

HansaWorld Enterprise

Integrated Accounting, CRM
and ERP System for
Macintosh, Windows, Linux,
PocketPC 2002 and AIX

Mail

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Preface

The HansaWorld Enterprise range of products contains a number of powerful accounting, CRM and ERP systems for the Windows, Macintosh, Linux, PocketPC 2002 and AIX environments.

The programs are designed to make administration and accounting as easy and fast as possible. They are similar in operation regardless of platform. In the specific areas where there are significant differences, these are described and illustrated in full. In all other cases illustrations are taken from the Windows version.

This manual covers Hansa's Mail features. Prior to reading it, you should already be familiar with Hansa's Work Area (its modules, registers, windows, menus and buttons, covered in the 'Introduction to HansaWorld Enterprise' manual) and the Customer register (described in the 'Customers and Suppliers' manual).

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

How these manuals are organised

Introduction to HansaWorld Enterprise

Introduction	Installing HansaWorld Enterprise, the basic ideas
Work Area	Basic elements of HansaWorld Enterprise: modules, registers, windows, menus, functions, buttons
Accounting Principles	About the place of HansaWorld Enterprise in your business, integration between ledgers, objects
Starting Work	Entering opening balances

Manuals for each Module

Assets	Asset accounting, calculation of depreciation using user definable depreciation models, revaluation
Cash Book	Inward and outward cash transactions, receipts and payments
Consolidation	Multi-company reporting, subsidiaries and daughter companies
Contracts	Periodic invoicing and repeat billing, contract renewals, contract quotations, contracts from invoices
CRM	Time management using daily or monthly calendar formats. Contact and customer history. Customer letters and mailshots. Target time. Employee Time Statistics
Currency	Multi-currency in all modules
Customers and Suppliers	Customers and suppliers, customer categories and reports
Expenses	Payments to and from employees
Items and Pricing	Products and services, pricing
Job Costing	Project management. Recording time, expenses and purchases. Instalments. Pricing by consultant, project, task and time of day. Budgets and quotations
Mail	Internal mail, external mail (email), conferences, off-line local mail, chat
Nominal Ledger	Transactions, simulations, budgets & revised budgets. Error correction. Account reconciliation. Transaction templates. Flexible management and financial reports with multi-dimensional analysis and drill-down to transaction level
Production	Multi-level assemblies from components
Purchase Ledger	Purchase invoices, payments and payment suggestions, creditor reports, prepayments, accruals, acceptance
Purchase Orders	Purchase orders, goods receipts and purchase pricing
Quotations	Sending quotations, call backs, pipeline management, opportunity forecasting and conversion ratio reporting
Report Generator	User-definable reports
Sales Ledger	Invoices, receipts, debtor reports and documents, deposits and prepayments, accruals
Sales Orders	Orders and deliveries. Invoices from orders
Service Orders	Management of service stock, invoicing of repairs, warranties
Stock	Deliveries, goods receipts, stock movements, batch and serial number tracking, multi-location stock management
System	Settings and parameters. System-wide usage

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***HansaWorld
Enterprise***

Mail

Mail

Hansa's Mail facilities allow users in multi-user systems to—

- send Mail to other users in your Hansa system, with or without attached files or Hansa records;
- send Mail to Conferences, where it can be read by all users (subject to access restrictions);
- update Mail that has been sent by other users;
- send and receive e-mail (electronic mail is also termed “External Mail” in this manual, signifying that its original source or final destination is outside the Hansa Mail system); and
- chat with other users.

Setting up the Hansa Mail System

The Server

Set up the server as described in the ‘Creating a New Database - Multi-user’ section in the first chapter of the ‘Introduction to HansaWorld Enterprise’ manual.

Open the Configuration setting in the System module. Ensure the numbers of Named and Concurrent Users and Mailboxes are correct, as follows—

Named Users Named Users are useful in cases where it is known that access to Hansa will be limited to certain employees in an organisation. Each employee that will use Hansa should be entered as a record in the Person register inside Hansa. Each Person must also have a Mailbox. The number of Named Users is the maximum number of Mailboxes that can be registered in Hansa. This number should be recorded in the Named Users field in the Configuration setting. Do not record the number of Mailboxes in the Extra Mailboxes field.

For example, if you have purchased three Named Users, you can register a maximum of three Persons with three

Mailboxes in your system. These three Persons/Mailboxes will represent the three employees that can use your system: all three will be able to log in to Hansa at once. You can register additional Persons without Mailboxes, perhaps for time recording purposes or for recording expenses for employees that will not use Hansa themselves. If one of these employees logs in to Hansa, other users will not be able to log in and the additional employee will automatically be logged out after one minute. To grant true access to one of these additional employees, you will need to purchase an additional Named User, record the increase in the Named Users field in the Configuration setting, and then create a Mailbox for the additional employee.

Concurrent Users Concurrent Users are useful in cases where it is known that many employees in an organisation will need access to Hansa, but not all at the same time. Each employee that will use Hansa should be entered as a record in the Person register inside Hansa. Each Person should not have a Mailbox: if a Concurrent User needs a Mailbox, it must be purchased separately and recorded in the Extra Mailboxes field in the Configuration setting. This field records Mailboxes for Concurrent Users only and should not be used for Named Users. The number of Concurrent Users is the maximum number of users that can be logged in to your Hansa system at any one time.

For example, if you have purchased three Concurrent Users, you can register any number of Persons (without Mailboxes). These Persons will represent the employees that can use your system: any three will be able to log in to Hansa at once. A fourth Person attempting to log in will be informed that the maximum number of users is already using Hansa.

Make sure too that the number of Conferences is correct, and that the Server box on the 'Basic' card and the E-Mail and Conferences box on the 'CRM' card are both checked. If you will be using external mail, check the External E-Mail box, also on the 'CRM' card.

If you have been using Hansa for some time before implementing its mail facilities, any changes in this setting will result in you having to apply for a new Enabler key.

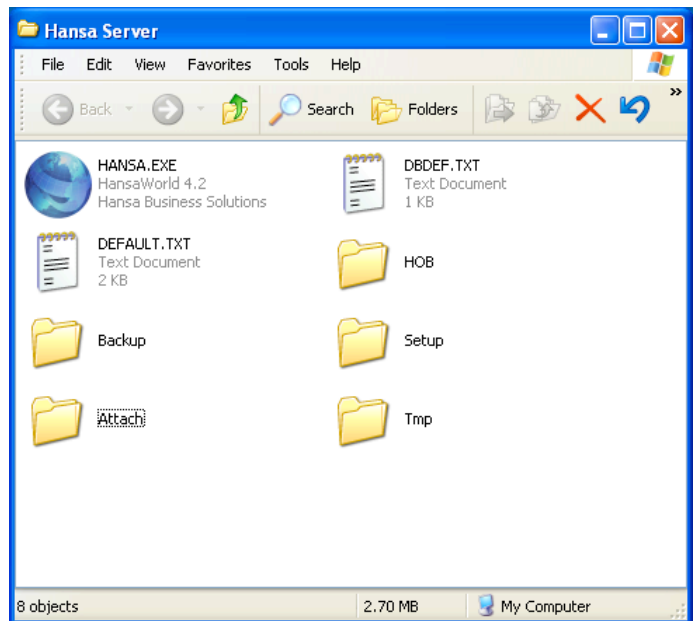
The screenshot shows the 'Configuration: Inspect' window with the following details:

- Operations** tab is selected. A **Save** button is in the top right.
- Control String:** AAA3A3AA-AB9-CVWESSA-AA-AAAAAA-AAC2RCC
- Control Code:** 16030339
- Key Valid Until:** 29/9/2005
- Enabler Key:** (empty field)
- Navigation tabs: **Users** (selected), Server, Basic, Verticals, Cash, CRM, HAL, Technical.
- Named Users:** 25
- Companies:** 1
- Extra Mailboxes:** (empty field)
- Single Functions:** (empty field)
- Concurrent Users:** (empty field)
- Conferences:** 25
- Server Hardware:** Generic PC
- Server OS:** Windows
- Checkboxes (all checked):**
 - Sales and Purchase Ledgers
 - Sales Orders
 - Quotations
 - Stock
 - Nominal Ledger
 - Consolidation
 - Purchase Orders
 - Server

If you want users to be able to log on to the server to send and receive mail over the internet using a browser, check the Home Page, Internet Server and Multiple Internet Users boxes on the 'Technical' card. Please refer to your local Hansa representative for more details about this feature.

Ensure that a folder or directory named "Attach" is in the Hansa server folder. This is used to store any files that have been attached to internal Mails.

If the server will be acting as the Gateway, a folder named "Tmp" should also be present in the Hansa server folder. This is used to store mail attachments downloaded from the POP3 server before they are transferred to the "Attach" folder and attachments that are to be uploaded to the SMTP server. Please refer to the 'External Mail' section below on page 27 for details about setting up the Gateway.



The remaining set-up work should be carried out on the server itself, or from a client machine. In both cases, apart from the entering of records representing members of personnel to the Person register, all configuration work for the Hansa Mail system is carried out in the E-mail and Conferences module. You should therefore log in as a Person that has access to this module.

Admin Client

If you are working on a client machine, some settings (E-Mail Aliases, E-Mail POP3 Servers and Gateways) require you to change to "Admin Client" mode after you have logged in. To do this, go to the Technics module using the Modules menu and open the Program Mode register. Choose 'Admin Client' from the Operations menu. If you are not in "Admin Client" mode, any work you do in these three settings will be saved on your client machine and not on the server. Once you have completed the setup work, leave "Admin Client" mode by returning to the Program Mode register and choosing 'Normal Client' from the Operations menu.

If 'Technics' is not available on the Modules menu, the probable reason is that you have logged on as a Person that does not have access privileges for this module. If you are the system administrator, it is recommended that your Person record should belong to an Access Group that Starts from Full Access and explicitly grants full access to the Technics module, as shown overleaf.

Access Group: Inspect

Code: SYSAD

Text: System Administrators

Block A/Cs:

Start From

☐ No Access

☒ Full Access

	Type	Item	Level
1	Module	Technics	Full
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

If your Person record belongs to such an Access Group, you will be able to enter the Technics Module on a client machine in order to change to “Admin Client” mode.

Persons and Access Groups are both fully described in the ‘System Module’ manual.

Persons

All members of personnel likely to use the mail system should be entered to the Person register, found in the System module. Full details about this register (including the assigning of passwords) can be found in the 'System Module' manual.

For each Person likely to send external mail, specify a return Email Address on the 'Bonus' card—

Person: Inspect

Signature: FF ☐ Closed

Name: Francoise French

Access Serial Nos **Bonus** Job Costing Web Time Entry Date and Numbers

Bonus: 0.00 Our Ref:

Location: Department:

Account: Object:

Bank Name: Bank A/C:

Email Address: FrancoiseFrench@RadiolmportExport.com

Specification:

Comment:

Job Group: ☐ Allow Short Codes only

Job Descr.:

Cost per Hour: 0.00

Price per Hour: 0.00

	Short Code	Project	Comment
1			
2			
3			
4			
5			
6			
7			

Where there is more than one Company in the database, records in the Person register are specific to the Company in which they were entered. However, their Mailboxes will be open to all Companies in the database. This allows mail to be sent between Persons in different Companies. One implication of this is that all Persons across all Companies should have different Signatures (initials). If there are two or more Persons in different Companies with the same Signature, they will not be able to have their own Mailbox.

If you are using external mail and have a separate Gateway machine, create a record in the Person register for the sole purpose of allowing the Gateway to connect to the server. So, it should have a Signature such as "GATE". This

Person should belong to an Access Group that Starts from No Access and with full access to the External Gateway module only —

Access Group: Inspect

Code: GATE

Text: Used by the Gateway only

Block A/Cs:

Start From:

☒ No Access

☐ Full Access

	Type	Item	Level
1	Module	External Gateway	Full
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

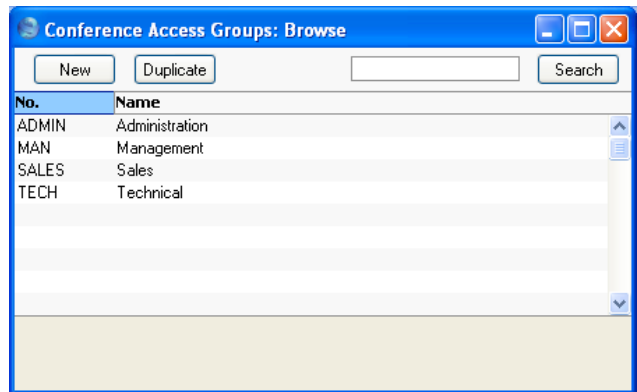
Access Groups are created using the Access Group register, described in the 'System Module' manual.

Conference Access Groups

When setting up a mail system in Hansa, you are likely to define a number of Mailboxes and Conferences. Mailboxes are personal: only their owners can view their contents. They can be used both to send and to receive Mail. Conferences are more public: unless there are access restrictions, their contents can be viewed by everybody. They can only receive Mail. For full details of Mailboxes and Conferences, please refer to the next two sections in this manual.

If you want to establish a system of access restrictions for your Conferences, use the Conference Access Groups setting in the E-mail and Conferences module. Select 'E-mail and Conferences' from the Modules menu and click the [Settings] button in the Master Control panel (or select 'Settings' from the

File menu). In the resulting list, double-click 'Conference Access Groups'. This will open the 'Conference Access Groups: Browse' window that shows the Conference Access Groups that already exist —



Double-click an item in the list to modify it or click [New] to create a new record. In the 'Conference Access Group: New' window, you should enter a code and a short descriptive text. The code may contain up to five characters, and you may freely mix letters and numbers. Click the [Save] button in the Button Bar to save.

Once you have defined your Conference Access Groups, they can be specified in Mailboxes and Conferences. They will be used as follows. When a Person logs in, they are automatically granted access to their Mailbox. This is the Mailbox with their initials in its User field. This Mailbox will contain a list of Conference Access Groups. Each Conference also has a list of Conference Access Groups. The Person will be able to open any Conference that shares at least one Conference Access Group with their Mailbox (and any Conference whose list of Conference Access Groups is empty). If a Person is not granted access to view the contents of a Conference, they will still be able to send Mail to it.

You can print a list of the members of each Conference Access Group by producing a Person Access Group report from the Technics module.

