



AUTOMATIC EMAIL PROCESSOR 3

PROGRAM HELP

GILLMEISTER SOFTWARE

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2 START

Automatic Email Processor is a useful tool for Outlook to store and print incoming emails and their attachments automatically. For this, various filters, flexible configuration options, such as individually definable storage folders and the possibility of subsequent processing are available. For example, the path of the location where you want Automatic Email Processor to save certain emails or email attachments, can be assembled dynamically from individual properties of an email.

The program supports the creation of an unlimited number of profiles to allow separate settings for different email accounts. Profiles can be additionally applied to emails of a specific time period or to any previously received emails of an Outlook folder.

The help describes the program functions and provides instructions for the use of Automatic Email Processor.

3 MAIN MENU – MENU ENTRIES OF THE GROUP MENU

3.1 OPTIONS...

Use this menu item to open the dialog box for customizing the program options.

3.2 ENTER LICENSE KEY...

This menu entry opens the registration dialog to enter the license key respectively to unlock the full version of the program.

3.3 HELP

Clicking on this menu item opens the online help in the default browser. To use the online help, an active Internet connection is required.

3.4 ABOUT...

Using this menu item, the dialog window to display the program version of the license state will be opened. This dialog window contains also links to contact the technical support, the product's web page etc.

3.5 OTHER --> CREATE ERROR REPORT

In case of technical problems, you can create a bug report by using this menu item. The created file is named "Automatic Email Processor - error report" and located on the Desktop. You can then send us the error report attached to an email with a short description of the problem.

3.6 OTHER --> CLEAR ERROR LOGS

This menu item allows the error log files to be emptied manually. However, the program automatically removes entries that are older than 7 days during every saving process.

3.7 OTHER --> BACKUP APPLICATION DATA...

This menu item allows you to store the entire application data (profiles, log, etc.) as ZIP archive in a directory to be selected. After saving the ZIP archive is highlighted in the Explorer.

3.8 OTHER --> BACKUP APPLICATION DATA (FOR A NEW PC)...

This menu item is used to backup the application data (without log information) as a ZIP archive, which is stored in a folder of your choice. This variant should be chosen for relocation to a new PC.

3.9 OTHER --> RESTORE APPLICATION DATA...

This menu entry can be used to restore previously saved application data.

3.10 OTHER --> RESTORE ATTACHMENTS

Opens a dialog window for mass recovery of attachments that have been replaced by a link file in the email (ATTLNK file).

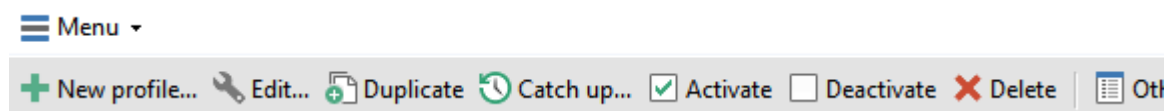
3.11 OTHER --> ADJUST PATH IN LINK FILES

Opens a dialog window for mass adjusting the path of outsourced attachments. This allows you to view or restore the stored attachments even after moving the storage folder.

3.12 EXIT

Use this menu item to exit the program.

4 BUTTONS OF THE PROFILE TOOLBAR



4.1 NEW PROFILE...

A click on this button opens a window for creating a new profile.

4.2 EDIT...

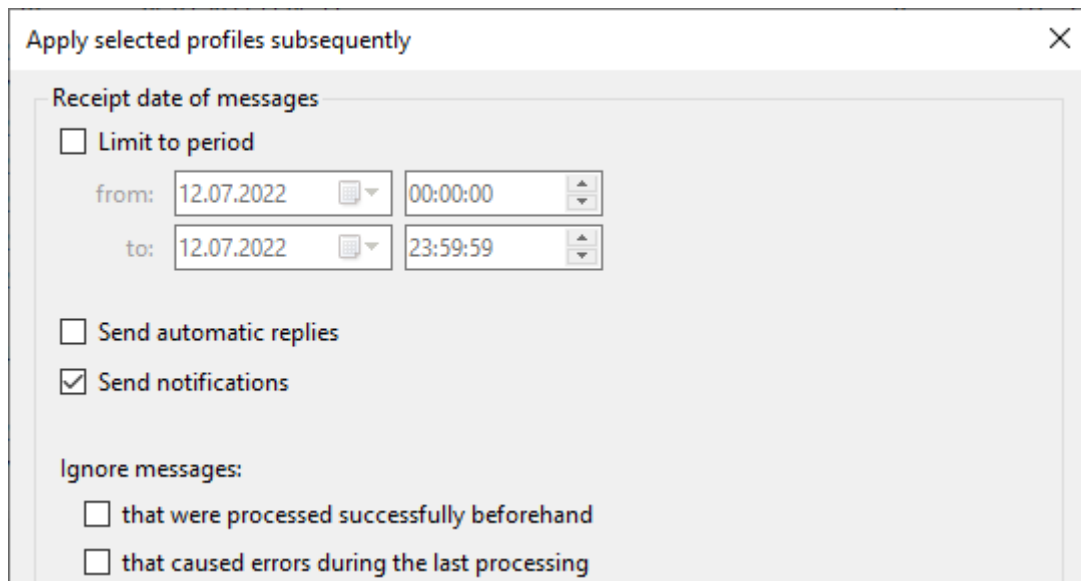
This button opens the window for editing the settings of the profile that is currently selected in the list.

