



This document provides information to administer and
use eTraq Server

User Guide for
eTraq Server

eTraq Server User Guide

The software described in this book is furnished under a license agreement and may be used only in accordance with the terms of the agreement.

Document Number : ETRQ/SET/17.5.04

Copyright Notice

Copyright (C) 2004. All rights Reserved.

Any technical documentation that is made available by MicroWorld is the copyrighted work of MicroWorld and is owned by MicroWorld.

NO WARRANTY. The technical documentation is being delivered to you AS-IS and MicroWorld makes no warranty as to its accuracy or use. Any use of the technical documentation or the information contained therein is at the risk of the user.

Documentation may include technical or other inaccuracies or typographical errors. MicroWorld reserves the right to make change without prior notice.

No part of this publication may be copied without the express written permission of MicroWorld.

Trademarks.

MicroWorld, MicroWorld Logo, eScan, eScan logo, MWL, MailScan are trademarks of MicroWorld.

Windows is a registered trademark of Microsoft Corporation;

All product names referenced herein are trademarks or registered trademarks of their respective companies. MicroWorld Software Services Pvt. Ltd. (MicroWorld) disclaims proprietary interest in the marks and names of others. Although MicroWorld makes every effort to ensure that this information is accurate, MicroWorld will not be liable for any errors or omission of facts contained herein. MicroWorld Software Services Pvt. Ltd. reserves the right to modify specifications cited in this document without prior notice.

Companies, names and data used in examples herein are fictitious unless otherwise noted.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of MicroWorld Software Services Pvt. Ltd.

Other product names mentioned in this manual may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.

Technical Support: support@mwti.net

Sales: sales@mwti.net

Printed : MicroWorld

May, 2004

Table of Contents

Welcome	5
ABOUT eTRAQ	5
NEED FOR eTRAQ	5
WHAT eTRAQ DOES FOR YOU	6
TOTALLY SERVER BASED SOLUTION	6
GET CLOSER TO YOUR CUSTOMERS	7
BENEFITS OF USING eTRAQ	7
HOW eTRAQ HELPS IN MARKETING CAMPAIGNS	8
GAUGING SUCCESS OF MARKETING CAMPAIGN	8
SECURE YOUR INFORMATION	9
ENHANCE YOUR CUSTOMER SERVICE AND CUSTOMER SUPPORT	9
ARCHIVE YOUR EMAILS AND THE COMMUNICATION HISTORY	10
ADMINISTER YOUR DATA EFFECTIVELY	10
MASS EMAIL MARKETING TEMPLATES	10
CONTACT US	11
Tasks in eTraq	12
File	13
TASKS IN FILE	13
Server	14
TASKS IN SERVER	14
STOP WEB SERVER	14
STOP ALL SERVICES	14
CONFIGURATION	14
PASSWORD	15
View	16
TASKS IN VIEW	16
TRACKED MAILS	16
UNTRACKED MAILS	17
ESCALATIONS	18
ALERTS	18
LOG FILES	19
Utilities	20
TASKS IN UTILITIES	20
EMAIL EXTRACTOR	20
GENERAL	21
EXCLUSIONS	21
EMAIL VALIDATOR	22

OPEN LIST	22
EXTRACT EMAILS	22
SETTINGS.....	22
GENERAL	22
DNS	23
SMTP.....	23
EXCLUDE	24
Options	25
TASKS IN OPTIONS	25

Welcome

About eTraq

eTraq is a Customer Relationship Management (**CRM**) software that allows you to track e-mails exchanged between your organization and your customers and run focused e-marketing campaigns. The emphasis is on optimizing opportunities by building lasting relationships.

Need for eTraq

In the current marketing scenario, over 75 % of business communication is done through e-mails. While e-mail offers a cheap and quick way to communicate, only the receiver and the sender are privy to the contents, unless either of them decides to c.c. a mail to you. This equation leaves a lot of loopholes and results in miscommunication and many lost opportunities. A need was felt for an intelligent software that would let you know for a specific subject, what correspondence was and is being exchanged between a customer and your employees. eTraq provides a solution for this need.

Click the links given below to find out what eTraq offers to your organization

- [What eTraq does for you](#)
- [Totally Server based solution](#)
- [Get closer to your customers](#)
- [Benefits of using eTraq](#)
- [How eTraq helps in Marketing Campaigns](#)
- [Gauging success of Marketing Campaign](#)
- [Secure your information](#)
- [Enhance your customer service and customer support](#)
- [Administer your data effectively](#)
- [Mass email marketing templates](#)

What eTraq does for you

eTraq provides an enterprise-wide view of your customers across the e-Mail Communication channel. It seamlessly integrates with your e-Mail Server and provides a gateway for your sales, marketing and service functions, with the business world. This is done in real-time.

eTraq performs the following tasks:

