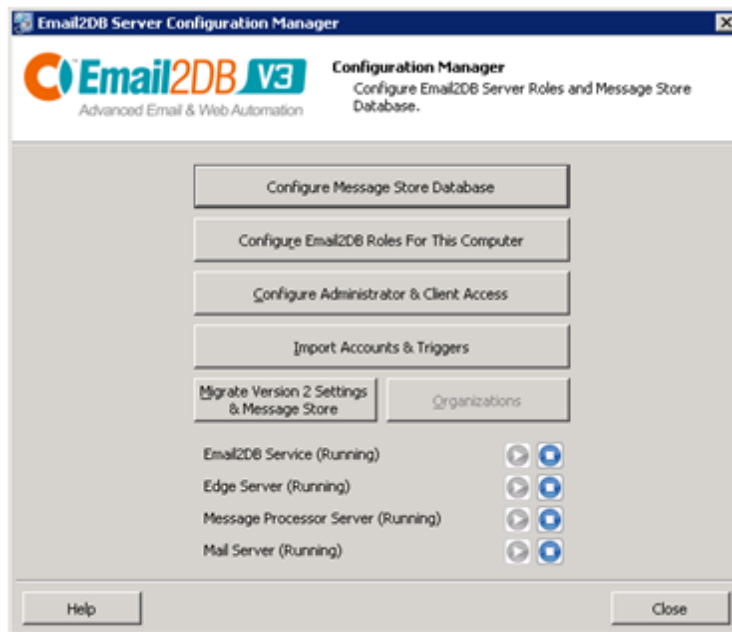


Leave the default selection as is and click **Next** and **Finish**.

The next step is to identify the mail server Email2DB will use to forward messages to Add Ticket Email Service. See "Selecting the Mail Server to Use" on page 7.

If you are upgrading from version 2:

1. Select **File > email2DB server configuration**.



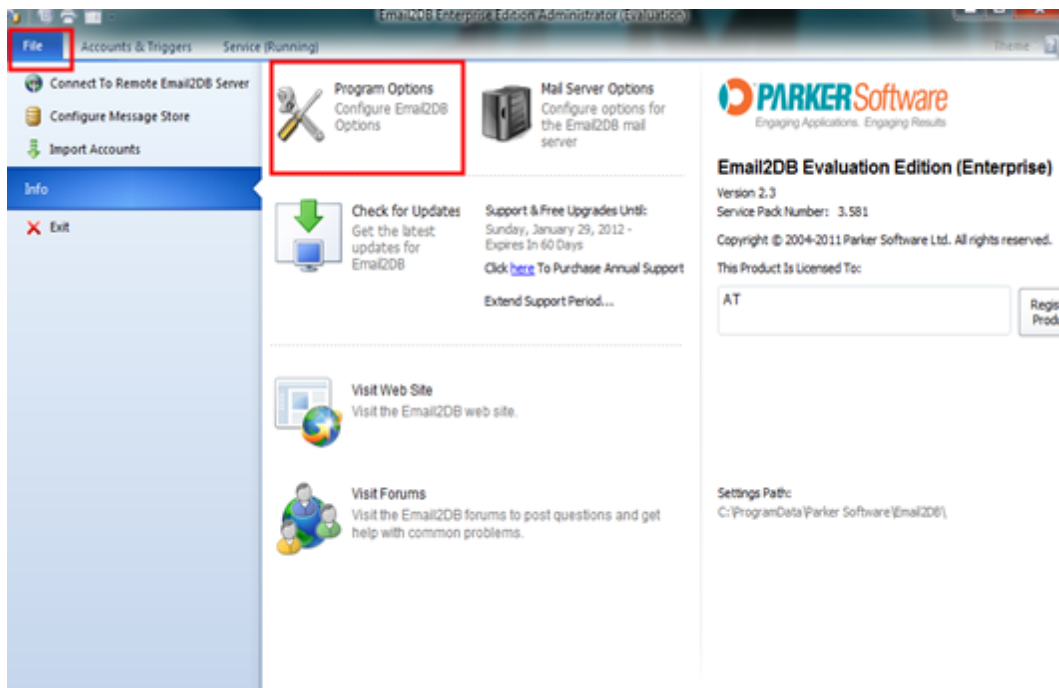
1. Then choose **Migrate Version 2 Settings & Message Store**. A wizard will open.
2. Click **Start** to import settings.

Selecting the Mail Server to Use

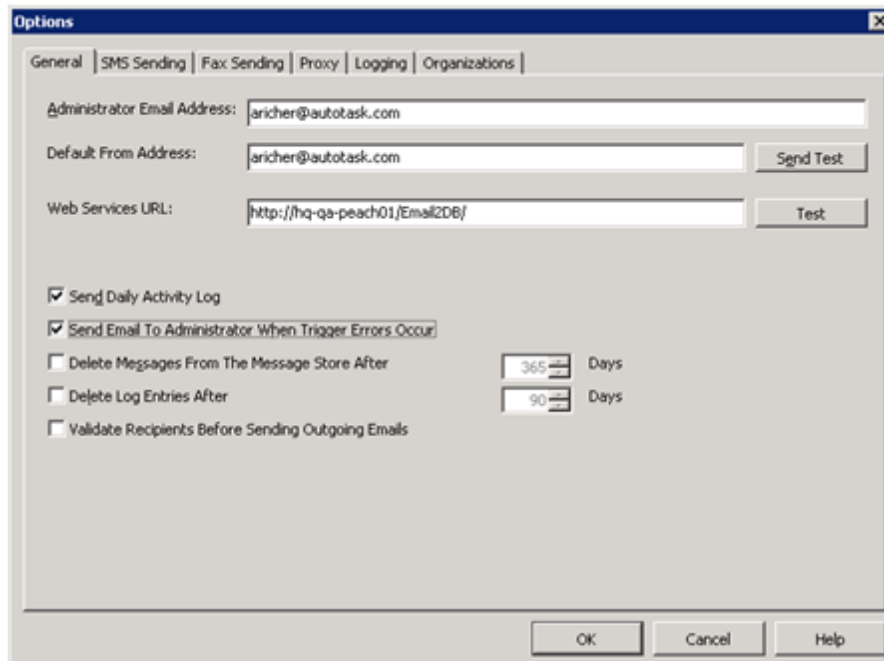
Email2DB has a built-in mail server, but if your company already has a mail server set up, you will want to use this external mail server to send the emails Email2DB processes to addticket@autotask.net, where the Auto-task Add Ticket Email Service (ATES) will pick them up and convert them to tickets.

To select your existing mail server, do the following:

1. Open Email2DB Administrator.
2. Click **File** in the top left corner of the Administrator window and select **Program Options**.



3. Enter the email address of the Email2DB administrator in the **General** tab.



Email2DB is now configured to use your existing mail server. The next step is to select the folder Email2DB will monitor. See "Selecting the Folder Email2DB Will Monitor" on page 9.