Do not confuse this setting in the E-mail and Conferences module with the Access Groups register in the System module. The latter is used to define access privileges to the various modules and functions in Hansa and is described in the 'System Module' manual.

Mailboxes

Each Person can have their own personal Mailbox, which they will use for sending and receiving Mail. This cannot be accessed by any other user, except by the system's administrator through the E-mail and Conferences module. All Persons marked as Named Users must have Mailboxes. Persons marked as Concurrent Users do not have to have Mailboxes: if a Concurrent User needs a Mailbox, it must be purchased separately and recorded in the Extra Mailboxes field in the Configuration setting in the System module as described at the beginning of this manual (page 9).

Mailboxes can be created using the following methods—

1. Select 'E-mail and Conferences' from the Modules menu and click the [Mailboxes] button in the Master Control panel (or select 'Mailboxes' from the Registers menu). This will open the 'Conferences' window which shows the Mailboxes that already exist. Click the [New] button in the Button Bar.
2. In the System module, open the Person register and highlight a record in the 'Persons: Browse' window. Select 'Create Mailbox' from the Operations menu.

In both cases, the 'Conference/Mailbox: New' window is opened—

Conference Access Group	
1	SALES
2	TECH
3	
4	
5	

User Level

☒ No User

☐ Level 1

☐ Level 2

☐ Level 3

Complete the fields as follows—

Name

Enter the unique name by which the Mailbox is to be identified from elsewhere in Hansa. Usually this will be the name of the Person owning the Mailbox. When Mail is sent to this Mailbox, this Name will be used as the

address of the Mail. It will also be shown in the 'Paste Special' list of possible addresses.

Make sure you type the Name correctly because it can't be changed once the Mailbox has received Mail for the first time. If you need to change the Name of a Mailbox after it has received Mail, create a new Mailbox with the new Name and then use the 'Change Mailbox Name' Maintenance function to move the Mail out of the old one into the new one.

As shown in the example, it can be a good idea not to use special characters in this field. If you have a mixed network (Windows, Linux and/or Macintosh), special characters may not appear as expected on all machines or platforms.

Comment	Any explanatory text about the Mailbox can be recorded here. This Comment is shown in the Who Is Online report.
Class	Ensure this is set to "Mailbox" (the default).
User	Paste Special Person register, System module Enter the Signature (initials) of the Person owning this Mailbox. Access to the Mailbox is only granted to this Person (and to system administrators with access to the E-mail and Conferences module).
Ser Nr	This unique identifying number is generated automatically when the Mailbox is saved for the first time. It cannot be changed.
Mother	This field is not used for Mailboxes, and must be left blank.
Max No of Mails	This field is used if you want to place a limit on the maximum number of Mails that can be stored in the Mailbox. Leave the field set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limit set in the Mail and Conference Settings setting. If a Mailbox contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the system administrator should use the 'Clean Up Mail Registers' Maintenance function in the E-mail and Conferences module to carry out this

task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail

These fields are used if you want to place a limit on the maximum number of days that Mails will remain in the Mailbox. The Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limits set in the Mail and Conference Settings setting.

The system administrator should use the 'Clean Up Mail Registers' Maintenance function to remove Mails whose Lifespan has expired.

Closed

Check this box if the Mailbox is no longer to be used (Mailboxes cannot be deleted if they contain Mails). Closed Mailboxes will appear in the 'Conferences' window but not in the Mailbox 'Paste Special' list. You will not be able to send Mails to closed Mailboxes. A closed Mailbox can be re-opened at any time.

Conference Access Group

Paste Special

Conference Access Groups setting, E-mail and Conferences module

Use the grid to grant access privileges to Conferences (Conferences are described in the next section). The owner of the Mailbox (the Person whose initials are shown in the User field) will be given access to any Conference that shares at least one Access Group with this list (and to Conferences whose list of Access Groups is empty).

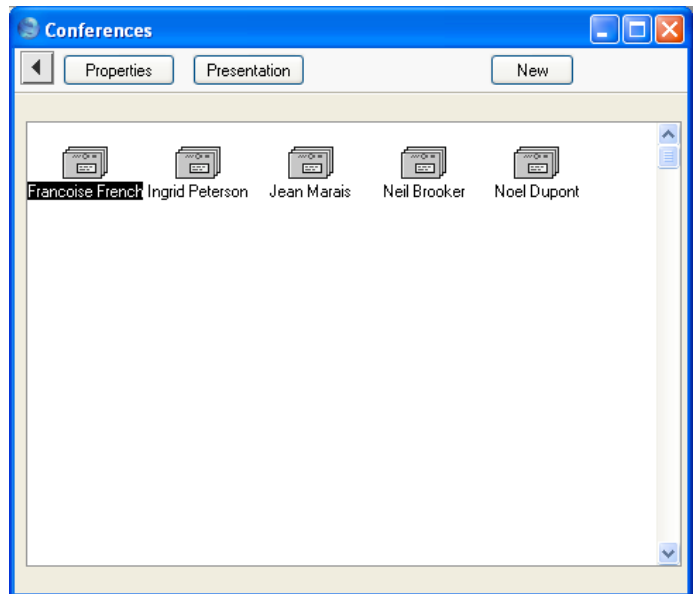
For example, the owner of the example Mailbox in the illustration above will be able to view the contents of any Conference belonging to the "Sales" or "Tech" Conference Access Groups.

An automatic reply can be sent in response to every piece of external mail that is received by the owner of this Mailbox. This will most often be useful

when the owner is out of the office and you need to let their correspondents know when they will be returning.

Use the 'Open Auto Reply' function on the Operations menu to create an automatic reply for a particular Mailbox. The owner of the Mailbox can also create their own automatic reply from the Operations menu of the Master Control panel. Please refer to the 'Automatic Replies to External Mails' section below on page 49 for details.

Save the Mailbox by clicking the [Save] button in the Button Bar. You are returned to the 'Conferences' window which now shows the Mailbox that you have just created.



Once a Mailbox has been created, its specifications can only be modified in the E-mail and Conferences module. Open the 'Conferences' window as described earlier in this section and click on the Mailbox to be changed. Then, click [Properties] in the top left-hand corner of the window. Make the changes as necessary and save in the usual way, or, to delete the Mailbox, select 'Delete' from the Record menu. Mailboxes can only be deleted if they don't contain any Mail. The contents of a Mailbox can be seen by double-clicking a Mailbox in the 'Conferences' window. A Mailbox can be emptied using the 'Clean Up Mail Registers' Maintenance function in the E-mail and Conferences module.

Conferences

Conferences are effectively public Mailboxes: unless there are access restrictions, their contents can be viewed by everybody. Unlike Mailboxes, they can only receive Mail. It is possible to set up a hierarchical system of Conferences within Conferences similar to the nested structure of folders and directories on your hard disk.

Before attempting to create Conferences, you must create at least one Mailbox as defined above and then quit Hansa and restart, logging in as a Person with a Mailbox. Then, click the [Conferences] button in the Master Control panel, and then click [New] in the Button Bar. You do not have to be in the E-mail and Conferences module to do this, but you must have been granted access to the E-mail and Conferences module otherwise the [New] button will be disabled.

The 'Conferences' window opens, displaying the Conferences that already exist. To create a new Conference, click the [New] button in the Button Bar. The 'Conference/Mailbox: New' window opens. This is the same window that was used to create Mailboxes in the previous section. Except as described under the illustration, the fields are used in the same way as for Mailboxes.

Conference/Mailbox: New

Operations New Duplicate Cancel Save

Name: Sales ☐ Closed

Comment:

Class: Conference Max No of Mails: 300

User: Lifespan of Read Mail: 100

Ser No: Lifespan of Unread Mail: 100

Mother: 0

Conference Access Group	
1	SALES
2	
3	
4	
5	

User Level

☒ No User

☐ Level 1

☐ Level 2

☐ Level 3

Name

Enter the unique name by which the Conference is to be identified from elsewhere in Hansa. When Mail is sent to this Conference, this Name will be used as the address of the Mail. It will also be shown in the 'Paste Special' list of possible addresses.

Make sure you type the name correctly because it can't be changed once the Conference has received Mail for the first time. If you need to change the Name of a Conference after it has received Mail, create a new Conference with the new Name and then use the 'Change Mailbox Name' Maintenance function to move the Mail out of the old one into the new one.

Class	Paste Special	Choices of possible entries This field should contain one of the following entries— Conference, News, Billboard, Archive, Library Use one of these options if you want the Conference to be able to receive Mail. The only differences between the options are that they have different icons (shown in the illustration below) and different global attributes can be set in the Mail and Conference Settings setting (Maximum Number of Mails and Lifespan).
	Folder	Use this option if you want to establish a nested or hierarchical structure. A Folder can contain Conferences or more Folders. You cannot send Mail to a Folder.
	Mailbox	This option should not be used here.
User		This field should be left blank: it is only used for Mailboxes.
Mother		<p>If the Conference is to be contained inside a Folder (known as the "Mother" Folder), the Serial Number of the Mother Folder should be entered here. This is used to ensure the Conference appears in the correct place in the nested or hierarchical structure.</p> <p>Before creating the Conference, double-click the Mother Folder in the 'Conferences' window to open it. When you then create the Conference, the Serial Number of the Mother Folder will appear here automatically.</p> <p>If the Conference is not to be contained in a Mother Folder but instead is to be on the top level of the nested or hierarchical structure, you must enter "0" (zero) to this field. Do not leave it blank.</p>

Conference Access Group

Paste Special

Conference Access Groups
setting, E-mail and Conferences
module

Use the grid to list the Access Groups that are to be allowed access to the Conference. When a user attempts to open the Conference, Hansa will compare the Access Groups listed in their Mailbox with those listed for the Conference. If there is at least one Access Group common to both, the Conference will be opened. If everybody is to have access to the Conference, leave the list empty.

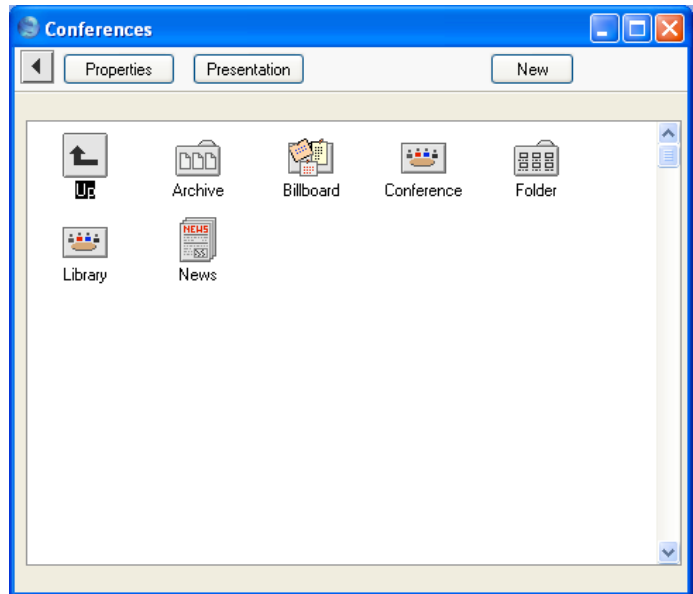
For example, the Conference in the illustration above could be opened by any user whose Mailbox features “Sales” Mail Access Group in its list.

You should use the Access Group grid as described above for Folders as well as for the Conferences they contain. All the Access Groups listed for a particular Conference should also be listed for its Mother Folder. Otherwise, a user might be given access to a Conference but will not be able to open the Folder to get to it.

User Level

These options are used in Mailboxes and in HansaWorld only. They are not visible in Hansa Financials.

Save the Conference by clicking the [Save] button in the Button Bar. You are returned to the ‘Conferences’ window which now shows the Conference that you have just created.



If the Conference has a Mother Number, you will have to open the Mother folder by double-clicking to see it. To get back to the top level, double-click the [Up] button that appears in the top left-hand corner.



Once a Conference has been created, its specifications can only be modified by Persons with access to the E-mail and Conferences module. Open the 'Conferences' window as described earlier in this section and click on the Conference to be changed. Then, click [Properties] in the top left-hand corner of the window. Make the changes as necessary and save in the usual way, or, to delete the Conference, select 'Delete' from the Record menu. Conferences can only be deleted if they don't contain any Mail. Folders can only be deleted if they are empty. The contents of a Conference can be seen by double-clicking it in the 'Conferences' window. A Conference can be emptied using the 'Clean Up Mail Registers' Maintenance function in the E-mail and Conferences module.

Miscellaneous Settings

Finally on the main server, a few miscellaneous settings should be considered. These are to be found in the Mail and Conference Settings setting in the E-mail and Conferences module.

Mail Settings: Inspect

Save

Personal Mailboxes

Max No of Mails: 0

Lifespan of Read Mail: 0

Lifespan of Unread Mail: 0

Libraries

Max Mail: 0

Lifespan: 0

News

Max Mail: 0

Lifespan: 0

Conferences

Max Mail: 0

Lifespan: 0

Billboards

Max Mail: 0

Special Users

Postmaster: FrancoiseFrench

Admin: FrancoiseFrench

From System:

☐ Lock all Received E-mails

☐ Lock and Send E-mails Automatically

☐ Exclude All Contact E-mails from Reports

Max Number of Mails, Max Mail

These fields are used if you want to place limits on the maximum number of Mails that can be stored in Mailboxes and in Conferences of different Classes. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

If a Mailbox or Conference contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the system administrator should use the 'Clean Up Mail Registers' Maintenance function in the E-mail and Conferences module to carry out this task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail, Lifespan

These fields are used if you want to place limits on the maximum number of days that Mails will remain in Mailboxes and in Conferences of different types. The Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

The system administrator can use the 'Clean Up Mail Registers' Maintenance function to remove Mails whose Lifespan has expired.

Postmaster**Paste Special****Mailboxes and Conferences**

Specify here the Mailbox or Conference that is to receive incoming external mail (e-mail) that has been incorrectly addressed. This may be because of a typing error (including the use of special characters, which should not appear in e-mail addresses), because the recipient no longer works for your company, or because your system of E-Mail Aliases is incomplete. Such mail should be sent to a Postmaster for redirecting. Specify here the Mailbox or Conference that is to act as the Postmaster.