- Provides an integrated communication and customer information flow between your service, marketing, and sales departments.
- Allows you to instantly retrieve details about specific customer interactions
- Allow instant access to your service, marketing, sales and other functions to the same data.
- Enables your solutions to scale to meet the rising demands of thousands of users and millions of customers
- Allows you to generate qualified leads from the marketing efforts
- You can profile and segment your customer base, so that you can deliver focused promotions and communications
- You can quickly identify targeted campaign opportunities, including cross-sell and up-sell opportunities, by analyzing purchase patterns
- Permits you to efficiently score leads, distribute them and follow-up appropriately
- Keep track of customer inquiries come that come in via email every day or every week, segregate emails that your personnel have attended and those that are still pending
- Find their status
- Generate a report for mails that have not been replied to or inquiries older than a specified time

Totally Server based solution

eTraq does not require a client component and other third party software. Other advantages are:

- Inbuilt web server for HTTP based communication
- Inbuilt SQL Server – to manage your email communications
- Client-Server based Technology.

- Supports all e-Mail Servers
- Uses MWL Technology – transparently integrates with your email Server.

Get closer to your customers

In today's world, retaining customers is getting to be more difficult than getting new ones. The following points suggest how this could happen:

- Large volumes of complex requests in a world of labor shortages and high costs associated with each incident
- Limited communication options that result in long wait times, causing high call abandonment rates and missed service level objectives
- Hard-to-access, often geographically dispersed information about customers, partners, and suppliers and their varied interactions
- Costly, routine, and repetitive inquires because users cannot easily find answers
- Inconsistent, ineffective service provided by agents handling thousands - even millions - of interactions

Benefits of using eTraq

eTraq gives the following benefits:

- Better Customer Support for technical problems.
- Better Sales co-ordination.
- Helps you track response times to customer emails
- Shrink the cost and time it takes to execute a personalized and targeted campaign
- Track the performance and ROI of your direct marketing efforts
- Reduce marketing costs by automating traditional back-office lead management marketing functions, such as lead qualification, lead distribution, event and seminar registration and follow-up, collateral management and distribution, etc.
- Get demographic profiling of your customers.
- A transcript of each interaction is e-mailed to the customer. By providing a solid record for future communication, the transcript builds customer retention rates.

How eTraq helps in Marketing Campaigns

Leading companies from both B2B and B2C industries - including financial services, retail, high-tech, communications, transportation and others - are turning to CRM applications to add power and breadth to their marketing efforts. eTraq helps you become more efficient and focus your direct marketing and relationship-building efforts, across all channels.

eTraq does this by analyzing customer behavior to identify targeted marketing opportunities and campaigns, as well as by executing, managing and measuring these campaigns. This allows you to more effectively drive revenue, build loyal relationships and reduce costs.

eTraq helps your marketing efforts by:

- Share a global view of the business relationship among enterprise staff, customers, partners, and suppliers. Manage each user's individual view to deliver the information needed to successfully resolve business issues, while ensuring the security of valuable enterprise data.
- Update your customer profiles in real-time
- Automatically respond to or suggest responses to incoming customer e-mails based on their content
- Manage requests and orders from anywhere within the company so that geographically dispersed agents can view and administer all information related to a specific user, such as profile information, purchase and service history, and escalation or reassignment activities
- Mail-merge feature allows for personalized E-Mail delivery using existing info

Gauging success of Marketing Campaign

When your company wishes to launch an esales promotion, you need to send mailers to a specific group, find out how many persons open the mail and how many respond to them. eTraq manages your sales campaign in the following way:

- Real-time operational reporting and batch-mode campaign performance analysis of the e-mail traffic
- Responses, click-through, purchases, revenues, opened emails, bounced emails, event registrants, leads by qualification score, survey results, etc.
- Identify campaign tactics that will help improve performance of future campaigns
- Watch your subscriber count grow
- Find out how many subscribers opened your emails

- Know which emails result in the most visits to your web-site
- Compare your results with other small businesses
- Track bounced messages and auto-update your Marketing list.
- Real-time reporting tools deliver up-to-the-minute analysis and status of message volume and performance as well as click through and conversion tracking that measure the effectiveness cross sell and up sell offers.

Secure your information

Departmental hierarchy capabilities that ensure request routing, reporting, and information administration are managed according to your best business practices and organizational structure, and sensitive information is appropriately protected.

eTraq provides a real-time window into all the activities within the contact center, including data from different departments on the number of messages, message state, service level information, and details of individual agent activity to facilitate effective day-to-day decision-making. An extensive analytic and reporting infrastructure to support long-term business decisions so you can extract trend data to make intelligent choices for staffing, training needs, improvements in contact center policies and procedures, as well as share information with other departments for possible product enhancements

Enhance your customer service and customer support

eTraq turns your company into totally customer driven. Customers 'repeat' only when they are attended promptly and effectively. eTraq helps your customer support to be better organized, prompt and effective in the following way:

- Problem capture, tracking, escalation and resolution
- Knowledge base
- Contract management
- Support Team management
- Contact center productivity and performance analysis
- Quality management
- Efficiently escalate customer requests
- Find out all the problems faced by a specific customer on a single-window

Archive your emails and the communication history

Valuable e-mails can be archived for later recall. This allows you to recover lost opportunities and also allows you to know details of mails exchanged with a customer by your employees.