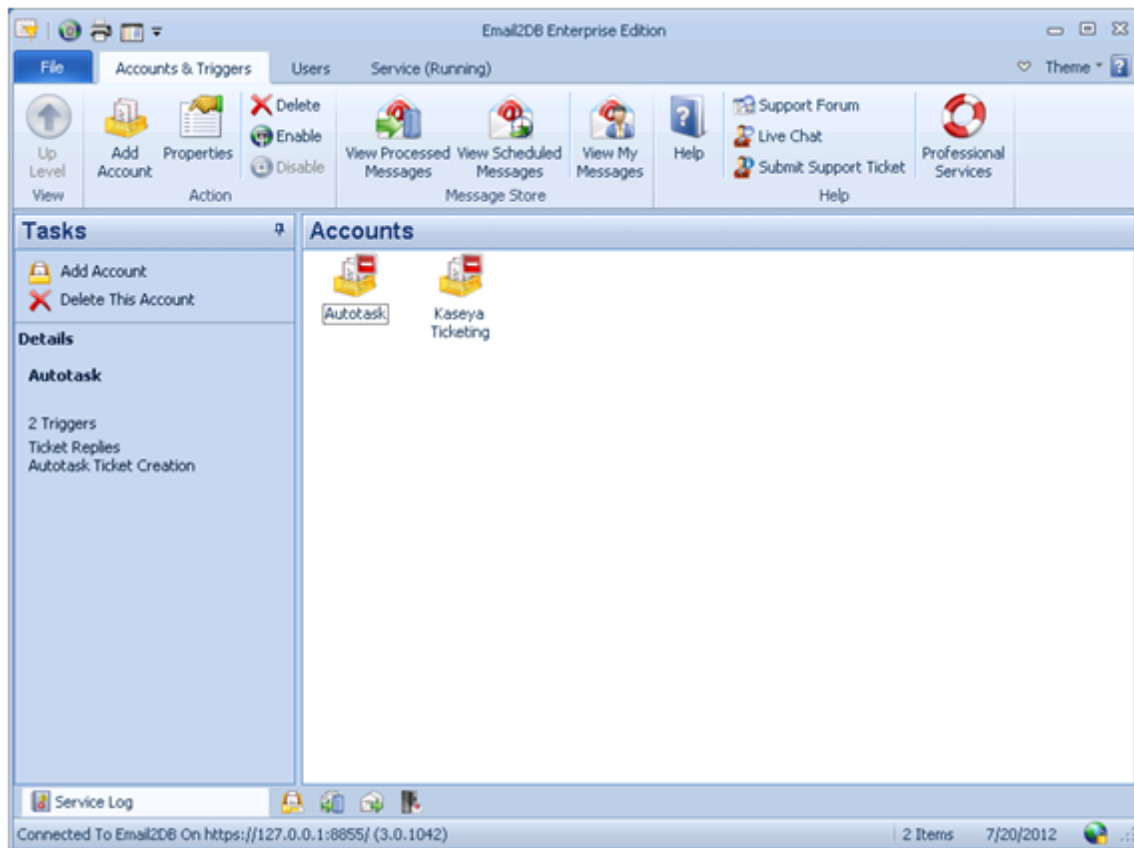
Selecting the Folder Email2DB Will Monitor

In this step you will set up Email2DB to read and process emails from a specific mailbox. The emails in this folder will be forwarded to addticket@autotask.net and converted to tickets.

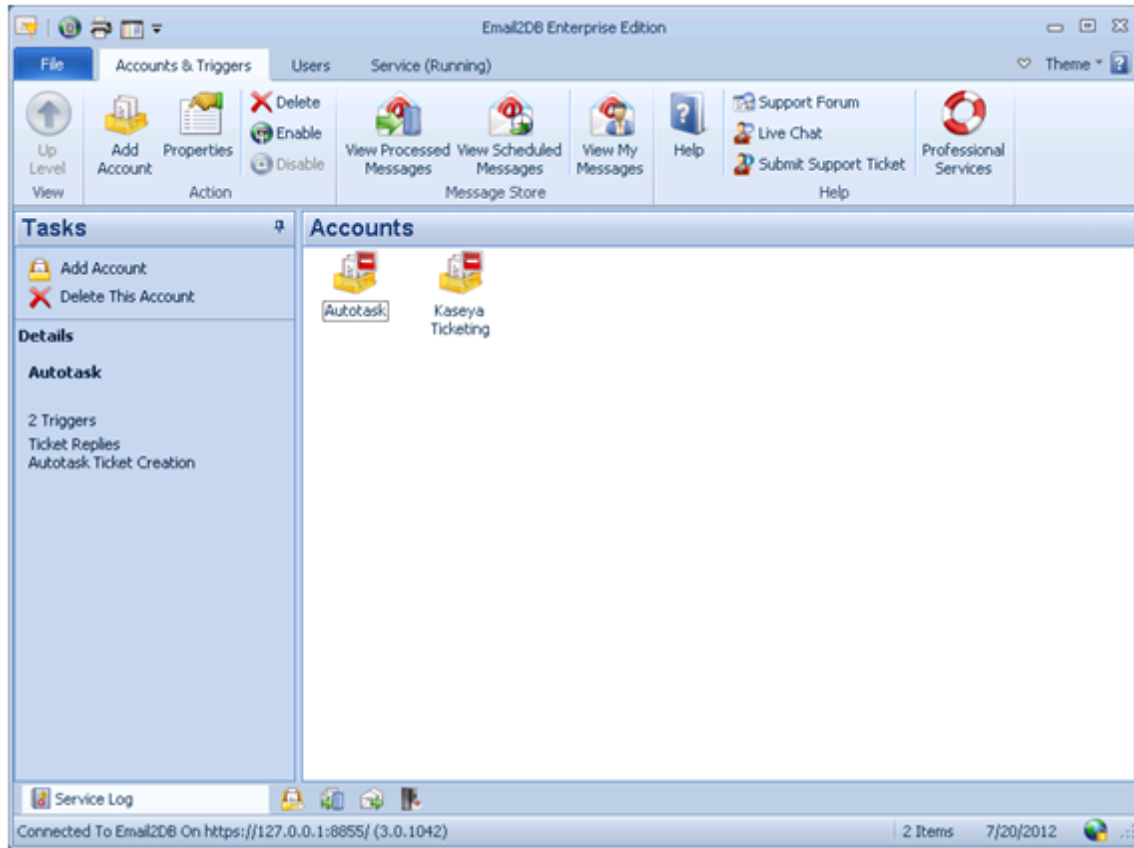
NOTE: If you want Email2DB to monitor more than one email address, you must set up a separate account for each address.

