Mailissa Admin Documentation

Mailissa Admin Documentation

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1. Mailissa Subscription

1.1 Mailissa Subscription Portal

This website is your entry point to the world of Mailissa. On this portal you manage your account and all your subscriptions to our Mailissa services.

1.1.1 Registration

If you are not registered yet, this will be your first step. You register with a custom user name (user ID) a valid e-mail address and a password.

Login with your user ID or the e-mail address and your password.

1.1.2 Shop

Here you can find the different Mailissa Transfer Plans and the Mailissa Team license. The Mailissa Transfer Free Plan has a maximum of five users, everything else can be added without limit.

MAILISSA

Mailissa Homepage   My Account   Shop   🇬🇧 ⌄   🛒 0

Pricing

Mailissa Transfer Prices →   Mailissa Team Prices →

Mailissa Transfer

Free

For individuals or teams working with Microsoft tools.

€ 0

Free forever

Buy now

Transfer emails to your Microsoft tools:

- − Max. 5 User
- − 5 MB data transfer per e-mail
- ✔ Microsoft Teams Connector
- ✔ Microsoft SharePoint Konnektor
- ✔ Microsoft OneDrive Konnektor
- ✔ Microsoft Planner Konnektor

Standard

For people & teams who have several tools in use.

€ 5,50

Per user per month

Buy now

Everything from Free plus:

- ✔ Unlimited users
- ✔ Unlimited data transfer
- ✔ Microsoft Teams Connector
- ✔ Microsoft SharePoint Konnektor
- ✔ Microsoft OneDrive Konnektor
- ✔ Microsoft Planner Konnektor
- + 5 selectable connectors
- + Support

Premium

For teams with many applications and individual wishes

€ 8,90

Per user per month

Buy now

Everything from Standard plus:

- ✔ Unlimited users
- ✔ Unlimited data transfer
- ✔ Microsoft Teams Connector
- ✔ Microsoft SharePoint Konnektor
- ✔ Microsoft OneDrive Konnektor
- ✔ Microsoft Planner Konnektor
- + Unlimited choices of connectors

1.1.3 My Account

Once you logged in, you will see your account page with the following sections.

Subscriptions

This area shows all your active subscriptions to our services and the details are displayed as well:

My Account

	Subscription	Product	Status	Next payment	Total	
Subscriptions	#6659	Mailissa Team Lizenz × 2	Active	23. September 2022 Via visa card ending in 4242	2,00 € / month	VIEW
Account Details						
Addresses	#6381	Mailissa Transfer Plans - Free × 4 • Lizenz -Plan: Free	Active	In 3 days	0,00 €	VIEW
Payment methods						
2-Factor Authentication						
Logout						

CHANGE PLAN AND AMOUNT OF LICENSES

If you want to change the licence plan and amount of licences you have to go to the `My Account` page. Then in the Subscription totals table click the `UPGRADE OR DOWNGRADE` button. In case you have more than one Subscription, you have to click on `VIEW` first. This action will open the detail view of the subscription. After clicking on the `UPGRADE OR DOWNGRADE` button you will be redirected to a new page where you can choose the plan and the new amount of licences.

Copyright © Axontic GmbH

Status	Active
Start date	9. June 2022
Last order date	16. August 2022
Next payment date	In 3 days
Payment	Via Manual Renewal
Actions	CANCEL

Subscription totals

Product	Total
Mailissa Transfer Plans - Free × 4 Lizenz -Plan: Free UPGRADE OR DOWNGRADE	0,00 € / month
Subtotal:	0,00 €
Total:	0,00 €

REMOVE PRODUCT

To remove a subscription just open the details by clicking `VIEW` and then clicking `CANCEL` in the corresponding section. It will take a few days until the cancellation is executed. The status during this period will be `Pending Cancellation`.

Account Details

In this area you can view and change your personal information and set a new password. If you leave the password fields blank, no password change will executed. Please make sure you have a strong password as it will be rejected otherwise.

Addresses

In this area you can define a billing and a shipping address (if it differs from the billing address). As Mailissa is offered as a pure software service, physical shippings are not to expect.

Payment Methods

Under the payment method menu you can view and change your payment options. Currently we are supporting a credit card or SEPA payment.

2-Factor Authentication

In this area you can set a 2FA to strengthen the security of your user account.

Logout

If you are finished using the Mailissa Portal, please consider to always logout from your account to avoid any abuse.

2. Prerequisites

2.1 Setup Mailissa Addin in Microsoft 365

> ⚠️ **Note**
>
> To make the Mailissa Addin work correctly in your Browser (Outlook Web Access) you have to allow third party cookies.
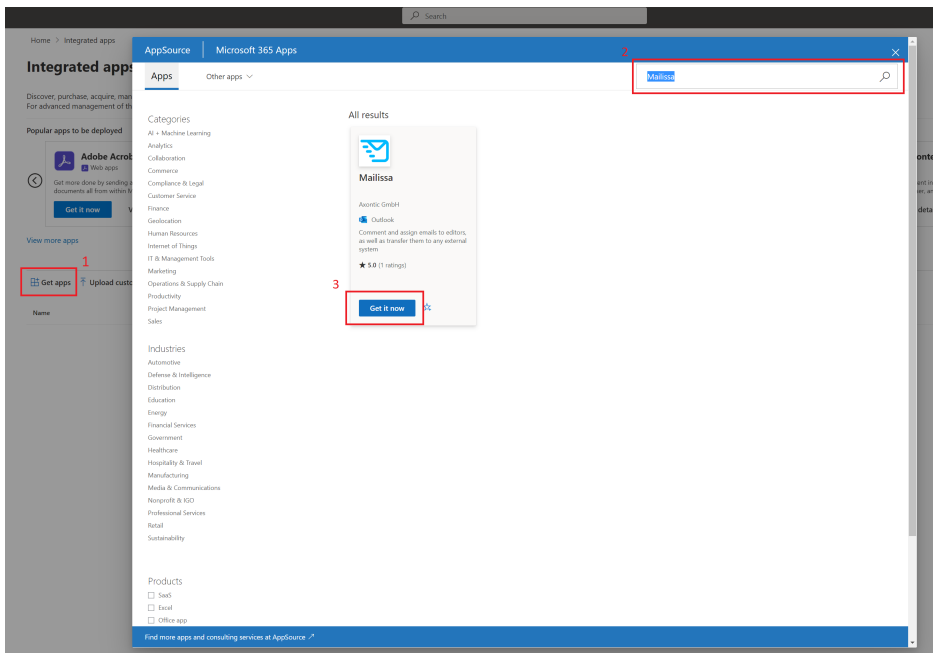
After you have added Mailissa to your tenant (from the Outlook store) you must assign it to the users in your company. To do this please open the admin area for the Integrated Apps. You can find it either under this link or in the menu bar of the M365 Admin area.

