Lynx Email

Revision 3.2

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1 Overview

Lynx edition can both send out Email and receive it on a dedicated address, depending on the version you are using. These features are not available in the 'Basic' version.

Outbound mail can run on one of two ways – you can use the default mail server provided by Lynx or, if you prefer and to better ensure delivery, you can use your own SMTP (outbound mail) server. Some of the setup issues you should be aware of for using outbound mail are described in section 2 below.

The Mail Handler system in Lynx, described in Section 3, allows you to set up semi-automated processing of inbound email. Messages received in the special Mail Queue accounts are automatically linked to the sending lead, customer or supplier and even to the order or project to which they relate. These messages are tracked, along with replies sent, greatly reducing the likelihood of information being lost.

All received messages are available after receipt in the Email Manager program, which enables tracked replies to be sent, follow up actions to be noted as to-do items and unidentified messages to be 'filed' appropriately.

Once tagged to a customer, order etc., messages are available for display within the associated enquiry programs, from which the same reply/to do options are available. The messages received and responses sent thus form a permanent record and audit trail of email interactions with third parties.

Received emails can be automatically forwarded to a second email account, providing the peace of mind that no messages have been lost.

2 Sending Mail

2.1 Using your own SMTP Server

The best option for sending Lynx email is to configure your own Email server into the System Configuration for sending messages. This is likely to give you the best deliverability as the Email server you use will be associated with the address you are sending from, making it less likely that the receiving server will treat your messages as spam. This may also give you the ability to track messages yourself to ensure delivery.

To configure your own outbound Email server, you will need to set the following fields in the System Configuration, on the 'General' tab:

Field	Note
LYNX_OUTBOUND_MAILUSER	The user ID on your own mail server, if used. It is normally an Email address
LYNX_OUTBOUND_MAILPASSWORD	The corresponding password for the user ID
LYNX_OUTBOUND_MAILTIMEOUT	Optional timeout period in seconds for connection to be made to the mail server. The default is 60 seconds.
LYNX_OUTBOUND_MAILPORT	If your mail server does not use the default SMTP port (25) you can set the correct port here.
LYNX_OUTBOUND_MAILUSESSL	Set to Y to use Secure Sockets Layer protocol,which your mail server may require.
LYNX_OUTBOUND_MAILUSETLS	Set to Y to use Transport Layer Security" protocol, which your mail server may require.

You can test whether these settings will work correctly from within the System Configuration program. IFCon will be glad to set these up and test them for you if you have any doubts.

2.2 Using the Lynx SMTP Server

Lynx also has the ability to send Emails for you using a default outbound Email server. This feature, which is the default for new Lynx systems, uses a third party service offering a very high level of deliverability, and avoiding many of the issues that surround Email 'blacklisting'.

Note that if you use this service, it is HIGHLY RECOMMENDED that you set up a 'Sender Policy Framework' (SPF) record. This is a change you make to your own Internet domain (for example 'mycompany.co.uk') that tells an Email recipient that messages sent from the Lynx server (which will otherwise apparently have come from somewhere unrelated to your domain) are genuine messages and not spam.

The process for setting up an SPF record varies from one Internet provider to another, so you will need to research the specifics for your service provider or else have your IT support company do this for you.

Currently, Lynx is using the Prolateral Consulting 'Outmail' service. Their advice regarding the creation of an SPF record for your domain is below:

How to create a Sender Policy Framework (SPF) Record to Authorise outMail Servers to send out your Email

Problem:

How to create a Sender Policy Framework (SPF) Record to Authorise outMail Servers to send out your Email?

Solution:

Although not essential it can help make email delivery more reliable if you create a SPF record for your domain name. This DNS record is to comply with the Sender Policy Framework (SPF) anti-spam initiative and it identifies outMail servers as being approved for sending emails from your domain.

It's a TXT record, which not all DNS servers or ISP control panels can handle, but if they can this is the record you need to add:-

```
example.com.   IN   TXT      "v=spf1 include:spf.smtp-engine.com -all"
```

This is how it should appear in your DNS Zone File, including the inverted commas, but with your domain name substituted for example.com.

