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VisNetic MailFlow Product Documentation

# VisNetic MailFlow Admin Guide

VISNETIC MAILFLOW PRODUCT DOCUMENTATION

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## Overview

*Welcome to the 4.0 release of VisNetic MailFlow.*

**V**isnetic MailFlow is a powerful email Customer Relationship Management solution, designed specifically to address the needs of small to medium sized businesses. With VisNetic MailFlow, your company can meet and exceed your customers' service and support expectations. VisNetic MailFlow allows you to:

- ❑ Distribute, process, and track messages sent to generic email inboxes such as sales@, support@, and info@
- ❑ Access the entire email history of any customer inquiry - instantly
- ❑ Enhance response quality and speed with robust workflow management
- ❑ Manage service quality where it matters most - at the point of customer contact
- ❑ Increase customer satisfaction and maximize profit potential

VisNetic MailFlow does all of this while enabling your organization to gain important operational insights, protect and secure critical business email correspondence with centralized storage and administration, and reduce service and support costs through improved employee productivity and efficiency.

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## What's new in 4.0?

- ❑ Server Clustering
    - Configure multiple MailFlow servers to utilize a common database. MailFlow services and tasks can be assigned to individual servers to provide load balancing and redundancy.
  - ❑ Agent Alerts
    - Agents can now elect to be notified via the Alert system when a Ticket is assigned to them, when a new message is received for a Ticket they own or when a new message is received from a Contact they own. Alerts can also be configured for outbound message approval events.
  - ❑ Outbound Message Approval
    - Individual MailFlow Agents can be configured to require outbound message approval from another Agent or Group of Agents.
  - ❑ Database Logging
    - MailFlow logs can now be configured to be written to the database instead of the file system. Most helpful in clustered server environments where logs for any configured servers can be viewed from any other server.
  - ❑ 3CX IP PBX Assistant Integration
    - A MailFlow plug-in to the 3CX Assistant has been written that will query the MailFlow database and present contact information when an incoming telephone call is received.
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## System Requirements

*This chapter discusses system requirements for installing VisNetic MailFlow.*

### Email Services

In order to effectively route and manage inbound email messages, VisNetic MailFlow must first be able to retrieve them. One of the great advantages of VisNetic MailFlow is its ability to retrieve email from any standard POP3 email account; regardless of where it is hosted or what mail server platform is used.

In VisNetic MailFlow, each individual POP3 email account is known as a message source. Message sources can reside anywhere, and VisNetic MailFlow will support an unlimited number.

For example, if your organization relies on a local ISP for Internet connectivity, you might also rely on them for email. In this case, you're likely to have one or more "generic" POP3 email accounts (e.g. sales@yourisp.net, support@yourisp.net, etc.) hosted by your ISP. This is easily supported by VisNetic MailFlow; create one message source for each POP3 email account, using the email server address (i.e. mail.yourisp.net) along with the username & password for the POP3 email account.

When VisNetic MailFlow collects messages from these POP3 accounts, it will route them either according to the specialized routing rules you create, or will direct them into a TicketBox with a matching default email address.

Another common scenario is one in which the organization deploying VisNetic MailFlow has a dedicated mail server running internally. Again, this could be any mail server platform, including VisNetic MailServer, Microsoft Exchange, or any other that supports collection of email messages via POP3 (nearly all do).

When a mail server is available within the organization, it might be configured to forward multiple, similar email addresses to a single POP3 inbox (see figure 2

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below). This is also handled readily by VisNetic MailFlow; simply configure MailFlow to collect mail from the destination POP3 email account(s), and then configure routing rules to match according to the message recipients (as designated by the "to" address).

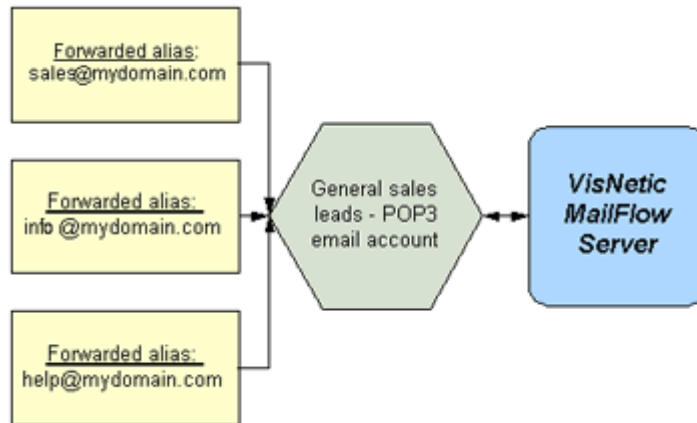


Figure 1 Mail Forwarding Scenario

Other, more complex forwarding scenarios are also handled gracefully by VisNetic MailFlow.

#### Database Services

VisNetic MailFlow stores nearly all of its data, including messages and configuration data, in an ODBC-compliant database. This means that a database server platform must be available at all times in order for VisNetic MailFlow to function.

VisNetic MailFlow presently supports two database platforms, one of which is available for free:

- ❑ Microsoft SQL Server 7, 2000, 2005 or 2008
- ❑ Microsoft Data Engine (MSDE) 7, 2000, or SQL Express 2005, 2008

The latter of these two options (MSDE) is a free, lightweight version of the MS SQL Server database engine that is suitable for smaller VisNetic MailFlow deployments (3-6 Agents, with light to moderate email loads). It can be downloaded and installed with the MSDE version of the VisNetic MailFlow product installer.

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For organizations with six or more VisNetic MailFlow users and moderate to heavy email loads, Microsoft SQL Server is recommended.

Please note that it's also fairly simple for an organization to start out using the MSDE version of VisNetic MailFlow, and then upsize to MS SQL Server at a later time (when email volume warrants it). Microsoft offers a free, easy-to-use migration tool for this very purpose.

Regardless of which of these database platforms is used, the VisNetic MailFlow product installer makes configuration of the database seamless and simple. There's also no need to interact directly with the database server once VisNetic MailFlow is installed; it transparently manages the database connection and provides backup, archiving, and purging functionality directly from within the VisNetic MailFlow administration console.

Finally, the VisNetic MailFlow database can be run on the same machine as the VisNetic MailFlow engine, or anywhere on the local network accessible to it. The VisNetic MailFlow product installer supports both scenarios.

#### Web Services

VisNetic MailFlow's powerful, intuitive interface is entirely web-based. This allows end users and administrators to access VisNetic MailFlow from any location that has an Internet connection. VisNetic MailFlow currently supports Microsoft Internet Information Services (IIS) 5.0 or greater.

Microsoft IIS 5.0 runs on Windows 2000 (Pro, Server, Advanced) and XP (Pro and Server). Microsoft IIS 6.0 runs on the Windows 2003 Server platform and IIS 7.0 on Windows 2008 Server and Windows 7. We recommend that you choose the web server platform that best suits your internal security and budgetary guidelines.

As with the database server platform, VisNetic MailFlow will configure your web server of choice during the product installation. No additional configuration is required once the installation is completed.

Please note that the VisNetic MailFlow server engine must be installed on the same machine as the web server.

#### Service Distribution

Only the web server and the VisNetic MailFlow server engine must be run together on the same machine. The database server may be installed on any part of the network directly accessible to the VisNetic MailFlow engine, though a fast connection (e.g. 10Mbps or greater) is recommended for maximum performance.

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Mail services can be provided by any mail server platform, and can be hosted locally (on the same machine or network) or anywhere on the Internet.