> ⚠️ **Note**
>
> You need certain permissions in your Microsoft 365 tenant. If you do not see individual menus, this is probably because you do not have the appropriate permissions. In this case, you should contact one of your M365 administrators.
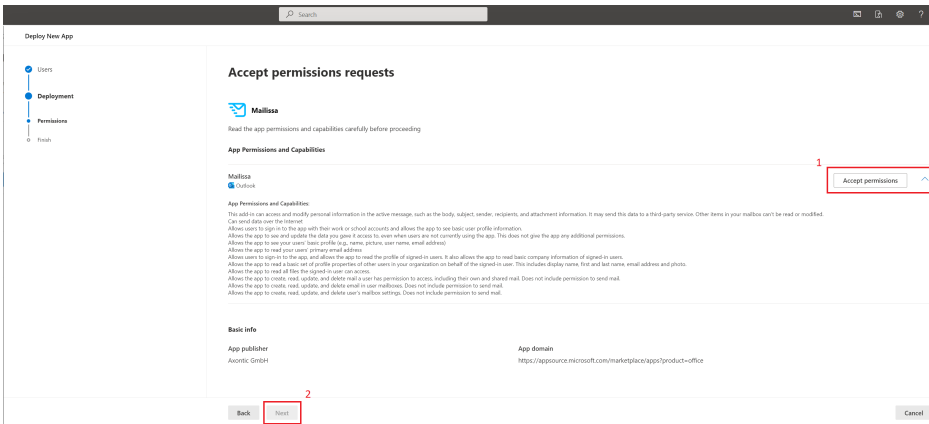

Click `Get Apps`, find Mailissa in the Outlook App Store and install it for your tenant.

Now you can select who should receive the add-in in your company. Select one of the options and confirm with Next.
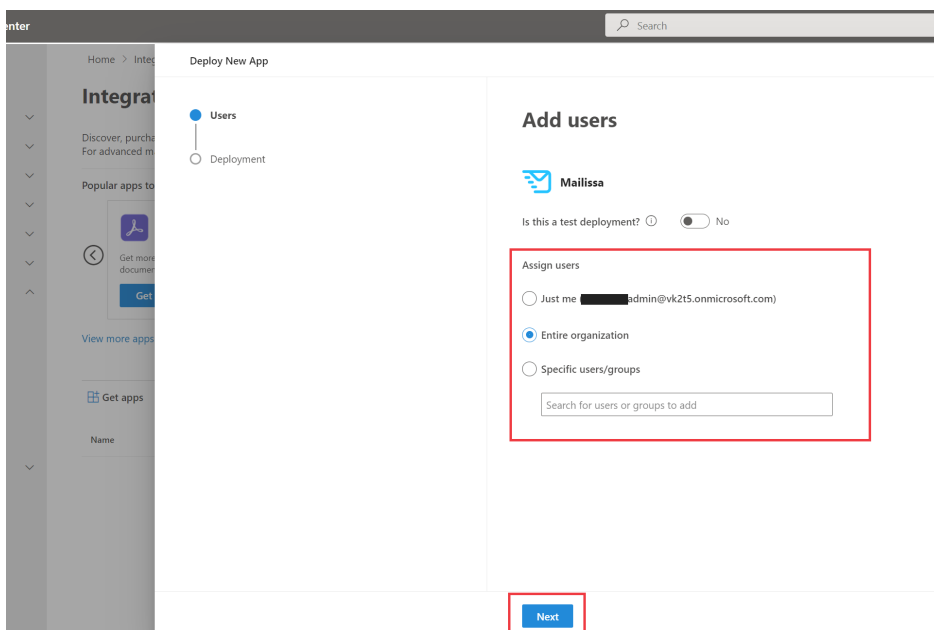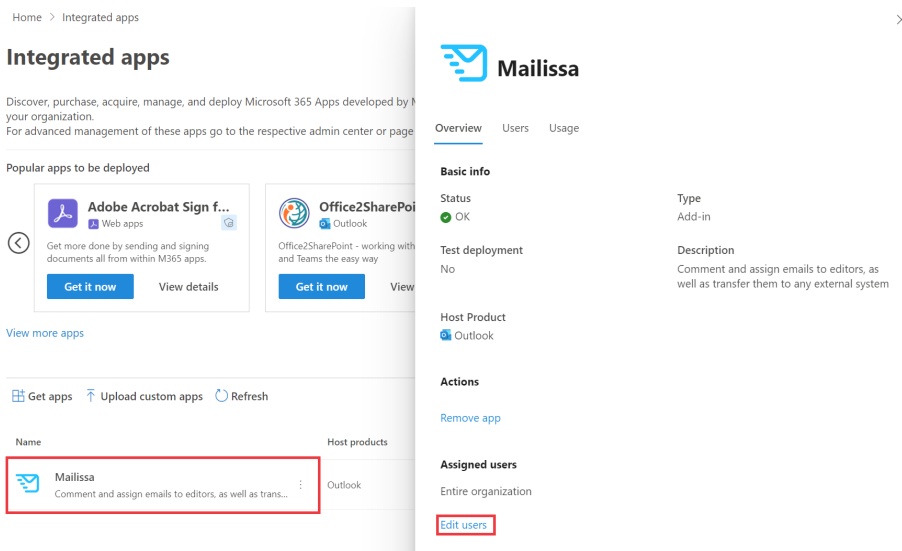

Accept the requested permissions and Mailissa is successfully installed for the users.

> **Info**
>
> According to Microsoft, it can take up to six hours for apps to show up in Outlook.

If you want to edit the assigned users, just click on the application again and select Edit Users.

2.2 Mailissa Administration

2.2.1 Basic Configuration

To access the administrational part of the Mailissa Portal you need your M365 credentials. Open a browser and navigate to the URL

https://portal.mailissa.com

Login using your M365 username and password. The first user account that logs in will be the tenant admin for Mailissa.

