

# Mails

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# Mail Set-Up

## Mail Set-Up Options

There are two basic options to set-up mail in Atollon, the differences are described below:

Atollon as Primary Mail Server	Atollon as Secondary Mail Server
Atollon may act as your primary mail server (our preferred option). That means that all your e-mail communication will be managed with Atollon use. We will take care about spam filtering, the benefit of using Atollon as primary e-mail system is it's tight connection to other Atollon's components and easier access rights. Disadvantage may be that it is possible to get mail only using integrated Atollon's e-mail client. If you therefore prefer using other e-mail clients, select the second option.	You can decide to use Atollon only as archive tool for e-mails or occasional e-mail solution. In this case, server will be set as secondary mail server. This option requires primary e-mail server managed by different mail services provider. In order to get e-mails into Atollon, you may need to set-up mail forwarding of selected (or all) mailboxes to addresses configured when setting-up Atollon mail.

Below mentioned guides will follow you in mail set-up. If you need assistance, do not hesitate to ask your Atollon Consultant.

## Set-Up Mailbox

## Set-Up Domain MX Records

# Mass Mail

If you are willing to use mass mail function which is available in Atollon, you should probably follow next steps before you starts.

## Introduction - how does it work?

First of all you need a distribution group. This can be done by following examples

1. create report and use send mass mail button,
2. create your own distribution group within Contact module and drag&drop contact you would like to have in this group,
3. use some nifty sql functions to create your distribution group :).

## Wanna language-based sending?

This feature is actually not working in mass mailing so the nifty sql's are needed to create language-based distribution groups. Then you of course can send emails which speak the same language recipient does.

Just to show you how you might do that:

1. Create empty distribution group in contacts.
2. Find out it's id using `SELECT id from contact_distributiongroups where name like 'name-of-your-group';`
3. Insert all contact which belongs to your organization and speak Czech:

```
insert into contact_bind_distrgroup(dgroup, contact)
select $YOUR-DISTRIBUTION-GROUP-ID, occ.contact from organization_contact_context
occ
left join
contact_personinfo cpi on occ.contact = cpi.contact
where
occ.organization = 1085000 and
cpi.preferedlang = 2607000
;
```

If you are done with distribution group creation process you can switch to real sending. But wait. We should speak more about what's behind it. Sooo

# Default folder aka organization\_contact\_context table

I would say you probably don't know what do I speak about. Let me just explain you. Every contact has its own default folder. As you probably know, every contact can have more than one folder. In this case - who knows which one is the default one? The answer is **default folder**. And also, you probably don't want to create folder for every *person* you have in your system. In this case **Default folder** is your very big friend again.

If you don't want to create Folder for every person in the system (what you probably really don't want to) you can easily update Default Folder using person's **relationship with employer**. This is pretty great because if you update Default Folder for the people you are willing to send your newsletter to, this message will actually stay on the person's employer's Folder.

## What's the organization\_contact\_context table structure

That's quite simple. Table takes in consideration the contact might have different Default Folder accross organizations which are implemented in the system. So for that you can see following columns within it:

- organization
- contact
- subject
- project
- activity

## Updating default folder

But first of all you have to update **Primary Employer**. In order to do that there is already (working) function within the Atollon. Just open up windows client and go to Settings -> Contacts -> Contacts maintenance -> Setup default main contact. Run it and make yourself a cup of coffee.

Output of the following command is delete/insert sql function list. You can use **\o /tmp/your-update-scrip.sql** directly within psql so the output of the select is sent to the update script on your drive and you can import it after using **psql -d \$YOUR-DATABASE -f /tmp/your-update-scrip.sql**. The command includes two values you should find and replace before you'll go to use it.