It is also entirely feasible to run any combination of the web server, mail server, database server, and VisNetic MailFlow server components on the same computer. Here are a couple of common deployment scenarios:

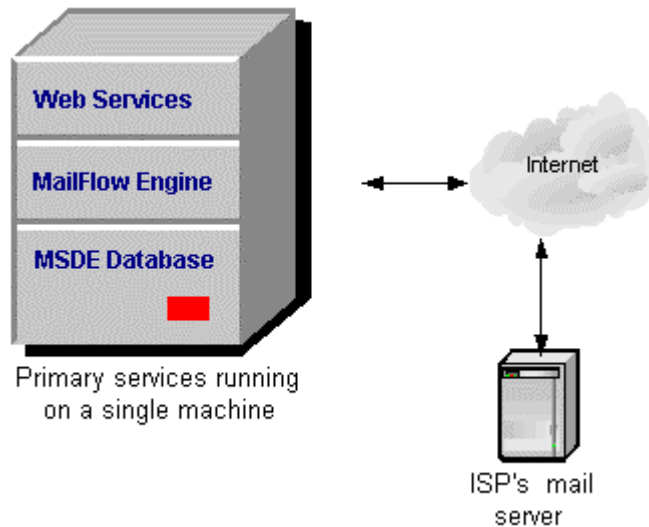


Figure 2 VisNetic MailFlow Deployment Scenario #1

In the scenario illustrated by figure 2 above, the primary services are all run on the same machine, while an ISP accessible via the Internet provides email services.

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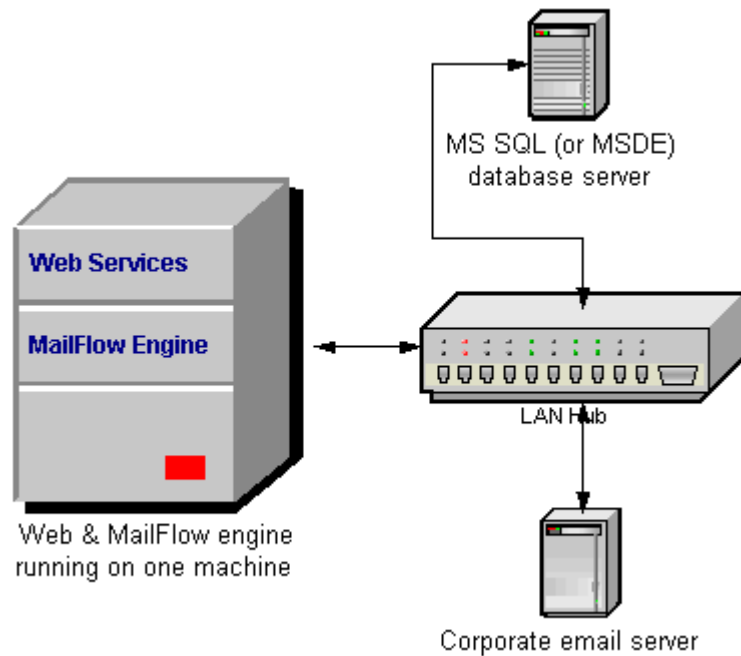


Figure 3 VisNetic MailFlow Deployment Scenario #2

In figure 3, the VisNetic MailFlow server engine and the web server are installed on the same machine, while the database server and corporate email server are installed on separate machines on the same local area network.

These are but two examples; other service distribution scenarios are certainly possible.

#### Clients

VisNetic MailFlow has only one requirement for end users and administrators accessing the system; they must have Microsoft Internet Explorer 5.5 or later installed.

There are no additional client requirements; any Windows operating system supporting this web browser will work.

## Requirements Summary

This section provides a summary of requirements for VisNetic MailFlow.

#### VisNetic MailFlow Server

- **Operating System:** Windows 2000 Pro, Server, Advanced Server, 2003 Server, XP Pro or Vista, 2008 Server or Windows 7

- ❑ **Memory:** 1GB minimum, 2 GB or more recommended
- ❑ **CPU:** Current CPU Technology recommended
- ❑ **Disk Space:**
  - 20MB Hard Disk space for VisNetic MailFlow installation files
  - Additional disk space for email attachment files
  - Additional disk space for logging, dependent upon configuration
- ❑ **Web Server:** Microsoft IIS 5.0 or greater

#### Database Requirements

- ❑ **Either of the following:**
  - Microsoft SQL Server 7, 2000, 2005 or 2008
  - Microsoft Data Engine (MSDE) 7, 2000 or SQL Express 2005,2008 (MSDE 2000 included free in the bundled download) <sup>1</sup>
- ❑ **Storage requirements:**
  - Avg. 4kb per message per thread stored in database (e.g.; 1000 threads in a month with 4 messages per thread = 16MB)

#### Client Requirements

- ❑ **Web Browser:** Microsoft Internet Explorer 5.5 or greater
- ❑ **Operating System:** Any Windows operating system that supports Internet Explorer 5.5 or above.
- ❑ **Disk Space:** No additional software components are installed on the client

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<sup>1</sup> MSDE is a free, light-weight version of MS SQL Server, and is primarily suitable for sites with relatively light email loads and 3-6 users. Larger installations should use MS SQL Server 7, 2000 or 2005

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## Installation

*This chapter describes the process of installing VisNetic MailFlow.*

### Checklist

**B**efore you start the installation program, please read the following checklist. You will need administrative access to install VisNetic MailFlow. If you will be using an existing MSSQL server, you will need the sa password. You will have the option to configure a message source and destination. You can defer this step until after installation.

- ❑ SQL Server Admin (sa) password (if using an existing MSSQL server)
- ❑ POP3 account information, including:
  - POP3 server hostname or address
  - TCP/IP Port (usually 110)
  - Account name and password
- ❑ SMTP account information, including:
  - SMTP server hostname or address
  - TCP/IP Port (usually 25)
  - Account name and password if using SMTP Auth.

### Installing

There are 2 different install programs. The smaller version requires that you have an existing Microsoft SQL (MSSQL) server. The second includes the Microsoft SQL Desktop Engine (MSDE). To begin installation, execute the install program. You will be presented with a welcome dialog. Clicking next will step you through the system requirements page, release notes, and end user license agreement.

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### Verifying Prerequisites

After accepting the license agreement, the installer will check the system for a compatible web server. You must have a compatible web server installed before running the VisNetic MailFlow installation.

The install searches for MSSQL servers. If you are running the MSDE version of the install program, then you will have the option to install MSDE 2000 service pack 3. If you install MSDE, you will need to select a password for the server admin (sa) account.

The version of Internet Explorer version is verified. If version 5.5 or higher is not found, then a dialog will appear asking whether you will attempt to connect to VisNetic MailFlow from this computer. If you answer yes, you will have the option to be redirected to the Internet Explorer download site and installation will exit.

### Select Database Server

After you fill in the name and company of the user and select the installation folder, you will be asked for the authentication mode used to connect to the SQL server:

If you choose Windows Authentication, you must use the account you are currently logged in with. You can use the administration tool to change the login credentials to any valid NT user that can access the database after installation.

The next option is to select the MSSQL server in which to create the VisNetic MailFlow database. If you installed MSDE, then SQL Server should be: "SERVER\MAILFLOW." where SERVER is the name of the Windows 2000 computer. If you selected Windows Authentication, then you will be asked for the password for the currently logged-in NT user.

The authentication credentials are verified by attempting to connect to the specified MSSQL Server.

### Configuring VisNetic MailFlow

You have the option to setup an email server and create a TicketBox in the installer. If you decide not to configure VisNetic MailFlow during installation, you can perform this task later.

The first step in configuring VisNetic MailFlow is to define a POP3 message source to collect email messages from. You will need a server hostname or IP address and account information. Click on the Test Login button to attempt a POP3 connection and verify the settings. If the Active checkbox remains

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checked, then the engine will start downloading mail from this message source into VisNetic MailFlow. The default interval for checking mail is 2 minutes.

The next step is to define a TicketBox to hold Tickets. More TicketBoxes can be created later. Enter a name and a description for the first TicketBox. You can also set the starting ticket ID number for all TicketBoxes.