To select the folder Email2DB will monitor:

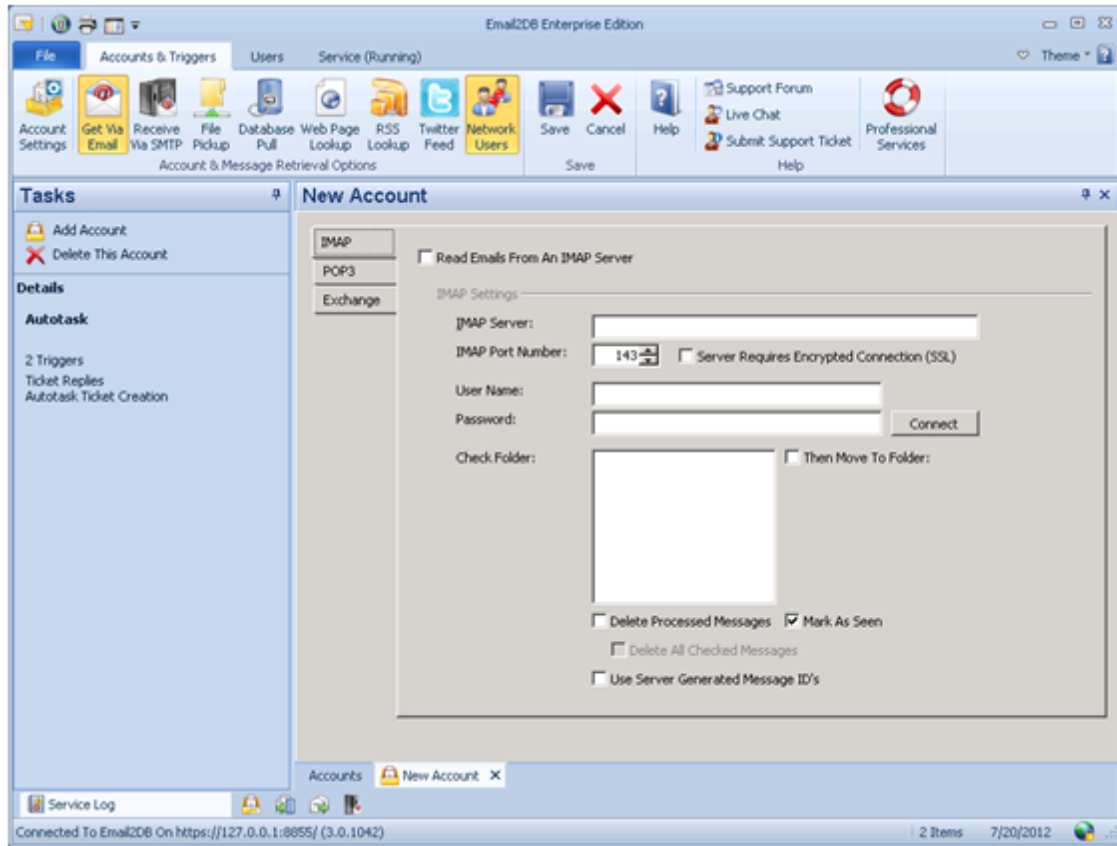
1. If not already open, open the **Email2DB Administrator** main screen.



2. In the Tasks menu on the left pane, select **Add Account**. The **Message Retrieval Account Setup** window opens.



3. In the **Name** field, enter Autotask.
4. Click Define Schedule and set the "Check For New Messages Every" interval to 1 Minute.
5. Leave the **Enabled** check box checked.
6. Next, click **Get via email** button, then click the **IMAP/Exchange Server** tab. Select the **Read Emails from an IMAP or Exchange Server** check box.



7. Enter your Exchange Server Name or IP address in the **IMAP Server** field and update the **IMAP Port Number** as necessary.
8. Enter your **Exchange Logon User Name** and **Password**, then click **Connect**. This should bring up all the folders for that mail account.
9. Select the folder that contains the emails you want Email2DB to process.
10. Optionally, select the check box for "Then Move to Folder" and select a folder to which Email2DB will move the messages after processing.

NOTE: If you have problems when trying to connect, refer to Email2DB's documentation or contact your Network Administrator.

You have now selected the mail server Email2DB will use, and selected the mail folder that will be monitored. The next step is to configure the email that will be sent to Add Ticket Email Service. Refer to "Configuring the Email Sent to ATEs" on page 12.

Configuring the Email Sent to ATEs

Once you have downloaded and installed Email2DB, selected the mail server you will use and identified the Inbox you want to monitor, you must specify how messages in this inbox will be processed. Different message types can be handled differently by configuring different triggers.

There are two types of messages:

- A completely new issue that has not been tracked in an Autotask ticket yet

In this case, you want Email2DB to create an Autotask ticket, that is, identify a new issue, add the XML token, and forward the ticket to "addticket@autotask.net". For details, see "Configuring Email2DB to Create New Tickets" on page 12, below.

- An email that refers to a previous message for which a ticket has already been created in Autotask.

In this case, you want to avoid creating a duplicate ticket. Instead, you want Email2DB to attach the reply email to the original ticket as a note. Refer to "Configuring Replies to Existing Tickets" in the [Email2DB](#) documentation.

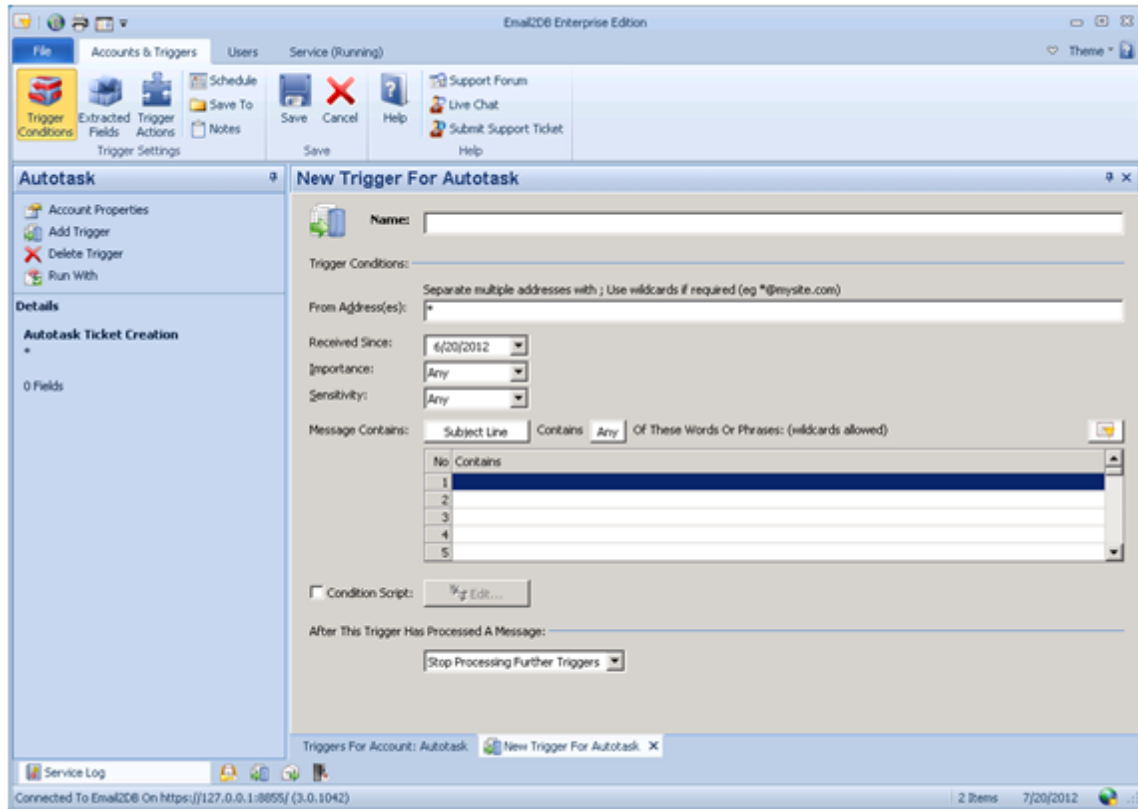
Configuring Email2DB to Create New Tickets

In the following steps, you will do the following:

- Configure the trigger for Autotask ticket creation. By default, all emails received in the Inbox specified in the Read Email Messages tab will be parsed and sent to ATEs for conversion to a ticket.
- Specify which fields will be extracted and passed to ATEs and the Autotask ticket. This includes the **From** Email Address, **Subject** and the **Email Body**.
- Append the XML token to the email body.
- Optionally, send a confirmation email to the customer informing them the ticket has been created.