Usually, incoming mail with an incorrect address will only be received if the POP3 account is a multiple recipient account. If so, the Gateway will receive all mail with the correct domain name (i.e. the part of the address after @ must be correct). It will then use E-Mail Aliases to try to find the correct Mailbox or Conference for it. If it fails to find a suitable Mailbox or Conference, the mail will be sent to the Postmaster. On the other hand, if the POP3 account is a single recipient account, the service provider will return incorrectly addressed mail to the sender as not delivered. Therefore it will not be received by the Gateway and so there will be no need to specify a Postmaster.

If incorrectly addressed mail is not very frequent, the Postmaster will be able to redirect such mail by opening it and typing in the correct Mailbox. If it is frequent, the cause will probably lie with your E-Mail Aliases. E-Mail Aliases match the name of the recipient of the mail as typed by the sender to the name of a Mailbox in Hansa,

and are described below on page 32. If this is the cause of the problem, you should first try to improve your E-Mail Alias system. Then, instead of redirecting the undelivered mail individually, the Postmaster can use the 'Update Postmaster Mailbox' Maintenance function to deliver it again using the updated E-Mail Aliases. Any mail that is redirected successfully will be removed from the Postmaster's Mailbox. So, as well as taking the labour out of redirecting mail, this function will test that the new E-Mail Aliases are correct.

Admin	Paste Special	Mailboxes and Conferences
	If the name of a Mailbox is specified here, its owner will be treated as the system administrator, the only Person that will be able to delete Mails from Conferences. This Person must have access to the E-mail and Conferences module.	
From System	Paste Special	Mailboxes and Conferences
	Enter the name of the Mailbox that is to act as the sender of Mails sent by the system. For example, if a database copy cannot be carried out because there is not enough space on the hard disk, an automatic mail will be sent from this Mailbox to the Postmaster.	

Lock all Received E-mails

Check this box if you would like all incoming external mail (e-mail) to be locked. This will mean that you will have to create a new Mail in order to reply, and that the original text of the e-mail will be retained. In other words, Hansa will treat incoming e-mail in a similar manner to traditional mailing programs.

Lock and Send E-mails Automatically

Check this box if you would like all outgoing external mail (e-mail) to be sent and locked automatically when it is marked as Sent and saved. This is Mail in which at least one recipient is an e-mail address containing the @ character. This will mean you should not include the e-mail address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally. It will also mean that you will retain a record of the text that was sent to the recipient.

Exclude All Contact E-mails from Reports

Use this option if you do not want Customer and Contact Person E-mail Addresses to be printed in the Birthday List, Contact Person List and Customer List reports or exported by the Contact List, Contact List to Palm3 and Customer List export functions.

External Mail

The sending and receiving of external mail (e-mail) is handled by Hansa's Gateway. This sends external mail to your SMTP server when necessary and periodically checks your POP3 accounts for incoming mail. It also distributes this incoming mail to the appropriate Mailboxes and/or Conferences.

Depending on your circumstances, a single copy of Hansa can act as the server and as the Gateway (an "Internal" Gateway). Alternatively, you might prefer to have the Gateway on a separate computer (an "External" Gateway).

In brief, some of the advantages of the Internal Gateway are—

- Easier to maintain and back up (all Gateway settings are on the main server);
- Faster sending and receiving of mail between your Hansa Mailbox and external e-mail addresses.

Some disadvantages are—

- Cannot be used if the main server is a Windows machine;
- Reporting speed will be slower in large installations where there is both heavy use of the Gateway and frequent production of large reports (e.g. the Sales and Nominal Ledger reports).

The Gateway machine should be connected to the internet (e.g. by modem or by permanent connection) and, if it is a separate machine, it should be connected to the server.

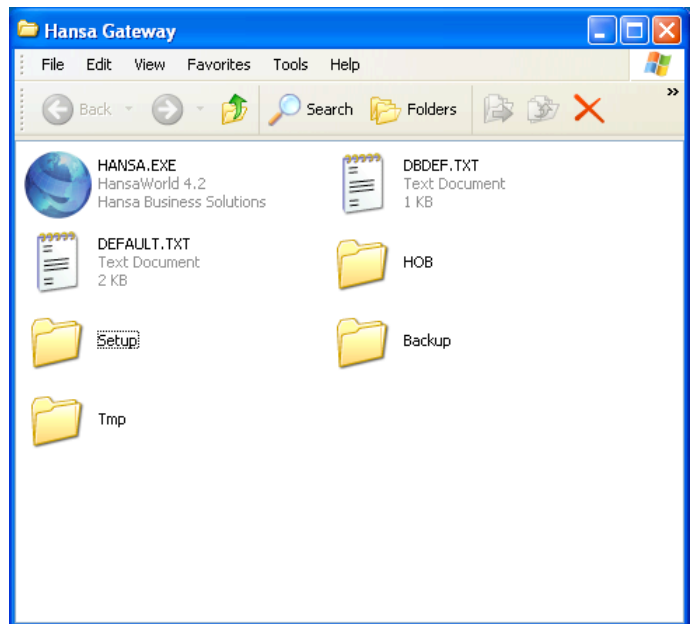
Follow the sections below to configure the Gateway, to allow Hansa to send and receive external mail, as follows—

Internal Gateway If you will be using an Internal Gateway, the work should be carried out on the server/gateway machine. Make sure that a folder named "Tmp" is present in the folder containing the Hansa application, and that the External E-Mail option in the Configuration setting ('CRM' card) in the System module is checked. This

will allow you to send and receive mail. The Use External Gateway option in the Optional Features setting in the System module should not be checked. If this option is checked, the server will not send or receive external mail because it will assume the Gateway is present on another machine.

You can carry out the work described below on the server/gateway machine itself, or you can log on from a client machine as a system administrator, ensuring you are in “Admin Client” mode. Please refer to the ‘Admin Client’ section above on page 11 for details. You should also ensure you are in the E-mail and Conferences module by selecting ‘E-mail and Conferences’ from the Modules menu.

External Gateway If you will be using an External Gateway, first, on the server machine, make sure that the Person register contains a record (perhaps with a Signature such as “GATE”), as described in the ‘Persons’ section above on page 13, and that the External E-Mail option in the Configuration setting in the System module (‘CRM’ card) is checked. The Use External Gateway option in the Optional Features setting in the System module should be checked as well. Then, select ‘Server’ from the Modules menu. The server will go into server mode and the ‘Server Status’ window will appear. Then, install Hansa on the Gateway machine. Make sure that a folder named “Tmp” is present in the folder containing the Hansa application. The External Gateway uses this to store mail attachments downloaded from the POP3 server before they are transferred to the “Attach” folder and attachments that are to be uploaded to the SMTP server.



Double-click the Hansa application and create a new database as described in the 'Logging on from a Client' section in the first chapter of the 'Introduction to HansaWorld Enterprise' manual. The purpose of this database is to allow the Gateway to connect to the server, so create a single Company with the IP address of the server and Port Number that is the same as the Server Port in the Program Mode register on the server. Log in using the ID created for this purpose (e.g. "GATE"), as described in the 'Persons' section above on page 13.

On entering Hansa, you will be in the External Gateway module and the 'Server Status' window will be visible. Open the Master Control panel using Ctrl-M or ⌘-M.

Incoming External Mail (POP3)

E-mail is received by logging in to a POP3 (Post Office Protocol, version 3) account and downloading unread mail to your computer. If you use Hansa to read your incoming e-mail, it will periodically and automatically log in to your POP3 account(s), download any unread mail and divert it to the appropriate Mailbox or Conference.

- In an External Gateway, this behaviour is controlled through the E-Mail POP3 Server and the E-Mail Alias registers in the External Gateway module.
- In an Internal Gateway, the E-Mail POP3 Server and E-Mail Alias registers can be found in the E-mail and Conferences module. If you have logged on to the server/gateway from a client, ensure you are in "Admin Client" mode before working in these settings. If you are not in "Admin Client" mode, the work will be saved on your client machine and not on the server.

Receiving Incoming External Mail (the E-Mail POP3 Server register)

The E-Mail POP3 Server register should contain details (including address and password) of each of your POP3 accounts. Periodically, Hansa will go through the records in this register one by one and log in to each account represented by those records. It will then receive any unread mail and distribute it to the appropriate Mailbox(es) or Conference(s) as specified in the E-Mail Alias register.

- If you are using single recipient POP3 accounts, you will have a separate POP3 account (i.e. a separate e-mail address) for each member of staff or department. So, the E-Mail POP3 Server register will contain many records (one for each member of staff or department that has its own e-mail address). As a further guide, make a note of all the e-mail addresses that you entered as return addresses in the Person register (see the 'Persons' section above). Each one of these should have an equivalent record in the E-mail POP3 Server register.
- If you are using multiple recipient POP3 accounts, you may only have one POP3 account. In this case, the E-Mail POP3 Server register will only contain one record. Logging in to this one account will allow you to receive all mail sent to everybody in your company.

To create a POP3 Server record, open the E-Mail POP3 Server register in the External Gateway module (External Gateway) or in the E-mail and Conferences module (Internal Gateway). The 'POP3 Servers: Browse' window will be opened, listing any records that have already been entered.

Click the [New] button in the Button Bar to create a new record, or click on an existing one that is similar and click the [Duplicate] button. The 'POP3 Server: New' window opens—

Complete the window as follows—

Code	Enter a unique identifying code for each POP3 Server record. Up to twenty characters can be used, and you may freely mix letters and numbers.
A-Pop	Check this box if you usually log in to this account using A-Pop encryption.
Closed	Check this box if the POP3 Server record is no longer used. This will stop the External Gateway checking the account for incoming mail.
IP Address	If it is not already known, the IP Address of the POP3 account can be obtained by pinging the domain name (i.e. the part of the address after the @). Alternatively, enter the domain name itself.
Port	Usually this will be 110. You may need to confirm this with your service provider.
User	Enter the user ID, as supplied by your ISP. This will usually not be the same as your e-mail address.
Password	Enter the password for this e-mail address.
Comment	Use this field to record any notes about the POP3 account.

All this information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

Complete the POP3 Server record as appropriate, then save it using the [Save] button and close the window by clicking the close box. Repeat the process as many times as necessary by creating new records or copying

existing ones. When the process is complete, close the browse window using the close box again.

Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)

The E-Mail Alias register connects incoming e-mail with Hansa's Mailboxes and Conferences. Hansa receives e-mail by going through the records in the E-Mail POP3 Server register one by one and logging in to each account represented by those records. When mail is received from a particular account, Hansa will then search for the Alias records that belong to that account. The mail is then distributed to the Mailbox(es) or Conference(s) specified in those Alias records. The recipient will then be able to read that e-mail in the same way as they would internal mail that they have received from another member of staff.

- In the case of single recipient POP3 accounts, incoming e-mail is addressed to a particular Person, so only a single E-Mail Alias is required to route that mail to the appropriate Mailbox. So, for each POP3 Server record, you should enter a single record in the E-Mail Alias register.
- In the case of multiple recipient POP3 accounts, incoming e-mail can be addressed to any Person in the company, so it can be difficult to route that mail to the correct Mailbox. You may need four or five Alias records for each Mailbox and Conference. You should also name a Mailbox that is to act as Postmaster. This will receive any mail for which a home cannot be found. Do this in the Mail and Conference Settings setting in the E-mail and Conferences module.

To create an E-Mail Alias record, open the E-Mail Alias register in the External Gateway module (External Gateway) or in the E-mail and Conferences module (Internal Gateway). When the 'E-Mail Aliases: Browse' window opens, click the [New] button to create a new record.

POP3 Server	Paste Special	E-Mail POP3 Server register, External Gateway module/E-mail and Conferences module setting
		Enter the Code of a POP3 Server record here.
		When e-mail is received from this POP3 account, Hansa will search for all Aliases with this Code and forward the e-mail to the Mailbox specified in the field below.
		If the POP3 account is a single recipient account, only one Alias record should be entered, allowing e-mail to be forwarded to the correct Mailbox.
		If the POP3 account is a multiple recipient account, there should be at least one Alias record for each possible recipient. The Field and Match will be used to establish which is the correct Mailbox for a particular e-mail.
Mailbox	Paste Special	Mailboxes and Conferences
		E-mail received from the POP3 account specified above will be forwarded to the Mailbox or Conference entered here.

Field, Match, Priority

The use of these fields will vary depending on whether the POP3 account specified above is a single- or multiple-recipient account

Multiple-Recipient POP3 Account

If the POP3 account specified above is a multiple recipient account, it can be difficult to establish who is the intended recipient, so there will be many Alias records relating to a particular POP3 account. These fields will be used to establish which Mailbox(es) should receive a particular e-mail.

In this situation, it is perhaps easiest to describe these fields using an example. You have two Mailboxes in the name of "Francoise French" and "Neil Brooker". First, you should anticipate receiving e-mail addressed to various spellings of these names ("FFrench", "Francoise", "Francoise French", "FrancoiseFrench", etc). Such e-mail is

clearly intended for the “Francoise French” Mailbox. For this e-mail, enter separate Alias records as follows—

Field	Match	Mailbox
Recip or Recvd or To	Francoise French	Francoise French
Recip or Recvd or To	FFrench	Francoise French
Recip or Recvd or To	Francoise	Francoise French

The address used by the sender (the part of the address before @) is entered in the Match field, and “Recip or Recvd or To” should be entered as the Field by using ‘Paste Special’ and selecting the final option. For example, e-mail addressed to “FFrench@RadioImportExport.com” will be forwarded to the “Francoise French” Mailbox by the Alias record with “FFrench” as the Match.

Similar Aliases should then be created for the “Neil Brooker” Mailbox. Because e-mail addressed to Francoise French and Neil Brooker is clearly intended for their Mailboxes, these Aliases can be given a high Priority, so enter a low number such as 1 in the Priority field in all these Aliases.

Second, you might want to anticipate receiving e-mail addressed to a department such as “Sales” or “Support”. If so, you can create further Alias records with “Sales” and “Support” as the matches. This e-mail can be forwarded to a particular Mailbox, a particular Conference, or any number of Mailboxes and Conferences. For example, e-mail addressed to “Sales@RadioImportExport.com” is to be forwarded to both Mailboxes and to a Conference named “Prospects”, so create Aliases as follows—

Field	Match	Mailbox
Recip or Recvd or To	Sales	Francoise French
Recip or Recvd or To	Sales	Neil Brooker
Recip or Recvd or To	Sales	Prospects

Providing all these Aliases have the same Priority, e-mail addressed to “Sales” will be forwarded to both Mailboxes and the Conference.