- Save messages for customer service reference or legal compliance
- Retrieve specific communication history of an employee, customer or agent.

Administer your data effectively

eTraq allows you to better manage your data. This can be done as given below:

- Build your email database
- Collect visitors' email addresses
- Easily import names from in-house lists
- Automate list management
- Permission-based - Not SPAM – email.

Mass eMail marketing templates

eTraq provides a variety of templates that allow you to quickly launch a mass marketing campaign. Templates are available for:

- Newsletters
- Promotions (including Holiday & Seasonal)
- Announcements
- Press Release
- Customer Letters

Contact us

We offer 24x7 support to our customers through e-mail, telephone and Chat.

Chat Support

- Chat with our support team at 'escanchat' using: AOL; MSN or Yahoo messenger service.

Email Support

- If you have any queries about our products or have suggestions and comments about this guide, please send them to support@mwti.net:


Head Office: MicroWorld Technologies Inc. 33045 Hamilton Court East, Suite 105 Farmington Hills, MI 48334-3385, USA. Tel: (248) 848 9081/ 848 9084 Fax: (248) 848 9085	Asia Pacific: MicroWorld Software Services Pvt Ltd. Plot No 80, Road 15, MIDC, Marol, Andheri (E), Mumbai, INDIA. Tel (91) - 22- 28265701 - 05 Fax (91) - 22-28304750
---	---

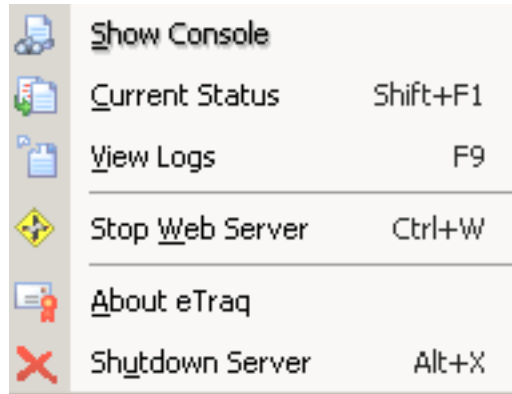
For sales enquiry, e-mail: sales@mwti.net

For support enquiry, e-mail: support@mwti.net

For details, please visit www.mwti.net

Tasks in eTraq

After installation, the eTraq icon  is added to the Windows task bar. When you right click the icon, the following drop-down menu is displayed.



Show Console: Displays [eTraq console](#). A password validation screen is displayed. Enter the admin login and password.

Current Status: Shows [current status](#) of eTraq.

View Logs: Displays eTraq [Logs](#).

Stop Web Server: Stops eTraq Web Server. All eTraq services are stopped.

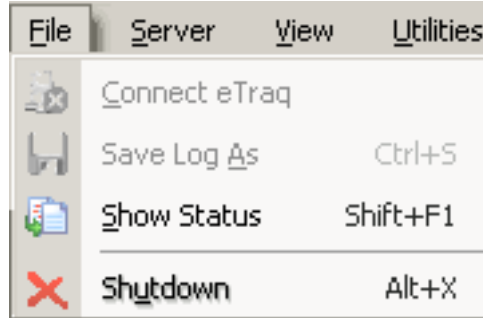
About eTraq: Displays eTraq splash screen giving details of version number and the manufacturer, MicroWorld Technologies Inc.

Shutdown Server: Shuts down eTraq Server.

File

Tasks in File

Provides links to run eTraq.



Connect eTraq:

Connects eTraq to the mail server database

Save Log As:

Allows you to save the log files

Show Status:

Shows status of eTraq activity.

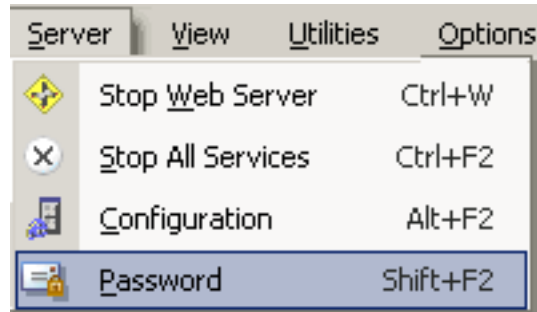
Shutdown:

Shuts down eTraq server. All services are stopped.

Server

Tasks in Server

This menu allows you to run basic tasks of the eTraq Server.