1. \$ORGANIZATION-ID - is id of your organization, of course,
2. \$ORGANIZATION-SUBJECT - is subject id of the organization.

```
SELECT 'delete from organization_contact_context where contact = '||cm.id||'; insert into
organization_contact_context(organization, contact, subject, project) values($ORGANIZATION-ID,
'||cm.id||', '||ss.id||', NULL);' from contact_main cm
```

```

left join (
    select distinct on (cpc.contact) s.id, cpc.contact as contact from subject s
        inner join contact_personcompany cpc on s.contact = cpc.company
        where
            cpc.isprimary = true
        order by contact
    ) ss on cm.id = ss.contact

where
    ss.id > 0 and

    cm.id in (
        select contact from contact_personcompany where company in (
            SELECT contact from subject where organization = $ORGANIZATION-ID group by contact
        )
    ) and
    cm.id not in (
        select contact from organization_contact_context where subject <> $ORGANIZATION-
SUBJECT
    )
order by
    cm.id
;

```

The command itself might be a bit more updated because:

1. company can have two Folders and we are selecting just first one (but how we can know which is the correct one?),
2. person can have only one Primary Employer but he might also be excluded (he got fired) from that company and then validTo timestamp should be considered in that select too.

## Done with distribution groups, ready for mass mailing

If you did update default folder, created your distribution group and are happy what you have you can switch to the real [mass mail sending](#).

# Bugging

What if something went bad ...

## Flash player crashed by mass mailing

Well ... that's great question. I was checking contact\_mmlist\_temp table for some changes and experienced some status changes but are those messages being still send or not?

Small hint - use following command where \$MASS-MAIL-ISSUE-ID is id of your last sending (you might find it by selecting over all issues and trying to remember for how many contact did you send that mass mail) and check for changes.

```
SELECT status, count(status) from cONTACT_MMLIST_TEMP where issue = $MASS-MAIL-ISSUE-ID  
group by status;
```

## Can not create mass mail list on the server side

This means your temporary mass mail list couldn't be created. This might be probably really bad bug. In my case the problem was in the insert of the distributiongroupid and contactid in the contact\_mmlist\_temp. I found out which insert was the wrong one and tried to apply it manually within plsql where I didn't experience any problem.

# Redirect existing mail address

## In windows client

1. **Setting** -> **Mail** -> **Mail boxes** -> doubleclick user to be redirected -> set combobox Active to No.
2. **Scribe down** (to notepad or piece of paper) users mail (just the name - part before @) and its aliases.
3. **Setting** -> **Mail** -> **Mail boxes** -> doubleclick user to redirect to -> push "+" button in Aliases section -> fill up user aliases which you were scribbling down

# Set-Up Domain MX Records

**There are several administration interfaces available to set-up your MX records.**

You need to set-up your Domain's MX record to be like this:

***MX 10 mx1.atollon.com***

where **yourserver.atollon.com** is server identification that you should receive when getting Atollon Windows administration interface. This information will be provided to you by Atollon Consultant on request. Do not hesitate to contact us, please.

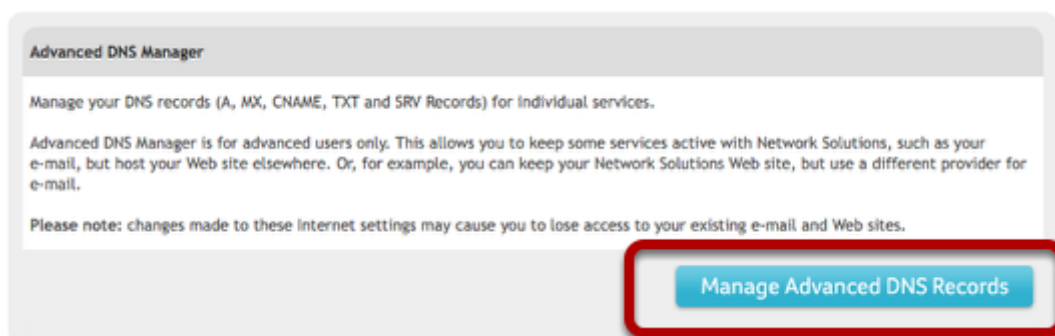
Below you may find tutorial to set-up your domain's MX record on Network Solutions:

## Edit Your Domain's DNS



After the list of your domains is displayed, click on (x) and press button **Edit DNS**.

