

## Connect to Mail

ProductInfo



## Integrated Email Management

Emails from an IMAP or Microsoft Exchange account can be organized and stored directly in DocuWare with Connect to Mail.

Connect to Mail monitors a folder in the Gmail inbox, another IMAP-enabled service, or Microsoft Exchange, for example. There, incoming email is automatically transferred to the DocuWare system. If the user has previously specified criteria for archiving, Connect to Mail can also automatically index the email.

Managing email and all other document types together in a single document management solution simplifies and improves the organization of related contents, such as project data, customer correspondence, and company information. Now you can use Connect to Mail to combine the practical benefits of web-based email accounts with the efficiency and functionality of DocuWare.

### Benefits

- **Efficient:** Save emails in DocuWare straight from IMAP and Microsoft Exchange accounts
- **Organized:** Index email automatically
- **Mobile:** Transfer your email to DocuWare from your smartphone, tablet, or via the browser
- **Convenient:** Easy, central setup

## Simple Archiving

Connect to Mail automatically indexes your email upon detection in a monitored folder. This saves you a lot of time as there's no need for manual storage in your project folders. You can decide whether to store an email with attachments, just the email, or just the attachments. Furthermore, you can decide in which order DocuWare should open them. This can be useful, for example, if you want a specific attachment to always be displayed first.

You can also make settings for your emails to be automatically deleted in your email service after transferring to DocuWare, or to be moved to other folders. Power users can store their emails directly, but at the same time leave them for further processing and for easy access on the email server. So you know which emails were already stored in DocuWare, the relevant messages are moved to another folder. You can choose between archiving emails in original format or as a PDF, with attachments in their original format.

The system administrator can define whether images from an email for archiving may be automatically downloaded or not. By default, the function is disabled for security reasons.

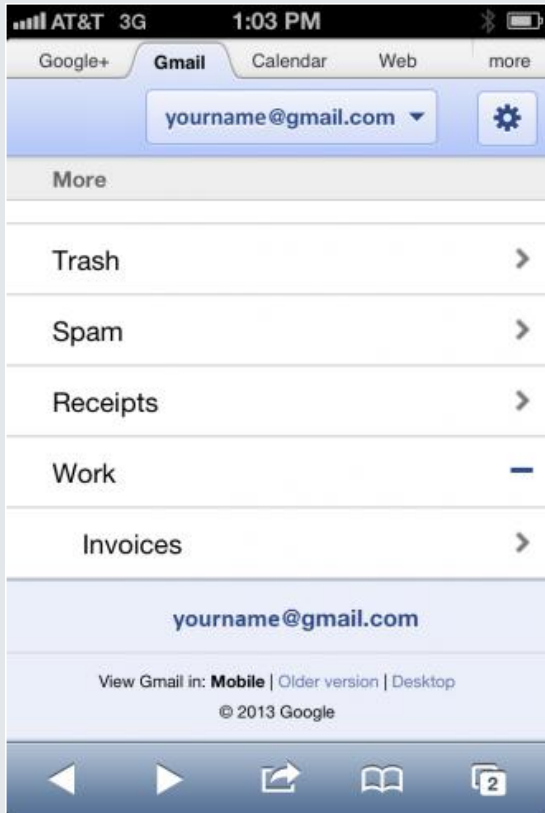
Spam senders may hide images in HTML emails that are invisible at first. If they are automatically downloaded on archiving, the spambot knows that the email address is active. There is a danger that the spam sender can misuse the email address for phishing. In order to prevent this, the automatic downloading of images is disabled by default in Connect to Mail.

## Automated Indexing for Quick Searches and Workflows

Connect to Mail monitors all activities in your folder and automatically stores email according to your selected criteria such as sender, subject, and date.

Example: You create a separate folder for invoices in your Gmail account, for example, and move all incoming invoices to this folder. When the folder detects that an invoice is moved to this folder, it uses the predefined storage configuration to automatically index it. This triggers the workflow for the invoice approval process.

Another way to save typing index entries, is to let the DocuWare Intelligent Indexing Service take care of indexing. To do this, you first store the invoices from your IMAP or Exchange Server account in a basket which is enabled for Intelligent Indexing rather than straight in the file cabinet. The Intelligent Indexing Service assigns the index words automatically in the background saving you the manual input. Archiving in a basket has a further benefit: you can collect associated email in a basket and then staple them to a DocuWare document.



*Connect to Mail is shown as a folder in Gmail (example "Invoices"). Simply drag and drop the email into this folder – they will be automatically stored in DocuWare.*

## System Requirements

Connect to Mail is the ideal extension to your DocuWare inhouse/online solution. The module can be used as an add-on for PROFESSIONAL and ENTERPRISE Server systems

- DocuWare 6.7
- Windows Vista from SP 2 (32 bit/64 bit)
- Windows Server 2008 from SP 2 (32 bit/64 bit)
- Windows 7 from SP 1 (32 bit/64 bit)
- Windows Server 2008 from SP 1 (64 bit)
- Windows 8 (32 bit/64 bit)
- Windows 8.1 (32 bit/64 bit)
- Windows Server 2012 (64 bit)
- Internet Explorer and Firefox
- Email provider that supports IMAP
- Microsoft Exchange from 2007 SP1

DocuWare

This document can also be found here:

<http://pub.docuware.com/en/connect-to-mail>

For more information please visit our website at

[www.docuware.com](http://www.docuware.com)