STOP WEB SERVER

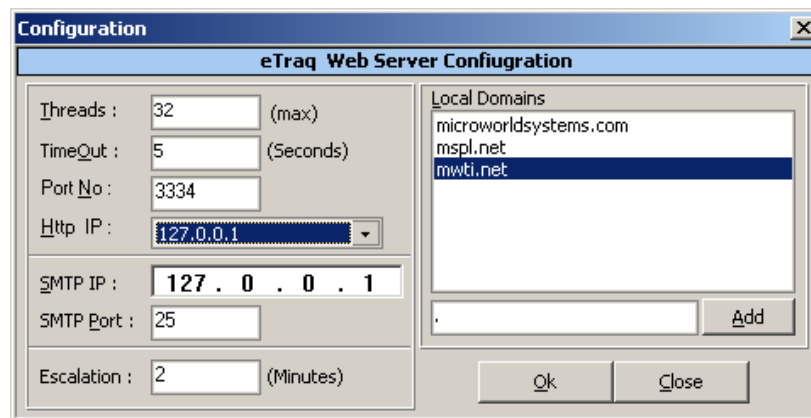
Stops the eTraq Web Server. If the Web Server is stopped then the link changes to Start Web Server. You can use the web browser access to eTraq only when the eTraq Web Server is running.

STOP ALL SERVICES

This menu stops all services given by the eTraq Server. The server still continues to run.

CONFIGURATION

This menu allows you to configure eTraq Server. Click the link to view the following figure.



Your mail server setting values and the values assigned during installation are displayed in the fields. Correct them if required.

Field	Description
Thread	Maximum number of threads allowed
Timeout (Secs)	Timeout in seconds is displayed
Port No	Port number of the eTraq Web Server
HTTP IP	Available HTTP IP of the eTraq Web Server are listed in the drop-down list. Choose the appropriate value.
SMTP IP	Enter IP of the SMTP server
SMTP Port	Port number of the SMTP server is displayed
Escalation	Displays the interval in minutes after which escalation server runs
Local Domains	Available local e-mail domains, specified during installation are displayed. Right click to edit the name and click Add to set it up as the local domain

- Click **OK**

PASSWORD

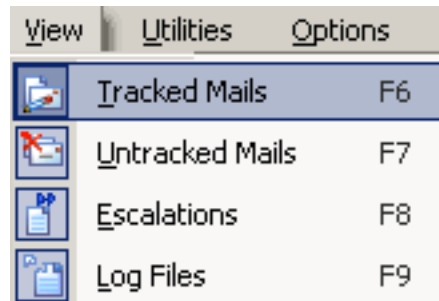
The menu allows you to modify the eTraq Administrator login and password you have entered during installation. Click on the menu to see the screen shown below.

- Enter the new user and password.
- If the new values you have entered are to be used for only this session, then select the check box **'Save Password for this Session only'**.
- **CAPS LOCK : OFF** toggles and indicates if the caps lock on you keyboard are on.
- Click **Ok**.

View

Tasks in View

This menu provides reports of eTraq activity that are happening through different eTraq components.



TRACKED MAILS

This link provides details of all mails that are assigned as 'Tracked' by the users. Information displayed includes:

Owner: The mail being tracked belongs to this user

Sender: Name of mail sender is displayed.

Owner	Sender	Recipient	Subject	Assigned On	DR Assigned	CC Users	Mail type
bhavaya	etechindi...	bhavaya@mw...	CCR ID 645	11/10/2003 12:...	SUPP-11102003.2512242023	tech@etechindia.co...	Forwarded
vidya	etechindi...	vidya@mwti...	CCR ID 645	11/10/2003 1:0...	SUPP-11102003.1631012730	tech@etechindia.co...	Forwarded
imshaikh	agnelo@...	lenn_je@hot...	Re: URGENT...	11/10/2003 1:0...	SUPP-11092003.1245743075	imshaikh@mspl.net	Replied Mail
imshaikh	agnelo@...	lenn_je@hot...	Re: URGENT...	11/10/2003 1:0...	SUPP-11092003.1245743075	imshaikh@mspl.net	Replied Mail
swapnil	vidya@1...	swapnil@mw...	link	11/10/2003 1:2...	SUPP-11102003.997837468	vinod@mwti.net	Normal Mail
oliver	grantmcn...	oliver@mwti...	Re: Re: Inva...	11/10/2003 1:4...	SUPP-11102003.283192382		Replied Mail
oliver	vidya@1...	oliver@mwti...	eScan Corpor...	11/10/2003 3:0...	SUPP-11102003.2072650602	mrjesh@bhansalila...	Forwarded
amancio	damjan.j...	amancio@m...	[Fwd: FW: M...	11/10/2003 3:0...	SUPP-11102003.880940218	nishant@mwti.net,s...	Forwarded

Recipient: User who receives the mail.

Subject: Mail subject name

Assigned On: Date on which the mail is assigned to the owner

DR Assigned: Discussion Report ID, assigned to the mail is displayed

CC Users: All users who are assigned to receive a copy of the mail

Mail Type: Displays the type of mail: forwarded, normal or replied.

UNTRACKED MAILS

This link provides a report of mails that are Untracked by eTraq.

Recipient: User who receives the mail

Sender: Name of mail sender is displayed.