Finally, you might want to anticipate receiving e-mail where the recipient is not so clear. A 'Paste Special' list is available from the Field field, offering the following options: All Mails; Recipient; Sender; Subject; Body; and Recip or Recvd or To. For example, if you know that all e-mail from a particular sender is intended for Neil Brooker, you can enter an Alias record to this effect, with "Sender" as the Field, the sender's address as the Match and "Neil Brooker" as the Mailbox. "All mails" should not be entered as the Field: this option should only be used with single recipient POP3 accounts.

You might also enter some Aliases as follows—

Field	Match	Mailbox
Body	Francoise French	Francoise French
Body	Neil Brooker	Neil Brooker

Such Aliases should be given a lower Priority (i.e. a higher number should be entered in the Priority field) than those above. They are intended to catch e-mail with unknown addresses by finding names in the e-mail text. So, e-mail with an unknown address whose text contains the phrase "Neil Brooker" will be sent to his Mailbox. But, if the address is "FFrench@RadioImportExport.com", it will be sent to her Mailbox because the Alias with "FFrench" as the Match has a higher Priority. It is not absolutely necessary to enter such Aliases, as you may prefer to deal with the issue by having such e-mail sent to the Postmaster. The Postmaster receives all e-mail for which no Alias exists. He or she should read the e-mail and forward it to the correct Mailbox or Conference manually. A Mailbox should be named as the Postmaster in the Mail and Conferences Settings setting in the E-mail and Conferences module.

Note: the "Recip or Recvd or To" option is so named because the name of the field in an e-mail containing the address can vary depending on the e-mail program used by the sender. "Recip or Recvd or To" provides a means of checking for

fields with each of these three names from a single Alias record. This option is therefore easy to maintain: an alternative method requiring three Aliases is more difficult to maintain—

Field	Match	Mailbox
Recipient	Francoise French	Francoise French
Recipient	FFrench	Francoise French
Recipient	Francoise	Francoise French
Received	Francoise French	Francoise French
Received	FFrench	Francoise French
Received	Francoise	Francoise French
To	Francoise French	Francoise French
To	FFrench	Francoise French
To	Francoise	Francoise French

Single-Recipient POP3 Account

If the POP3 account specified above is a single recipient account, incoming e-mail is addressed to a particular Person, so only a single E-Mail Alias record is required to route that mail to the appropriate Mailbox. This should be configured as follows—

Field	Match	Mailbox
All mails	(blank)	name of Mailbox or Conference

Set Priority on Mail

Check this box if you would like e-mail that has been forwarded by a particular Alias to have its Priority box checked when it appears in the recipient's Mailbox.

Full Header

E-mails usually contain information such as the e-mail address of the sender, the time it was sent and the servers it has passed through. This is known as header information and is usually visible at the end of the e-mail text. Hansa distributes e-mail by creating new Mail records and copying in the e-mail text. If you would like this header information to be copied in as part of the e-mail text, check this box.

Keep Original Address

If this check box is off, the address originally used by the sender will not be shown in e-mails. Continuing the

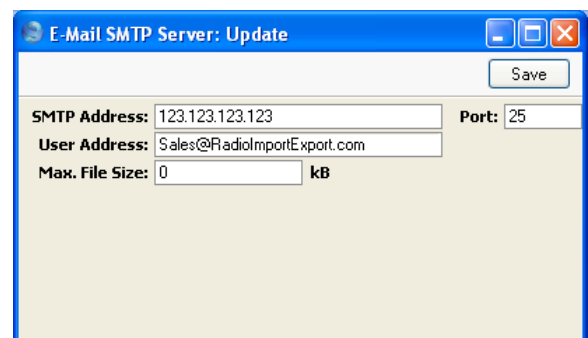
example above, e-mails will appear in the “Francoise French” Mailbox with no indication that they were actually sent to “FFrench@RadioImportExport.com”. If this check box is on, the original e-mail address (“FFrench@RadioImportExport.com” in the example) will be listed separately as one of the recipients. This can be useful if you have several Aliases linked to a single Mailbox or Conference.

Complete the E-Mail Alias record as appropriate, then save it using the [Save] button and close the window by clicking the close box. Repeat the process as many times as necessary by creating new records or copying existing ones. When the process is complete, close the browse window using the close box again.

The E-mail and Conferences module contains a report allowing you to print out a list of E-Mail Aliases for each user. It also lists users that don’t have Mailboxes, and users that have Mailboxes but not E-Mail Aliases.

Outgoing External Mail (SMTP)

The SMTP (Simple Mail Transfer Protocol) server is used for outgoing mail. The E-Mail SMTP Server register in the External Gateway module (also available as a setting in the E-mail and Conferences module) allows you to define a single SMTP Server, to which the External Gateway will send all your external mail.



SMTP Address If it is not already known, the IP Address of the SMTP server can be obtained by pinging the domain name (i.e. the part of the address after the @). Usually it will be the same as that for the POP3 server. Alternatively, enter the domain name itself.

Port Usually this will be 25. You may need to confirm this with your service provider.

- User Address** An e-mail address can be specified for each member of staff, using the field on the 'Bonus' card of their Person record. This address will be shown as the sender (and therefore as the return address) of any e-mail sent by that Person. If a Person does not have a separate e-mail address (i.e. the field on the 'Bonus' card is blank), the address entered here will be used instead.
- Max. File Size** Enter the size limit imposed on individual mails by your SMTP server. You will be warned if you try to send a mail that is larger than this.

All three pieces of information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

When the setting is complete, click the [Save] button in the Button Bar to save and close the window.

Encoding

All e-mails are encoded to protect special characters in the text. This allows the recipient to read these characters as they were written. By default, Hansa uses the ISO-8859-1 (Western European) encoding standard. If you need to use a different encoding standard, you should specify this in the Default Mail Encoding field in the Company Info setting in the System module ('Fonts' card). For example, users in Russia should enter "koi8-r" to this field. If you have a separate Gateway machine, this should be done on the Gateway and on the server. Please refer to your local Hansa representative for further information.

While in the Company Info setting, the DB Encoding field should be set to "mac" (all lower case) if the server uses a PowerPC processor (e.g. AS/400, AIX, Macintosh, zSeries). If the server is Intel-based, the field should be blank. If you have a separate Gateway machine, this should be done on the main server.

Activating the Gateway

To activate the Gateway, open the Gateway register in the External Gateway module (External Gateway) or the Gateway Settings setting in the E-mail and Conferences module (Internal Gateway). The ‘Gateways: Inspect’ window opens—

The screenshot shows a window titled "Gateways: Update". It features a "Save" button in the top right corner. The main content area is divided into two sections. The first section, titled "POP3 and SMTP Calls", contains a checked checkbox labeled "Activate" and a text field labeled "Seconds Between POP3 Calls" with the value "3600". The second section, titled "Edit for automatic login", contains two text fields labeled "Username:" and "Password:".

Specify in seconds how often the Gateway is to check for incoming and outgoing mail. A typical setting will be 3600 seconds (one hour). In an Internal Gateway, it is not recommended to check for mail much more frequently than this. Checking for mail (especially incoming mail) makes heavy demands on the server and so other tasks may be completed more slowly than usual.

If you will be using an External Gateway on a machine without an interface, enter its ID (e.g. “GATE”) and password in the Username and Password fields. This will allow the Gateway to log in to your main Hansa server automatically when it is started up. Make sure the ID does not have access to other parts of the system, as described above on page 11.

Finally, check the Activate box. Then, save and close the window by clicking [Save] in the Button Bar.

Backing up the Gateway

If you are using an External Gateway, information in the E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server registers is stored in the database on the Gateway machine, not on the main server. This means the Gateway must be backed up separately.

If the Gateway has not been backed up before, a second Company must be created, to be used for backing up only. Follow these steps—

1. Select 'Company' from the File menu. The 'Select Company' window appears. Select 'Open Company Register' from the Operations menu.
2. The 'Companies: Inspect' window appears. On the second row, enter a new Company. This should be a local Company, so leave the TCP/IP and Port fields blank.
3. Save the new Company by clicking the [Save] button in the Button Bar. For security reasons, Hansa quits automatically. Restart Hansa, and choose to use the new, second, Company. You might wish to enter a single record in the Person register with a password, again for security reasons.

If the Gateway has been backed up before and the second Company already exists, you must change from the Gateway Company to the second Company before backing up. Gateway information will not be included in any back-up made from the main Gateway Company. Follow these steps—

1. If the Gateway is running, quit Hansa.
2. Restart Hansa and choose to use the second Company. You cannot change Companies using the 'Company' function on the File menu because the two Companies are on different machines.

In both cases, you can now back up the Gateway machine. This is done in the usual way, by using the 'Database Text Backup' Export function in the System module. E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server information is stored at the database level, not the Company level, so do not use the 'Company Text Backup' Export function.

External Mail in a Single-User Installation

If you have a single-user installation of Hansa, it is unlikely that you will want to use the internal mail facility. However, you may still wish to send and receive external mail (e-mail). If so, follow these steps to configure Hansa—

1. In the Configuration setting in the System module, ensure that the number of Named Users or Concurrent Users (whichever is appropriate for your installation) is set to one. If you are using the Concurrent User option, you should also set the number of Extra Mailboxes to one if you want to use Hansa's mail facilities.

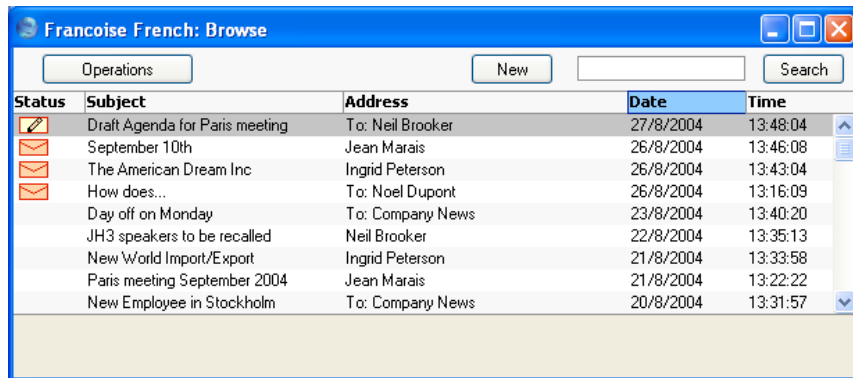
Checking the E-Mail and Conferences box on the 'CRM' card will give you access to the E-Mail and Conferences module, which you will use to

configure Hansa to send and receive external mail. Do not grant yourself access to External E-Mail on the 'CRM' card.

2. Make sure the Person register in the System module contains a single record for yourself.
3. Use the Modules menu to enter the E-mail and Conferences module. Following the instructions in the 'Mailboxes' section above on page 16, create a single Mailbox for yourself.
4. Following the instructions in the section above on page 30 entitled 'Receiving Incoming External Mail (the E-Mail POP3 Server register)', enter an E-Mail POP3 Sever record to represent your POP3 account.
5. Refer now to the section on page 32 entitled 'Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)' and follow the instructions to enter E-Mail Alias records to link your POP3 account to your Mailbox.
6. Move on to the section on page 37 entitled 'Outgoing External Mail (SMTP)' and follow the instructions to configure the E-Mail SMTP Server record with the address of the server to which your outgoing mail should be sent.
7. Finally, refer to the section on page 38 entitled 'Encoding' to configure the DB Encoding and Default Mail Encoding fields in the Company Info setting in the System module.
8. You will now be able to send and receive e-mail.

Sending and Receiving Mail

To open your Mailbox, click the [Mailbox] button in the Master Control panel. If the Master Control panel is the active (front) window, you can also press Ctrl-Shift-M (Windows and Linux) or ⌘-Shift-M (Macintosh). The following window is opened, listing all Mail that you have sent and received—



Status	Subject	Address	Date	Time
	Draft Agenda for Paris meeting	To: Neil Brooker	27/8/2004	13:48:04
	September 10th	Jean Marais	26/8/2004	13:46:08
	The American Dream Inc	Ingrid Peterson	26/8/2004	13:43:04
	How does...	To: Noel Dupont	26/8/2004	13:16:09
	Day off on Monday	To: Company News	23/8/2004	13:40:20
	JH3 speakers to be recalled	Neil Brooker	22/8/2004	13:35:13
	New World Import/Export	Ingrid Peterson	21/8/2004	13:33:58
	Paris meeting September 2004	Jean Marais	21/8/2004	13:22:22
	New Employee in Stockholm	To: Company News	20/8/2004	13:31:57

Mail is sorted in Date order, with the most recently modified Mails at the top of the list.

The Status column can contain the following symbols—

(blank)

The Mail has been sent or read.



The Mail has one that you have not yet read, or it has been changed by somebody else since you last read it.



The Mail is one that you have written but not yet sent.

Double-click a Mail in the list to read or edit it, or create a new Mail by clicking the [New] button in the Button Bar. You can also use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. If you want to create a Mail by copying a similar one, you must open the old Mail first before you can click [Duplicate] on the Button Bar. If you want to send a Mail to a Customer, you can drag the appropriate record from the 'Customers: Browse' window in to your Mailbox browse window. A new Mail will be created, with the Customer's Email Address as the recipient. You can also use this feature from the 'Contact Persons: Browse' window.

Francoise French: New

Operations New Duplicate Cancel Save

Date: Time: Lifespan: Normal

☐ Sent
☐ Locked
☐ Priority

	Address
1 From	Francoise French
2 To	
3	
4	

Subject:

Text

Date

The date the Mail was last modified. This is updated automatically by Hansa and cannot be changed. The date is taken from the server.

Time

The time the Mail was last modified. This is updated automatically by Hansa and cannot be changed. The time is taken from the server.

