



# AUTOMATIC EMAIL PROCESSOR 1

PROGRAM HELP

GILLMEISTER SOFTWARE

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## 2 START

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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

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### 3.1 MENU ENTRIES OF THE GROUP MENU

#### 3.1.1 Options...

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

#### 3.1.2 Enter license key...

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

#### 3.1.3 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.

#### 3.1.4 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.

#### 3.1.5 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.

#### 3.1.6 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.

#### 3.1.7 Exit

Use this menu item to exit the program.

## 3.2 TOOLBAR BUTTONS "PROFILE"

### 3.2.1 New...

Clicking this button opens the Task Wizard to create a new profile. The wizard guides you through the necessary steps.

### 3.2.2 Edit...

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

### 3.2.3 Duplicate

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

### 3.2.4 Catch up...

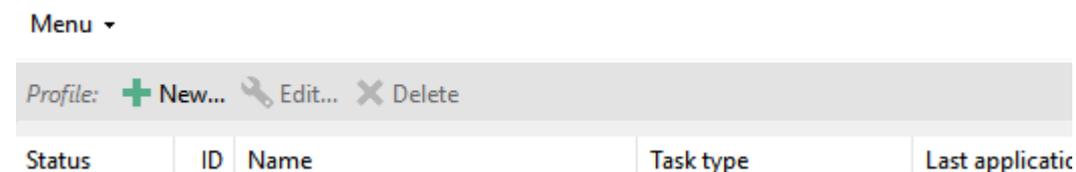
Clicking this button opens a new window in which the period for an email receipt date can be defined. After confirmation, all emails received during this period (in the monitored folders) are subsequently processed using the currently selected profile. The limitation of the period is optional.

### 3.2.5 Delete

By clicking the button, you can delete the selected profile after a confirmation prompt.

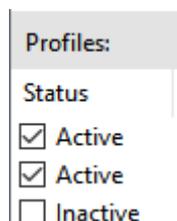
## 4 PROFILE LIST

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### 4.1 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".



### 4.2 ID

The ID is used for internal management of the profiles and cannot be changed.

### 4.3 NAME

The name of the profile.

### 4.4 TASK TYPE

The task type specified on profile creation. This cannot be changed later.

## 4.5 LAST USE

Shows date and time of the last successful application of the profile.

## 4.6 MONITORED EMAIL FOLDERS

A list of all email folders the profile will be applied to.

## 4.7 COMMENT

An optional comment to the profile.

# 5 PROFILE CREATION WIZARD / PROFILE EDITING

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## 5.1 SELECT TASK TYPE

Here you can select the type of the task to be created. The following types are available:

- Save attachments
- Save message
- Print message/attachments

*The task type cannot be changed later.*

## 5.2 GENERAL

### 5.2.1 Name

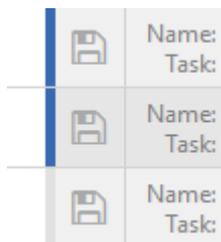
Here you can give the profile a meaningful name.

### 5.2.2 Comment

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

### 5.2.3 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.



## 5.3 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.

### 5.3.1 Manual input of an e-mail folder

After activating this option, you have the option to enter an e-mail 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 or example).

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

## 5.4 EMAIL 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.

**Email filter**

**Sender name**  
contains:  [Insert operator](#)  
does not contain:   
Logical AND  
Logical OR

**Sender address**  
contains:  [Insert operator](#)

### 5.4.1 Sender name contains/does not contain

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

### 5.4.2 Sender address contains/does not contain

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

### 5.4.3 Recipient name contains/does not contain

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

### 5.4.4 Recipient address contains/does not contain

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

### 5.4.5 Subject contains/does not contain

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

### 5.4.6 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.

### 5.4.7 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 process only certain file types, such as PDF files, 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

*If the option "Storage location - Save all attachments into the same folder" is enabled, the filters Filename Contains/Does Not Contain are only used to define an attachment to be used for dynamic*

*namings, i. e. to use certain parts of the name of the attachment defined by the filter for the folder or file name.*

#### 5.4.8 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.*

## 5.5 TASK SETTINGS

Depending on the selected task type, the settings are different.

### 5.5.1 Task type: Save attachments

#### 5.5.1.1 Storage location

##### 5.5.1.1.1 Folder

Select the base directory where the attachments should to be stored by clicking on the button with the label "...".

##### 5.5.1.1.2 Subfolders

Use the Link Menu above the input field to select email properties that should be used to create an optional subfolder structure within the base directory.

Folder:  
 ...

Subfolder(s) (dynamically generated from ...) [Insert placeholder](#)

File name (dynamically generated from ...) [Insert placeholder](#)

##### 5.5.1.1.3 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.

##### 5.5.1.1.4 Preview File Name

Enter here optional the expected (or a similar) file name of the attachment to be processed. This can be useful if you want to compose a new file name from parts of the original attachment file name. To change the preview file name, click on "Preview".

##### 5.5.1.1.5 Preview Subject

Enter here optional the expected (or a similar) subject of the emails to be processed. This can be useful if you want to use parts of the subject for the folder or file name. To change the Preview Subject, click on "Preview".

#### 5.5.1.1.6 Save all attachments into the same folder

This option is required if the storage location is to be dynamically generated from the name or a part of the name of a specific attachment (for example, if an order number should be part of the name of a sub-folder) and all additional attachments should be stored into the same folder. In this case, enter into the field with the label "File name contains" the name or a part of the name of the attachment to be used as reference and enable the option.