After you're logged in successfully you will be presented with an overview page of your credentials that are defined for the connectors. If you are starting with a new instance you will see no credentials here. Credentials have to be set with the add-in itself, they cannot be managed from this page.
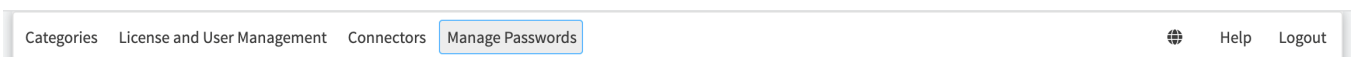
> **Notice**
>
> You will be logged out after 3 minutes of inactivity
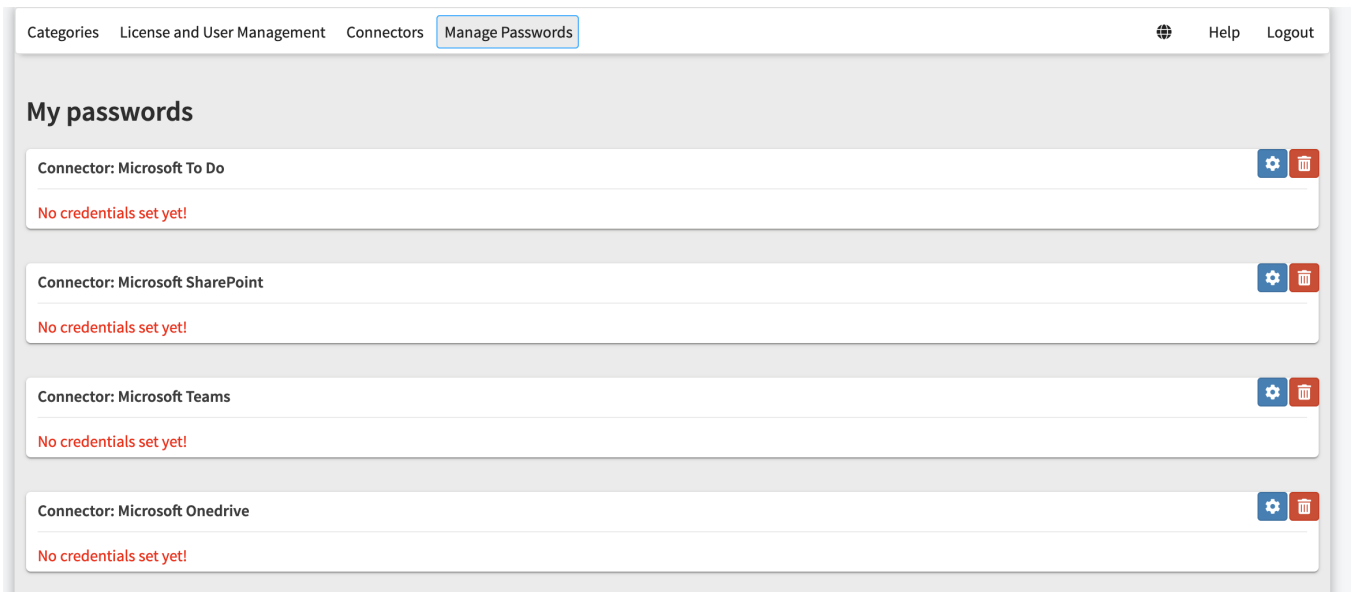
2.2.2 Sections

All configuration pages in Mailissa have a top navigation bar that contains the following:
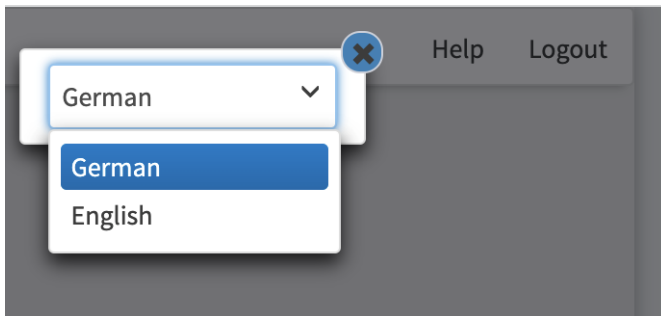
- Categories
- License and User Management
- Connectors
- Manage Passwords
- Language Selector
- Help (Link to our support pages)
- Logout action

This documentation will guide you through all of the parts.

Select your Language

Mailissa comes in two languages, English and German. To switch to your preferred language, click on the globe icon and select the language from the list.

Get Help

Click on `Help` to open our support pages. It's a good idea to bookmark the URL `https://support.mailissa.com/portal` for later.

You can also create a new ticket directly by clicking on the icon in the lower right corner.
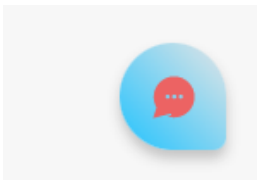
Manage Categories

For the Team module of Mailissa you can assign categories to mails. On this page you can edit those categories, translate them or assign different colors to them.

You can also add and remove custom categories here. To edit an existing category, simply click on the blue cogs icon. In the edit dialog you can define the category's name and the color.

To mark an e-mail as transferred there is a special category which you can also edit and change the name and the color.

License and User Management

This section is devided into two parts:

- Current License
- Registered Users

The first section is read-only and displays your license information about your subscription. It displays your Tenant-ID, the date until the license is valid (and when it's potentially renewed automatically) and the remaining licenses left for users.

License and User Management

Current License

TenantId

87b82f71-4227-4b98-8e31-9170cf35e8bb

Automatic monthly renewal

Feb 25, 2023, 8:11:15 AM

User count

5

1 of 5 licenses used

The second section is an overview of all users who logged in with the add-in and used the Mailissa service. As an admin you can also define which user account is enabled in general and if it can act as a User Administrator and/or Tenant Administrator.

Registered users

	1 of 1			
Username ↓↑	Last successful access ↓↑	Enabled ↓↑	User administrator ↓↑	Tenant administrator ↓↑
👤 We4IT Cloud Admin	Mar 18, 2022, 2:14:42 PM	🟢	🟢	🟢 🗑

1 of 5 licenses used

If you are running out of free licenses you have the option to delete users from Mailissa by clicking on the Trash icon.