Configuration Steps

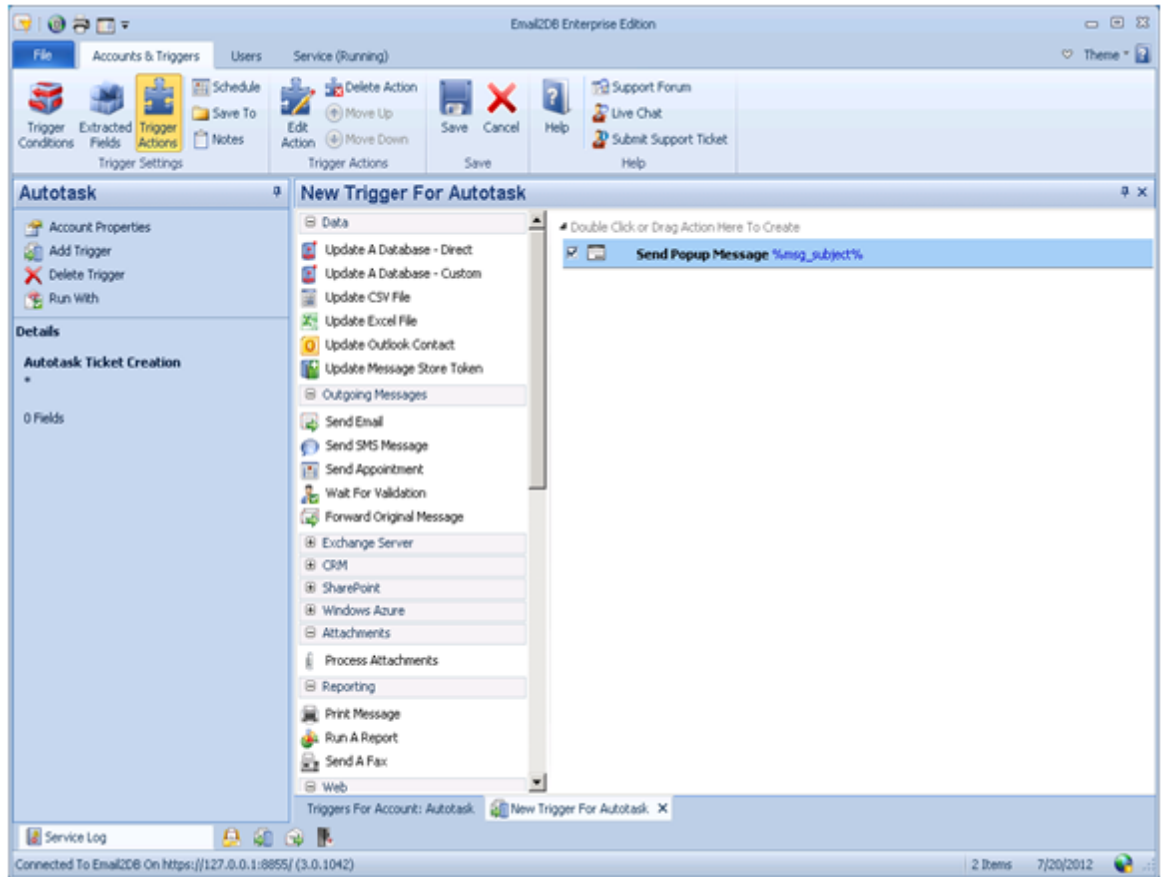
1. On the Email2DB main screen, double-click on the Autotask icon in the Accounts pane.
2. On the left "Autotask" pane, click **Add Trigger**. The Account Trigger window opens on the **General** tab.



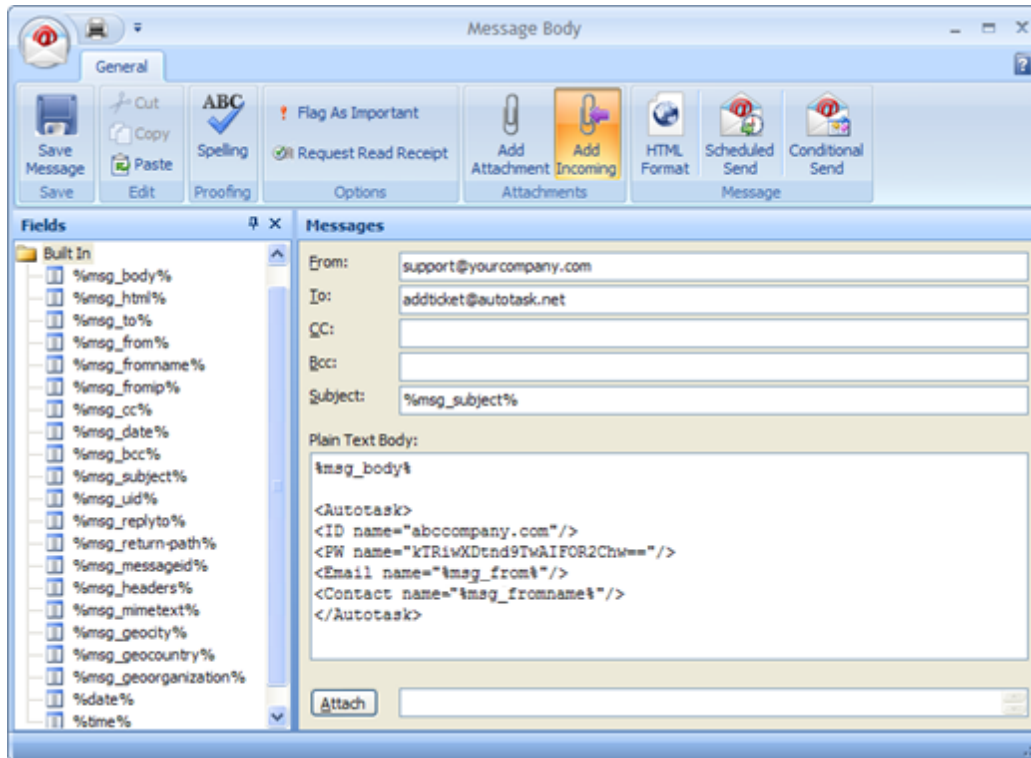
3. In the **Name** field, enter "Autotask Ticket Creation".