*If this option is enabled, the filters Filename Contains/Does Not Contain are only used to define an attachment to be used for dynamic naming, i. e. to use certain parts of the name of the attachment defined by the filter for the folder or file name.*

#### 5.5.1.1.7 Name collisions

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.

#### **5.5.1.2 Further process the stored file**

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

##### 5.5.1.2.1 Run program

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

##### 5.5.1.2.2 Parameter

Optionally enter one or more parameters that should be passed to the program to be executed by using the link menu.

### 5.5.2 Task type: Save message

#### **5.5.2.1 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 oder MHT file
- RTF file or DOC file (both in Rich Text Format)
- TXT file
- MSG file (in Outlook message format) with additional setting option: Keep or remove digital signature/encryption
- original format of the message

#### **5.5.2.2 Additional options when saving as PDF file**

After selecting the file format "PDF file", an additional button "Options..." is available. This opens a new dialog window in which the page orientation (portrait or landscape format) and the paper format (A3, A4, Letter, ...) can be defined.

You can also specify whether the message, embedded messages or other attachments are to be embedded into the PDF file.

### 5.5.2.3 Storage location

#### 5.5.2.3.1 Folder

Select the base directory where the message should to be stored by clicking on the button with the label "...".

#### 5.5.2.3.2 Subfolders

Use the Link Menu above the input field to select email properties that should be used to create an optional subfolder structure within the base directory.

Folder:  
 ...

Subfolder(s) (dynamically generated from ...) [Insert placeholder](#)

File name (dynamically generated from ...) [Insert placeholder](#)

#### 5.5.2.3.3 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.

#### 5.5.2.3.4 Preview File Name

Enter here optional the expected (or a similar) file name of the attachment to be processed. This can be useful if you want to compose a new file name from parts of the original attachment file name. To change the preview file name, click on "Preview".

#### 5.5.2.3.5 Preview Subject

Enter here optional the expected (or a similar) subject of the emails to be processed. This can be useful if you want to use parts of the subject for the folder or file name. To change the Preview Subject, click on "Preview".

#### 5.5.2.3.6 Name collisions

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.

### 5.5.2.4 Further process the stored file

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.

#### 5.5.2.4.1 Run program

Here, you can optionally enter the path of a program that should be executed after storing the message.

#### 5.5.2.4.2 Parameter

Optionally enter one or more parameters that should be passed to the program to be executed by using the link menu.

### 5.5.3 Task type: Print

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...

#### 5.5.3.1 Page range

By using the "Page Range" dialog, you can specify which pages should be printed. For example, to skip the first page, select the type "Certain pages" and enter 2-1000 into the field "Pages (relative to the beginning)". Each value higher than the actual number of pages of the document to be printed (1000) will be individually replaced by the number of the last page of the document. To print all pages except the last one, enter 2-1000 into the field "Pages (relative to the end)".

Define the pages to be printed

All pages

Certain pages

pages (relative to the beginning, e.g., 1, 3 - 5)

pages (relative to the end)

OK Cancel

#### 5.5.3.2 Plain text attachments

For plain text attachments, you can customize the font.

## 5.6 EMAIL (PROCEDURE AFTER SUCCESSFUL PROCESSING)

### 5.6.1 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.

### 5.6.2 Move Email

Here you can optionally select an email folder into which the email should be moved after successful processing.

## 5.7 NOTIFICATIONS

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

### 5.7.1 Status notification via email

Here, enter one or more (comma separated) recipients of the status message and choose whether a notification should occur in case of success and/or errors.

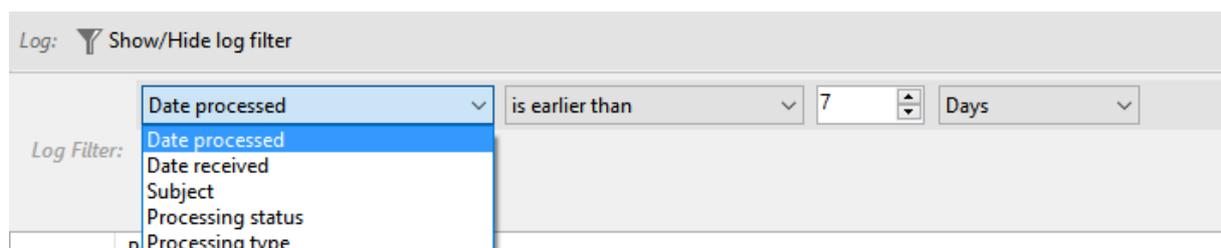
### 5.7.2 Status notification by an acoustic signal

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

## 6 LOG

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### 6.1 LOG FILTER



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.

### 6.2 LOG LIST

The log list contains information about all processed emails within the period that is specified in the program options. By default, this period is 30 days.

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)*
- Clear list  
*(removes all entries from the log list)*

## 7 PROGRAM OPTIONS

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### 7.1 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.

### 7.2 OUTLOOK

#### 7.2.1 Check Interval

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.

#### 7.2.2 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.)*

### 7.2.3 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.)*

### 7.2.4 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.

## 7.3 PROCESSING

### 7.3.1 Log errors

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

### 7.3.2 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.

### 7.3.3 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.

### 7.3.4 PDF renderer

Select the preferred PDF renderer here. AGG is recommended because it is more compatible with the PDF standard and offers improvements such as full transparency support, shading pattern support, image editing enhancements and additional image rendering filters.

## 7.4 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.

## 7.5 LOG

Here you can set the retention period of the log entries.

## 7.6 NOTIFICATIONS

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.

## 8 EULA

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