Now you can define a rule to route newly created Tickets into the TicketBox defined in the previous step. Enter an email address to match and a description of the rule. There are many other routing rule options that can be configured later

The last step is to define a SMTP message destination. Enter a server hostname or IP address to deliver mail to. The default port is 25 and the default interval for sending mail is once a minute. If you enable SMTP Auth, then you will need to enter a username and password.

#### Web Server

You must select the installed Web Servers to use with VisNetic MailFlow. The next step is to configure the parameters of the newly created website. If you select "Create as Virtual Directory of existing website", then you will have to select which website to create the virtual directory in. The directory name will be "mailflow." If you create a new website, then you will need to select the domain name or host and the IP addresses and port.

#### Built-in Administrator Account

You will need to set a password and email address for the built-in administrator account. Use this account to login to VisNetic MailFlow to finish configuration.

#### Registration

The next step is to copy the application files to the target directory, and to create the website and database. The final step is to enter a registration key. You can enter a registered key or enable a 30-day evaluation.

#### Optional Components

You have the option to download some additional components to your VisNetic MailFlow server. These components are the Adobe SVG and Acrobat plug-ins for Internet Explorer. The SVG plug-in is required to view the graphs in the reports. The Acrobat reader is required to view documentation. When these components are downloaded through the installer, they can then be distributed to users through the VisNetic MailFlow website.

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### Uninstalling

To uninstall VisNetic MailFlow, navigate to Add/Remove Programs in the control panel. Select VisNetic MailFlow and click on the Change/Remove button. You will be asked whether you want to remove the VisNetic MailFlow database and website.

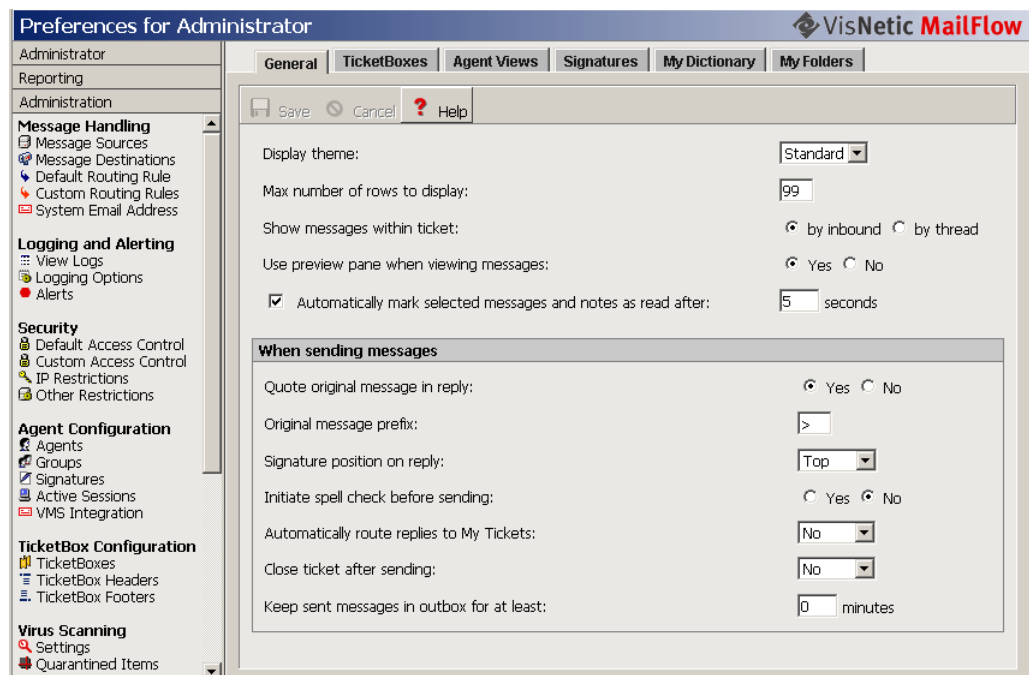
## Overview

*This chapter describes how to access the administration functions.*

### Administration Roll-up

To login to VisNetic MailFlow, enter the URL for the website configured in installation into Internet Explorer. On the VisNetic MailFlow server, there is a shortcut titled "Login to MailFlow" in the "Deerfield.com\VisNetic MailFlow" program group. You will be presented with the login page. Enter "Admin" in the username field. Enter the password for the built-in administrator account in the password field and hit Enter or click on the Login button.

The first time a user logs in, the preferences page appears in the right pane. Refer to the chapter on Agent Preferences in the user guide for more information. Subsequent logins will take the user directly to the "My Tickets" page.



The left pane contains three "roll-ups". Click on the title (e.g. "Administration") to "unroll" the administration section and display links to the administration pages. All administrative functions except ODBC connection settings can be configured from this menu.

#### Administrators Group

The built-in administrator account cannot be disabled or removed from the administrators group. Agents in the administrators group have access to the administration roll-up. Agents that are not a member of this group do not have the administration roll-up in their left pane and cannot access these pages.

#### Administration Tool

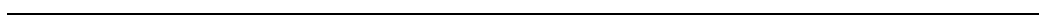
If VisNetic MailFlow cannot access the database, you will need to run the Administration Tool on the VisNetic MailFlow server, which can be launched through a shortcut titled "Administration Tool" in the "Deerfield.com\VisNetic MailFlow" program group. This tool provides these functions:

- ❑ Modify the ODBC connection parameters, including:
  - Name of SQL server that houses the VisNetic MailFlow database
  - VisNetic MailFlow Database name
  - Authentication Mode (SQL Server or Windows Authentication)
  - Account information (username, password, and domain)
- ❑ Enable or disable the Force HTTPS Option. Enabling this option without an operating SSL web site can lock you out of VisNetic MailFlow. If this happens, you can disable the option with this tool.
- ❑ Set the password for the built-in administrator account.

If you are logged in to an NT account with administrative access, then you can immediately access these functions. Otherwise, you must first enter the username and password of a valid VisNetic MailFlow user in the administrators group.

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ADMIN GUIDE



## Message Handling

*This chapter shows how to collect, send, and route email.*

### Message Sources

**M**essages Sources represent the email accounts from which VisNetic MailFlow collects mail for routing and re-distribution throughout the system. VisNetic MailFlow supports any number of message sources, which are accessed using the standard POP3 message retrieval protocol. These POP3 email accounts might be hosted by your Internet Service Provider (ISP) or on a local mail server on your local area network.

Click on the link to message sources in the message handling section of the administration roll-up to view a summary of each message source that's currently defined within the system. From here you can create, edit and delete message sources. Note that you cannot define your first message source until at least one message destination has been created.

Click on the Check Mail button to force all defined message sources to check for new messages.

Each message source is defined by the following parameters:

- Enabled** - allows VisNetic MailFlow to collect from account; if disabled, messages will not be collected from specified account
  - Server Address** - location of mail server to collect messages from; specify hostname or IP address
  - Port** - TCP/IP port that mail server is listening on
  - User Name** - account to collect messages from
  - Password** - associated password to access account
-

- ❑ **Use APOP** - check this box if the mail server you are collecting from supports authenticated POP
- ❑ **Leave Copies on Server** - check this box if you wish to leave messages on the server after collecting AND if the mail server supports UIDL
- ❑ **Check Interval** - specifies how often VisNetic MailFlow will check the account
- ❑ **Connection Timeout** - amount of time VisNetic MailFlow will wait for a response from the Message Source before timing out
- ❑ **Max Message Size** - maximum size of individual message and attachments; if exceeded, VisNetic MailFlow will not retrieve message
- ❑ **Message Destination** - each Message Source must be associated to a Message Destination to help ensure the efficient flow of messages in and out of the organization

You can verify authentication credentials for message sources that use APOP by clicking on the Test Login button.