TIP: The default settings on this screen will parse *every* email that is received in the inbox that was setup in "Selecting the Folder Email2DB Will Monitor" in the [Email2DB](#) documentation. This is the setup we recommend, but the Trigger can be configured to only send emails to the Add Ticket Email Service when certain criteria are met in the original email. Enter any filtering criteria in the **From Address (es)**, **Received Since**, **Importance**, **Sensitivity**, and **Message Contains** fields.

4. Click **Trigger Actions**.



5. Under **Send Emails** select the **Send New Emails** checkbox and then select **Add**. A window will open that lets you construct the new email that is sent to addticket@autotask.net.



6. Double-click the **Built In** folder in the Fields pane on the left side of the page . This will display a list of all the fields that can be extracted from an email.
7. Delete the **From:** address and enter your Helpdesk email address (such as support@yourcompany.com).
8. In the **To:** field, enter addticket@autotask.net.
9. In the Fields pane, select the **%msg_subject%** field and drag to the **Subject** field.
10. Select the **%msg_body%** and drag it to the **Plain Text Body** field.
11. Now enter the following **XML information** under **%msg_body%**:


```
<Autotask>
<ID name="abccompany.com"/>
<PW name="kTRiwxDtnd9TwAIFOR2Chw==" />
<Email name="%msg_from%" />
<Contact name="%msg_fromname%" />
</Autotask>
```
12. **Replace** the sample content for the ID and PW variables with your Add Ticket Email Services (ATES) **Provider ID** and your **Provider Password**. You can find these in Autotask in **Admin > Auto-taskExtend > Tools > Add Ticket Email Service**.

THIS STEP IS REQUIRED. Emails forwarded to addticket@autotask.net cannot be converted to tickets in the Autotask database unless you provide the correct company ID and Password for authentication.

NOTE: The XML information sample above includes the Contact name tag `<Contact name= "%msg_fromname%" />` which is required if you want the Autotask Web Service to add a new contact to Autotask if no matching contact is found. If the Contact name tag is not included and the From email address is not in your Autotask database, a new contact is created with the lastname, firstname of "Unknown, Unknown".

13. If you would like to include attachments with the email to add ticket, depress the **Add Incoming** button located in the top bar. All attachment types that are supported within Autotask can be added to the ticket.
14. Click **Save Message** on the left hand side of this screen. Click **OK** on the next screen. You will get a prompt that asks you to confirm that you did not specify any trigger conditions (that is, you want to convert all emails into tickets). Click **Yes**.
15. On the next prompt, confirm that you want to enable this trigger now. Your trigger is now enabled.
You should be returned to the Email2DB main screen Accounts and Triggers tab. If not return to that screen. In the left pane menu below the Delete Trigger option, locate the "Run Test" option.
16. Click "Run Test" to verify that the newly created trigger is configured correctly.
17. On the Email2DB main screen, click the Service tab. If the **Start All** option is grayed out, the Service is running. If not, click **Start All** to start the service.



You will see the Email2DB icon in your system tray indicating that the service is running.

NOTE: This service must be kept running in order to process incoming emails.



When you have completed these steps, the emails that reach your designated Inbox are now forwarded to ATES with the correct XML tag that allows Add Ticket Email Service to convert them to a ticket in your Autotask database.

TIP: To notify the customer contact once the ticket is created, you can set up automated workflow rules in Autotask. For information on how to set up workflow rules, refer to [Setting Workflow Rules and Notifications](#).

Next, you must create a separate trigger for emails that reach your Inbox that are replies to existing tickets. See "Configuring Replies to Existing Tickets" in the [Email2DB](#) documentation.

Configuring Replies to Existing Tickets

The second type of email that needs to be handled by Email2DB is a customer reply to an *existing* ticket.

Example: The original customer email reported an error message in a software application you are supporting. Email2DB processed the message and forwarded it to ATEs, where it was converted to a ticket. A technician picked it up, and asked the customer via a ticket notification to submit a screen shot of the error message. The client replies to the email.

In this scenario, you do not want Email2DB to create a duplicate ticket. Instead, you want the client's reply email to be attached as a ticket note to the original ticket.

The steps below outline how to convert replies to Notes instead of duplicate tickets.

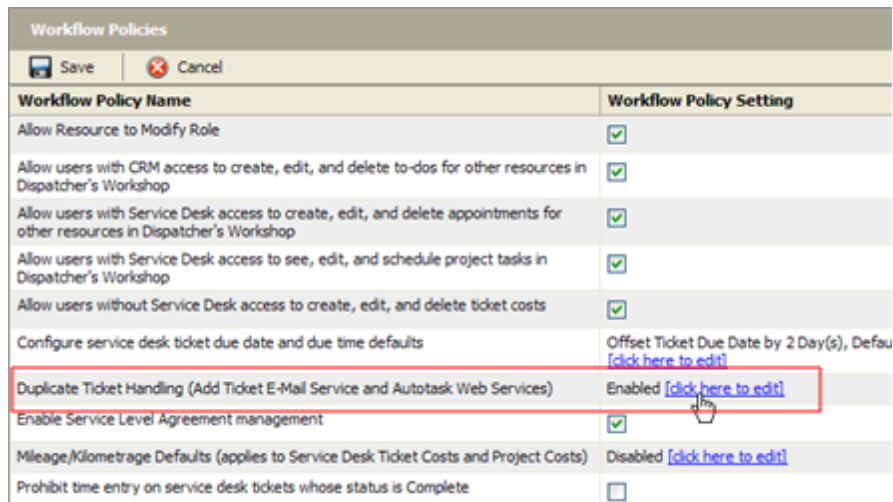
Configuration Steps in Autotask

These steps require a System Administrator's license.

First, enable the Duplicate Ticket Handling workflow policy.

NOTE: All duplicate ticket handling specifications apply to both Add Ticket Email Service and the Web Services API.

1. Go to **Admin > Service Desk > Workflow Policies** and locate the workflow policy under Service Desk.



Workflow Policies	
Workflow Policy Name	Workflow Policy Setting
Allow Resource to Modify Role	<input checked="" type="checkbox"/>
Allow users with CRM access to create, edit, and delete to-dos for other resources in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users with Service Desk access to create, edit, and delete appointments for other resources in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users with Service Desk access to see, edit, and schedule project tasks in Dispatcher's Workshop	<input checked="" type="checkbox"/>
Allow users without Service Desk access to create, edit, and delete ticket costs	<input checked="" type="checkbox"/>
Configure service desk ticket due date and due time defaults	Offset Ticket Due Date by 2 Day(s), Default [click here to edit]
Duplicate Ticket Handling (Add Ticket E-Mail Service and Autotask Web Services)	Enabled [click here to edit]
Enable Service Level Agreement management	<input checked="" type="checkbox"/>
Mileage/Kilometrage Defaults (applies to Service Desk Ticket Costs and Project Costs)	Disabled [click here to edit]
Prohibit time entry on service desk tickets whose status is Complete	<input type="checkbox"/>

2. Select **click here to edit** to open the Duplicate Ticket Handling window.

Duplicate Ticket Handling -- Webpage Dialog

Duplicate Ticket Handling

Save and Close Cancel

Please tell us how your organization defines and treats duplicate tickets. The options on this screen pertain to tickets created via the **Add Ticket E-Mail Service** and the **Autotask Web Services API**.