## Manage Your Advanced DNS Records





Click on **Manage Advanced DNS Records** button

# Edit Your Domain's MX Records

## Mail Servers (MX Records) ?

Note: Mail Servers are listed in rank order

The screenshot shows a web interface for managing MX records for the domain **company.com**. At the top, there is a button labeled "Add Sub-Domain". Below it, a table lists the current MX records:

MXMailServer(Preference)	TTL
starfish.atollon.com.(10)	7200

Below the table, there are links for "Edit Sub-Domain" and "Delete Sub-Domain". Another table shows a second MX record:

MXMailServer(Preference)	TTL
motorboat.atollon.com.(10)	7200

At the bottom right of the interface is a blue button labeled "Edit MX Records".

Click on **Edit MX Records** button.

# Edit Your Domain's MX Records

The screenshot shows a form titled "Add/Edit Mail Servers (MX Records)". It indicates the "Currently Managing Domain" is **atollon.com**. Below this, it says "Add new e-mail server information or update the order in which e-mail will be attempted to be delivered." The form is for the domain **atollon.com** and contains a table with the following columns: Priority, TTL, Mail Server (Example: mail.your-domain.com), and Delete.

Priority	TTL	Mail Server (Example: mail.your-domain.com)	Delete
10	7200	<input type="text" value="yourserver.atollon.com."/>	<input type="checkbox"/>
<input type="text"/>	7200	<input type="text"/>	<input type="checkbox"/>

Replace **yourserver**.atollon.com to the information you received from Atollon's consultant for Windows Administrative client interface.

# Setup Domain's SPF Rules

You should add TXT record to your domain's DNS in the following format:

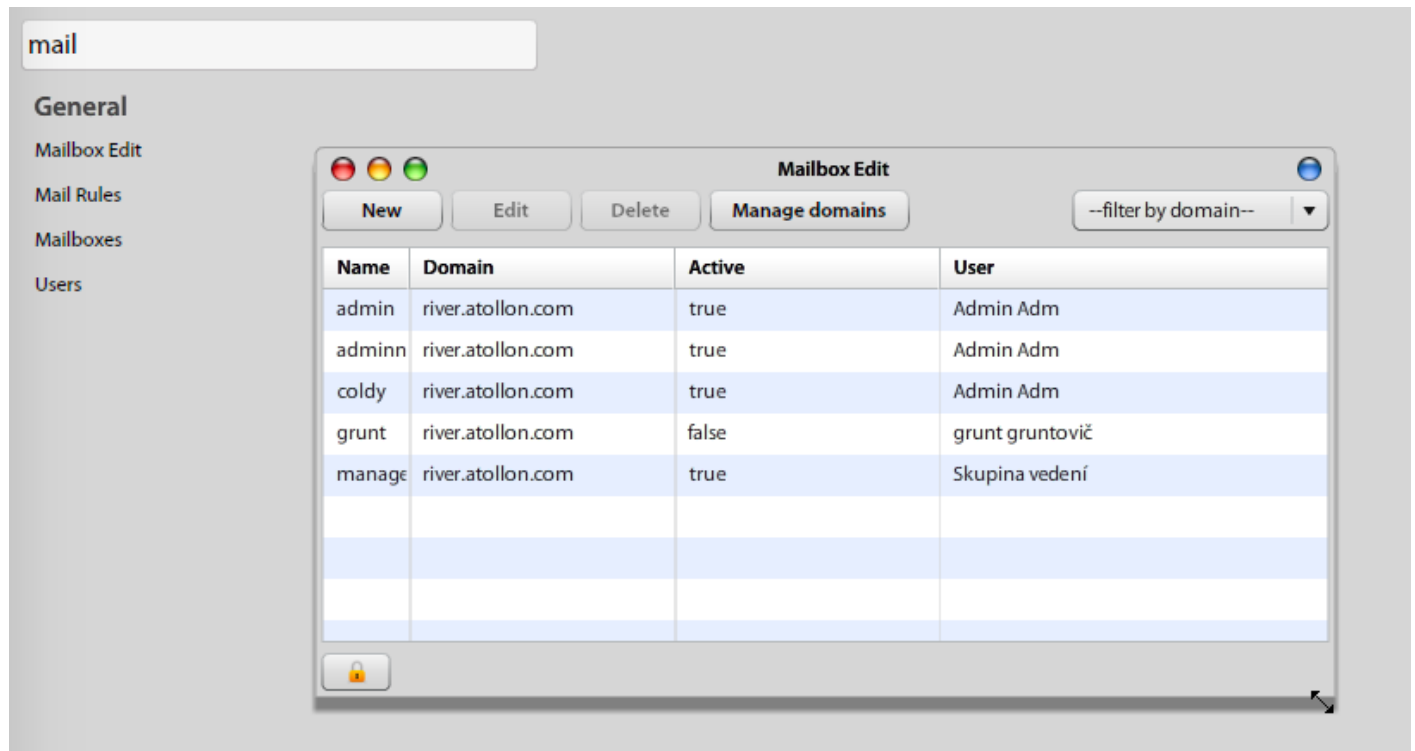
```
v=spf1 include:spf.atollon.com ~all
```