Connectors

This area presents an overview of all connectors that are available for your subscription. Each connector section shows basic information such as
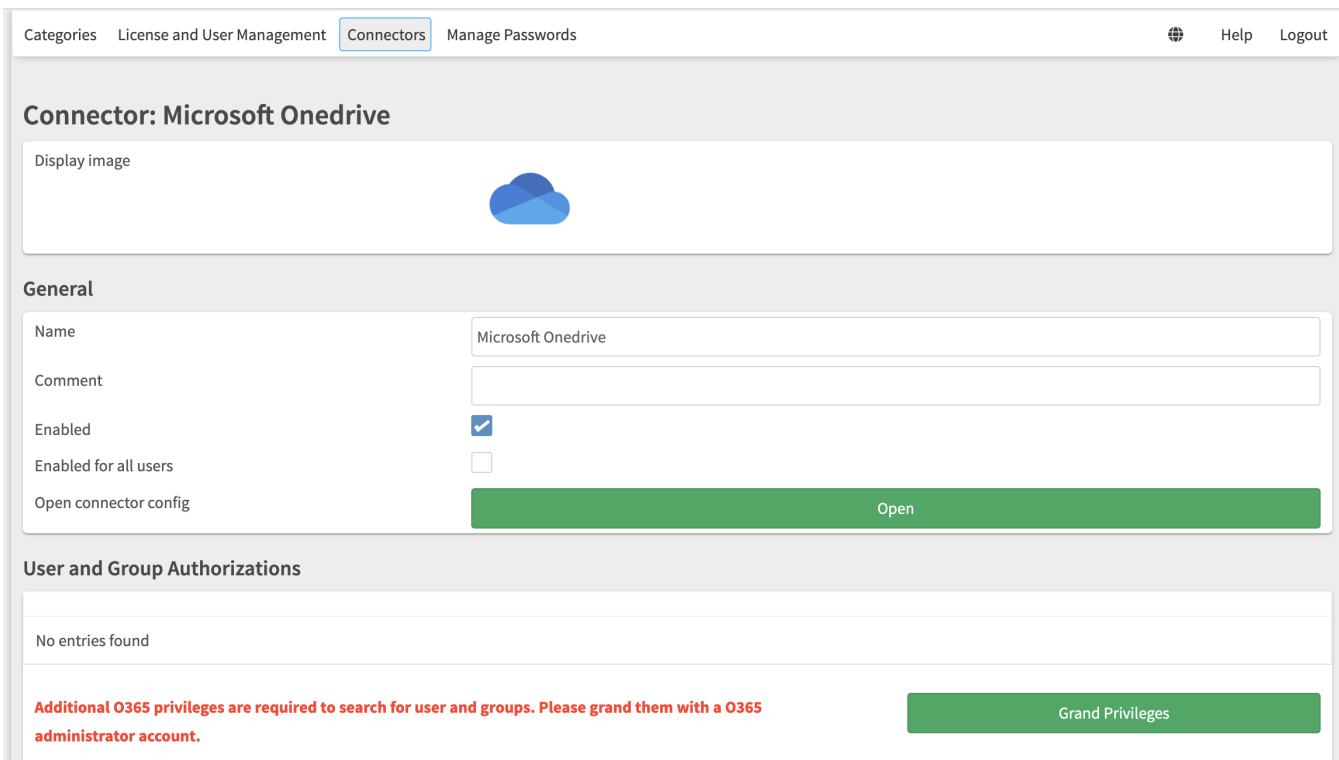
- the name of the connector
- the users/groups who are auhorized to use the connector
- the status of the connector (enabled or disabled)

| Categories | License and User Management | Connectors | Manage Passwords | | 🌐 | Help | Logout |

Connector overview

Connector: Microsoft To Do

User & Group authorizations: All users are allowed to use this connector.

Connector: Microsoft SharePoint

User & Group authorizations: All users are allowed to use this connector.

Connector: Microsoft Teams

User & Group authorizations: All users are allowed to use this connector.

Connector: Microsoft Onedrive

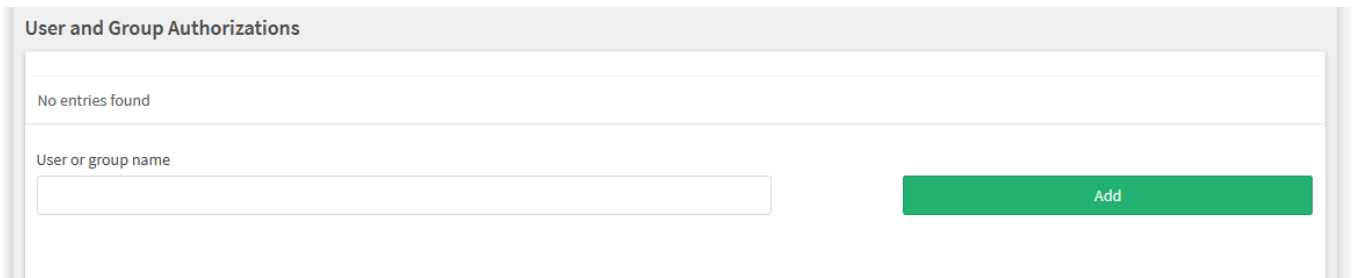User & Group authorizations: All users are allowed to use this connector.

You can easily enable or disable a connector in general by clicking the green switch button. A green switch indicates that the connector is enabled.

You can access the detailed settings by clicking the blue cog button.