Lifespan**Paste Special**

Choices of possible entries

This field is used to determine how long the Mail is to remain in the system. The system administrator can regularly use the 'Clean Up Mail Registers' Maintenance function in the E-mail and Conferences module to remove old Mail. The possible entries are—

Normal

The Mail will be deleted by the 'Clean Up Mail Registers' function once its Lifetime has expired. The Lifetime of a Mail is calculated from the date it was last modified and can be specified for each

	<p>Mailbox or globally using the Mail and Conference Settings setting.</p>
Never Remove	<p>The Mail will not be deleted by the 'Clean Up Mail Registers' function.</p> <p>If a Maximum Number of Mails has been set for a Mailbox and it contains more than this number of Mails marked as Never Remove, the 'Clean Up Mail Registers' function will remove all other Mails (i.e. those marked as Normal and Remove Next Day) each time it is run.</p>
Remove Next Day	<p>The Mail will be deleted by the 'Clean Up Mail Registers' function the next time it is run.</p> <p>You can change the Lifespan of a Mail at any time, unless the Mail has been Locked.</p>
Sent	<p>Click this box to send the Mail. When the Mail is next saved, it will appear immediately in the Mailboxes of the specified recipients, with the 'envelope' icon signifying that the recipient has not read it.</p> <p>If you delete a sent Mail from your Mailbox, it will remain in its recipients' Mailboxes even if it has not yet been read.</p> <p>If at least one recipient is an e-mail address (i.e. an address containing the @ character), (and the Lock and Send E-mails Automatically box in the Mail and Conference Settings setting is checked, the Mail will be sent and locked automatically when you mark it as Sent and save it. This will mean you should not include the e-mail address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally. If the Lock and Send E-mails Automatically box is not checked, you should send the Mail to the e-mail address by selecting 'Send E-mail' from the Operations menu once the Mail has been marked as Sent and saved.</p>
Locked	<p>Once a Mail has been marked as Locked and saved, it can no longer be changed, even by its author. However, it can still be deleted by both author and recipient, and will be deleted by the 'Clean Up Mail Registers' function when its Lifetime expires.</p>

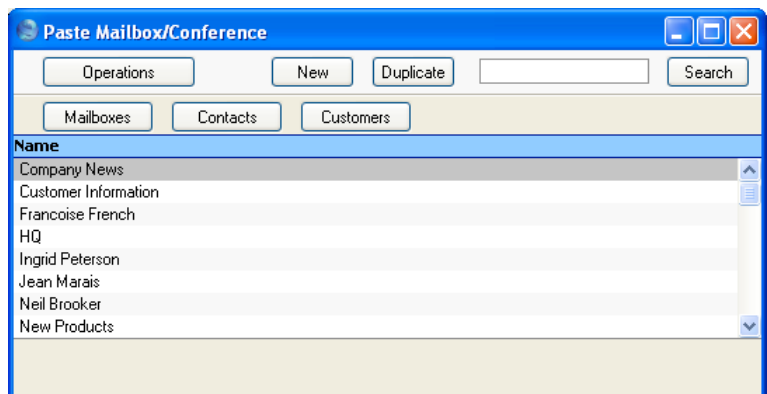
Priority Check this box if you want to indicate to the recipient that the Mail is to be treated as high priority.

Address **Paste Special** Mailboxes and Conferences, Contacts and Customers

The name of the Mailbox or Conference to which the Mail is to be sent. A single Mail can be sent to up to 99 Mailboxes, Conferences and e-mail addresses. Once a Mail has been read, it can be forwarded to other Addresses by its author or recipient, simply by adding the new Address to the end of the list.

If you know the first few characters of the recipient, enter these and press Return. Their full name will appear.

If you are sending external mail, type in the full e-mail address(es) of the recipient(s) in this list. Alternatively, activate 'Paste Special' in the usual way by pressing Ctrl-Enter or ⌘-Enter. The 'Paste Special' list appears, listing internal Mailboxes and Conferences —



Click the [Contacts] or [Customers] buttons: the list will change to show Contacts or Customers. Double-click a Contact or Company, and their e-mail address will appear in the list of recipients.

If you are using the Lock and Send E-Mails Automatically option in the Mail and Conference Settings setting, you should only enter an e-mail address when you are sure the Mail is correct. (This option will mean that a Mail containing an e-mail address (i.e. an address containing @) will be sent and locked

automatically when it is marked as Sent and saved. Therefore you should not include the e-mail address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally.

The name of your Mailbox is brought in automatically to the first line of this list, and is shown as the sender.

The column to the left of the Address can be changed to show "To:", "From:", "Cc:" or "Bcc:" as appropriate. 'Paste Special' can be used to choose one of these options. "Bcc" (blind carbon copy) is only relevant when sending external mail: each recipient of internal mail can see the full list of recipients.

Subject	The title of the Mail, or a summary of its contents, which will appear in the Mailbox browse window.
Text	<p>The text of the Mail. There is space for about 32,000 characters. Once a Mail has been read, its Text can be changed by its author or any recipient.</p> <p>If the Mail is an incoming e-mail containing more than 7,500 characters, the message text will be appended to the Mail as an Attachment.</p>

Sending Mail

As you write a Mail, particularly if it is a long one, you might want to save it periodically for safety, but you might not want its recipients to see it while it is unfinished. To do this, write the mail and list the recipients, but do not check the Sent box. You can close the Mail and return to it another day, and print it out for checking. It will retain the 'pencil' icon in your Mailbox, signifying that it has not yet been sent.



When you are satisfied that the Mail is finished, check the Sent box and save it. It will immediately appear in the Mailboxes of its recipients. It will no longer be marked with the 'pencil' icon in your Mailbox, but it will be marked with the 'envelope' icon in all the recipients' Mailboxes, signifying that they have not yet read it.



Sending External Mail

If at least one recipient is an e-mail address, they can receive the Mail in one of two ways—

1. The Mail will be sent automatically once it has been marked as Sent and saved. This will be the case if you are using the Lock and Send E-Mail Automatically option in the Mail and Conference Settings setting. The Mail will also be locked.
2. If you are not using the Lock and Send E-Mails Automatically option, select 'Send E-mail' from the Operations menu after the Mail has been saved. If changes to the Mail are not saved before this function is used, the most recently saved version of the Mail will be sent. The Mail will be sent even if you have not checked the Sent box , but it is recommended that you check this box, to remove the 'pencil' icon from the Mail in your Mailbox. The Mail will not be locked.

Once a Mail with an e-mail address has been sent, it will be placed in an E-mail Queue. This Queue is processed as follows—

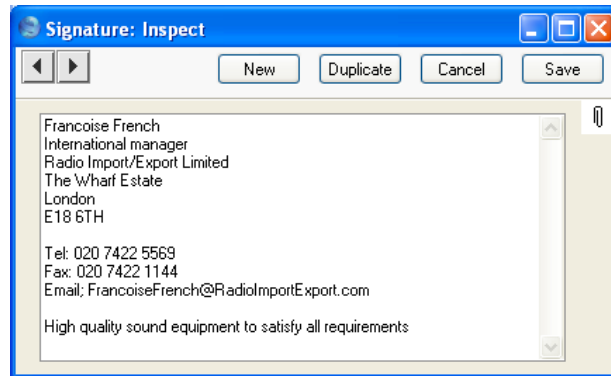
Multi-user	Once you have activated the External Gateway as described above on page 39, it will check the E-mail Queue periodically. Any Mail in the Queue will be sent automatically.
Single-user	In a single-user system, e-mail should be sent manually. To do this, bring the Master Control panel to the front and select 'Send and Receive E-Mail' from the Operations menu. Depending on how your computer has been configured, you may have to establish a connection to the internet first. All Mail in the Queue will then be sent, and any incoming mail will be downloaded from your POP3 account as well.

If you need to check the contents of the E-mail Queue, you can do so on the main server using the E-mail Queue register in the E-mail and Conferences module. Note that Mail is not removed from the Queue once it has been sent. The 'Delete E-Mail Queue' Maintenance function in the E-mail and Conferences module can be used to empty the Queue. This function will not remove Mail that has not been sent.

Attaching a Signature to External Mail

You can attach a Signature to every piece of external mail that you send. This is a short piece of text that will appear at the end of the Mail.

To enter your Signature, bring the Master Control panel to the front and select 'Open Signature' from the Operations menu. The following window opens —



Type in your Signature and click the [Save] button in the Button Bar to save it and close the window. You can return to your Signature at any time using the same route to change it.

Every Mailbox can have its own Signature. Administrators can examine and edit all the Signatures in the system using the Signatures setting in the E-mail and Conferences module.

Automatic Replies to External Mails

An automatic reply can be sent in response to every piece of external mail that you receive. This will most often be useful when you are out of the office and want to let your correspondents know when you will be returning.

To create an automatic reply, bring the Master Control panel to the front and select 'Open Auto Reply' from the Operations menu. The following window opens —

Std. Text

Paste Special

Standard Text register, CRM module

Specify here the Code of a record in the Standard Text register in the CRM module. This record will contain the text that will be copied to the Text field below.

Active

Check this box when you want automatic replies to be sent in response to incoming external mail. For example, you should check this box when you leave the office, and remove the check when you return. Automatic replies will not be sent if this box is not checked.

Subject	Enter the short piece of text that is to appear in the Subject line of the automatic response Mail.
Text	Enter the main text of the automatic response Mail here. If you entered a Std. Text above, you can modify the default text as appropriate (e.g. to enter the dates when you will be away).

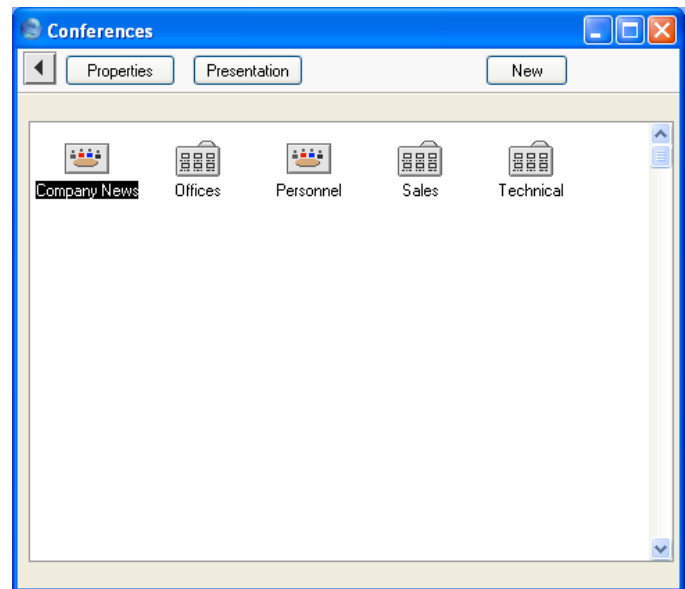
Click the [Save] button in the Button Bar to save the Auto Reply and close the window. You can return to your Auto Reply record at any time using the same route to change it.

Once you have entered an active Auto Reply record, an automatic reply will be sent in response to every piece of incoming external mail (up to a maximum of three for a particular e-mail address). You will not be able to see these automatic replies in your Mailbox, but the original incoming Mails will be there as usual. Automatic replies will not be sent to Cc addresses or to Internal Mail.

Every Mailbox can have its own Auto Reply record. Administrators can examine and edit all the Auto Reply records in the system using the Auto Replies setting in the E-mail and Conferences module.

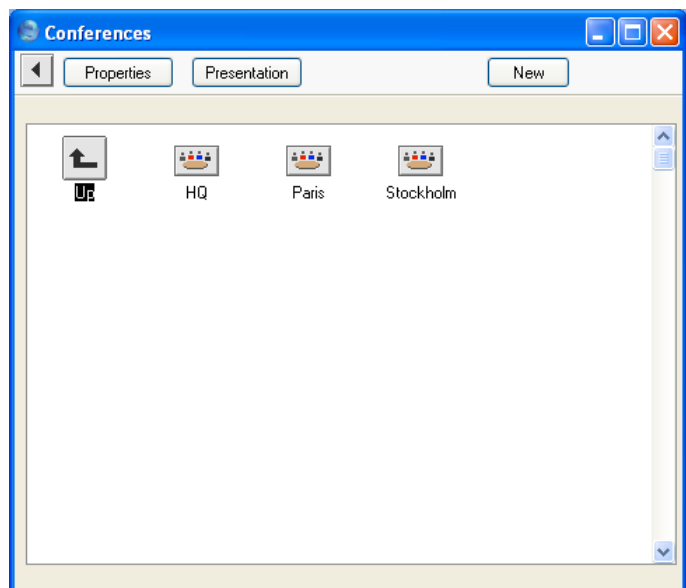
Mail and Conferences

Mail in Conferences can be read in much the same way as that in your Mailbox, as described above. To gain access to your Conferences, click the [Conferences] button in the Master Control panel. The 'Conferences' window opens, showing the Conferences and folders in alphabetical order.



To open a Conference or folder, double-click its icon.

If a folder is opened, its contents are then shown. In this example, the “Office” folder has been opened to reveal three Conferences—

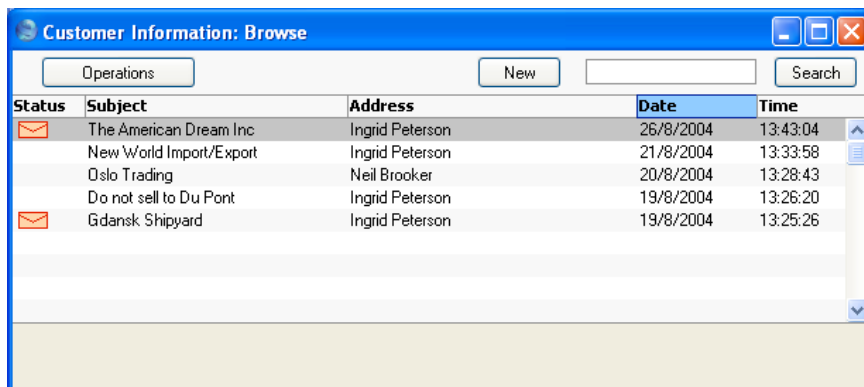


To return to the previous level, double-click the arrow in the top left-hand corner.



If a Conference is opened, a browse window opens, listing its Mails in Serial Number order. The title of the browse window shows the name of the Conference. As with your Mailbox, if you choose 'Save Position' from the Window menu after sorting by date, this will mean that the most recently modified Mails will always be at the top of the list. 'Save Position' applies to each Conference separately, so that you can save different sort orders or different window sizes for each Conference.

If you do not have access rights to the Conference, it will not open when you double-click its icon.



Mail that you have not yet read will be shown with the 'envelope' icon. To read a Mail, double-click it in the list. Once you have read it, you can add your comments, as described in the 'Replying to and Amending Mail' section below on page 54.