4.3 DUPLICATE

Creates a copy of the selected profile. To create a larger number of profiles, you should also consider the CSV import of profiles.

4.4 CATCH UP...

Clicking this button opens a new window in which the period for an email receipt date can be defined. After confirmation, all emails received during this period (in the monitored folders) are subsequently processed using the currently selected profile. The limitation of the period is optional.



4.5 ACTIVATE

With this button, you can set the selected profiles to the status Active, i. e. the profiles are applied to newly received emails.

4.6 DEACTIVATE

This button sets the selected profiles to the status Inactive, i. e. the profiles are ignored when processing newly received emails.

4.7 DELETE

By clicking the button, you can remove the selected profiles from the list after a confirmation prompt.

4.8 OTHER

4.8.1 Apply all profiles subsequently...

This menu entry opens a new window in which the period for an email receipt date can be defined. After confirmation, all emails received during this period (in the monitored folders) are subsequently processed using all active profiles. The limitation of the period is optional.

4.8.2 Activate all profiles

With this button, you can set all profiles to the status Active, i. e. the profiles are applied to newly received emails.

4.8.3 Deactivate all profiles

This button sets all profiles to the status Inactive, i. e. the profiles are ignored when processing newly received emails.

4.8.4 Delete all profiles

Clicking this button removes all profiles after a confirmation prompt.

4.8.5 Import profiles from JSON file

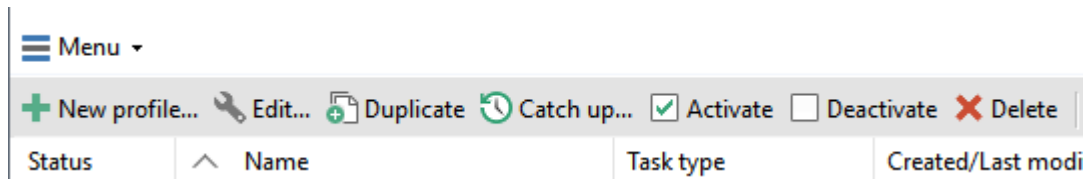
This menu item allows you to import profiles from a JSON file.

4.8.6 Export profiles to JSON file

Here you can export profiles, for example to transfer them to another computer. Choose from the following options:

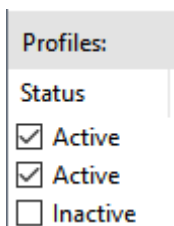
- Export all profiles
- Export active profiles
- Export selected profiles

5 PROFILE LIST



5.1 STATUS

Newly created profiles are given the status "active". All profiles with this status will be applied to incoming emails. To disable a profile, click the check box at the beginning of each row. The status then changes to "inactive".



A status change causes the profile change date to be altered. A profile is only automatically applied to messages whose detection date lies after the profile creation date and the profile change date.

5.2 NAME

The name of the profile.

5.3 TASK TYPE

Displays the task types defined in the profile. "Save Attachments" and "Save Message" get the diskette icon, "Print Attachments" and "Print Message" get the printer icon.

5.4 LAST USE (REGULARLY)

Shows the date and time of the last successful regular respectively automatic application of the profile.

5.5 LAST USE (SUBSEQUENTLY)

Shows the date and time of the last successful application of a profile using the Catch-Up function.

5.6 POSTPONEMENTS

Shows the number of pending processings by the respective profile. This only affects those profiles in which a delayed application of the profile has been activated.

5.7 MONITORED EMAIL FOLDERS

A list of all email folders the respective profile will be applied to. The leading number shows the number of monitored folders.

5.8 COMMENT

An optional comment to the profile.

5.9 CONTEXT MENU OF THE PROFILE LIST

The context menu of the profile list contains the following entries:

- Select all
- Select nothing
- Invert selection
- Export profile to JSON file

6 PROFILE SETTINGS

6.1 GENERAL

6.1.1 Name

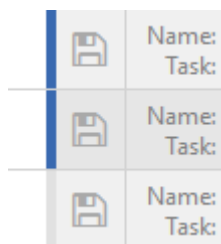
Here you can give the profile a meaningful name.

6.1.2 Comment

Optionally, you can enter a comment that will be displayed in the profile list.