The details page shows the icon (not changeable for default connectors), the name, its status and the users/groups that can use this connector. You can rename the connector if you want and/or add a comment for it.
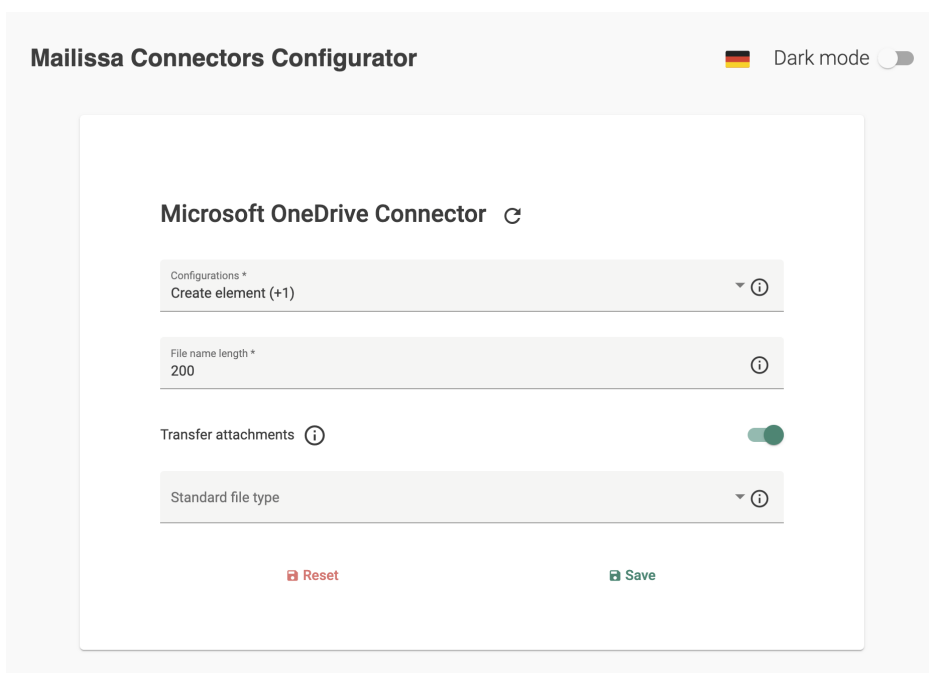
| Categories | License and User Management | Connectors | Manage Passwords | | 🌐 | Help | Logout |

Connector: Microsoft Onedrive

Display image

General

Name	Microsoft Onedrive
Comment	
Enabled	☑
Enabled for all users	☐
Open connector config	Open

User and Group Authorizations

No entries found

Additional O365 privileges are required to search for user and groups. Please grand them with a O365 administrator account.

Grand Privileges

If you de-select the option `Enabled for all users` you will be able to assign this connector to specified M365 users and / or groups in the panel below.

Each connector also has an additional detailed configuration option. You can open it by clicking the green `Open` button.

Manage Passwords

This area is available for every user to handle credentials for every connector service available in your subscription.

| Categories | License and User Management | Connectors | Manage Passwords | | 🌐 | Help | Logout |

My Passwords

Connector: Microsoft SharePoint ⚙️ 🗑️

No credentials set yet!

Connector: Microsoft Teams ⚙️ 🗑️

No credentials set yet!

Connector: Microsoft Onedrive ⚙️ 🗑️

No credentials set yet!

Connector: Microsoft To Do ⚙️ 🗑️

No credentials set yet!

There is actually no option to set or modify your credentials here as you always use or update them directly when using the add-in. However, you can delete credentials for a certain connector service as a user here. After removing the credentials of a connector service, you will be asked to log in again when using the connector service in the add-in.

3. Mailissa

3.1 Special considerations when using Mailissa within "Shared Mailboxes"

In general it is possible to use Mailissa also in shared Mailboxes (Mailboxes without any license). Mailissa is then used in the context of the logged-in user.

When using Outlook in the browser (Outlook Web Access – OWA) there are two options accessing a shared mailbox:

- Adding the mailbox to the 'folder' section in the left handed pane
- Open the mailbox by using 'Open another mailbox'

Microsoft does NOT recommend using the 2nd option as some APIs and also Addins (like Mailissa) 'may not work properly'.

https://docs.microsoft.com/en-us/office/dev/add-ins/outlook/delegate-access

3.2 Using Mailissa Portal as an end user

All M365 users that are enabled for Mailissa can access the Mailissa Portal.

Open the Portal by using the URL you defined as hostname in your Office 365 setup, or if your using the SaaS offer, use https://portal.mailissa.com.
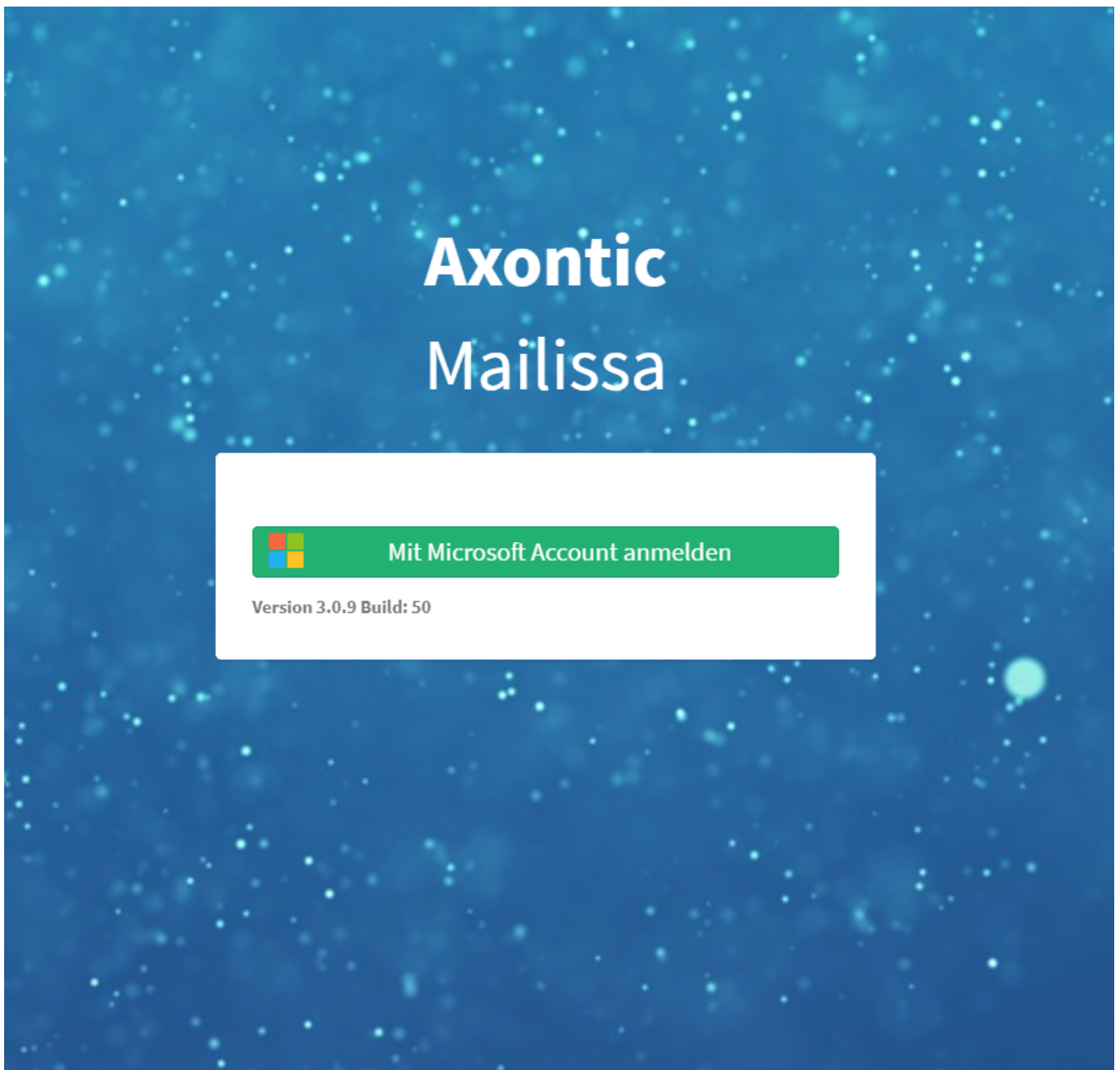
This will redirect you to a Microsoft login where you may select user you want to login and/or prompt you for your password. After the successful Microsoft-Login, you are now also logged in on the Mailissa Portal.