Please note that if you are sending e-mail from other serves, you should add only "include:spf.atollon.com" to your existing record.

# Set-Up Mailbox

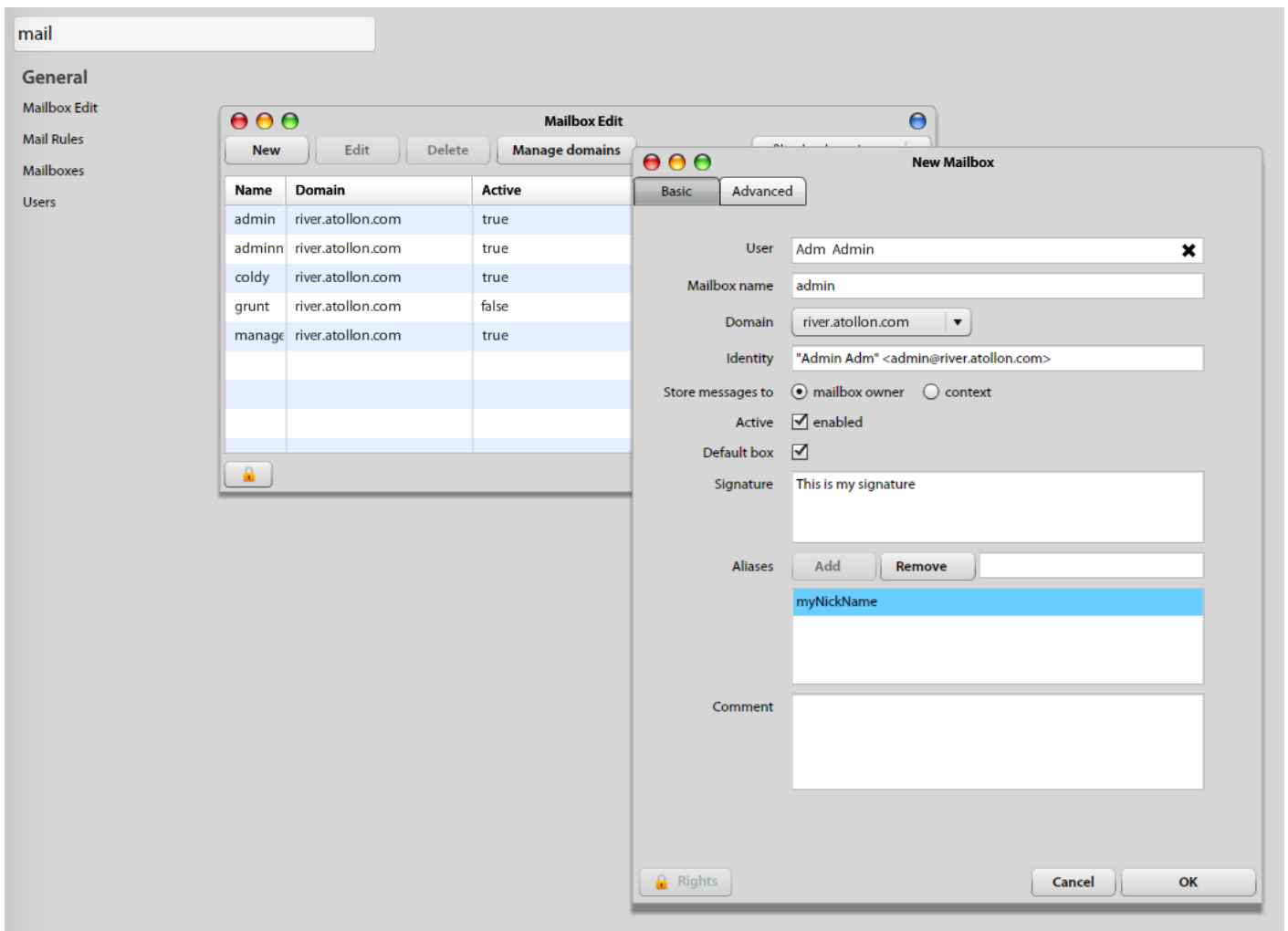
The following guide will show you how to add or edit Atollon Mailbox.