#### Message Destinations

Message destinations represent the SMTP email servers through which outbound messages are delivered to their recipients. Any Message Destination defined must support the SMTP protocol standard, and must be directly accessible to the VisNetic MailFlow host computer. For example, a message destination could be a mail server hosted by your ISP, or one hosted somewhere on your local area network.

Message destinations are also intrinsically linked to message sources - each message source must have an associated message destination in order to successfully deliver outbound email received by that message source. One message destination can also be flagged as the "default", which means that defined message sources will use it for outbound message delivery by default.

Click on the link to message destinations in the message handling section of the administration roll-up to view a summary of each message destination that's currently defined within the system. From here you can create, edit and delete message destinations.

Click on the Send Mail button will force all defined message destinations to send queued up messages.

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Delivery Failures are messages that experience a permanent SMTP delivery failure. This might be due to an email addressed to an unknown local user within a valid domain, or the connection to the SMTP server could not be made within the retry interval. These failed messages will be held in the Delivery Failures and can be processed in a batch by an administrator, rather than having each individual agent attempt to re-send. Click the View Failed button to the current list of failed messages for the selected message destination.

Each message source is defined by the following parameters:

- ❑ **Enabled** - allows VisNetic MailFlow to deliver to this mail server; if disabled, messages cannot be sent to this server for delivery
- ❑ **Server Address** - location of mail server to send messages to for final delivery; specify FQDN or IP address
- ❑ **Port** - TCP/IP port that mail server is listening on
- ❑ **Use SMTP Auth** - check this box if the mail server you are delivering to supports SMTP Auth
- ❑ **User Name** - account to collect messages from
- ❑ **Password** - associated password to access account
- ❑ **Delivery Interval** - specifies how often VisNetic MailFlow will deliver queued messages to this server
- ❑ **Connection Timeout** - amount of time VisNetic MailFlow will wait for a response from the Message Destination before timing out
- ❑ **Max Message Size** - maximum size of individual message and attachments; if exceeded, VisNetic MailFlow will not deliver message; agent will be notified if size is exceeded

## Default Routing Rule

The default routing rule is the routing rule that takes effect when no custom routing rules match an inbound message. The default routing rule can be used to assign both ownership and TicketBox location for an un-handled inbound email message.

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Click on the link to default routing rule in the message handling section of the administration roll-up to view the default routing rule. Click on Save to make the changes go into effect.

#### Assign Ownership

From the default agent drop-down box, choose which agent should act as the default owner for any Tickets created by the entry of new messages into the VisNetic MailFlow system. Setting this to "NONE" will effectively cause there to be no default ownership of such Tickets (e.g. they will be "unassigned").

Next, select the radio button next to the routing option that best suits your default ownership assignment requirements. For example, you may wish for the system to assign un-handled inbound messages to the default agent only if another agent doesn't already own the associated message contact.

#### Assign to TicketBox

From the default TicketBox drop-down box, choose which TicketBox should receive Tickets that are otherwise un-handled by custom routing rules. The default option is to route such Tickets to the built-in "Unassigned" system TicketBox.

Next, select the radio button next to the routing option that best suits your requirements. The default routing rule can assign un-handled Tickets directly to the "Unassigned" TicketBox, or it can prefer to assign it to a TicketBox with a matching email address (if one exists).

## Custom Routing Rules

Custom routing rules are created in order to provide specific ticket routing instructions for inbound messages that match their associated criteria. Custom routing rules can be used to sort Tickets into specific TicketBoxes, assign ticket ownership to specific agents, set ticket priority, provide automatic message responses, and much more.

Click on the link to custom routing rules in the message handling section of the administration roll-up to edit the custom routing rules. You can create, edit, and delete routing rules from this page. You can also adjust the order by which the rules are evaluated. The routing engine processes the rules in order starting with the lowest order number. The first rule to match is processed. If no defined custom routing rule matches an inbound message, the default routing rule is used to determine ticket ownership and the destination TicketBox. Click on Save to make changes to the order go into effect.

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### Rule Information

- ❑ **Description** - descriptor shown in Routing Rules list window
- ❑ **Enabled** - allows VisNetic MailFlow to process inbound messages against specified rule

### Matching

Matching will occur when all defined criteria are met, as an example, if you specify a To: Address and a From: Address in the same Routing Rule, the rule will not be satisfied unless the specified To: and From: addresses match the inbound message header To: and From: addresses.

If multiple match items are defined in the same field, the OR operator will be used, as an example, if you specify "sales@mydomain.com" and "info@mydomain.com" in the To: Address field of the same Routing Rule, the rule will be satisfied if either of those addresses are in the inbound message To: header.

- ❑ **Source Type** - message source to process rule against
- ❑ **(To) Address** - email address as specified in the To field from the message originator; if multiple defined, match will occur if any one is met
- ❑ **(From) Address** - email address of message originator; if multiple defined, match will occur if any one is met
- ❑ **Match Text** - allows matching of text in Subject, Message Body, Headers, or combinations thereof. Uses Regular Expression Syntax

### Automatic Processing

When a match occurs, automated action can be performed prior to Destination handling. Messages can be automatically responded to or forwarded to an Email address

- ❑ **Enable** - allow Automatic Processing to occur on matching rule
  - ❑ **Forward(To)** - sends a copy of the message to an email address
  - ❑ **Foward(CC)** - sends a carbon copy of the message to an email address
  - ❑ **Forward(From)** - allows you to forward the message as if it appears direct from the originator or from an Agent email address
-

## Destination

When a routing rule matches, messages can be acted upon by moving to a TicketBox, priority level of ticket set, agent ownership assigned, or removed from the system.

- ❑ **TicketBox** - TicketBox to create ticket for matching message in
- ❑ **Ticket Priority** - importance of ticket when rule matches
- ❑ **Assign to Agent** - ownership of ticket
- ❑ **Shred** - deletes message to Trash can or permanently removed from VisNetic MailFlow database
- ❑ **Create new Ticket** - If inbound message is not a reply to an existing ticket, assign a unique ticket number. Use this option to create a new unique ticket even if the Subject and/or From address match an existing ticket

## System Email Address

The System Email Address is an email address assigned to the VisNetic MailFlow system itself. This email address will appear within the "from" field of email messages used to deliver external Alert notifications and Anti-Virus message bounces/notifications.

Because of its use within bounce and notification email messages, the defined System Email Address should be a valid, Internet-routable email address.

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## Logging and Alerting

*This chapter describes the logging and alerting options available.*

### Logging

VisNetic MailFlow provides an integrated log viewing facility to allow administrators to view events logged by the system. MailFlow logs can be written to the file system of the individual MailFlow servers, to a network UNC or to the MailFlow database.

Logging Options can be configured by selecting the Logging Options shortcut from the left-hand navigation pane.

### To modify Logging Options

1. To log to the database, select the "Log to Database" option by placing a checkmark in the corresponding box.
2. To set the log path, enter the entire folder path, excluding the trailing slash. UNC paths must begin with \\ . You cannot log to a mapped drive, you must enter the UNC.
3. Set the number of days to retain the logs, enter "0" (zero) to retain them indefinitely.
4. Place a checkmark in each corresponding box for level of severity and category you wish to log information on.
5. Click Save.

### Levels Of Severity

Category	Description
Informational	Successful operations

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Warning	Event that did not cause an error, but may indicate future errors
Error	Failed operations
Critical Error	An error that critically impacts the operation of VisNetic MailFlow

### Log Event Categories

Category	Description
Outbound Messaging	Events that occur while sending to message destinations
Inbound Messaging	Events that occur while checking message sources
Message Processing	Events that occur in message processing that are neither inbound nor outbound specific
Routing Rules	Events that occur while routing inbound messages into TicketBoxes
ISAPI Extension	Events that occur in the ISAPI extension
Database Maintenance	Events that occur in database maintenance operations
Security Violation	When a user requests data that he does not have access to
Authentication	Agent logins, logouts, and session time-outs
Product Registration	Events relating to product registration
Virus Scanning	Virus scanning events

When the File System Logs shortcut is selected within the left-hand navigation pane, the right-hand pane will display a summary listing of available VisNetic MailFlow log files. The summary information includes the log file name, date it was last modified, and file size.