Based on your role you will have different options.

3.2.1 Options as a 'normal' end-user

Every user can update his credentials for the assigned connectors

There are two options available for each Service

1. Test the Connection
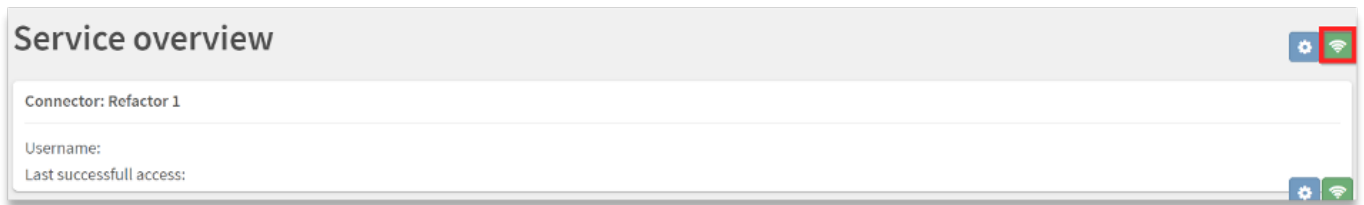
If successful, a message is displayed
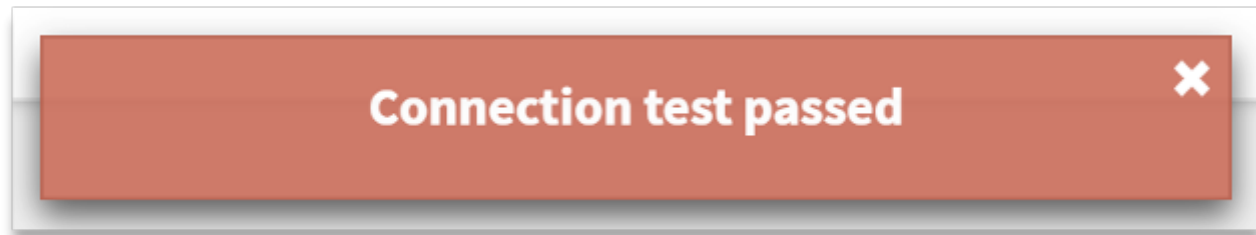
2. Change your credentials. This is only possible if the Authorization-Type is basic. If it is token-based, please revoke your token in the target system, and the connector will prompt you for a new one

Fill in the form, and save

Save successfull ✖
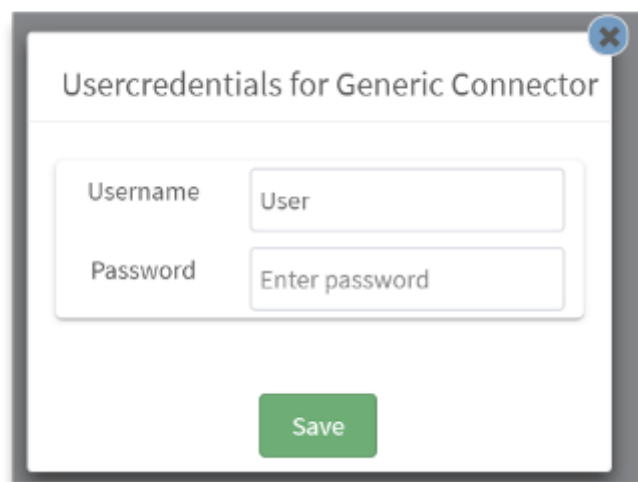
3.2.2 Options as a User Administrator