6.1.3 Color highlighting in the log list

Here you have the option to determine a color in which the profile will be highlighted in the log list.



6.1.4 After applying this profile, ignore all subsequent profiles

This option allows, among other things, to simplify the processing of messages with ambiguous properties and to create a catch-all profile.

6.1.5 Postpone profile application

If this option is enabled, the profile will only be applied to the respective message after the set time has elapsed. If the message was moved from another profile in the meantime, processing can still take place (if the "Do not process message again" option was not active). However, if the message

was deleted in the meantime, no processing can take place, and the processing is discarded. Adjusting the delay period also affects already active processing delays.

6.1.6 Messages embedded in the actual message

By default, embedded messages are treated as standalone messages. However, the program behavior can be customized. The following options are available:

- Treat as message

Embedded messages can be printed and saved in various formats.

- Treat as attachment

Embedded messages can only be saved as MSG files and cannot be printed.

- Treat as attachment and message

Embedded messages can be printed and saved in various formats.

- Ignore

Embedded messages will be excluded from processing.

6.2 EMAIL FOLDERS

Here you can add one or more email folders. The profile is applied to all added email folders if the specified filter criteria are met. When the option "Including sub-folders" is activated, additionally, all emails from folders which are subordinate to the added folders are processed.

6.2.1 Manual input of an e-mail folder

After activating this option, you have the option to enter an email folder that cannot be reached in the above selection list. Select a folder in the selection list so that its path appears in the input field (as template respectively example).

This option is mainly useful when using a centrally managed profile file.

6.3 MESSAGE FILTER

Here you specify the (optional) conditions that must be met by the email properties. Only if all filter criteria are met, the email is processed. You can use logical comparison operators to set several conditions for an email property. In this case, the "AND" operator takes precedence over the "OR" operator. The filter is case insensitive - no distinction is made between uppercase and lowercase letters of the entered terms. Wildcards as the asterisk are not supported. Use the placeholder "Regex" for this purpose. Please note that a regex placeholder must either be the sole filter value or be surrounded exclusively by logical operators. Example:

<BeginOfRegex>^Offer<EndOfRegex><AND>.pdf

Email filter

Sender name
 contains: [Insert operator/placeholder](#)
 Buchhaltung
 does not contain: Logical AND Logical OR
Placeholders Logical operators

Sender address
 contains: [Insert operator](#)
 billing@hetzner.de

6.3.1 Sender name contains/does not contain

Enter an optional name or partial name of the sender of the email to be processed.

6.3.2 Sender address contains/does not contain

Enter an optional email address or a partial address of the sender.

6.3.3 Recipient name contains/does not contain

Enter an optional name or partial name of the recipient of the email to be processed.

6.3.4 Recipient address contains/does not contain

Enter an optional email address or a partial address of the recipient.

6.3.5 Subject contains/does not contain

Enter here optional the subject or a part of a subject.

6.3.6 Message header contains/does not contain

Enter here optional, for example, an email address or a part of an email address. This filter option is, inter alia, helpful when using alias email addresses. Normally, you should prefer the filter for the sender or recipient address.

6.3.7 Message text contains/does not contain

Optionally enter the message text or a part of the message text.

6.3.8 Attachment's file name contains/does not contain

Enter here an optional file name or part of a file name of an email attachment.

To ensure that the email has a PDF attachment, simply enter the term ".pdf" here. If additionally, a specific word (for example, invoice) should be contained in the attachment filename, the entry would look like this: .pdf<AND>invoice

6.3.9 Attachment's file size

Optionally, specify here the allowed file size of the attachment. The default setting is "not evaluated". The following restrictions can be defined:

- File size is less than
- File size is greater than
- File size is between two values

In the program options, you can specify whether the value displayed in Outlook or the actual file size should be used to determine the file size.

6.3.10 Number of attachments

Here you can optionally set a rule for the number of attachments that the message to be processed must contain. The following restrictions can be specified:

- is smaller than
- is exactly
- is greater than
- lies between

6.3.11 Receipt date

Allows you to limit the processing to emails of a certain date of receipt (e.g. 01/01/2019 - 12/31/2019). This filter is particularly useful for creating email archives.

6.4 TASK TYPE: SAVE ATTACHMENTS

6.4.1 General settings

Here you can define whether the task is assigned the status „Activated“ and will therefore be executed when there are matching emails, or whether it is assigned the status „Deactivated“. Activated tasks are given a check mark in the task name.

6.4.2 Storage location

6.4.2.1 Directory

Click on the " ... " button to select the base directory in which the attachments to be saved will be stored. The link menu above the input field can be used to optionally insert placeholders for properties of the e-mail in order to create corresponding dynamic subfolders in the base directory.

Directory: [Insert placeholder](#)

 ...