When the Database Logs shortcut is selected within the left-hand navigation pane, the right-hand pane will display a summary listing of available VisNetic MailFlow logs. The summary information includes the date, server and number of entries.

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Double-click on a log, or select a log and click on the View button to see the contents. When viewing large data sets, use the paging buttons at the bottom of the screen to move between pages.

You can change your filtering options and click the Filter button to refresh the listing. Or you can double-click on a log entry to view the text in a pop-up window. Alternatively, you can select the log entry and click View. You can filter on severity, component, category, and time. Log entries always are presented in reverse chronological order.

### Alerting

VisNetic MailFlow has the ability to notify Administrators and Agents of key events. There are two types of configurable Alerts, 1) Administrator configured Alerts and 2) Agent configured Alerts.

The Administrator configured alerts are defined within the Administration section and include message delivery errors, ticket age alerts and more. Administrators can choose who is notified and specify the delivery method. Click on the Alerts shortcut to view the alert settings.

By default, several key alert configurations are enabled to notify the Administrator of specific VisNetic MailFlow system events.

Agent configured alerts are defined within the Agent's Preferences, My Alerts tab and include Inbound Message to Owned Ticket, Inbound Message from Owned Contact, Ticket assigned to you, Outbound Message Requires Approval, Outbound message Approved, and Outbound Message Returned.

Agent Alerts configuration options:

- **Alert On Event** - the event that will trigger the Alert.
- **Alert To Method** - signifies whether the Alert will be Internal (left menu "Alerts" option) or External via email.
- **Alert To Recipient** - if the Alert is External, the recipient email address.

Administrator configured Alerts can be sent internally to an agent or group, Agent configured Alerts are only sent to the agent that defined them. With internal delivery, the alert messages appear in the Alerts window, which can be accessed from agent shortcuts in the left-hand pane.

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Alerts can also be sent to an external email address. A recipient email address is required for this method of delivery.

The "For" column is used by the ticket-based alerts: Ticket Age, Low Watermark, and High Watermark. This field selects the TicketBox to monitor for alerts, or any TicketBox to monitor all TicketBoxes.

#### Administrator configured Alerts

Event	Description
Low WaterMark	When the number of open Tickets exceeds the Low WaterMark threshold for the TicketBox
High WaterMark	When the number of open Tickets exceeds the High WaterMark threshold for the TicketBox
Product Registration	Events relating to product registration
Disk Full	When disk full error occurs saving a file to disk
Inbound Delivery	Events that occur while receiving messages
Outbound Delivery	Events that occur while sending messages
Critical Error	Errors that prevent the system from functioning

#### Agent configured Alerts

Event	Description
Inbound Message to Owned Ticket	When a new Inbound Message is received and placed in a Ticket owned by the Agent
Inbound Message from Owned Contact	When a new Inbound Message is received from a Contact owned by the Agent
Ticket assigned to you	When a Ticket is assigned to the Agent, either automatically by the MailFlow system or by another Agent
Outbound Message Requires Approval	If an Agent has been assigned the responsibility to approve another Agent's Outbound Messages, an Alert can be triggered to notify the Agent that an Outbound Message requires their review and approval
Outbound Message Approved	If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been approved

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Outbound Returned Message	If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been returned and they need to review, modify and resend the message
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## Security

*This chapter describes how to implement a security policy.*

### Access Control Model

**V**isNetic MailFlow provides a secure environment where all members of the organization can perform their job functions through the same interface without being able to view or modify privileged information. Implementing a security policy involves customizing access control lists to securable objects.

VisNetic MailFlow uses a least restrictive security model. If everyone is granted full access to an object, then creating read-only access for a particular agent will have no effect. To restrict access for one agent, lower the access level to read-only for everyone, and create a group that contains everyone but the particular agent, and grant the group full access.

### Securable Object Categories

Object	Controls Access to:	Custom ACLs?
Agents	Tickets owned by the agent, agent views, agent preferences	yes
TicketBoxes	Tickets in the TicketBox	yes
Contacts	The Contact Editor	no
Groups	Group signatures <sup>2</sup>	yes
Standard Responses	Standard Response Editor	no
Ticket Categories	Tickets assigned to the Ticket Category	yes

<sup>2</sup> Note that access to a group only affects group properties, such as signatures, and does not provide access to all agents in the group.

Standard Reports	Left menu Reports section (Allow/Deny)	no
Scheduled Reports	Left menu Scheduled Reports option, schedule, view, edit, delete	yes
Auto Ticket Open	The option to set a Ticket to automatically reopen from a Closed state (Allow/Deny)	no
Agent Audit	The Agent Audit reporting option (Allow/Deny)	no

### Default Access Control

Click on the shortcut to default access control in the administrative roll-up to display the list of securable object categories. Click once to select a category and click Edit, or double-click the category to bring up the default access control list. This access control list applies to all objects in the category that don't have a custom access control list defined.

### Access Control Rights

Right	Grants these privileges:
None / Deny	no access
Read	read-only access
List	the ability to enumerate objects in this category <sup>3</sup>
Edit	read and write access to the objects
Delete / Allow	full access, including the ability to delete objects of this type

Agents in the administrators group have full access to everything. The Everyone group also has full access by default. The first step in implementing a security policy is to lower the privileges granted to the Everyone group. The next step is to grant access to the agents and or groups that need them.

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<sup>3</sup> If an agent has only list access to a TicketBox, then the agent can move Tickets to that TicketBox, but cannot view the contents of the that TicketBox.

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### Custom Access Control

Default access control definitions allow you to define access control lists for all objects in a category, but there are always exceptions. Custom access control lists override the default access control lists for a particular object. Click on the shortcut to custom access control in the administrative roll-up to display the list of custom access control lists.

### IP Access Restrictions

You can restrict the IP addresses that agents can login from. Click on the shortcut to IP access restrictions in the administrative roll-up to display the list of IP access restrictions. Separate restrictions are combined using the least restrictive model, just like access control. Granting the everyone group authorization to login from the IP range: 0.0.0.0 to 255.255.255.255 will override all other restrictions.

### Other Restrictions

There are two security-related options that are configured from the other restrictions page:

- ❑ Force HTTPS - If enabled, only SSL clients will be allowed access to VisNetic MailFlow. Please note that this setting can be undone with the administration tool.
- ❑ Session IP locking - If enabled, then agents cannot login from more than one IP address at a time.

## Agents

*This chapter describes agent configuration.*

### Authentication

**V**isNetic MailFlow users must have an agent account to login. To create or modify agents, click on Agents shortcut under Agent Configuration in the administration roll-up. Users can set their own agent preferences, but cannot modify their own agent configuration unless they belong to the administrators group.

The built-in administrator account is a special account. It cannot be made inactive or removed from the administrators group. It is not included in the user size calculation used for licensing. If you are evaluating VisNetic MailFlow and your 30 days is up, then the only account that can login is the built-in administrator. If you forget the built-in administrator password, you can set it using the Administration Tool (see chapter 4).

Users can login using a password stored in the VisNetic MailFlow database, on the NT domain controller, or in VisNetic MailServer ODBC data source. The method used depends on the type of agent account. Local users store their passwords in the database in an encrypted form. To change an agent's password, clear the password field and enter the new password. This is required because eight asterisks (\*) are returned in lieu of the agent's password for security reasons.

NT users authenticate against the NT domain controller as determined by the NT Domain configured for the agent. You can browse the NT user accounts by clicking on the NT Users button.

If VisNetic MailServer integration is enabled, you can create VisNetic MailServer users, who authenticate against a VisNetic MailServer ODBC data source.