Only User administrator can access the following settings

There are 3 options available for each connector

1. This button enables or disables the connector globally
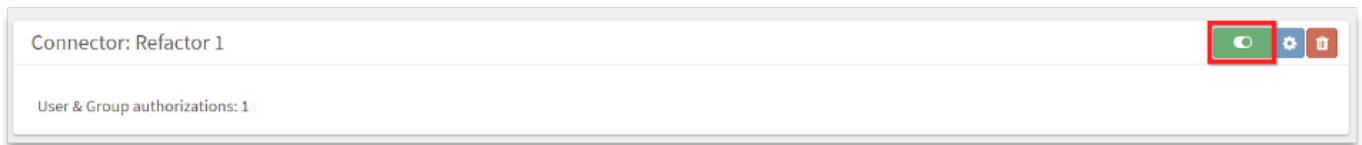
2. This button opens the configuration site of the connector
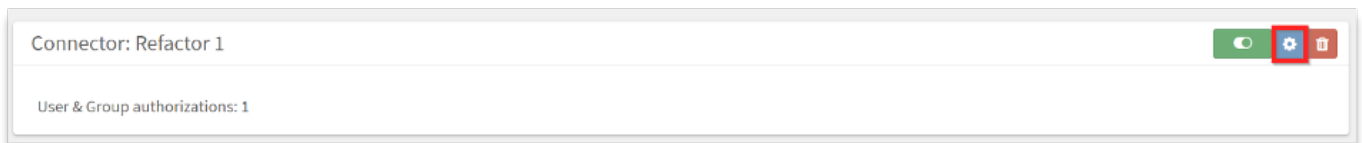
This opens the following site. If the setting "Enabled for all users" is active, there will be no configurations available (Note: Below the connector name, the setting is displayed)
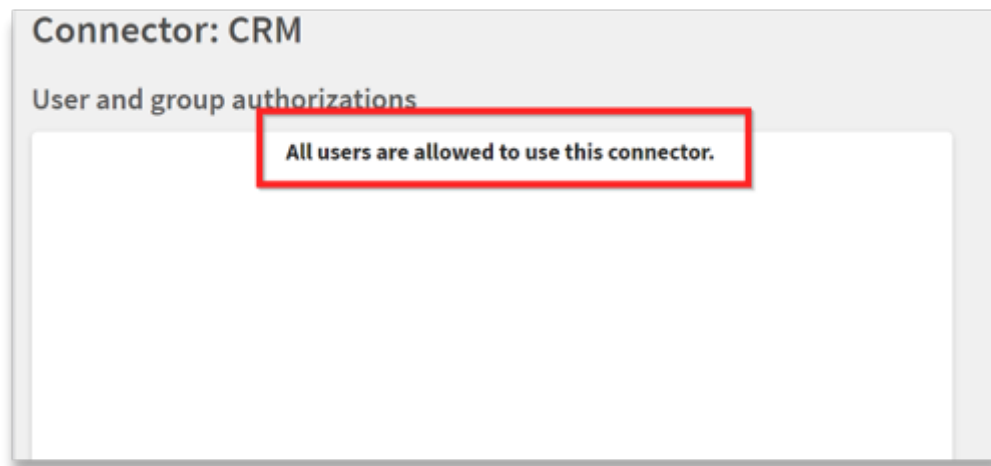
If the setting is not active, a selection panel is shown, where you can select O365 Users and Groups which should be able to access the connector. Choose corresponding users and / or groups and save.

Connector: Refactor 1

User and group authorizations

👤	Mika von Essen	🗑
👤	MAILISSA	🗑

Save to apply the changes

User or group name

[   ]   Add

Save   Reset

4. Connectors

4.1 General Adjustment
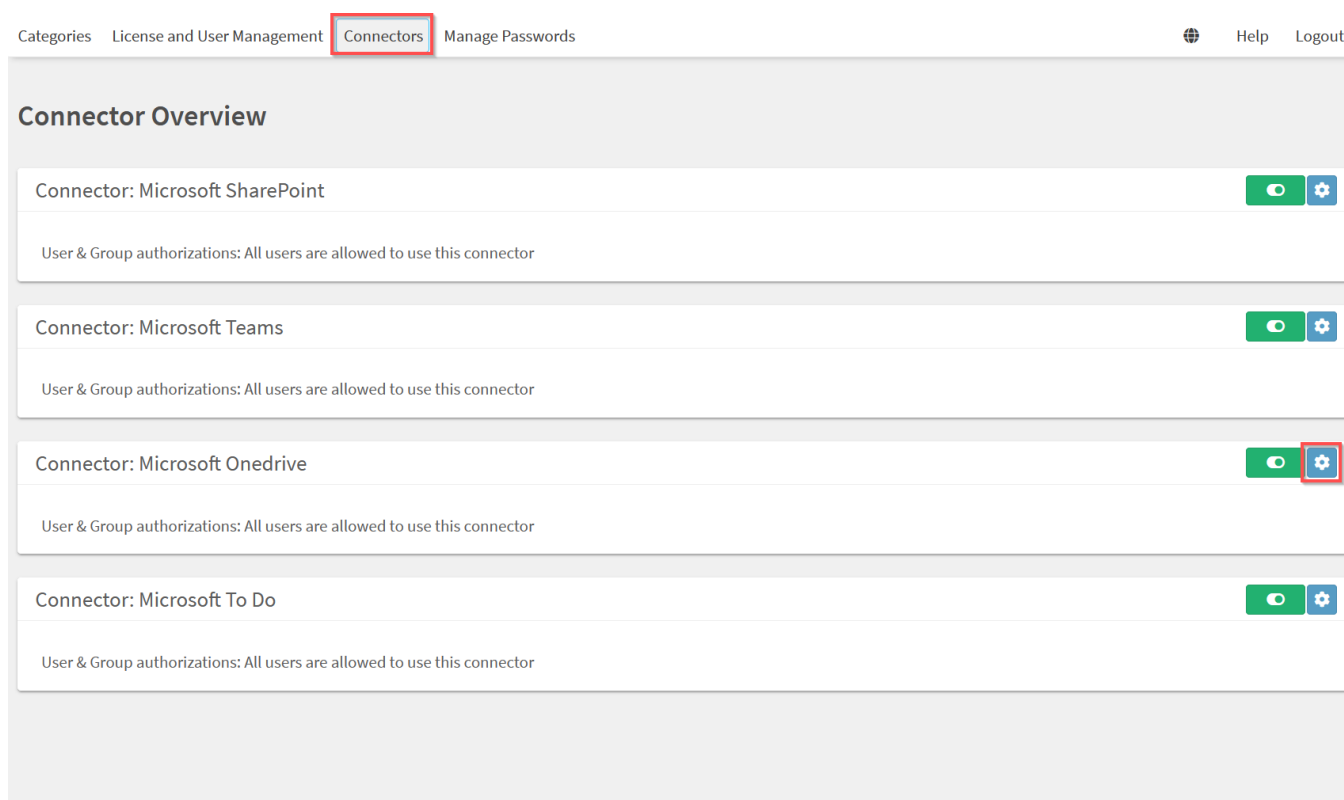
4.1.1 Configurator

Introduction

You can adjust each Connector to a unique specific configuration. For example you could set a default file type or disable not needed configurations.

Access the Connector Configuration

You can access your specific configuration through the Mailissa Middleware. Login and select the connector you want to adjust.

On the connector site select "Open" and the specific configuration dialog will open in a new browser window.