You can send a new Mail to the Conference while its browse window is open. Click the [New] button in the Button Bar: a new Mail window opens—

The screenshot shows a window titled "Customer Information: New" with a blue title bar. Below the title bar is a button bar containing "Operations", "New", "Duplicate", "Cancel", and "Save". The "Operations" button has a printer icon. The main area of the window is divided into several sections. At the top, there are input fields for "Date:", "Time:", and "Lifespan:" (set to "Normal"). To the right of these fields are three checkboxes: "Sent", "Locked", and "Priority". Below these is a table with the header "Address". The table has four rows, numbered 1 to 4. Row 1 is labeled "From" and contains "Francoise French". Row 2 is labeled "To" and contains "Customer Information". Rows 3 and 4 are empty. To the right of the table are up and down arrow buttons. Below the table is a "Subject:" label and a large text area for the message body. The text area has a "Text" label and a vertical scrollbar on the right.

Address	
1 From	Francoise French
2 To	Customer Information
3	
4	

Note that the name of your Mailbox is shown as the sender, and the name of the Conference is the first recipient. Complete the Mail in the same manner as described earlier in this section, add more recipients if necessary, check the Sent box and save. The Mail immediately appears in the Conference's browse window, without the 'envelope' icon for you (the author) but with one for all other users.

Replying to and Amending Mail

To reply to a Mail, open it and select 'Reply', 'Reply with Quote' or 'Reply to Sender' from the Operations menu. A new Mail is created, in which the From and To Addresses are reversed. In the case of the 'Reply' function, the Subject is prefixed with the text "Re " —

Mail: New

Operations New Duplicate Cancel Save

Date: 8/9/2004 Time: 20:17:19 Lifespan: Normal

☐ Sent
☐ Locked
☐ Priority

Address	
1	From: Francoise French
2	To: Neil Brooker
3	
4	

Subject: Re: Please call Herbert at AAQTC

Text

The 'Reply with Quote' function, copies the text of the previous Mail to the new one, where it is shown with quotation marks—

Mail: New

Operations New Duplicate Cancel Save

Date: 8/9/2004 Time: 20:18:26 Lifespan: Normal

Address

1	From	Francoise French
2	To	Neil Brooker
3		
4		

☐ Sent
☐ Locked
☐ Priority

Subject: Re: Please call Herbert at AADTC

Text

>>He would like you to quote for a stereo installation

The 'Reply to Sender' function can be used when you are replying to a Mail with many recipients, and you only want the sender to see the reply. In the reply, the original sender will become the sole recipient, and all other recipients will be removed from the list of addresses.

In all three cases, the reply is shown in a window entitled 'New', meaning that it has not yet been saved. Complete and send the Mail in the manner described above, or, if you no longer require the Mail, click [Cancel].

The 'Reply' functions are likely to be used for replying to external mail only, because there is no need to reply to internal mail by creating new Mails. Instead, mail can be amended by any of the recipients, so there is no need to read several Mails to keep track of a discussion. This is the case for all Mails, but is especially useful if the Mail has been sent to a Conference where it can be read and discussed by many people.

Francoise French: Inspect

Operations

Date: 21/8/2004 **Time:** 13:22:22 **Lifespan:** Normal

	Address
1	From Jean Marais
2	To Francoise French
3	To Ingrid Peterson
4	To Noel Dupont

Subject: Paris meeting September 2004

Text: This will take place over the weekend of 10-13 September.

Please let me know of your travel plans.

Jean
...
I will be arriving by EuroStar on September 10th 09.30 and will leave on the 13th at 17.30. Can you arrange for someone to be at the station to pick me up?

Francoise
...
I will arrive by plane from Stockholm on the 10th at 09.45. Please can you collect me from the airport. Thanks

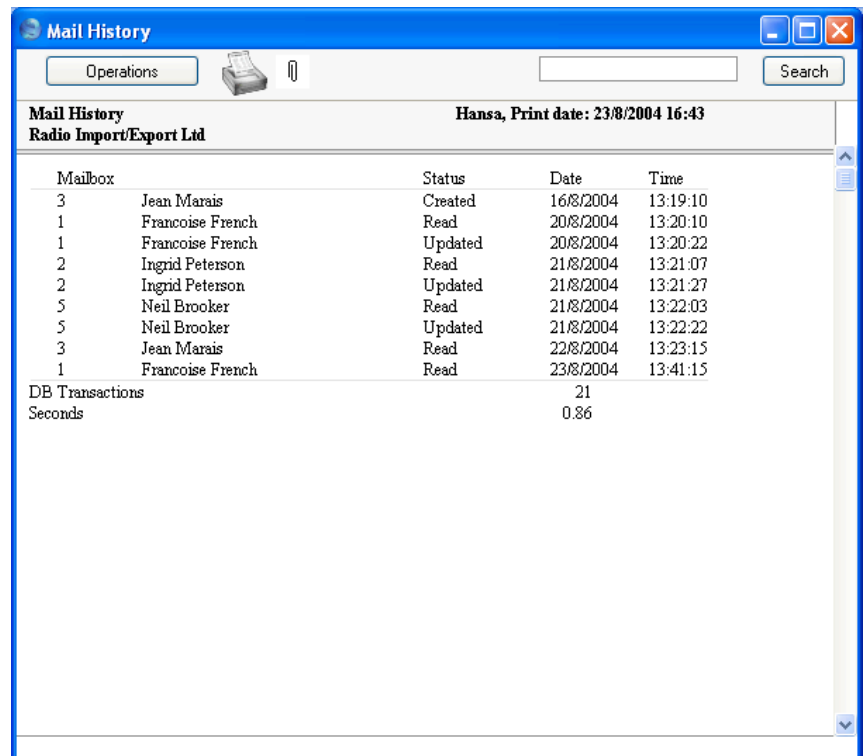
Ingrid
...
I will already be in Paris, to try to see what is happening at Du Pont.

Neil

☒ Sent
☐ Locked
☐ Priority

Whenever an amendment is made and the Mail saved, it will appear as unread (with the 'envelope' icon) in the Mailboxes of all other recipients. If the Mail is in a Conference, it will appear as unread to all other users, so that they are aware that a change has been made since they last read it. If at least one recipient is an e-mail address, you should select 'Send E-mail' from the Operations menu after the Mail has been saved, if you want that recipient to see the amendment. You will not be able to amend Mails where at least one recipient is an e-mail address if you are using the Lock and Send E-Mails Automatically option in the Mail and Conference Settings setting.

When changing Mails in this manner, it is recommended that all changes be accompanied by the date of the change and the person's initials, otherwise the sense of the Mail and the order of the changes can be lost. If this happens, it can be helpful to look at the History of the Mail. Highlight it in the Mailbox browse window or open it and select 'History' from the Operations menu. This report will show who has read and amended the Mail and when.



The screenshot shows a 'Mail History' window with a blue title bar. Below the title bar is a toolbar with an 'Operations' button, a printer icon, a paper clip icon, a search box, and a 'Search' button. The main content area has a header bar with 'Mail History' on the left and 'Hansa, Print date: 23/8/2004 16:43' on the right. Below this is a table with columns: Mailbox, Name, Status, Date, and Time. The table contains 10 rows of mail history data. At the bottom of the table, there are two summary rows: 'DB Transactions' with a value of 21, and 'Seconds' with a value of 0.86.

Mailbox	Name	Status	Date	Time
3	Jean Marais	Created	16/8/2004	13:19:10
1	Francoise French	Read	20/8/2004	13:20:10
1	Francoise French	Updated	20/8/2004	13:20:22
2	Ingrid Peterson	Read	21/8/2004	13:21:07
2	Ingrid Peterson	Updated	21/8/2004	13:21:27
5	Neil Brooker	Read	21/8/2004	13:22:03
5	Neil Brooker	Updated	21/8/2004	13:22:22
3	Jean Marais	Read	22/8/2004	13:23:15
1	Francoise French	Read	23/8/2004	13:41:15
DB Transactions			21	
Seconds			0.86	

Marking Mail as Not Read

You can mark any Mail in your Mailbox or in a Conference as unread. You might want to do this so that it retains the 'envelope' icon as a reminder to read it again or to act on it at a later date. To do this, highlight the Mail in your Mailbox or Conference browse window and select 'Mark as not read' from the Operations menu. You can also select 'Mark as not read' from the Operations menu when the Mail is open.

Attachments

Files, notes and other Hansa records (including other Mails) can be attached to a Mail using the [Attachments] button with the paper clip icon. This can take one of two forms—



These connected objects are known as "Attachments" and this feature is universal in Hansa. Please refer to the 'Working with Records' section in the

‘Work Area’ chapter in the ‘Introduction to HansaWorld Enterprise’ manual for full details. Remember that a folder or directory named “Attach” must be present in the Hansa server folder if you want to use Attachments, and that a folder named “Tmp” should also be present on the Gateway machine if you will be sending or receiving external mail with Attachments. A Mail must have been saved at least once before any Attachments can be added to it.

Mails with Attachments have an extra icon in the Mailbox and Conference browse windows—



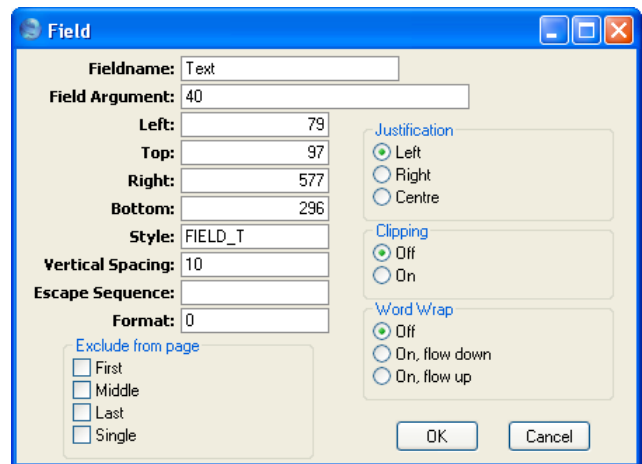
Printing Mail

To print a Mail, open it and click the Printer icon in the Button Bar or select ‘Print’ from the File menu.

The Form used is determined as follows—

1. Using the Form register in the System module, design the mail document and name it “MAIL”. Use the ‘Properties’ function on the Operations menu to assign a Document Type of “Mail Form”. A sample Form is supplied with Hansa: this can be modified to suit your requirements.

To include fields, click the [Fields] button and then draw a box on the Form where the field is to appear. It can be moved or resized later if necessary. The ‘Field’ window opens. In the case of the field representing the Mail text itself and that representing the addressees, since they are likely to extend over more than one line, it is necessary to make an entry in the Spacing field. If this is left at 0 (the default), all the lines of text will be superimposed on one another. If the Style is 10 point Times, a Spacing of at least 10 points is recommended.



You should also enter as the Field Argument the maximum number of characters that can be printed in one line. In the example illustration, it has been specified that up to 40 characters can be printed per line (fewer if the 40th character occurs in the middle of a word).

Full instructions for using the Form register can be found in the 'System Module' manual.

2. Remaining in the System module, select 'Documents' from the File menu. The 'Documents' list window is opened: highlight 'Mail'.
3. Select 'Define Document' from the Operations menu.
4. In the subsequent window, enter "MAIL" in the Form field of the first line (you can use 'Paste Special' to ensure the spelling is correct).
5. Click [Save] to save the Mail Form definition. From now on, the mail form that you have designed will be used whenever a Mail is printed.

Saving Mail

You can save the text of a Mail as a text file. To do this, open the Mail and select 'Save Text as File' from the Operations menu. The usual 'Save File' dialogue appears, allowing you to name the file and place it on your hard disk. The Mail's Subject is used as the default file name (although any characters that might be illegal in some operating systems will be removed). If the Subject is too long, it will be truncated, and Hansa will beep. The Subject will also appear as the first line in the resulting text file.

Saving a Mail as a text file can be useful because—

1. You want to keep a record of the Mail before it is removed by the 'Clean Up Mail Registers' Maintenance function.
2. You want to read and update the Mail at leisure off-line. In this case, open the text file in a word processor and make the necessary amendments. Then, copy the text (omitting the first line which is the Subject of the Mail), return to the Mail in Hansa. Place the cursor in the Text field, choose 'Select All' from the Edit menu (Ctrl-A or ⌘-A) and then paste in the copied text.

Searching for Mail

You can search for Mails containing a certain word or phrase. To do this, open your Mailbox or a Conference and select 'Search' from the Operations menu. The following window opens—

Period

Paste Special

Reporting Periods setting,
System module

The function will search for the specified word or phrase in Mails last changed during this period.

To/From	Paste Special	Mailboxes and Conferences
		Enter a Mailbox or Conference here if you want to search for Mails with a specific sender or recipient (choose whether you are looking for a sender or recipient using the Function options below).
Text search		Enter here the word or phrase that you are looking for.
Function		Choose whether you are looking for Mails with the Mailbox or Conference entered in the To/From field above as the sender, the recipient, or both.
Search		Choose whether you want to search for the word or phrase in the Subjects of Mails, in the main texts of Mails or in both.

Press [Run] to activate the search. A report will be printed to screen, listing the Mails found. In the report, click on the Subject of a Mail to open and read it.

The function will only search for Mails in the Mailbox or Conference from where it was activated.

Deleting Mail

To delete a Mail, highlight it in your Mailbox browse window and select 'Delete' from the Record menu. You can also select several Mails (hold down the Shift key to select a range of Mails in the list) and delete them all at once. You cannot delete Mails from Conferences in this way.

If you delete a Mail that has been sent, it will be deleted from your Mailbox only. It will remain in its recipient Mailboxes and Conferences even if it has not yet been read. If you want to delete a Mail from all Mailboxes and Conferences, remove the check from the Sent box before deleting.



You cannot undo the deletion of a Mail.

Local Mailboxes

Local Mailboxes allow you to read and change Mail off-line (i.e. when you are not connected to the server). You can log on to the server and download the contents of your Mailbox to a local Company. You can then disconnect from the server, and read and change your Mail when convenient. At the end of the day, you can reconnect to the server and upload the Mails that you have changed (and download once again any Mails that have been created or changed during the day).

Configuring a Local Mailbox System

The Server

The server needs little configuration work to make it ready for a Local Mailbox system. Working on the server or on any client machine, make sure you have created Person records and Mailboxes for each user likely to be using the Local Mailbox system. The Person register is described in the 'System Module' manual and Mailboxes are described in the 'Setting up the Hansa Mail System' section above on page 16. Switch on the Local Mailbox option on the 'CRM' card of the Configuration setting in the System module.

The Clients

If you are using the Local Mailbox system, there should be two Companies in the databases on each client machine, as follows—

- The “Local Company” will be used to read and edit Mail off-line.
- The “Client Company” allows the user to log in to the server.