### Agent Configuration

The fields in the edit agent page are described below:

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- ❑ **Local or NT User** – Indicates whether the User is authenticated against the local database or the defined NT Domain.
- ❑ **User Name** - Used to login with
- ❑ **Password** - Used to authenticate (only present for local users)
- ❑ **Domain** - Used to locate domain controller (only present for NT users)
- ❑ **Escalate Tickets To** - Choose another Agent or an Escalation Group to assume ownership of Tickets escalated by this user.
- ❑ **Outbound Message Approval From** - Choose another Agent or Group to provide outbound message approval for this Agent.
- ❑ **Agent Status** - If Active, the agent can login. If Inactive, the agent cannot login and no more Tickets will be assigned to them.
- ❑ **Require Get Oldest** - If yes, then the agent cannot browse Tickets contained in TicketBoxes. They must use the Get Oldest button to take ownership of Tickets. If no, then the agent can freely browse TicketBoxes.
- ❑ **Require Get Oldest** - If yes, then the agent cannot browse Tickets contained in TicketBoxes. They must use the Get Oldest button to take ownership of Tickets. If no, then the agent can freely browse TicketBoxes.
- ❑ **Default Email Address** – The default email address that will be utilized in outbound messages drafted by this Agent. Alternative email addresses may be presented as options during the message composition process.

#### Group Configuration

VisNetic MailFlow provides the ability to define groups of agents. Groups can be used to define access control rules, for sharing signatures, and for sending alerts. There are two special pre-defined groups, the everyone group and the administrators group.

The everyone group always contains all agents. It cannot be edited or deleted. The administrator group always contains the built-in administrator agent, but can also include other agents.

Groups can also be defined as Escalation Groups, which can then be assigned to individual Agents as the Escalation object.

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### Additional Agent Information

Define additional properties associated with this Agent. Available properties include the system default properties and any properties added within the Administration Contacts, Contact Properties dialog.

### Signatures

The default signature is automatically inserted into new messages. Group signatures are available to all agents in the group.

### Active Sessions

This page shows information about the users who are logged in to VisNetic MailFlow. It lists the IP address they connected from and the most recent time a page was requested from the server.

### VMS Integration

You must enable VMS Integration to define VMS users. Enter the ODBC parameters used to connect to the VisNetic MailServer database. You can test the settings by attempting to browse the VMS users from the edit agent page.

## TicketBoxes

*This chapter describes VisNetic MailFlow TicketBoxes.*

### TicketBoxes

**T**icketboxes are like folders. They provide a way to organize and group Tickets. The needs of your company's organizational structure will determine the TicketBoxes to be created. For example, there may be a Sales TicketBox for sales related correspondence, a support TicketBox for customer support requests, and an info TicketBox for product or service information requests.

Tickets are created when a message is received that is not associated with any existing ticket. Both custom and default routing rules can specify which TicketBox to create the new ticket in. Any agent with edit access to the TicketBox the ticket resides in can take ownership of the ticket or move it to another TicketBox. Tickets that are owned by the agent appear in their "My Tickets" view. Note that "My Tickets" is not a TicketBox.

To configure TicketBoxes, click on the TicketBoxes link on the administration rollup under TicketBox Configuration. You will be presented with a list of TicketBoxes defined in the system. You can edit a TicketBox by double-clicking a row or create new TicketBoxes with the new button.

- ❑ **Name** - TicketBox name that will appear to agents
  - ❑ **Default Email Address** - address that is associated with this TicketBox (e.g. sales@company.com for General Sales TicketBox). This email address can be the from: address when composing messages in this TicketBox. Routing rules compare this value with the to: address of inbound messages.
-

- ❑ **Default Email Address Name** – the real name that will be utilized in the from: address when composing messages in this TicketBox (e.g. “Sales Department” <sales@company.com >).
  - ❑ **Description** - brief description of TicketBox for easy reference when viewing TicketBox listing
  - ❑ **Enable Age Alerting** - trigger alert delivery when a ticket remains open longer than the value specified in Age Alerting Threshold
  - ❑ **Age Alerting Threshold** - if a ticket remains open longer, a ticket age alert is sent
  - ❑ **AutoReply with Standard Response** - when enabled, an automated response is sent to the originator when a newly created ticket remains open longer than the AutoReply Threshold. Automatic replies will only be sent for the first inbound message in the ticket. If the ticket contains any outbound messages, no auto reply is will be sent.
  - ❑ **Standard Response** - allows you select which Standard Response to sent to the message originator in auto replies.
  - ❑ **AutoReply Threshold** - automated response will be sent when ticket in exceeds time specified here; threshold of 0 sends automated response within a minute of creating the new ticket.
  - ❑ **Quote Original Message** - includes a quoted copy of the original message into the automated response
  - ❑ **Close Ticket Upon Reply** - changes ticket state to closed when auto reply is sent
  - ❑ **Require Get Oldest** - requires that agents retrieve a ticket first before performing any action (e.g. reply, forward); ensures oldest messages are answered first. When this is set, agents cannot browse the Tickets.
  - ❑ **Send Low Watermark Alert when open ticket count exceeds** - when the number of open Tickets in the TicketBox exceed this value, a Low Watermark alert will be sent. Indicating 0 in this field disables Low Watermarks for this TicketBox.
  - ❑ **Send High Watermark Alert when open ticket count exceeds** - when the number of open Tickets in the TicketBox exceed this value, a High
-

Watermark alert will be sent. Indicating 0 in this field disables this function. Works well in conjunction with Low Watermark alert to provide 2nd stage notification.

- ❑ **TicketBox Header** - applies text as defined in selected header to beginning of outbound messages (originating from this TicketBox)
- ❑ **TicketBox Footer** - applies text as defined in selected header to end of outbound messages (originating from this TicketBox)
- ❑ **Additional TicketBox Email Addresses** – additional email addresses that will be available as the from: address during message composition.
- ❑ **Custom Ticket Fields** – custom ticket fields that will be associated with this TicketBox. Custom Ticket Fields are defined within the Tickets section of the administration menu.
  - **IE** = Is Enabled for this TicketBox
  - **IR** = Is Required to be populated before outbound messages can be sent from this TicketBox
  - **IV** = Is Viewable in Ticket Lists, such as “My Tickets”, Agents must enable the Custom Ticket Field column view by selecting the “Columns” toolbar button
  - **SD** = Set Default when new Tickets are created (requires the Default Value field be populated)
  - **Default Value** is the value to set the field to when new Tickets are created (requires the SD flag be set)
- ❑ **Move all Tickets to TicketBox** - allows you to move all Tickets that reside in this TicketBox to another TicketBox; useful when changing your organization's TicketBox architecture

#### Custom Ticket Fields

Custom Ticket Fields are defined within the Tickets section of the administration menu. From this configuration interface, you can associate a custom Ticket Field with one or many TicketBoxes. Custom Ticket Fields can be set within message composition windows and also within the Ticket Properties dialog. If the IV flag is set, the Custom Ticket Field can be listed

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within any Ticket lists, such as “My Tickets”. Select the Columns toolbar button within the Ticket list and then select the relevant Custom Ticket Field to display.

Please see the configuration definitions in the TicketBox section above.

#### Headers and Footers

TicketBox headers and footers provide a way to automatically insert text all messages sent from a ticket. TicketBox headers are inserted before the body of the message and footers are appended to the end of the message. Please note that viewing the outbound message in VisNetic MailFlow will not show the TicketBox headers and footers.



## Virus Scanning

*This chapter describes the anti-virus capabilities of VisNetic MailFlow.*

### Settings

VisNetic MailFlow has integrated support for the VisNetic AntiVirus Plug-in. This allows for an additional layer of anti-viral protection directly within the VisNetic MailFlow system. When engaged, this feature will cause all inbound and outbound email messages to be scanned for viruses - appropriate actions can then be taken to prevent the spread of virus-infected email messages.