Destination directory must already exist, otherwise evaluate operation as: "Error"

File name (may be left empty) [Insert placeholder](#)

[Preview](#)

D:\Buero\Rechnungen\Eingang\2022\Hetzner\Dateiname.endung

The option "Destination directory must already exist" is particularly useful if, for example, the drive letter is also dynamically included via a simple mapping placeholder (Options → Simple mappings). For example, a single mapping "drive" could look like this: X:<OR>Y:<OR>Z:

In this case, the program checks all combinations to find the corresponding destination folder. If this does not exist, you can specify whether the failed processing should be noted as "Error" or "No match".

6.4.2.2 File name

Use the Link Menu above the input field to select email properties from which the file name should be generated. If you leave this field empty, the original name of the email attachment is used.

6.4.2.3 *Preview*

Clicking on the "Preview" link opens a new window in which you can specify your own values for the subject, sender, attachment name, etc. This can significantly simplify the compilation of dynamic names in combination with the real-time preview.

6.4.2.4 *If a file with that name already exists*

If a file with the distinguished name already exists, the collision rule determined here will be applied. Decide whether the program should: overwrite the file, add a number or the processing date to the name, or cancel the operation.

6.4.2.5 *Process images embedded in message body as regular attachments*

Images embedded in the message body are often just signature images and are therefore ignored by default. This option serves to force their processing. Note: In the attachment filter, there are also filter settings for image dimensions, among other things.

6.4.2.6 *Provide placeholders for file content*

If this option is enabled, values extracted from the contents of text files can be used as placeholders for the path or file name. The allowed file types can be configured in Options → Filter. By default, only TXT, XML, CSV, and JSON files are valid.

6.4.3 Attachment filter

The attachment filter is used to save only certain attachments. For example, enter a part of the file name or the allowed file extensions.

6.4.4 ZIP archives

6.4.4.1 *Extract files from ZIP archives*

If this option is enabled, all files in a ZIP archive are extracted. If necessary, a password for the ZIP archive can be stored. By using the optional filter for the name of the files to be extracted, these can be restricted. You can also specify whether the ZIP archive should additionally be stored in the storage folder.

6.4.5 Subsequent

For automatic further processing, the path and name of the extracted attachment can be passed to a program as parameter. Here you can specify the appropriate settings.

6.4.5.1 *Execute program*

Here, you can optionally enter the path of a program that should be executed after the successful extraction of an attachment.

6.4.5.2 *Replace extracted attachments with links*

If this option is activated, the stored attachments of the email will be replaced by a link file. This contains the path to the file and has the file extension ".attlnk". By double-clicking on the replaced attachment of the email, a drop-down menu appears with the following options:

- Open extracted file
- Select extracted file in Explorer
- Restore all email attachments

In the program options on the tab Other, you can specify that instead of displaying the selection menu, one of the three options above is always executed.

The stored attachments are not replaced in the following cases:

- The email is encrypted.
- The extracted file is part of a ZIP archive and the option "Also save the ZIP archive in the storage folder" has not been activated.

6.4.5.3 Save copies of the stored attachments

The configuration for creating copies of the saved attachments can be made here. Any number of copies can be created. With the help of exception rules, messages with certain characteristics can be excluded from the copy creation.

6.5 TASK TYPE: SAVE MESSAGE

6.5.1 General settings

Here you can specify whether the task is to be given the status Activated and thus executed when a matching email is received or whether it is to be given the status Deactivated. Activated tasks get a checkmark in the task name.

6.5.2 File format

Here you can specify the file format in which the email message is stored. Choose from the following formats:

- PDF file
- HTML file
- MHT file
- RTF file
- TXT file
- EML file
- MSG file (Outlook message format)
- original format of the message

6.5.2.1 Additional options when saving as PDF file

After selecting the PDF file format, additional setting options are available.

- page orientation (portrait or landscape)
- paper size (A3, A4, ...)
- embedding the message, embedded messages, or other attachments into the PDF file
- attaching images and PDF files as separate pages to the created PDF file (with filter settings)

6.5.2.2 Additional options when saving as MSG file

After selecting the MSG file format, it is possible to specify whether the file should be saved including the encryption and/or the digital signature.

6.5.3 Storage location

6.5.3.1 Directory

Click on the " ..." button to select the base directory in which the message to be saved will be stored. The link menu above the input field can be used to optionally insert placeholders for properties of the e-mail in order to create corresponding dynamic subfolders in the base directory.

Directory: [Insert placeholder](#)

D:\Buero\Rechnungen\Eingang\<EmailYear4>\Hetzner

Destination directory must already exist, otherwise evaluate operation as: "Error"

File name: [Insert placeholder](#)

<Subject>

[Preview](#)

D:\Buero\Rechnungen\Eingang\2022\Hetzner\Betreff.pdf

The option "Destination directory must already exist" is particularly useful if, for example, the drive letter is also dynamically included via a simple mapping placeholder (Options → Simple mappings). For example, a single mapping "drive" could look like this: X:<OR>Y:<OR>Z:

In this case, the program checks all combinations to find the corresponding destination folder. If this does not exist, you can specify whether the failed processing should be noted as "Error" or "No match".