Recipient	Sender	Subject	CC Users	Mailed On	Reason
support@mwti.net	nishant@mwti.net	MailScan for SMTP Co...	sunilk@mspl.net,j...	11/10/2003 12:...	Local Email
s_sen@icfai.org	lenn_je@hotmail.c...	Report from MicroWo...		11/10/2003 12:...	Tracking Disabled For Recipient
pcprob@mwti.net	swapnil@mwti.net	Fw: problems - Swap...		11/10/2003 12:...	Local Email
swapnil@mwti.net	bhavya@mwti.net	Fw: MailScan for SMT...	support@mwti.net	11/10/2003 12:...	Tracking Disabled For Recipient
parveen@mspl.n...	govind@mwti.net	Please RENEW your ...		11/10/2003 12:...	Tracking Disabled For Recipient
govind@mwti.net	agnelo@mwti.net	Fw: [SUPP-11092003...		11/10/2003 12:...	Local Email
govind@mwti.net	imshaikh@mwti.net	Fw: [SUPP-11092003...	pkkurian@mwti.net	11/10/2003 12:...	Tracking Disabled For Recipient
vidya@mwti.net	bhavya@mwti.net	Fw: [SUPP-11072003...		11/10/2003 12:...	Local Email
vidya@mwti.net	bhavya@mwti.net	Fw: [SUPP-11072003...		11/10/2003 12:...	Local Email
parveen@mspl.n...	govind@mwti.net	Please RENEW your ...		11/10/2003 1:3...	Tracking Disabled For Recipient
parveen@mspl.n...	govind@mwti.net	Please RENEW your ...		11/10/2003 1:3...	Tracking Disabled For Recipient

Listening... ESCALATED : 292, WARNED : 344 eTraq for Mail Servers

Subject: Mail subject name

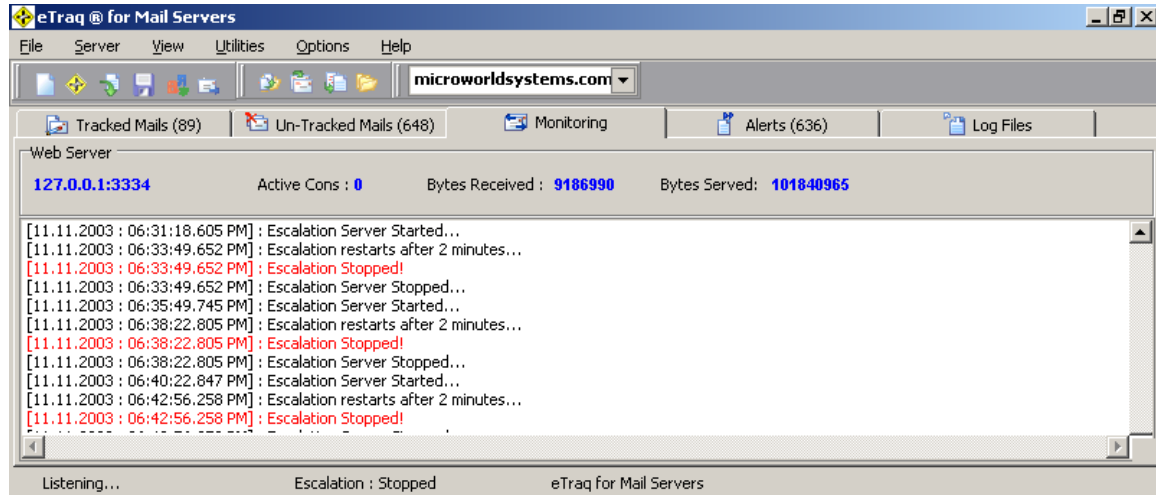
CC Users: All users who are assigned to receive a copy of the mail

Mailed On: Date on which the mail was sent

Reason: Reason why the mail is not tracked

ESCALATIONS

Escalations server starts as per the time set in Configuration. The server starts escalation cycle and based on the escalation settings for a mail, it is either escalated or bypassed.

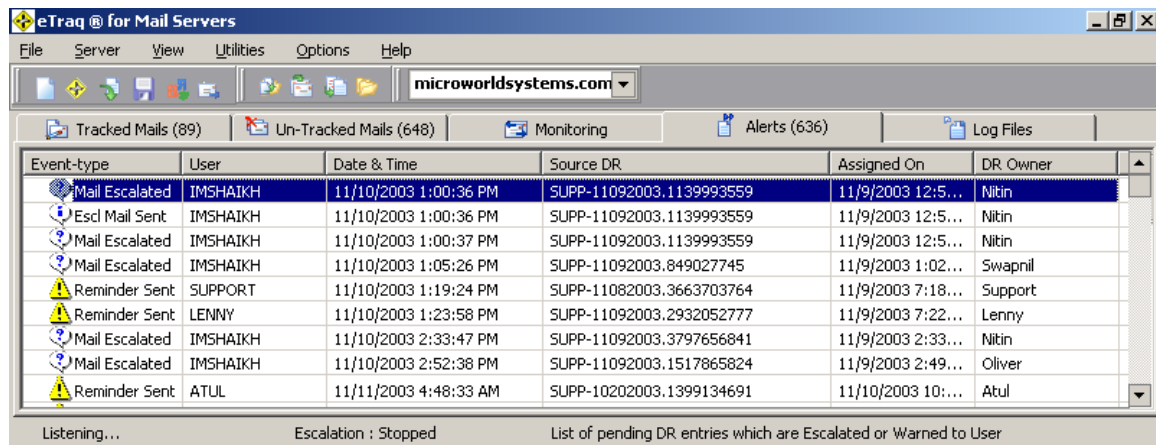


ALERTS

Alerts are sent by eTraq Server to users when events like mail escalation, reminders, etc. occur.