Just as important as keeping virus-infected email messages out of VisNetic MailFlow is the need to prevent their spread from internal corporate representatives to external entities such as customer or business partners. VisNetic MailFlow's AntiVirus integration can accomplish both goals.

Click on the Settings link under Virus Scanning on the administration roll-up to enable virus scanning. Note that you must have the VisNetic AntiVirus Plug-in installed. You must also have a valid registration key. Click on the link to VisNetic AntiVirus Plug-in under Product Registration to enter a key or create a 30-day evaluation key.

If virus scanning is enabled, inbound messages bodies, inbound message attachments, and uploaded attachment files will be scanned for viruses. You can configure how VisNetic MailFlow handles files of the following types:

- ❑ **Virus-Infected** - files that contain an identified virus
  - ❑ **Suspicious** - files that may contain a virus, but do not match a signature in the current database
  - ❑ **Files that cannot be scanned** - password-protected archives, and encrypted or corrupted files
-

The virus scanning actions are:

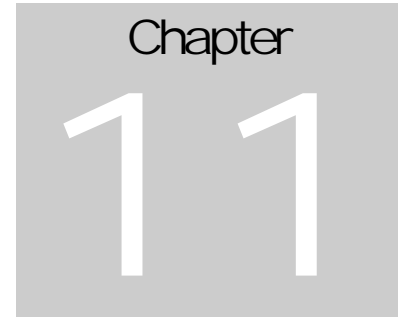
- ❑ **Allow** - suspicious files and files that cannot be scanned can be allowed into the system, but will be marked as such
- ❑ **Delete** - file will be immediately deleted
- ❑ **Repair** - the AntiVirus Plug-In will attempt to disinfect the file. If the repair fails, the file will be deleted.
- ❑ **Quarantine** - the file will be moved to the quarantine folder and cannot be downloaded

#### Quarantined Items

Attachments that are quarantined by the VisNetic AntiVirus Plug-In are managed in the quarantined items page. Click on the link to Quarantined Items under Virus Scanning in the administration roll-up.

From this page you can repair, delete or restore infected files.

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## Database Maintenance

*This chapter describes how to manage your VisNetic MailFlow database*

### Settings

**D**atabase Maintenance allows VisNetic MailFlow to maintain and backup its internal data structures at scheduled intervals or through manual intervention. Database Maintenance provides operations to minimize the current "working" data set and protect data from permanent loss.

To configure database maintenance, click on the shortcut to Settings under Database Maintenance in the administration roll-up. You can schedule daily database maintenance to run automatically at a certain time of day, or you can make it run immediately. Keep in mind that agents will not be able to access VisNetic MailFlow while database maintenance is running.

Backing up the database saves the contents of the database and all attachments in a compressed file with a proprietary format.

Archiving the database stores Tickets older than specified time period in a compressed file with a proprietary format. The ticket age is determined by last time the ticket was opened or when the most recent message was added to the ticket. The way this function works depends on what will be removed from the database:

- ❑ **Tickets and Messages** - completely removes older Tickets from the database. No trace of the Tickets remains in the database.
  - ❑ **Messages** - removes all messages and attachments from the database, but leaves the ticket, ticket notes, and system ticket events. You can access the messages from the archive through the system ticket events if the archive file remains on the system.
-

- ❑ **Nothing** - leaves the database alone. This option is primarily for running database maintenance now. If this option is enabled for daily maintenance, older Tickets may be archived multiple times.

Purging old records automatically removes items that are older than the specified time interval. You can remove the following types of records:

- ❑ **Tickets** - purges closed Tickets older than the cut-off interval
- ❑ **Trash** - removes trash records older than the cut-off interval
- ❑ **Standard Response Usage** - removes standard response usage data older than the cut-off interval.
- ❑ **Alerts** - removes any alerts older than the cut-off interval
- ❑ **Contacts without Tickets** - removes contact records that have no associated Tickets

### Archives

The Archives page provides a listing of all archive files generated by the VisNetic MailFlow database maintenance. The listing includes the Archive filename, date of creation, the number of inbound and outbound messages it contains, and the size of the file. Archive files that are copied to the archive folder will also appear, so that you can import archives from other systems. Please note that the system will be unavailable to agents while importing an archive.

### Backups

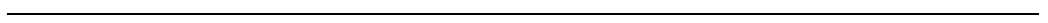
The Backups screen provides a listing of all backup files generated by the VisNetic MailFlow database maintenance. Restoring a 2.x backup will merge the backup file with the current contents of the database. Restoring a 1.x backup will replace the current database with the contents of the backup. Please note that the system will be unavailable to agents while restoring a backup.

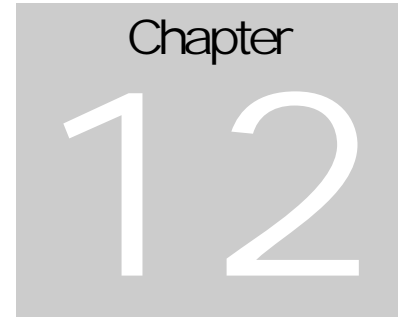
### Deleted Items

Deleted Items is the repository for Tickets, messages, contacts, and standard responses that have been deleted by an agent. This ensures that items are not permanently removed from VisNetic MailFlow prior to administrative approval, and provides an opportunity to restore items deleted by mistake.

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## Customization

*This chapter describes how to customize VisNetic MailFlow*

### Contact Properties

Custom contact properties allow custom data fields to be added to any contact record within the system.

For example, if you created a custom contact property called "Partner ID", that field could then be added to any contact records in the system. Custom contact property fields can also be searched during contact search operations.

Once the new contact property has been defined, you can add correlative fields to any contact record. You can also add custom contact property fields to agent records.

### Global Dictionary

The VisNetic MailFlow global dictionary can be used to add custom entries to the global spell-check dictionary. Unlike entries added to per-agent dictionaries, the words contained within the global dictionary will be in effect for all agents during spell-check operations.

### Settings

**Default Database Timeout for Ticket Searches** - Set the number of seconds to wait for the database query to finish when performing ticket searches. The default is 60 seconds

**Use cutoff date to enable read/unread of messages and notes** - If enabled, the system will ignore the read/unread status of any messages or notes generated on or before the cutoff date specified. As an example, if you enable the option and set the cutoff date to 10/01/2007 (October 01, 2007) any messages or notes that were created on or before 10/01/2007 will not have a read/unread status and you will not be able to set the read/unread status.

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**Agent Audit** – Enable/Disable the Agent Audit feature and set the Agent activities that should be written to the Agent Activity Log for later reporting. Ensure the appropriate security is set for the Agent Audit reporting on the Default Access Control panel. The default is all options enabled.

**Scheduled Reports** – Enable/Disable the execution of Scheduled Reports. The default is Enabled.

**Max Ticket Lock Time** - Set the maximum number of minutes a Ticket can be locked before the system will automatically unlock it. Set to 0 to disable the feature, set to 20 > minutes. The default setting is 60 minutes.

### Ticket Categories

In VisNetic MailFlow, Tickets (which contain sent and received messages) are housed within TicketBoxes. The TicketBoxes will normally be set up to reflect the needs of your company's organizational structure – for example, there may be a *sales* TicketBox for sales related correspondence, a *support* TicketBox for customer support requests, and an *info* TicketBox for product or service information requests.

An Agent's primary job is to monitor one or more TicketBoxes.

In addition to Ticket classification by TicketBox, Tickets can also be classified by Ticket Category. Like TicketBoxes, Ticket Categories will normally be set up to reflect the needs of your company's organizational structure. You must have at least View rights to a Ticket Category in order to see Tickets assigned to that Category.

Ticket lists, such as MyTickets, Public TicketBoxes and the Ticket Search results dialog can be sorted by Ticket Category. To sort by Ticket Category, click the Ticket Category Ticket list header.

