EMAIL AUTOMATION OPTIONS

- There are three options you can decide on setting up, depending on several factors that you need to consider.

Inbox Rules (Auto-forwarding)

What does it mean?

- Rules are applied at the individual inbox level, so when you receive an email that fulfills specified condition(s), this will automatically trigger the rule (e.g., forward the email to a specific address).

- You can set this up at the inbox level. Conexiom will be added as a "to" or "cc" recipient.

It is a good option if...

- ✓ All your documents are sent to a centralized inbox(es)

- ✓ You receive ONE type of document in this inbox

  - ✗ If you receive more than one (e.g., you receive POs, and RFQs to the same email) this option is not suitable.

> **This option allows you to automatically forward your orders once they hit your inbox**

Mail Server Rules

What does it mean?

- Rules are set up and applied at your organization level (before the inbox level). This means that rules take action on messages *while they're in transit,* and not after the message is delivered to the mailbox.

- Depending on your email provider, you can set this up in your company's email server level. Conexiom will be added as a "to" or "cc" recipient.

It is a good option if...

- ✓ Your documents are sent to a centralized inbox(es)

- ✓ You receive ONE type of document in this inbox

- ✓ Provides some additional options beyond just forwarding (e.g., Append a value to the subject line so the user can see it went to Conexiom)

> **This option contains a richer set of conditions, exceptions, and actions other than forwarding**

What are my next steps?
Conexiom recommends coordinating with your internal IT resources to pursue further setup/configuration on either level.

Looking for more robust processing rules?
Please speak with your Conexiom Implementation Manager for more information on Rules Based Order Processing (RBOP)*

*Used when you receive more than one type of document to the inbox, or documents come into multiple individual inboxes.

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