Event Type: Displays the event for which the alert is sent

User: User to whom the alert is sent



Date & Time: Date and time when the alert is sent

Source DR: Source Discussion Report ID for which the alert is sent

Assigned on: Date and time the DR was originally assigned

DR Owner: User name who owns the DR

LOG FILES

This menu lets you view the various log files eTraq has generated. Log files used for debugging purposes, i.e. to find out what is wrong etc. In case of any unexpected operation or results by eTraq, mail the log files to the technical support team at MicroWorld.

The screenshot shows the eTraq @ for Mail Servers application window. The title bar reads "eTraq @ for Mail Servers". The menu bar includes "File", "Server", "View", "Utilities", "Options", and "Help". Below the menu bar is a toolbar with icons for home, back, forward, and search, along with a dropdown menu showing "microworldsystems.com". The main interface has several tabs: "Tracked Mails (91)", "Un-Tracked Mails (649)", "Monitoring", "Alerts (636)", and "Log Files". The "Log Files" tab is active, displaying a table with the following data:

Filename	Size in Bytes	Created On	Modified On	Last Accessed	Location
EscWarnings-20031105183...	104084	11/5/2003 6...	11/5/2003 6:35...	11/5/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
EscWarnings-20031105200...	104187	11/5/2003 8...	11/5/2003 8:06...	11/5/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
EscWarnings-20031109053...	102019	11/9/2003 5...	11/9/2003 5:30...	11/9/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
EscWarnings-20031110064...	102413	11/10/2003 ...	11/10/2003 6:4...	11/10/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
ET10312003.LOG	8464	10/31/2003 ...	10/31/2003 11:...	11/7/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
ET11012003.LOG	58434	11/1/2003 1...	11/1/2003 11:1...	11/4/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
ET11022003.LOG	35293	11/2/2003 1...	11/2/2003 11:5...	11/2/2003	D:\PROGRA~1\MICROW~1\eTraq\L...
ET11032003.LOG	67261	11/3/2003 1...	11/3/2003 11:5...	11/4/2003	D:\PROGRA~1\MICROW~1\eTraq\L...

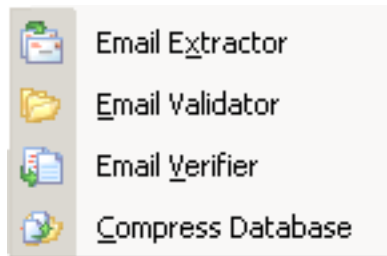
At the bottom of the window, there is a status bar with the text "Listening...", "ESCALATED : 292, WARNED : 344", and "Log Files".

Double click on any file to view it in a text editor. You can now save the file.

Utilities

Tasks in Utilities

This menu provides a list of utilities that allow you to administer eTraQ.

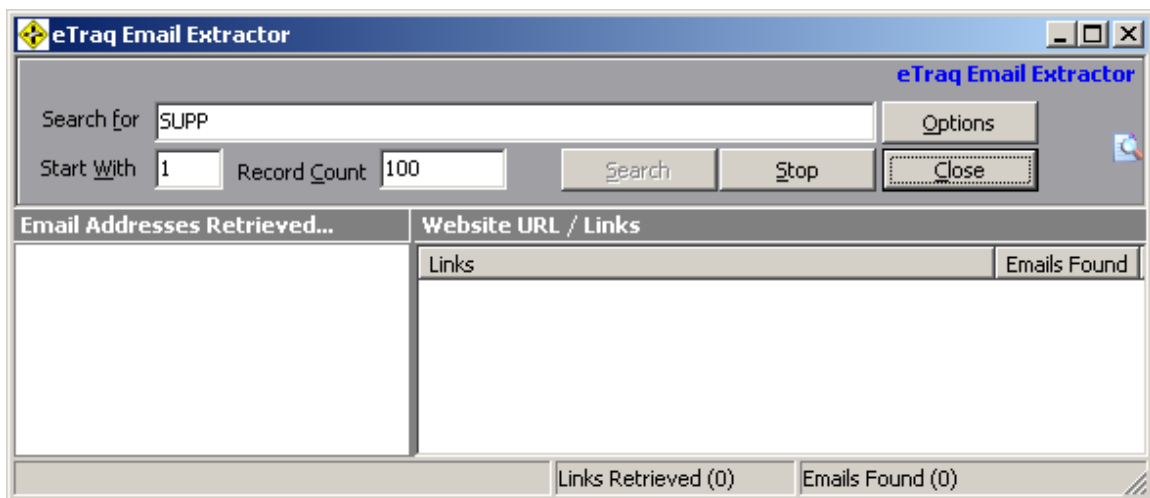


Email Extractor

This menu allows you to search for an e-mail ID from a site and extract it. This feature is very useful when over a period of time, you have thousands of e-mails and wish to find a specific e-mail or e-mail ID.