6.5.3.2 File name

Use the Link Menu above the input field to select email properties from which the file name should be generated. This is a mandatory field.

6.5.3.3 Preview

Clicking on the "Preview" link opens a new window in which you can specify your own values for the subject, sender, attachment name, etc. This can significantly simplify the compilation of dynamic names in combination with the real-time preview.

6.5.3.4 If a file with that name already exists

If a file with the distinguished name already exists, the collision rule determined here will be applied. Decide whether the program should: overwrite the file, add a number or the processing date to the name, or cancel the operation.

6.5.4 Subsequent

For automatic further processing, the path of the stored message can be passed to a program as parameter. Here you can specify the appropriate settings.

6.5.4.1 Execute program

Here, you can optionally enter the path of a program that should be executed after storing the message. Optionally enter one or more parameters that should be passed to the program to be executed by using the link menu.

6.5.4.2 Save copies of the stored message

The configuration for creating copies of the saved message can be made here. Any number of copies can be created. With the help of exception rules, messages with certain characteristics can be excluded from the copy creation.

6.6 TASK TYPE: PRINT

6.6.1 General settings

Here you can define whether the task is assigned the status „Activated“ and will therefore be executed when there are matching emails, or whether it is assigned the status „Deactivated“. Activated tasks are given a check mark in the task name.

6.6.2 Print settings

Here you determine whether the message, attachments, or both should be printed immediately after receipt. Activate the respective check box, and then make the appropriate settings on the printer selection dialog. Confirm these in the printer selection dialog by clicking the "Print" button.

Print message/attachment(s)

Print message

Printing settings...

Selected printer: HP PCL3 A-size Printer Class Driver

Page range...

Pages: All pages

Print attachments

Printing settings...

Selected printer: HP PCL3 A-size Printer Class Driver

Page range...

Pages: (relative to the beginning): 2
(relative to the end): 1-2

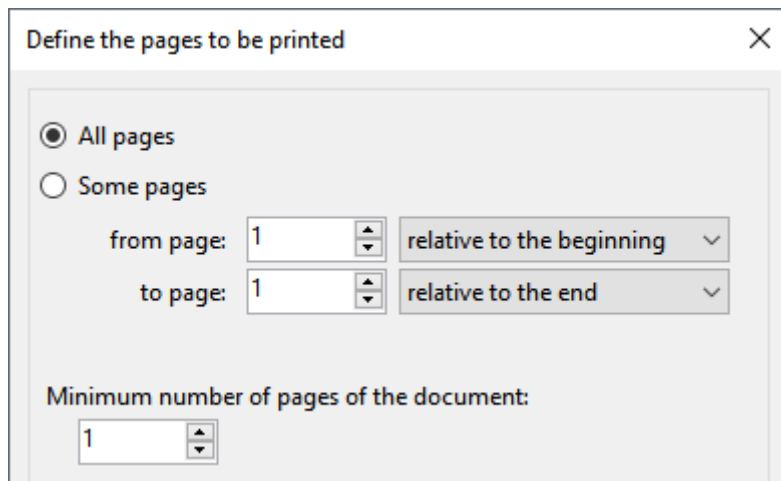
Font settings for plain-text attachments

Font settings...

6.6.2.1 Page range

By using the "Page range" dialog, you can specify which pages to print. For example, to skip the first page, select the type "Some pages", enter the value 2 in the field "from page", and select "relative to beginning". In the field "To page", enter the value 1 and select "Relative to end".

With the "Minimum number of pages of the document", you can ensure that only documents corresponding to this setting are printed.



6.6.2.2 *Automatically rotate pages*

Determines whether the pages to be printed should be rotated automatically. This is necessary, for example, if some documents/pages to be processed are in portrait format and some in landscape format. The default setting is set in the program options.

6.6.2.3 *Plain text attachments*

For plain text attachments, you can customize the font.

6.7 EMAIL OPERATIONS (PROCEDURE AFTER SUCCESSFUL PROCESSING)

6.7.1 *Mark message as read*

Here you can set whether the email should be marked as read after successful processing. If the access type "Use add-in" is selected in the program options (section "Outlook"), it can also be distinguished whether a requested read receipt will be sent. Otherwise, the Outlook options to send a read receipt apply.

6.7.2 *Add prefix to email subject*

Enable this option to prefix the email subject, for example, with "*ARCHIVE*" or "Archived_".

6.7.3 *Move Email*

Here you can select an email folder into which the email should be moved after a successful processing. Use the link menu above the input field Subfolders to optionally add the properties of the email that are to be included in the names of the subfolders.