Duplicate Ticket Definition

My organization defines a duplicate ticket as:

Any ticket with the same ticket number as an existing ticket

Any ticket with the same alert ID as an existing ticket

Any ticket with the same external ticket ID as an existing ticket

Any ticket with the same title and installed product as a ticket that has been created in the last: 0 days 0 hours 0 minutes

Any ticket with the same title as a ticket that has been created in the last: 0 days 0 hours 5 minutes

Any ticket with the same installed product as a ticket that has been created in the last: 0 days 0 hours 0 minutes

Duplicate Ticket Action

When a duplicate ticket is identified:

Attach the matching ticket as a note to the existing ticket

If the existing ticket has a status of "Complete", change its status to: Note Added

If the existing ticket has a status other than "Complete", change its status to: Note Added

Ignore the matching ticket (take no action)

3. Select **Any ticket with the same ticket number as an existing ticket**.
4. Under **Duplicate Ticket Action**, select **Attach the matching ticket note to the existing ticket**. You also have the option to change the ticket status when a note is added.
5. Click **Save and Close**.
6. Optionally, the Add Ticket Email Service can generate **automatic notification** to specified recipients, including your Helpdesk email address, when a ticket is created and/or if ticket creation fails. For details see Add Ticket Email Service (ATES).

TIP: If ticket creation fails, you can retrieve the original email from the "Processed" folder in Email2DB.

Configuration Steps in Email2DB

Adding the Ticket Replies Trigger

In "Configuring the Email Sent to ATES" on page 12, we set up the trigger that converts incoming emails into new Autotask tickets. Now, we need to add a separate trigger that will process emails that are *replies to existing tickets* differently from new emails.

To add the second trigger, do the following:

1. Open Email2DB Administrator, if not already open.
2. Double-click on the **Autotask** icon in the Accounts pane.
3. In the left Autotask navigation pane, click **Add Trigger**. The Account trigger popup opens.

1. In the **Name** field, enter **Ticket Replies**.
2. Continue to the **Message Contains** section. "Message Contains" filters the messages that you want this trigger to act on.
3. Click the **Subject Line** button to change it to **Subject/Body**.
4. Click into **Line 1** and enter **RE:**. Filtering by this text will identify incoming emails that are replies to existing tickets.

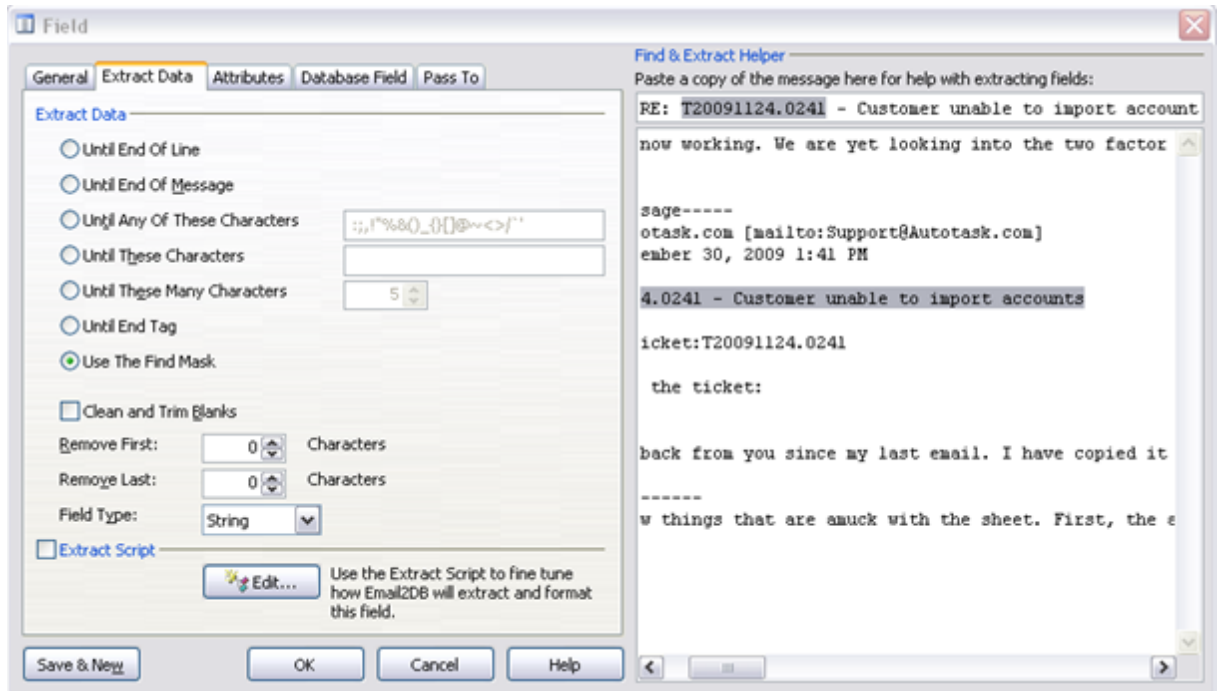
NOTE: If **RE** is not your email identifier for a reply (as in New Zealand), substitute RE: with your term.

5. Under **After This Trigger Has Processed A Message**, make sure that **Stop Processing Further Triggers** is selected so that no duplicate ticket is created.

Creating a Field to Extract the Ticket Number to

NOTE: Each company's system is unique and therefore your Email2DB extraction rules may vary from the general configurations presented here. For questions specific to Email2DB configuration, contact Parker Software support at email2db@parker-software.com

The next step is to find the original ticket number in the reply email and create an Email2DB field to extract it to.