### To add a new Ticket Category

- Click the New toolbar button in the Ticket Categories window
- Enter a name for the new Ticket Category in the Description field
- Click the Save toolbar button

Once the new Ticket Category has been defined, you can automatically set new Tickets to a Category within Custom and the Default Routing Rule, Processing Rules and manually via the Ticket Properties dialog from the My Tickets, Ticket

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Boxes or Ticket Search Results pages. You can also set the Ticket Category during message composition.

**Note:** Once a Ticket Category is defined and a ticket is set to that Category, the Ticket Category cannot be deleted. To delete a Ticket Category, you must first set all Tickets that are set to that Category to some other Category.

## Server Clustering

*This chapter describes how to setup Server Clustering in VisNetic MailFlow*

MailFlow supports any number of servers, configured to utilize the same MailFlow database, to provide Agent Web Services and to perform background server tasks, such as inbound message collection via Message Sources, outbound message delivery via Message Destinations, message routing, etc...

If multiple servers are defined, it is imperative that certain system settings be modified to utilize a shared network file system, these setting include the following:

- **Inbound Attachment Folder** - set within the MailFlow Servers dialog, Global Server Properties
- **Outbound Attachment Folder** - set within the MailFlow Servers dialog, Global Server Properties
- **Path for Backup Files** - set within Database Maintenance, Settings
- **Path for Archive Files** - set within Database Maintenance, Settings

**Note:** The above paths must be set utilizing the UNC format (\\servername\sharename), a mapped drive letter can **NOT** be utilized.

**Note:** The MailFlowEngine Service and Web Services (Application Pool) must be set to utilize a login name that has read/write/create/delete access to the defined network shares.

### Adding Servers to the Cluster

MailFlow Servers are added to the cluster during installation, they can also be added by specifying the database login credentials via the MailFlow

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Administration Tool Windows application. After defining and testing the database login credentials in the Windows Tool, cycle the relevant MailFlowEngine service and the server will be added to the cluster.

Once the Server is added to the cluster and is listed in the MailFlow Servers, Servers list, it can be assigned Server Tasks to perform. To delete a Server, select it from the list and then select the "Delete" toolbar button.

#### Global Server Properties

- **Inbound Attachment Folder** - the folder where Inbound Message Attachments are stored.
- **Outbound Attachment Folder** - the folder where Outbound Message Attachments are stored.

**Note:** A directory structure utilizing the Year/Month/Day will be created within the above defined folders.

#### Individual Server Properties

- **Description** - Set by the installer or MailFlowEngine Service when the Server is added to the cluster (this is the Windows Server Name and cannot be modified).
- **Type** - Master or Secondary, determines whether this server is a Master or Secondary server. Only one Master server can exist within a MailFlow Cluster.
- **Spool Folder** - the folder that is utilized during outbound message creation and delivery.
- **Temp Folder** - the folder that is utilized during inbound message processing.

**Note:** The Spool and Temp Folders must be local paths accessible to this server only.

#### Server Tasks

- **Database Maintenance** - Only one server within the cluster can be set to perform the automated Database Maintenance tasks, such as database backup, archiving, etc...
-

- **Message Destinations** - Multiple servers within the cluster can be set to perform the Message Destinations (outbound delivery) task. Assign the configured Message Destinations that this server will process by selecting the "Assign" button.
  - **Message Router** - Only one server within the cluster can be set to perform the Message Routing task .
  - **Message Sources** - Multiple servers within the cluster can be set to perform the Message Sources (inbound collection) task. Assign the configured Message Sources that this server will process by selecting the "Assign" button.
  - **Scheduled Reports** - Only one server in the cluster can bet set to perform the Scheduled Reports task.
  - **Ticket Monitor** - Only one server in the cluster can bet set to perform the Ticket Monitor task. This task sends TicketBox based auto responders, checks Age and Watermark Alerts and other Ticket and TicketBox based functions.
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## Outbound Message Approval

*This chapter describes how to setup Outbound Message Approval in VisNetic MailFlow*

Individual Agents can be set to require Outbound Message Approval either by another Agent or Group of Agents. This feature allows supervisory personnel the opportunity to review an Agent's outbound correspondence before the message is released for delivery to the recipient.

An approving Agent can either release (approve) the message for delivery or return it to the authoring Agent for edit and resend. Ticket Notes can be utilized to instruct the authoring Agent what needs to be changed in the Outbound Message before it can be released/approved.

The entire approval/return process can be logged via Agent Audit and/or Ticket Events Logging.

### Outbound Message Approval Components

The Outbound Message Approval feature utilizes the following MailFlow components:

**Agent Configuration** - Enable/Disable individual Agents to require Outbound Message Approval and define the approving Agent or Group.

**My Alerts** - Define Agent Alerts to be notified when an Outbound Message requires approval (for approving Agents) , when an Outbound Message has been approved (released) or when an Outbound Message has been returned (Agents requiring outbound approval).

**Approval Queue** - An "Approval Queue" will appear in the left menu of Agents that are configured to approve Outbound Messages for other Agents. The Queue will also be visible if an Agent belongs to a Group that is configured to provide Outbound approval for an Agent.

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**Agent Audit Logging** - Agent Audit Logging can be enabled to log Outbound Message approval (release) and return events.

**Ticket Event Logging** - Outbound Message approval (release) and return events are logged to Ticket History and displayed within Ticket Events.

### Outbound Message Approval Configuration

Agent Configuration options:

- **This Agent Requires Outbound Message Approval From Agent** - the Agent that will provide Outbound Message Approval
- **This Agent Requires Outbound Message Approval From Group** - the Group of Agents that will provide Outbound Message Approval.

My Alerts configuration options:

- **Alert On Event** - the event that will trigger the Alert.
- **Alert To Method** - signifies whether the Alert will be Internal (left menu "Alerts" option) or External via email.
- **Alert To Recipient** - if the Alert is External, the recipient email address.

Approval Queue options:

- **Contacts** - view Contacts associated with the Ticket the Outbound Message belongs to.
- **Notes** - add/edit Ticket Notes associated with the Ticket the Outbound Message belongs to.
- **Return Message** - return the Outbound Message to the authoring Agent.
- **Release Message** - release the message for delivery to the recipient.

**Note:** Returned Outbound Messages will be placed in the authoring Agent's "Drafts".

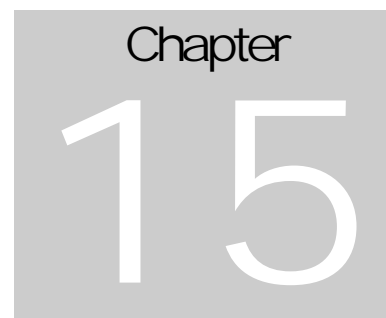
**Note:** All Agents within the defined Outbound Message Approval Group can receive notification (via My Alerts) that an Outbound Message requires approval, however only an individual Agent within that Group can perform an action on the approval request. Once an action is taken (message is

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released or returned) by an Agent within the approval Group, all corresponding Alerts for that Outbound Message will be cleared for all other Agents within the defined approval Group. The Outbound Message will also be removed from the Approval Queue.

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## 3CX IP PBX Assistant Plug-in

*This chapter describes the VisNetic MailFlow 3CX Assistant Plug-in*

The MailFlow Plug-in for the 3CX Assistant provides lookup of MailFlow Contacts when an inbound telephone call is received. It utilizes the callerid of the inbound telephone call to query the MailFlow database for Contacts with that telephone number defined in any of the Contact telephone number fields.

There are no special MailFlow server requirements to support the 3CX Plug-in. Configuration of the plug-in is done at the client utilizing the same MailFlow login URL, port, user name and password that the Agent utilizes to log into the MailFlow web based interface.

For additional information regarding the MailFlow Plug-in for the 3CX Assistant, please click [here](#).

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