If you already have an SPF record, the key change required is to insert `include:spf.smtp-engine.com` **before** the `-all`, this will ensure that the outmail records are checked.

2.3 The NOREPLY address

Note that some outbound Email messages from Lynx use the 'NOREPLY' address set up in the system configuration. This includes scheduled reports. IT is generally better that the Email address you provide as the 'noreply' address is, in fact, a real Email address. Some recipients will reject messages sent from 'noreply' if it is not.

3 Receiving Mail - Setup

To set up the Lynx email system, you will need to have one or more dedicated email addresses which will be used solely to receive Lynx email. Whilst it IS possible to share these accounts with a conventional email program, it is not a good idea to do so as Lynx will delete each email received once it has been safely stored in the Lynx database. All emails received are forwarded immediately to a separate email address, so if you still want to see emails in your usual program as well as in Lynx, you can do so by fetching them from this second account.

To set up the email facility, you need to create one or more 'Mail Queues' and provide the following information for each queue in either the Admin->Tables->Edit Email Queues program.

Field	Note
Queue Name	A unique name for the mail queue – for example 'Sales', 'Service'
Email Server	Host name for the POP3 account that Lynx will check for inbound Email. – for example mail.mycompany.com
Email Account	The POP3 user ID – often the same as the email address. Note that this MUST NOT be the same as the address to which Email is being forwarded or you will create a mail 'loop' as all items received will be forwarded to the same account.
Email Password	The password for the above user ID.
Forward Received Email to	This is the email address to which all Emails received will be forwarded.
Use SSL	Set to Y if your Email provider requires SSL (Secure Sockets Layer) for fetching mail
Port Number	Set to the POP3 port for inbound Email from your Email provider. The default is 110, but is usually 995 if you are using SSL.

Once this information is set up, Lynx will start processing inbound mail every few minutes. Note that this can mean a short delay between sending a message and it appearing on the list in the **Admin->Email** manager program, which is used to pick up and process received Email.

You can also refine the Email collection process by setting the following fields in te Admin->System Config program, on the Email/SMS tab:

Field	Note
EMAIL_NOSTORE_LIST	A list of file names to be ignored and not treated as attachments. For example logo.jpg,anotherlogo.jpg
EMAIL_AUTO_ACTION	IF an email is received from an address corresponding to a staff Email and the email can be automatically matched to a customer, order etc. setting this field to 'Y' will result in the Email being marked as actioned upon receipt. It will therefore not appear in the Email manager for follow-up.

4 Received Mail - The Email Manager and Email Tabs

The Email Manager program shows you a list of inbound Emails that have not been actioned. IT can be accessed from either the **Admin** menu, or the Email icon at the top of every screen. This icon is overlaid with a count of the number of emails awaiting action.

The list of emails is updated every few minutes by polling the Lynx inbound Email accounts set up in the Mail Queue information.

Emails and their attachments can be viewed, forwarded and replied to from the Email Manager program. If not already identified as having come from a known customer or relating to an existing project etc. you can also establish this link in the program.

Similarly, several enquiry programs such as the Customer and Project enquiry screens have an 'Email' tab which allows you to perform the same actions on Emails received and which have been 'filed' with the customer, project, supplier etc.

The Email manager program will allow you to select a single inbound Mail Queue to work with. You can also restrict which Mail Queues are visible to each Lynx User by ticking or unticking the individual queues in the Admin->Edit User program.

5 Lynx EDI

The Mail Handler system is integrated with the Lynx EDI facility, enabling automated processing of certain document attachments, such as invoices and order acknowledgments. This facility is available at an extra charge.

When a link exists with a business partner, via the EDI service, routine tasks, such as entering invoice data, can be substantially automated, reducing administrative workload by hours each week.

Please ask for more details of Lynx EDI, which at the time of writing is in Beta.