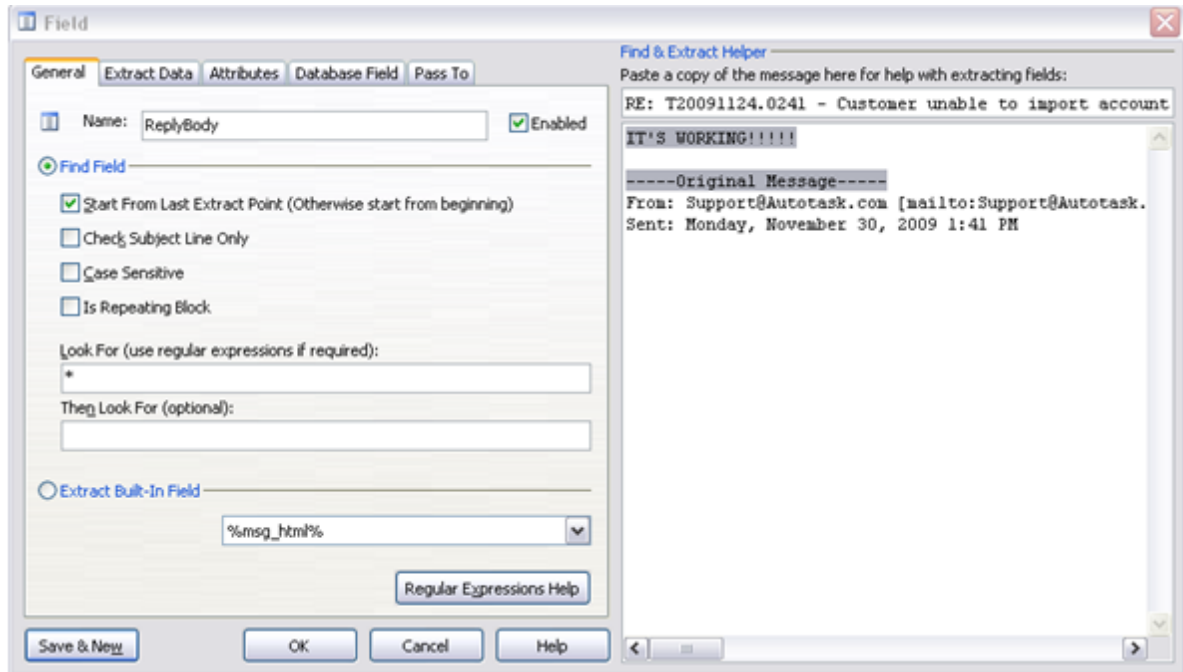


9. Select **Use the Find Mask**. If the ticket number in the Subject field is highlighted in blue, your settings are correct.
10. Un-check the **Clean and Trim Blanks** selection.
11. Click **OK** to save this extraction.

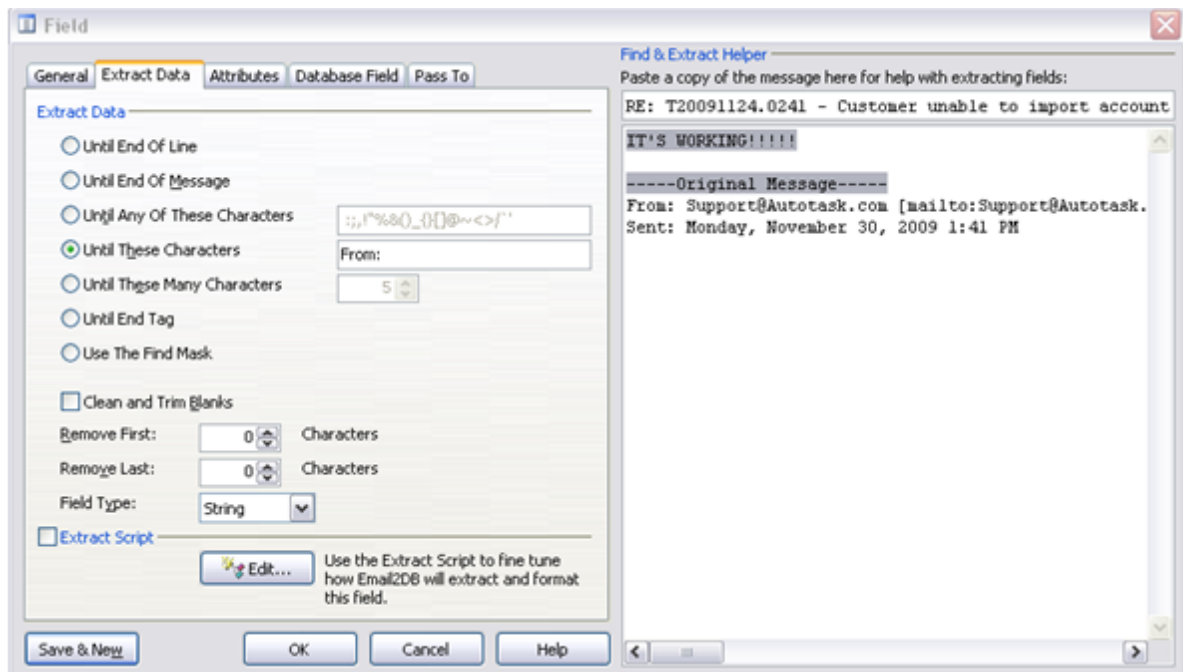
Extracting the Reply Body into a Field

The next step will extract from the reply email only the customer's response to your original email. This is to shorten the Note that is being added to your existing ticket and avoid duplication.

1. On the Field Extraction tab of the Account Trigger window, click **Add Field** to add the second field.
2. In the **Name** field, enter **ReplyBody**.
3. Under **Find Field**, only one check box, **Start From Last Extract Point**, should be selected.



4. Type an **Asterisk** into the **Look For** field. Leave **Then Look For** field blank.
5. Click the **Extract Data** tab. The Extract Data tab is used to find the end point.
6. Check **Until These Characters** and enter **From:**. The email body above the From line should now be highlighted.
7. Clear (un-check) the **Clean and Trim Blanks** option.

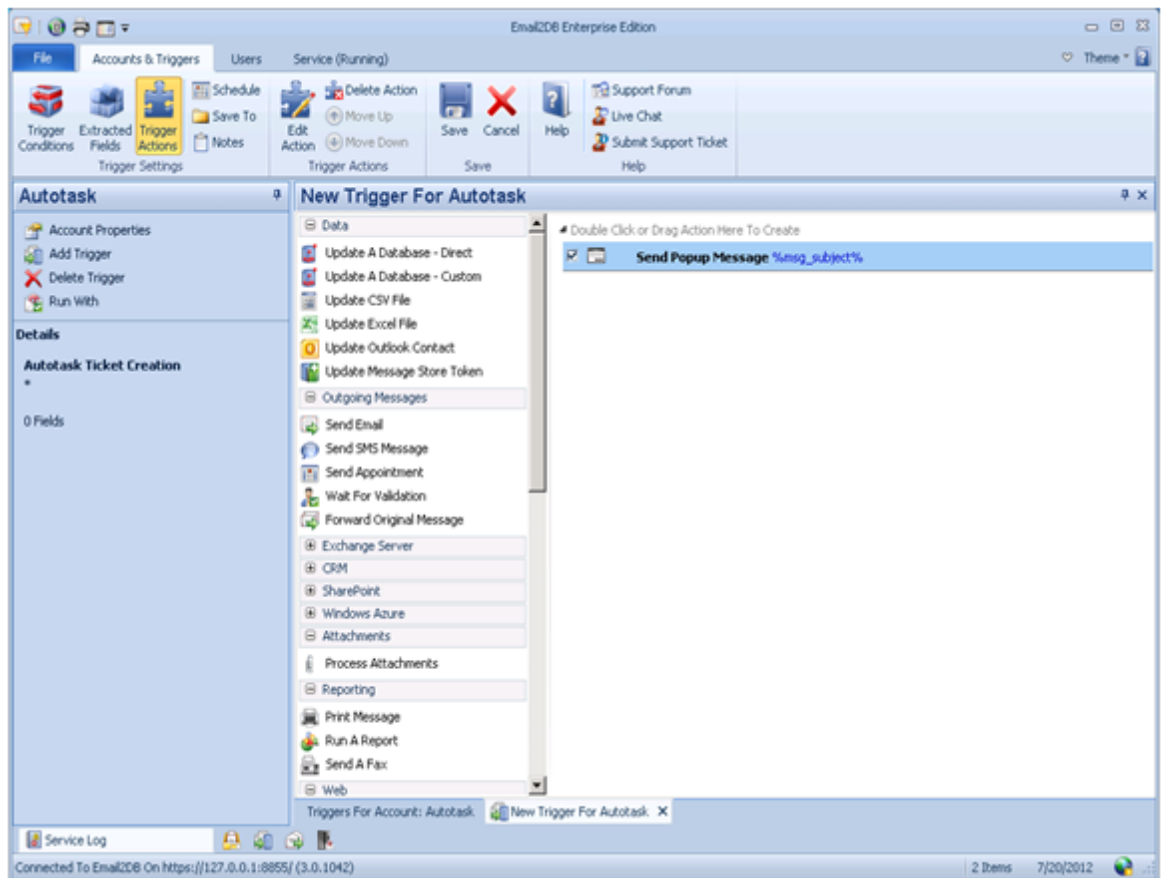


- Click **OK**.