## Open Mailbox Settings



Open **Options & Tools** > and search for **Mailbox Edit** tool.

## Create New Mailbox



First, select the user, who will be the owner of the mailbox. Each user may have several mailboxes at the same time. One mailbox is always primary (used first when sending new e-mail from Atollon).

## Edit Mailbox Settings

There are the following Mailbox options that you should fill-in:

1. **E-mail name** is the identification of Mailbox in the system and primary Mailbox name in the same time. This is the part that will be **before** "@".
2. **Domain** is the mail server identification. This is the part that will be **after** "@".
3. **Identity** is the default Mailbox owner's identity, when sending e-mails. Be careful, when changing this field and keep suggested syntax emailName@domain.
4. **Store messages to**: you have option either to distribute new e-mail to user's individual message folder (To Do) or select any folder or project from contexts.
5. **Active (Yes/No)**: indicates whether Atollon receives mail on this address or not.
6. **Default box (Yes/No)**: indicates, whether this Mailbox is used first when sending new E-mail by the owner.
7. **Signature**: fill-in owner's signature.

8. **Aliases:** you can add more names to this Mailbox. Please note that Alias must not have the same name as some other existing Mailbox. Aliases are used only for receiving emails. You need to create new mailbox if you want to send mails with some other name. Aliases are always in same domain as the mailbox they are specified in. Do not write "@domain" part here.

## Mailbox Advanced Options

- Auto - respond settings = it allows you to enable and set up automatic response when out-of office or unavailable
- Forward settings = it allows you to enable automatic forwarding of incoming e-mails ( **Allow forwarding**), where you can choose **Save forwarded** option (all incoming messages will be saved in your mailbox, otherwise forwarded only); finally you can set up/ manage forward e-mail addresses.

## Mailbox Access Rights

In Mailbox detail: Bottom left you may find access rights to each individual mailbox. Each user must have View & Edit rights to their mailbox in order to be able to:

1. Use the mailbox
2. Edit own signature in Mailbox Settings.

To set up user rights just push the **Add User** button and select the name of mailbox owner from the list, select appropriate user rights and commit changes by pushing **Save** button.

After you are ready, press Ok to save your mailbox settings. If Domain MX records are properly set, you should soon be able to receive new Mail.