6.7.4 *Copy email*

Here you can optionally select an email folder into which the email should be copied after successful processing. Use the link menu above the input field Subfolders to optionally add the properties of the email that are to be included in the names of the subfolders.

6.7.4.1 *Subject prefix of the copy*

Enter any prefix in the input field of the same name to add it to the subject of the copy, e.g. "*ARCHIVE*" or "Archived_".

6.7.4.2 *Mark copy as read*

Here you can set whether the email copy should be marked as read.

6.7.4.3 *Decrypt copy / save copy without digital signature*

Creates an unencrypted and unsigned copy of the message, for example for archiving purposes.

6.7.5 Forward email

Up to three email forwardings can be set up here. For each forwarding, you can specify which of the original attachments to include.

6.8 AUTOMATIC REPLIES

If the sender of a message is to be informed of a status, this can be configured here. You can send a message if other filter criteria match, but no attachments are included, or to inform the sender about a successful processing.

6.9 NOTIFICATIONS

Here you can make settings that are used to tell the processing status of an email.

6.9.1 Status notification via email

Select the case in which a notification is to be made:

- on success
- on errors
- if filter criteria are not fulfilled
- If other filter criteria are fulfilled, but attachments are missing

and enter one or more (comma-separated) recipients of the status message.

6.9.2 Status notification by an acoustic signal

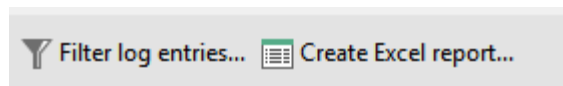
Here you can optionally select a wave file that you want to play after successful processing.

6.10 POSTPONED PROCESSINGS

Displays all messages for which a processing is still pending in relation to the current profile. Messages can be removed from the list and thus excluded from processing (profile-specific). For a better overview, the list of pending processings can be displayed in a separate window.

7 TOOLBAR OF THE LOG AREA

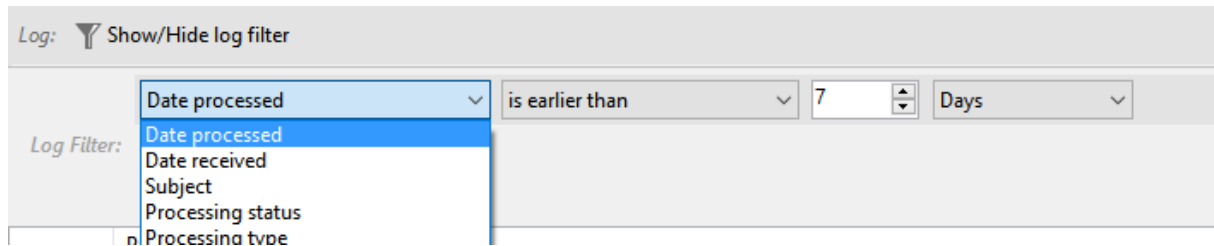
The toolbar contains the following buttons:



7.1 FILTER LOG ENTRIES

By using the log filter, log entries can be limited. The filter criteria may be, for example, the date of receipt, which is to be limited to a period within the last week. The comparison operator is context-sensitive, that is, he always fits the selected filter criteria. By clicking on the button with the plus or minus symbol, further filters can be added (linked with a logical AND) or the respective filter will be

removed.



7.2 CREATE EXCEL REPORT

This button is used to generate an overview of the processings as an Excel report. This contains the following sheets:

- Overview
- Successful processing
- Errors
- Not overwritten
- No match

and allows filtering and custom sorting of processing data. In the program options, you can configure a periodic sending of the current report.

7.3 MANAGE POSTPONED PROCESSINGS...

Displays an overview of pending processings grouped by profile and provides the option to remove individual or all pending processings.

8 LOG LIST

The log list contains information about all processed emails and is divided into the four tabs: “Successful processed”, “Error”, “No match”, and “Postponed processings”.

Depending on the active tab page, the context menu contains the following entries:

- Open saved file
(opens a saved file with the associated program)
- Select saved file in Explorer
(opens the Explorer and selects the saved file)
- Copy log entry to clipboard
(copies relevant data of the selected entry to the clipboard)
- Clear list
(removes all entries from the respective log list)

9 STATUS BAR

9.1 PROFILES

Shows the total number of profiles and the number of active profiles.

9.2 LOG FILTER

Shows the number of entries that do not fulfill the conditions of the log filter, for example, entries that are too old.

9.3 LOG ENTRIES

Shows the number of visible entries.