Follow these steps to configure each client machine to use the Local Mailbox system. These steps assume you are installing Hansa on each client machine for the first time. Please refer to the end of this section on page 65 if you have been using Hansa for some time before you start using Local Mailboxes.

1. Install Hansa on the client. Ensure that the Hansa folder contains the “DBDef.txt” and “Default.txt” files but not a “Hansa.HDB” file and launch the Hansa application.
2. Hansa opens the ‘Companies: Inspect’ window. Enter a single Company, as shown on the next page.

	Code	Name	Short	TCP/IP	Port
1	L	Local	L		
2					
3					
4					
5					
6					
7					
8					
9					

This is the Company that will be used to read and edit Mail off-line (the “Local Company”). As it will not be used to connect to the server, the TCP/IP and Port fields are left blank. Click the [Save] button to save and double-click the new Company in the subsequent list.

4. When the ‘Import files available’ window appears, close it by clicking the close box. Do not import anything yet.
5. Select ‘System Module’ from the Modules menu, and click the [Settings] button in the Master Control panel. Double-click ‘Configuration’.

Operations Save

Control String: AAAAAABAA:AC9-DVYNWAJ:A9-ABAB6A:AACJUCC

Control Code: 1

Key Valid Until: 1/10/2004

Enabler Key:

Users | Server | Basic | Verticals | Cash | CRM | HAL | Technical

Named Users: 1 **Single Functions:**

Companies: 2 **Concurrent Users:**

Extra Mailboxes: **Conferences:** 0

Server Hardware: Generic PC

Server OS: Windows

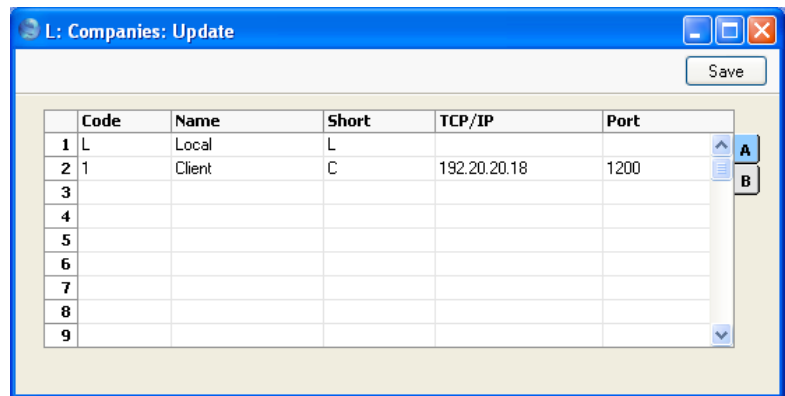
☒ Sales and Purchase Ledgers ☒ Nominal Ledger
☒ Sales Orders ☐ Consolidation
☒ Quotations ☒ Purchase Orders
☒ Stock ☒ Server

If you are using Named Users, set the number of Named Users to the number of different users that you anticipate will be using the machine. If you are using Concurrent Users, the numbers of Concurrent Users can be set to one, and the number of Extra Mailboxes should be set to the number of different users that you anticipate will be using the machine. For example, if the machine will be used by one user in the morning and another in the afternoon, set the number of Named Users to two, or the number of Concurrent Users to one and the number of Extra Mailboxes to two, depending on which option you are using. The number of Companies should be set to two. Check the Local Mailbox option on the 'CRM' card, and any other boxes as required. Click the [Save] button to save.

6. Open the Person register by clicking the [Persons] button in the Master Control panel or by selecting 'Persons' from the Registers menu. Enter Person records for all members of staff that will be using the machine. In our example, two records will be entered, one for the morning user and one for the afternoon user. Don't forget to set passwords for all users.

As mentioned in the 'Server' section above, each of these members of staff should also have records in the Person register on the server (with the same initials), and should have Mailboxes on the server as well.

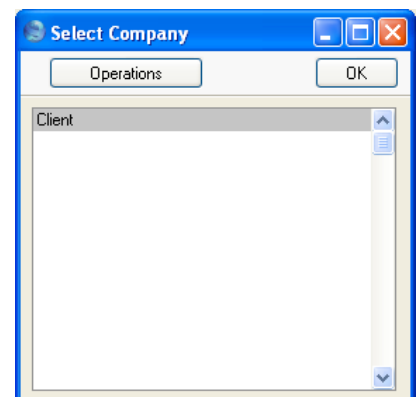
7. Change to the E-mail and Conferences module using the Modules menu, and click the [Mailboxes] button in the Master Control panel. Create a Mailbox for each user. In the example, two Mailboxes will be created.
8. Change back to the System module and click the [Companies] button in the Master Control panel (or select 'Companies' from the Registers menu). Enter a second Company with the IP address of the server and Port Number that is the same as the Server Port in the Program Mode register on the server. The Code should be the same as that you entered on the server.



When you click [Save], Hansa will quit for reasons of security. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.

If you have been using Hansa for some time before you start using the Local Mailbox system, you can still configure each client as described above, with these differences—

- i. The database on the client machine will already contain a single Company, the “Client Company”. When you launch Hansa, this Company will be shown in the ‘Select Company’ window—



If the Login window appears instead of the ‘Select Company’ window, click [Cancel]. The ‘Select Company’ window will then appear.

- ii. Select 'Open Company Register' from the Operations menu. The 'Companies: Inspect' window opens—

	Code	Name	Short	TCP/IP	Port
1	1	Client	C	192.20.20.18	1200
2					
3					
4					
5					
6					
7					
8					
9					

- iii. Enter the Local Company on the second row as shown—

	Code	Name	Short	TCP/IP	Port
1	1	Client	C	192.20.20.18	1200
2	L	Local	L		
3					
4					
5					
6					
7					
8					
9					

- iv. Click [Save]. Hansa will quit for reasons of security. Restart Hansa and choose to enter the Local Company. Complete steps 5, 6 and 7 as described above. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.
- v. In some installations, you might not be able to save the 'Companies: Update' window when you click the [Save] button in step iv, because the number of Companies has been exceeded. In this situation, you should quit Hansa, take the "Hansa.HDB" file out of the Hansa folder and follow the sequence for a new client database from step 1 above. The only information that will be lost will be any custom window positions,

sizes and/or sort orders that you might have saved using the 'Save Position' function on the Window menu.

Using Local Mailboxes

If you are using the Local Mailbox system, you will have two Mailboxes, as follows—

- your 'live' Mailbox. This is your normal Mailbox, used as described earlier in this manual. It can only be used when you are logged in to the server, because it is stored there. As soon as you update a Mail in this Mailbox, it will appear as unread in its recipient's Mailbox.
- your 'local' Mailbox. This is stored in your client database, so you don't have to be logged in to the server in order to read and update its contents.

In this section, we describe the sequence that you might follow to read and edit Mail off-line in a typical Hansa installation.

1. At the start of the day, launch Hansa and choose the Client Company. This enables you to log in to the server.
2. Open your Mailbox by clicking the [Mailbox] button in the Master Control panel.

Urgent Mail can be dealt with now. Non-urgent Mail should be transferred to your Local Mailbox. To do this, select 'Local' from the Modules menu and then 'Local Mail' from the Registers menu (or click the [Local Mailbox] button in the Master Control panel). A new window entitled 'Local Mailbox: Browse' opens. This lists the contents of your Local Mailbox. If this is the first time you have opened your Local Mailbox, the list will be empty.

3. Select 'Synchronise' from the Operations menu. The contents of your Mailbox will be transferred to your Local Mailbox. The 'pencil' and 'envelope' icons will be preserved, so that you can see which Mails need attention.
4. Log off from the server by quitting Hansa.
5. During the day, you can launch Hansa and choose the Local Company. Select 'Local' from the Modules menu and then click the [Local Mailbox] button in the Master Control panel: the 'Local Mailbox: Browse' window opens, showing the Mail that you transferred to your Local Mailbox in step 3 above.

6. Read and update Mail in the normal way, as described in the 'Sending and Receiving Mail' section above on page 42. There is one restriction on updating Mail: changes cannot be inserted into the Mail text, they must be added to the end of the text.
7. On returning to the office at the end of the day, you can once again launch Hansa and select the Client Company to log in to the server. Once again, open your Local Mailbox by selecting 'Local' from the Modules menu and then clicking the [Local Mailbox] button. Select 'Synchronise' from the Operations menu. All changed Mail will be transferred from your Local Mailbox to your 'live' Mailbox, and from your 'live' Mailbox to your Local Mailbox. If you updated a Mail in your Local Mailbox during the day at the same time as it was being changed by its recipient in your 'live' Mailbox, all changes will be preserved.

Chat

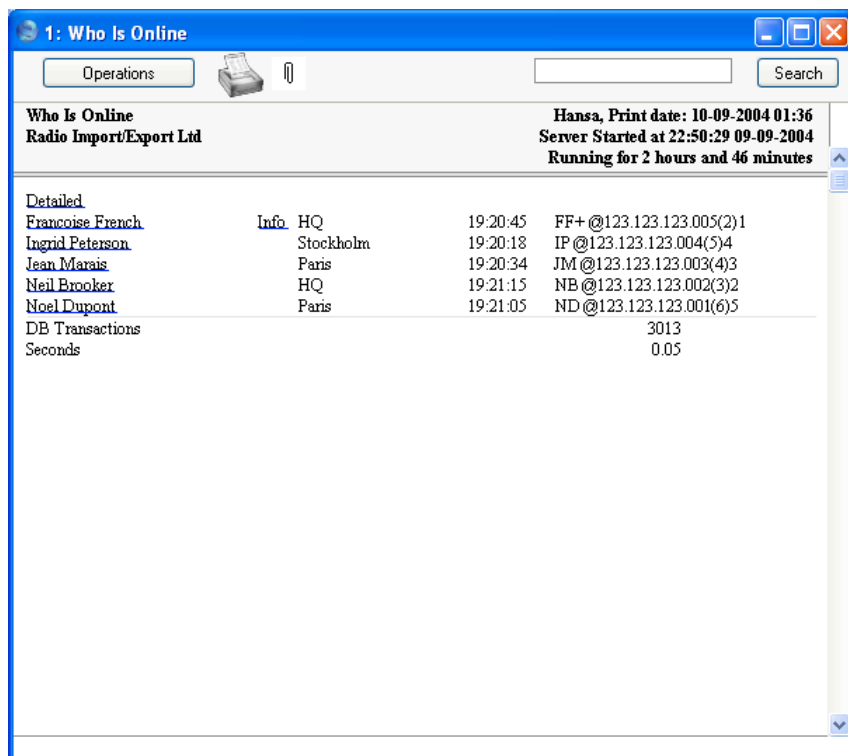
The Chat facility allows any user to have a conversation with any other user, providing they both have Mailboxes. These conversations are not saved in the database. There is no limit to the number of users that can take part in a Chat, and a single user can participate in more than one chat simultaneously. Chats are not visible to those not taking part or to the system administrator.

To start a Chat, proceed as follows —

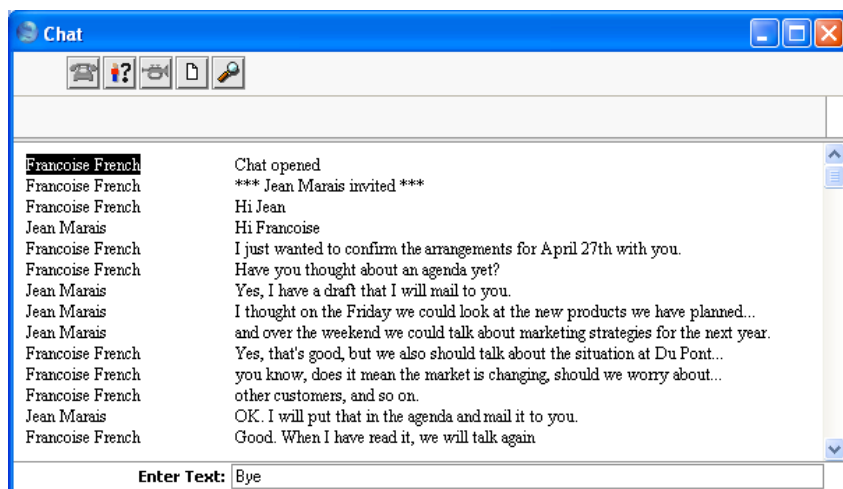
1. Bring the Master Control panel to the front by pressing the Ctrl-M (Windows and Linux) or ⌘-M (Macintosh) keyboard shortcut. Alternatively, use the 'Master Control' function on the File menu.
2. To find out who is currently logged in to Hansa, click the [Chat] button in the Master Control panel —



The Who Is Online report appears, showing who is currently logged in together with the time of their last action and their IP address. Users with the word “Info” beside their name have entered a Presentation (described below on page 72). Click the word to read the Presentation.



- To start a Chat with someone, click on their name in the report. The Chat window opens.



4. To participate in a Chat, simply type your message in the Enter Text field at the bottom of the screen and press Return or Enter. Your message appears in the main area of the 'Chat' window, visible to all participants.
5. To print a Chat, select 'Print' from the File menu.
6. To leave the Chat, close the 'Chat' window by clicking the close box. The other participants will be told that you have left.

Buttons

The buttons at the top of the 'Chat' window provide features that are, in some platforms, duplicated by functions on the Operations menu.

Invite



This function opens a list showing everyone currently logged in to Hansa. Double-click on a name to invite a person into the Chat.

Who is in this chat?



This function produces a report showing everyone currently participating in the Chat. You can print the report by clicking the Printer icon.

Beep Others



This function causes the computers of everyone currently participating in the Chat to beep.

Save as File



Use this function if you want to save the Chat as a text file.

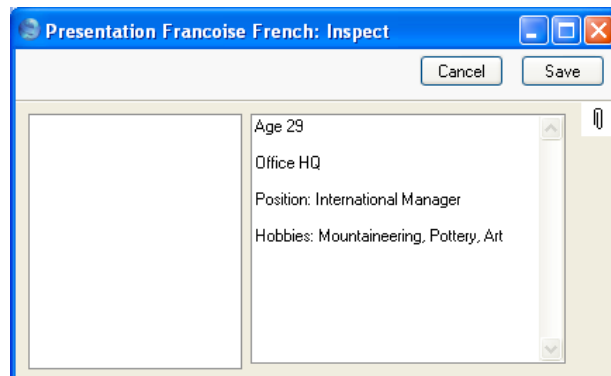
Presentations

Each Hansa user with a Mailbox can enter a Presentation containing a brief profile about themselves and a picture. This profile will be visible to other users. Each Conference can also have a Presentation, which can contain details about the purpose of the Conference.