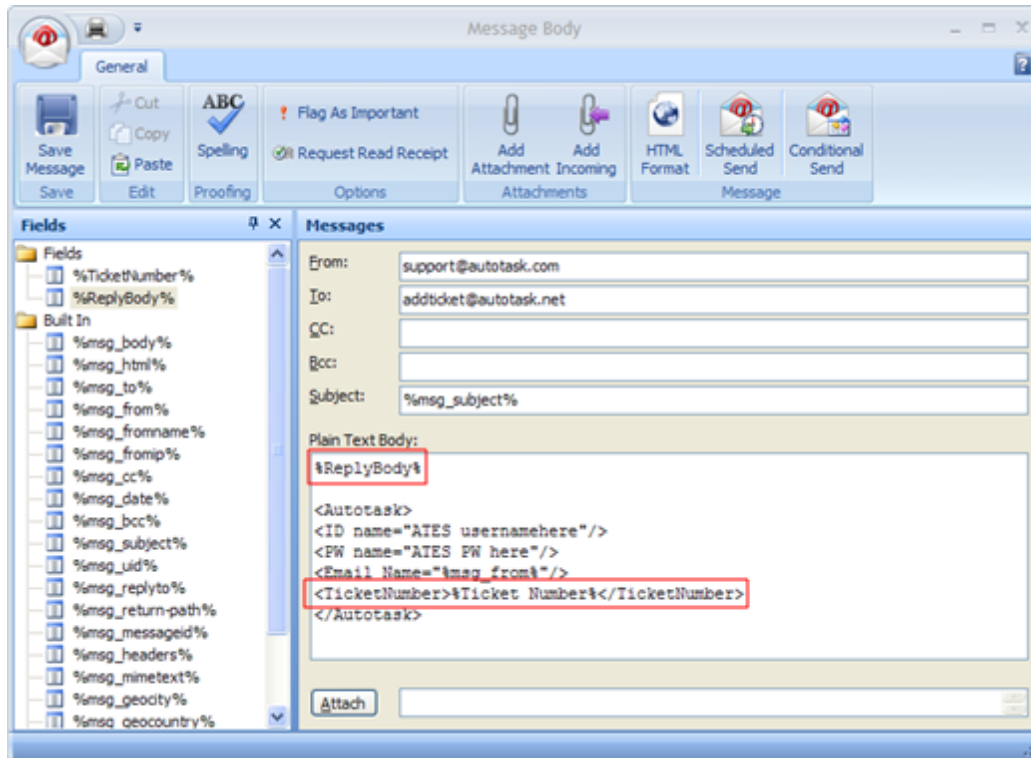
Configuring the Email Sent to Autotask Add Ticket Email Service

The next step is to configure the portion of the reply email that is forwarded to ATES and converted to a ticket Note on the existing ticket.

- On the **Ticket Replies** Account Trigger window, select the **Additional Actions** tab.



Under **Send Emails** select the **Send New Emails** checkbox and then select **Add**. A window will open that lets you construct the email that is sent to addticket@autotask.net when an email is identified as a reply.



NOTE: In the Fields folder, you will see the TicketNumber and ReplyBody fields you created in the previous 2 steps.

2. Double-click on the **Built In** folder in the Fields pane on the left side of the page. This will display a list of all the fields that can be extracted from an email.
3. Delete the **From:** address and enter your Helpdesk email address (such as support@autotask.com).
4. In the **To:** field, enter addticket@autotask.net.
5. Select the **%msg_subject%** field and drag to the **Subject** field.
6. Select the **%Reply Body%** and drag it to the **Plain Text Body** field.
7. Now enter the following **XML information** under **%ReplyBody%:**

```
<Autotask>
<ID name="ATES usernamehere" />
<PW name="ATES PW here" />
<Email Name="%msg_from%" />
<TicketNumber>%Ticket Number%</TicketNumber>
</Autotask>
```

8. **Replace** the sample content for the ID and PW variables with your Add Ticket Email Services (ATES) **Provider ID** and your **Provider Password**. These can be found in **Admin > AutotaskExtend >**

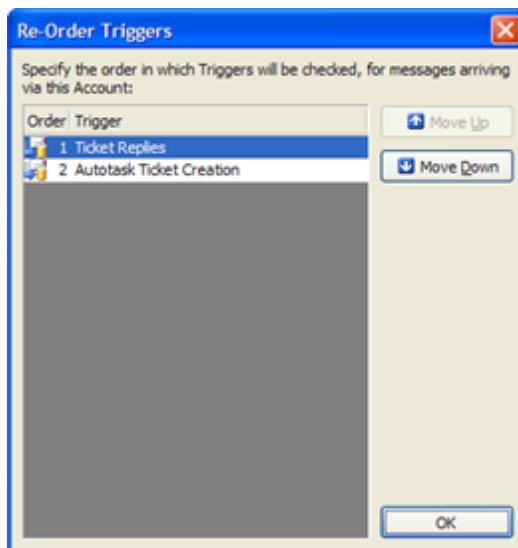
Tools > Add Ticket Email Service. If you skip this step, emails cannot be converted to tickets.

9. If you would like attachments to be added with the note, depress the **Add Incoming** button located in the top bar. All attachment types that are supported within Autotask will be added to the ticket.
10. Click **Save Message** on the left hand side of this screen. Click **OK** on the next screen.
11. On the next prompt, confirm that you want to enable this trigger now.

Re-ordering your Triggers

The last thing you need to do is re-order your triggers. When an email arrives in the Inbox, you need to find out if it is a reply to an existing ticket first. If yes, the email is converted to a note for the existing ticket. If no, a new ticket is created. The trigger we named "Ticket Replies" needs to be tripped first.

1. On the Email2DB Administrator main screen, double-click on the Autotask icon.
2. Right-click on the Ticket Replies trigger icon. The Re-Order Triggers popup opens.



3. Select the **Ticket Replies** trigger, and click the **Move Up** button.
4. Click **OK**.
5. On the Email2DB Administrator main screen, click the **Service** tab.
6. Click **Stop All** to stop the service, and then click **Start All** to restart.

NOTE: The Service has to be stopped and restarted for changes in the trigger order to take effect.

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