9.4 STATUS

Displays the following status information:

- the number of seconds until the next check for new messages (divided into quick check | complete check)
- information about the current check (the number of messages already checked)
- information on current processing (the number of messages already processed)
- other information about the current process

10 COMMAND LINE

The following parameters can be passed to the executable file "AEPProcessor.exe":

| Parameter | Alternative | Description |
|-----------|-----------------|---|
| r | run_once | New emails will be processed and the program terminated afterwards. |
| q | quit | Program will terminate execution at the next opportunity. |
| c | catch_up | Emails of the specified period will be processed according to the specified profiles and the program will then be terminated. |

The parameter "c" or "catch_up" requires further parameters to specify the time period, the profiles to be applied and additional options:

| Parameter | Description |
|---|---|
| <i>Specifications on the period</i> | |
| p | Determines the period of the receipt date of the messages to be processed (Unlimited, Today, FromTo). |
| f | Start date in the following format: yyyy-mm-dd (only necessary if period type FromTo was specified). |
| t | End date in the following format: yyyy-mm-dd (only necessary if period type FromTo was specified). |
| <i>Specifications for the profiles to be used</i> | |
| s | Specification of the profiles to be used for catching up (SingleProfile, ActiveProfiles, AllProfiles, FileWithListOfProfiles). |
| n | Profile name or identification number. |
| pf | Path to a TXT file (*.txt) with a list of profile names or identification numbers (each exclusively). |
| <i>Additional options</i> | |
| is | If this parameter is passed, messages that were processed successfully before are ignored. |
| ie | If this parameter is passed, messages are ignored whose previous processing resulted in an error. |

Some application examples:

| |
|--|
| <i>One run only</i> |
| AEPProcessor.exe -r |
| <i>Terminate program</i> |
| AEPProcessor.exe -q |
| <i>Catch up for a period</i> |
| AEPProcessor.exe -c -p Unlimited -s SingleProfile -n "Testprofil" |
| AEPProcessor.exe -c -p Unlimited -s ActiveProfiles -is -ie |
| AEPProcessor.exe -c -p Today -s AllProfiles -ie |
| AEPProcessor.exe -c -p Today -s FileWithListOfProfiles -pf "D:\Profile lists>List1.txt" -is |
| AEPProcessor.exe -c -p FromTo -f "2019-03-15" -t "2019-03-20" -s SingleProfile -n "Test profile" -ie |
| AEPProcessor.exe -c -p FromTo -f "2017-01-01" -t "2018-12-31" -s AllProfiles |

11 PROGRAM OPTIONS

11.1 GENERAL

Here you can define settings such as the language of the program interface and the startup behavior as well as a centrally managed profile file.

As soon as a centrally managed profile file has been specified, no further changes can be made to the individual profiles - even deletion and recreation are blocked. Changes can or should only be made by the administrator. The administrator edits the profile file locally (i.e., using the application data directory "%AppData%\Automatic Email Processor") and then copies it to the designated network folder (provided that he does not use a centrally managed profile file himself).

The centrally managed profile file is reloaded by the individual processes before each run and the profile list in the main window is updated at regular intervals (every 5 minutes). Updating the profile list in the main window can be forced by minimizing the application to the notification area of the taskbar and then restoring it.

11.2 OUTLOOK

11.2.1 Type of remote control

Determines how Outlook will be accessed. The following types are available:

- Use add-in
(This is the recommended type of access for older version of Outlook (2007 and 2010). In case there are problems or conflicts with other Outlook add-ins, the type should be changed to "direct access", which generally works fine.)
- Directly access Outlook
(Typically, this type of access works fine and is especially recommended when using Outlook 2013 or newer. However, in case of an inactive antivirus program or outdated virus definitions, it can happen that a warning window appears with a reference to accessing Outlook. Typically, this window will appear only once at startup. This can either be adjusted in the Outlook security settings or prevented by using an active antivirus program with up-to-date virus definitions.)

11.2.2 Outlook instance

Determines whether the program creates its own Outlook instance for automation. The following options are available:

- Use own instance
This option should be used, if there are multiple Outlook profiles available to logon to. The program will create its own Outlook instance and logon to the standard profile.)
- Use user's instance
(This option can be used if there is only one Outlook profile that the program can logon to. There are no advantages to using this option - depending on the individual system, one or the other variant may be better supported.)

11.2.3 Retrieving new messages

If the option "Independently call the "Send/Receive all" function to receive new emails" is activated, the program automatically calls the Outlook function "Send/Receive all" at the interval set below, if Outlook is not opened.

11.3 PROCESSING

11.3.1 Interval of the check for new messages to be processed

Determines at what interval (in seconds) "Automatic Email Processor" checks whether new messages have been received. The Quick Check checks the emails of the last 30 days for messages that have not yet been processed. During the Full Check, all emails in the respective folder are checked. For a larger number of emails, the full scan may take some time and processor power, so the default interval is 15 minutes.