Presentations can be viewed and modified by the system administrator using the Presentations setting in the E-mail and Conferences module.

Entering a Presentation

To enter your Presentation, bring the Master Control panel to the front. Select 'Presentation' from the Operations menu to open the following window—



Type your profile in the right-hand field and paste a picture in the left-hand field. Click the [Save] button to save the Presentation and close the window.

You can follow the same route to change your Presentation at any time.

Reading Presentations

To read the Presentation of another user, first open a Mail where that user is the sender or one of the recipients, or create a new Mail and enter the user's name as the recipient. Ensure the cursor is in the user's name and select 'Presentation' from the Operations menu. The user's Presentation is opened. Once you have read it, close it by clicking the close box. You can also read a Presentation by clicking the word "Info" in the Who Is Online report.

This method should also be used to create Presentations for Conferences.

Maintenance

Introduction

Maintenance functions tend to be used to carry out certain updating tasks, usually involving batch processing and encompassing all or many of the records in the affected register. Maintenance functions connected with Hansa's Mail facilities are located in the E-mail and Conferences module. Use the Modules menu to ensure you are in the E-mail and Conferences module and then select 'Maintenance' from the File menu. When the 'Maintenance' list appears, double-click an item in the list. A specification window will then appear, where you can decide how the function is to operate. Click [Run] to operate the function.

Clean Up Mail Registers

This function can be used to remove old Mails, to free up disk space.

Mailbox

Paste Special

Mailboxes and Conferences

If you would like to remove Mails from a particular Mailbox or Conference, enter its name here. Otherwise, all Mailboxes and Conferences will be affected.

Max Number of Mails

Specify here the maximum number of Mails that you would like Mailboxes and Conferences to contain. If any Mailboxes or Conferences contain more than this number of Mails, the oldest Mails will be removed until this number is reached. Mails whose Lifespan is Never

Remove will not be removed, while those whose Lifespan is Remove Next Day will be removed first.

You should only enter a number here if you want to override the maximum number specified in the Mail and Conference Settings setting in the E-mail and Conferences module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

Max Age of Mails Specify here the maximum age in days of Mails that you would like Mailboxes and Conferences to contain. All Mails that are older will be removed, unless their Lifetime has been set to Never Remove. The calculation is made from the date a Mail was last modified, not the date it was created. Mails that have not reached this age may be removed as well if the Maximum Number (above) has been exceeded.

You should only enter a number here if you want to override the maximum number specified in the Mail and Conference Settings setting in the E-mail and Conferences module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

The maximum age for read Mail applies to both Mailboxes and Conferences, while that for unread Mail applies to Mailboxes only.

Press the [Run] button to start the updating process. This may take a few minutes, depending on the number of Mailboxes and Conferences, and on the number of Mails to be deleted. When the process has finished, you will be returned to the 'Maintenance' list window. This can be closed by clicking the close box.

Removing Mail Automatically

You can choose to have this function run regularly and automatically. To do this, open the Timed Operations setting in the Technics module—

Timed Operations: Inspect

Save

Daily Backup

Start Time: 23:12

Backup Path: c:\hansa\backup\

Daily HAL Routine:

Do

☒ Backup

☒ Mail Cleanup

Database Events

Database Close: 23:00 Database Open: 04:00

Database Copy: Second Database Copy:

Background Tasks

HAL Routine: Seconds between: 0

Special Tasks

Seconds Between Browse Updates: 0

Client Time Out: 0

Specify a time in the Operation Time field (using the 24 hour clock) and check the Mail Cleanup box. The 'Clean Up Mail Registers' function will be run automatically at that time every day, providing the server is running. If you use this facility, you must make sure a maximum number of Mails and/or a maximum age has been specified in the Mail and Conference Settings setting, if not for the individual Mailboxes and Conferences. Otherwise, no Mails will be deleted. In the illustration, it has been determined that both backing up and removing old Mail will take place automatically every day.

Emptying the E-mail Queue

External mail is placed in an E-mail Queue, from where it will be sent to its recipient by the Gateway. Once it has been sent, it is not removed. Instead it is marked as Sent (this can be seen in the E-mail Queue register in the E-mail and Conferences module, and printed using the E-Mail Queue List report).

If you want to empty the E-mail Queue register, use the 'Delete E-Mail Queue' Maintenance function in the E-mail and Conferences module. Do this on the main server, not on the separate Gateway machine if you have one.

Specify Delete E-Mail Queue

Run

Period: 1/1/2004:31/12/2004

Enter the period for which you want E-Mail Queue records deleted and click the [Run] button. Mail that has not been sent will not be deleted.

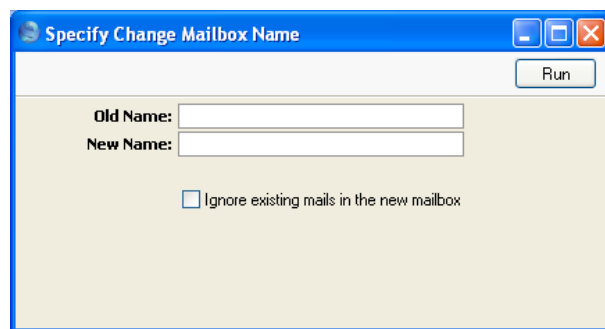
Emptying the “Tmp” Folder

The External Gateway uses a folder named “Tmp” to store mail attachments downloaded from the POP3 server before they are transferred to the “Attach” folder and attachments that are to be uploaded to the SMTP server.

Once an attachment has been transferred to the “Attach” folder or uploaded to the SMTP server, it is removed from the “Tmp” folder automatically.

Change Mailbox Name

Use this function when you need to change the Name of a Mailbox or Conference after it has received Mail. First, create a new Mailbox or Conference with the new Name and then use this function to move the Mail out of the old one into the new one. Then, delete the old Mailbox.

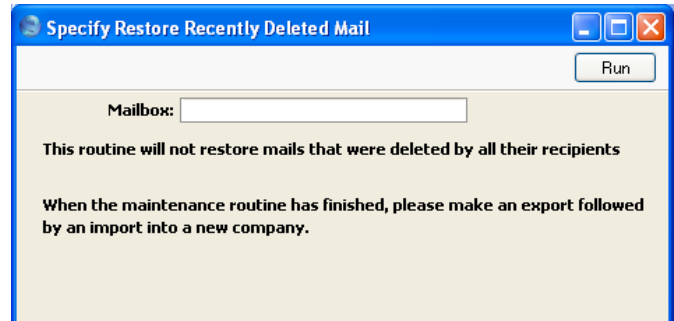


Old Name	Paste Special	Mailboxes and Conferences
	Enter the name of the old Mailbox or Conference here. If you do not enter an Old Name, the function will have no effect.	
New Name	Paste Special	Mailboxes and Conferences
	Enter the name of the new Mailbox or Conference here. If you do not enter a New Name, or if you enter the name of a Mailbox that doesn't exist, the function will have no effect.	
Ignore existing mails in the new mailbox	Check this box if you would to move Mail into the new Mailbox or Conference even if it already contains Mail.	

If you do not check this box, Mail will only be moved into a new Mailbox or Conference if it is empty.

Restore Recently Deleted Mail

This function can be used to recover Mail that was deleted by mistake. It will not recover Mail that was deleted from all Mailboxes and Conferences.



After using the function, back up your database using the 'Database Text Backup' Export function in the System module and import the back-up file into a new database.

Update Postmaster Mailbox

The Postmaster is the Mailbox or Conference that receives incoming external mail (e-mail) that has been incorrectly addressed. This may be because of a typing error (including the use of special characters, which should not appear in e-mail addresses), because the recipient no longer works for your company, or because your system of E-Mail Aliases is incomplete. You should specify the Mailbox or Conference that is to act as the Postmaster in the E-mail and Conference Settings setting.

If incorrectly addressed mail is not very frequent, the Postmaster will be able to redirect such mail by opening it and typing in the correct Mailbox. If it is frequent, the cause will probably lie with your E-Mail Aliases. E-Mail Aliases match the name of the recipient of the mail as typed by the sender to the name of a Mailbox in Hansa, and are described above on page 32. If this is the cause of the problem, you should first try to improve your E-Mail Alias system. Then, instead of redirecting the undelivered mail individually, the Postmaster can use this function to deliver it again using the updated E-Mail Aliases. Any mail that is redirected successfully will be removed from the Postmaster's Mailbox. So, as well as taking the labour out of redirecting mail, this function will test that the new E-Mail Aliases are correct.

Reports

Introduction

Reports connected with Hansa's Mail facilities are located in the E-mail and Conferences module. Use the Modules menu to ensure you are in this module and then select 'Reports' from the File menu or click [Reports] in the Master Control panel. Then, double-click the appropriate item in the list. A specification window will then appear, where you can decide what is to be included in the report.

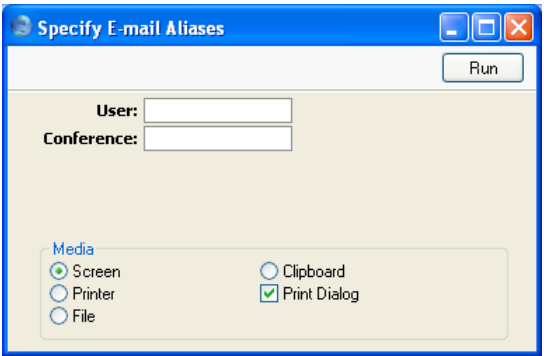
Where specified below, it is often possible to report on a selection range, such as a range of Mails. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Mails 001 to 010, enter "001:010" in the Serial Number field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Using the options at the bottom of the specification window, determine the print destination of the report (the default is to print to screen). You can initially print to screen and subsequently send the report to a printer using the Printer icon.

Once you have entered the reporting criteria and chosen a print destination, click [Run].

E-mail Aliases

This report has two sections. The first section lists the E-Mail Aliases for each Mailbox and Conference. The second section lists users (i.e. Persons) that don't have Mailboxes, and users that have Mailboxes but not E-Mail Aliases.



User	Paste Special	Person register, System module
	Range Reporting	Alpha
Conference	Paste Special	Mailboxes and Conferences
	Range Reporting	Alpha

Enter the initials of the Person for whom you wish to check E-Mail Aliases. If the Person has a Mailbox and that Mailbox has at least one Alias, only the first section of the report will be printed, listing the Person's Aliases. If the Person does not have a Mailbox, or has a Mailbox that does not have an Alias, only the second section of the report will be printed.

If you enter two sets of initials separated by a colon (:), the report will list E-Mail Aliases for all Persons whose initials fall between those two sets alphabetically. Leave the field blank to report on all Persons.

This field only relates to the first section of the report. Enter the name of the Mailbox or Conference for which you wish to check E-Mail Aliases. If the Mailbox or Conference has at least one Alias, the first section of the report will list the relevant Aliases. If the Mailbox or Conference does not have an Alias, the first section of the report will be empty.

If you enter two names (or two initial letters) separated by a colon (:), the first section of the report will list E-Mail Aliases for all Mailboxes and Conferences in the range. Leave the field blank to report on all Mailboxes and Conferences.

E-Mail Queue List

This report is a list of the contents of the E-Mail Queue. This contains outgoing external mail that is waiting to be sent and that has been sent.

For each item of external mail, the report shows the sender, the date and time the Mail was saved, the date and time it was placed in the E-Mail Queue and an indication of whether the external mail has been sent.

User

Paste Special

Person register, System module

Enter the initials of the Person whose outgoing external mail is to be listed in the report. If you do not specify a User, the report will list external mail sent by everybody in your system.

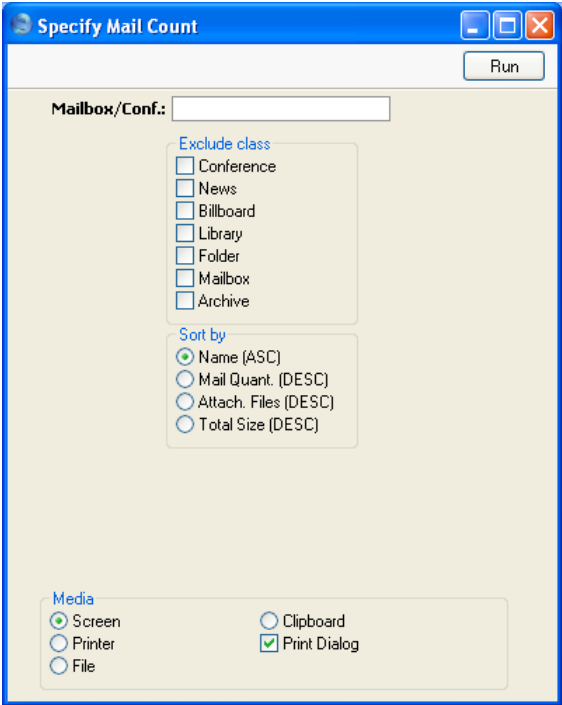
Function

Use these options to choose whether the report is to list mail that has been sent, mail that has not been sent or both.

Mail Count

This report lists the number of Mails in each Mailbox and Conference, the number of Attachments and the total size of those Attachments.

Note that each Mail will usually be shown as belonging to at least two Mailboxes (the sender and the receiver), so the report does not give a representative figure for the number of Mails in the database as a whole.



Mailbox/Conf.	Paste Special	Mailboxes and Conferences
		Use this field to limit the report to a single Mailbox or Conference. Leave it blank to report on all Mailboxes and Conferences.
Exclude class		Check one or more boxes to leave Mailboxes and Conferences of various types out of the report.
Sort by		These options control the order in which the Mailboxes and Conferences will be listed in the report.
Name (ASC)		The Mailboxes and Conferences will be sorted alphabetically by name.

Mail Quant. (DESC)

The Mailboxes and Conferences will be listed in the order of the number of Mails they contain, from highest to lowest.

Attach. Files (DESC)

The Mailboxes and Conferences will be listed in the order of the number of Attachments they contain, from highest to lowest.

Total Size (DESC)

The Mailboxes and Conferences will be listed in the order of the total size of Attachments they contain, from highest to lowest.

HansaWorld Enterprise

Mail

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