Enter the e-mail details in the **Search for** field.

- Default parameters to refine the search are displayed in **Start With** and **Record Count** fields.
- Click on **Options**. A dialog box with two tabs: **General** and **Exclusions** is displayed. Validate the dialog box and begin searching.

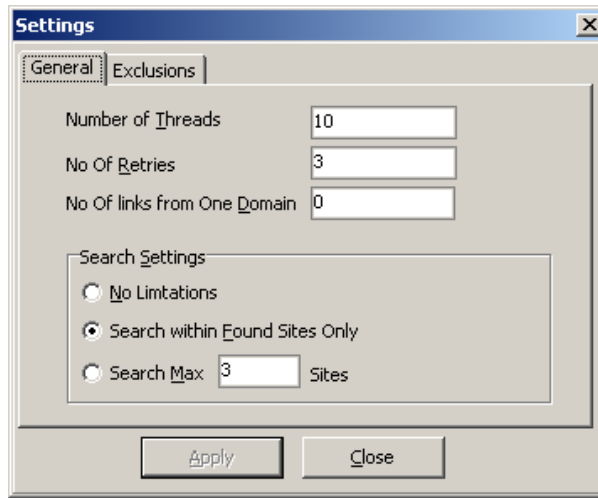


GENERAL

This tab allows you to specify parameters and search settings.

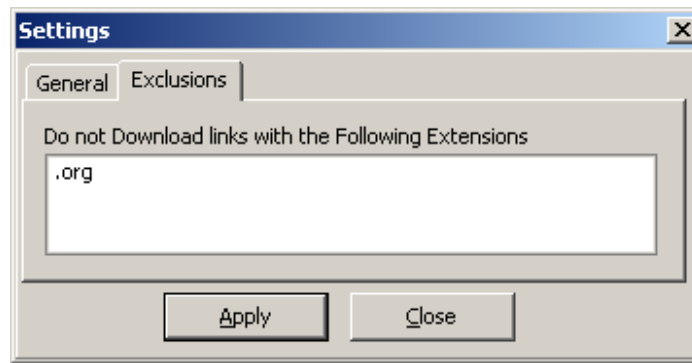
Parameters: You can specify the number of threads, number of retries for the search query and the number of links from one domain.

Search Settings: You can specify search settings to search within the found sites, specify the number of sites to search for or search without any limitations.



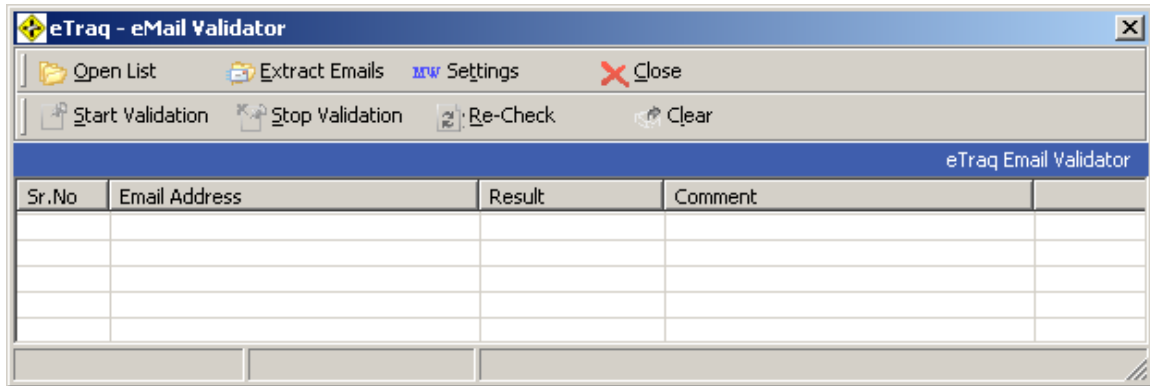
EXCLUSIONS

You can stop links with specific extensions from being downloaded. Enter the link extension in the dialog box and click **Apply**.



Email Validator

This menu validates or verifies e-mail IDs. Links in the screen allow you to run specific tasks. Screen given below displays the Email validator feature.



OPEN LIST

This link allows you to browse your system and select the list of e-mail IDs that need to be verified.

- Select the file and click OK. You can now click Start Validation to verify the IDs.

EXTRACT EMAILS

This link allows you to browse your system and select the file required to parse the e-mail IDs.