11.3.2 Log errors

Determines whether errors are recorded. If problems occur, this option must be activated because detailed information about the error is necessary to generate an error report. Otherwise, this option can be disabled to reduce write accesses to the hard disk.

11.3.3 Display errors that occur during saving additionally in a message window

If this option is activated, processing is interrupted until the acknowledgement of the message is confirmed.

11.3.4 Cancel the execution of the task after one minute

This option should only be activated if the program hangs in the processing of a particular email. Some emails may differ from the standard or contain corrupted information. When the option is activated, the time available to process an email is limited. However, this increases the likelihood that your Outlook installation cannot be automated by the program.

11.3.5 Pause between processing multiple new messages

Here you can set whether the program should pause for a certain time after processing a message. This option is relevant for the further processing of saved files.

11.3.6 Pause between work steps when using Word

The default value of 1500 milliseconds can be reduced on some systems to allow faster processing. However, this increases the probability of errors occurring.

11.3.7 Process messages only in the following time

This option allows messages to be processed automatically only at the times specified here.

11.3.8 Set file date of saved attachments to email receipt date

If this option is activated, the file date (date of creation, last modification and last access) of the saved attachments is set to the date of receipt of the respective email.

11.4 FILTER

Here you can specify whether the value displayed in Outlook or the actual file size should be used to determine the file size. Since the calculation of the actual file size is considerably more expensive, it is recommended to use the value displayed in Outlook.

11.5 EMAIL ACCOUNT FOR SENDING

Here, the email account for sending notifications is set. You can use the default Outlook email account or provide custom settings. The account data specified here will be used to send status notifications to the recipients listed in the respective profile settings.

11.6 EXCEL REPORT BY EMAIL

This option allows you to define an interval at which an automatically generated Excel report is sent to the specified email address about the processings of a specific time period.

11.7 BACKUPS

If this option is enabled, the program periodically creates a complete backup of the application data as ZIP archive in the specified folder. The backups can be used to restore application data to an earlier state via Menu → Other → Restore application data.

11.8 CSV MAPPINGS

CSV mappings allow you to make a mapping for different properties of the email. For example, if only the sender and the storage location (assigned to the sender) change in the profile settings, it is no longer necessary to create a profile for each sender, but it is sufficient to add an entry to a managed list. This list would, in this case, consist of at least two columns, the sender address and the associated path of the storage location.

A new mapping Storage Location can then be added to the list of CSV mappings. In this CSV mapping, the sender address is selected as the filter criterion, and the column Sender Address (previously created in the managed list) is assigned for the filter values. The column Path is assigned as the result mapping. In the profile settings -> category Storage Location, the placeholder Storage Location can then be added to the input field Directory.

All future sender address/storage location combinations are then added to the managed list. Alternatively, the managed list can also be managed in an Excel file, for example, on a shared network directory.

In a managed list, several values (separated by a specifiable character) can appear in a table cell. If the corresponding column is used for the filter values, it is sufficient if one of the table cell values is valid.

If values with many characters are repeated in a column, it is possible to create an abbreviation list. If then, for example, messages are to be filed in three places (for accounting, archive, employee X), the specification acc;ar;x would be sufficient. The prerequisite for this is that an assignment

Abbreviation;Path has been made in a managed list named Abbreviations or similar, and the Abbreviations list has been specified as the source for the column values in the column settings.

When using CSV mappings, it is recommended to adjust the respective preview values in Profile Settings -> Storage Location to be able to check the correctness of the mappings. Separate lists for incoming and outgoing messages may also be required.

CSV mappings can become very complex and are not suitable for every use case.

[Step-by-step instructions for a basic CSV mapping](#)

11.9 SIMPLE MAPPINGS

Simple mappings make it possible to reference values that may change using a placeholder. For example, the drive letter for the storage location can be included via a placeholder Drive. If the drive letter changes, it does not have to be adjusted in all profiles, but only in the placeholder.

Access to mappings is possible in many places in the program, not only in the storage location placeholder menu.

11.10 OTHER

11.10.1 Replace non-alphanumeric characters with an underscore in e-mail properties that are used for naming

This option serves to simplify the automated further processing of the attachments, since only letters, numbers, underscores, and a dot to separate the file extension remain in the file name.

11.10.2 Remove the following prefixes from the subject, if it is used for the folder name

The option allows to remove subject prefixes such as "Fw:", "Re:" etc. from a subject to be used for the folder name. Separate multiple prefixes with a semicolon.

11.10.3 When double-clicking on a replaced attachment

By double-clicking on the attachment that has been replaced with a link file, per default a drop-down menu with the following options appears:

- Open extracted file
- Select extracted file in Explorer
- Restore all email attachments

Here you have the option to specify instead one of the actions listed above, which should be executed without further asking.

12 EULA

The license agreement can be found at the following address: <https://gillmeister-software.com/products/automatic-email-processor/download.aspx>