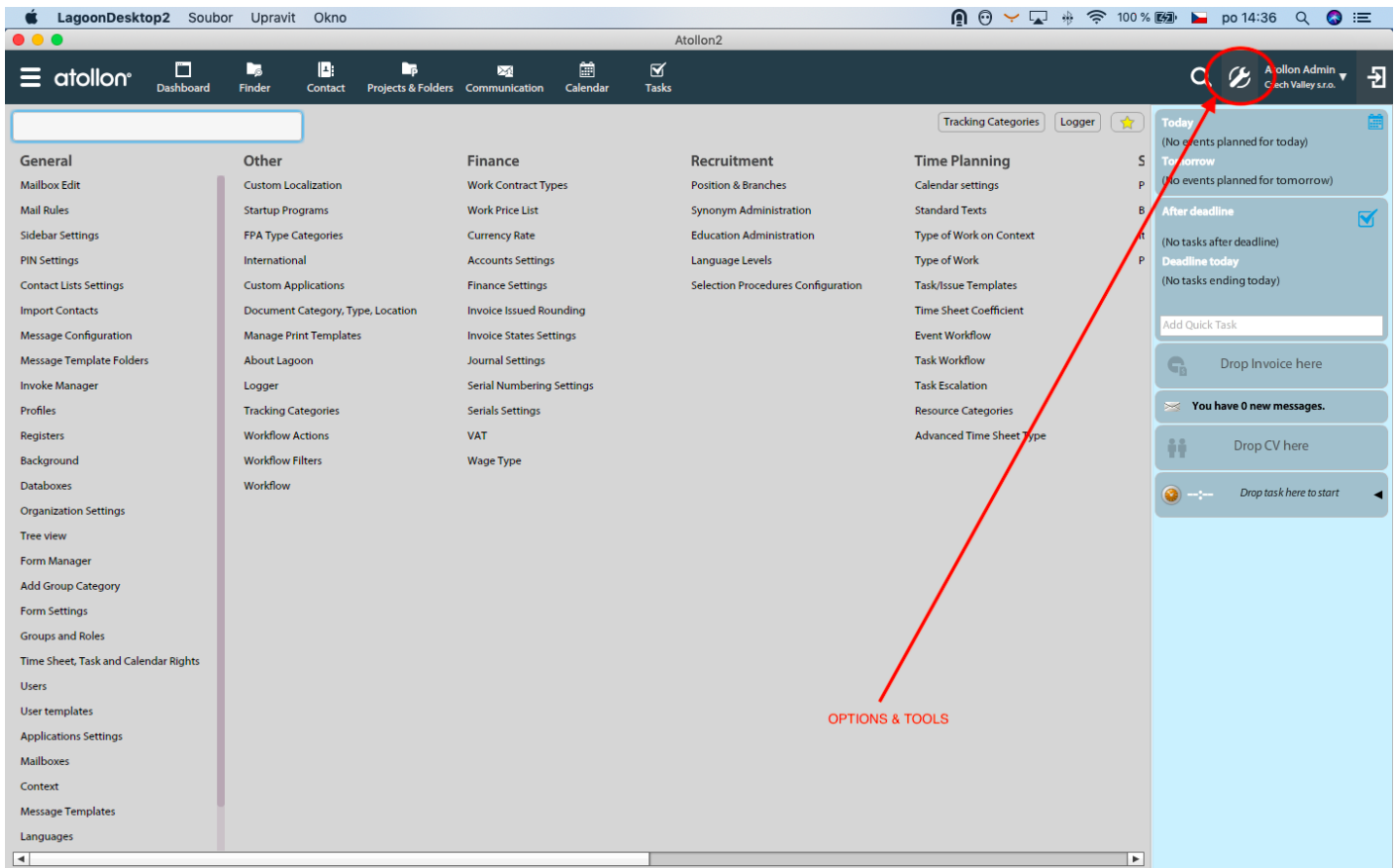
### Next Step:

If you have not done so, [set-up your Domain MX records](#).

# Message Configuration

Message Configuration options allows you to configure different message types as per your requirements.

## 1. Go to **Options & Tools**



2. Type "message" into the text field there, the application will filter only those settings relating to messaging

3. Choose **Message Configuration** option, in order to call for appropriate dialog

4. Use the buttons in dialog as per your need

- create new item (new message type)
- edit existing item
- delete exiting item