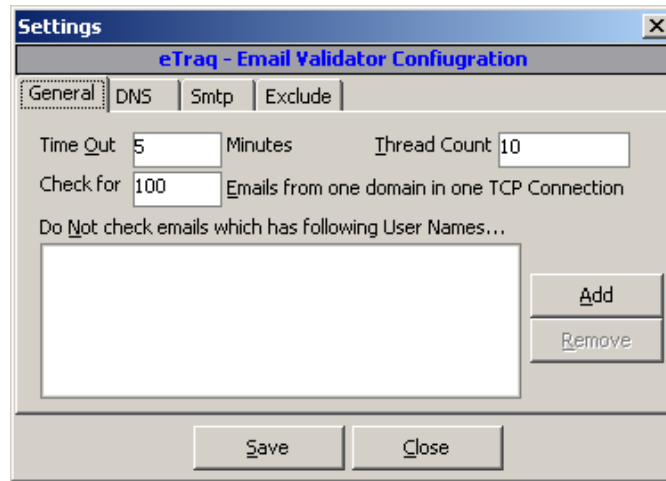
- Select the file and click OK.

Settings

This link allows you to specify settings for e-mail validation. There are four tabs: General, DNS, Smtip and Exclude.

GENERAL

This tab allows you to specify criteria for validation like: thread count, timeout, number of e-mails to be checked in a domain. You also specify user names whose e-mails need not be checked. Enter the appropriate values in the following screen.



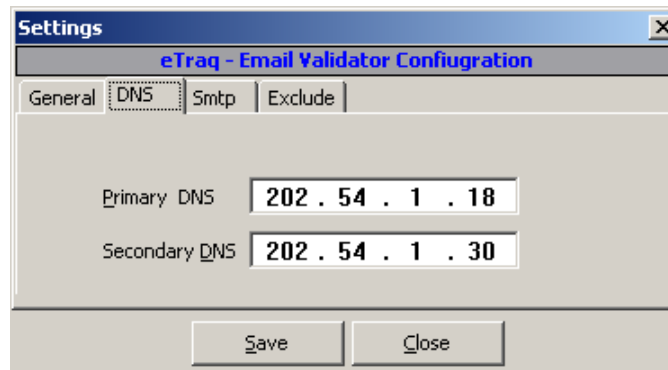
You can also specify a keyword for the ID. All IDs with such words are excluded from being validated.

- Click **Add**. A dialog box Enter a keyword to exclude is displayed.
- Enter the keyword and click **OK**.

DNS

This tab allows you to specify the IP of your primary and secondary DNS.

- Enter the IPs in the respective fields and click **Save**.

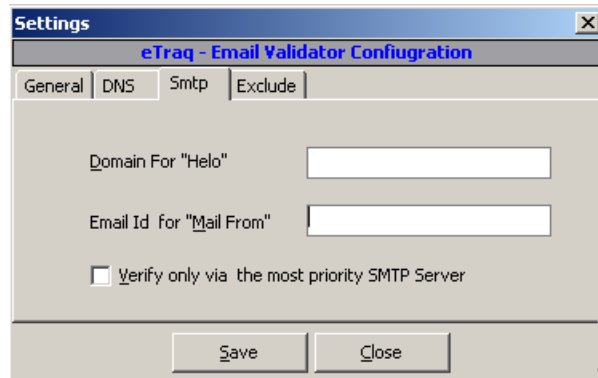


SMTP

This tab allows you to specify the SMTP domains for Hello and the e-mail ID from which mails are received.

- Enter the values in the respective fields.

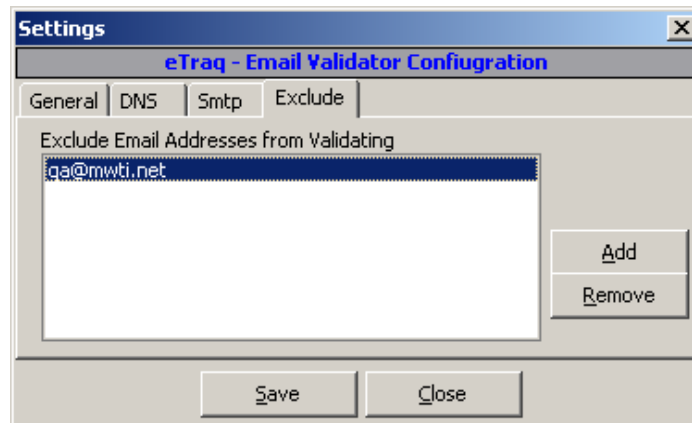
- If required select the check box for 'Verify only via the most priority SMTP Server' and click Save.



EXCLUDE

This tab allows you to exclude e-mail IDs from being validated.

- To add the e-mail ID to be excluded, click **Add**.
- A dialog box **Enter a email ID to exclude** is displayed. Enter the ID and click OK.



- The ID is displayed in the display box. To remove an ID, select it and click **Remove**.
- Click **Save** and **Close**.

Options

Tasks in Options

This menu allows you to specify the console display.

Stay On Top: The console is always at the top

Minimize On Close: Console is minimized when you close it

Hide When Minimized: The console is hidden when you minimize it. You have to reopen the console from the task bar.

Clear Window: All tabs are refreshed.