Categories   License and User Management   Connectors   Manage Passwords   🌐   Help   Logout

Connector: Microsoft Onedrive   - 29/55 -

Display image

General

Name	Microsoft Onedrive
Comment	
Enabled	☑
Enabled for all users	☑
Open connector config	Open

User and Group Authorizations

All users are allowed to use this connector

Now you can adjust the connector to your specific needs and business case.

Usage

After you adjusted the connector don´t forget to save. Optionally you can also reset the configuration to the default values or refresh the panel.

Specific Adjustments

For each connector there will be additional specific adjustments. Most of them are optional and filled with default values but some may be required to use the connector.

> **Notice**
>
> Keep in mind to check the specific sections for each connector to see if you may need to add some information to use the connector. You can find required adjustments in each connector documentation under Required Adjustments.

General Adjustments

Some configurations can be made in each connector.

CONFIGURATIONS

You can disable or enable the different configurations that are available for the connector. This could be for example Create Element or Transfer Attachments.

Mailissa Connectors Configurator

🇩🇪 Dark mode ⬜

- 31/55 -

Microsoft OneDrive Connector ↻

Configurations *
Create element (+1) ▾ ⓘ

File name length *
250 ⓘ

Transfer attachments ⓘ 🟢

Standard file type ▾ ⓘ

🔖 Reset   💾 Save

TRANSFER ATTACHMENTS

You can set the default value for every transfer attachments input for the connector.

Mailissa Connectors Configurator

🇩🇪 Dark mode

Microsoft OneDrive Connector ⟳

Configurations *
Create element (+1) ▼ ⓘ

File name length *
250 ⓘ

Transfer attachments ⓘ 🟢

Standard file type ▼ ⓘ

🗑 Reset   💾 Save

4.2 Individual Adjustment

4.2.1 Atlassian

Atlassian Confluence

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`Title length`	The max length for the title of the new generated content
`Standard file type`	The standard file type of the new generated file

OPTIONAL ACTIONS

There are no optional actions.

Atlassian Jira

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`Title length`	The maximum length of the title for the new issue
`Update issue`	If this option is checked, it is possible to update the existing issue on the process 'Update issue'
`Standard file type`	The standard file type of the new generated file

OPTIONAL ACTIONS

There are no optional actions.

Atlassian Jira Servicedesk

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`Title length`	The maximum length of the title for the new request
`Standard file type`	The standard file type of the new generated file

OPTIONAL ACTIONS

There are no optional actions.

4.2.2 Microsoft

Microsoft OneDrive

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`File name length`	The max length for the file name of a new generated eml or pdf file
`Standard file type`	The standard file type of the new generated file in a document library

OPTIONAL ACTIONS

There are no optional actions.

Microsoft Planner

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`Folder name`	The name of the folder where the files will be uploaded. Only 35 normal cases, whitespaces or hyphen (no Ä,Ö,Ü, e.g.)
`Preview type`	Preview type of the new created task in planner
`Only my tasks (default)`	Default value of the 'Only my tasks' input
`Update task (default)`	Default value of the 'Only my tasks' input
`Create comment (default)`	Default value of the 'Create comment' input

OPTIONAL ACTIONS

Action	Description
`Enable all features`	This will open a dialog to grant admin consent for the additional scopes which will be for example needed to assign a task or comment on an existing task. You need to execute this action and grant admin consent if you want to use these features

Microsoft Sharepoint

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`File name length`	The max length for the file name of a new generated eml or pdf file
`Mail type`	If the content type Mail should be used. If disabled, the connector will not try to set additional metadata to list items or pdf/eml files
`Standard file type`	The standard file type of the new generated file in a document library
`Sharepoint templates`	The SharePoint which should be enabled for transfer. Normally only document library and/or list should be selected
`Ignored Sites`	Sites that will not display in the site combobox

OPTIONAL ACTIONS

Action	Description
`Deploy mail content type`	This will deploy the custom 'Mail' content type which is needed to have additional metadata transferred on every list item or pdf/eml file. Additionally you should set the 'Mail type' flag, otherwise the properties will not be tried to be set

Microsoft Teams

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`File name length`	The max length for the file name of a new generated eml or pdf file
`Mail type`	If the content type Mail should be used. If disabled, the connector will not try to set additional metadata to list items or pdf/eml files
`Standard file type`	The standard file type of the new generated file in a document library
`Subject length`	The max length for the subject of the message to be sent
`Message length`	The max length for the message, which will be placed before the mail body
`Send message`	Default value of the 'Send message' input

OPTIONAL ACTIONS

Action	Description
`Enable all features`	This will open a dialog to grant admin consent for the additional scopes which will be for example needed to get the member of a team or channel. You need to execute this action and grant admin consent if you want to use the mentions feature for messages
`Deploy mail content type`	This will deploy the custom 'Mail' content type which is needed to have additional metadata transferred on every list item or pdf/eml file. Additionally you should set the 'Mail type' flag, otherwise the properties will not be tried to be set

Microsoft To Do

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

There are no optional adjustments.

OPTIONAL ACTIONS

There are no optional actions.

4.2.3 Zoho

Zoho Desk

REQUIRED ADJUSTMENTS

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

OPTIONAL ADJUSTMENTS

Property	Description
`Transfer Attachments (default)`	Default value of the 'Transfer Attachments' input
`Select contact (default)`	Default value of the 'Select contact' input
`Only my tickets (default)`	Default value of the 'Only my tickets' input
`Update ticket (default)`	Default value of the 'Update ticket' input
`Public comment (default)`	Default value of the 'Public comment' input
`Domain`	The domain which should be used for API requests. Select the domain which is also used directly in your Zoho Desk. The default is 'eu'
`Department (default)`	Default value of the 'Department' input
`Channel (default)`	Default value of the 'Channel' input. If none is selected and a channel with key EMAIL is present it will be selected.
`Product (default) - >> Your Product <<`	Default value of the 'Product' input

OPTIONAL ACTIONS

There are no optional actions.

4.2.4 Generic Domino Connector

The generic connector for Domino allows you to configure any database in your Domino environment as a target for Mailissa. You can store the mail as a document and you can even associate it to an existing document.

Requirements

If you want to run the Node.js based connector, you need the generic Domino connector installed on your Mailissa middleware. The Domino connector is also provided "stand-alone", which means you do not need the Node.js part in general.

The Domino server that will host the configuration application (a Notes database that comes with this connector) must have HTTP(S) enabled. User must have write-access to the database(s) where mails could be stored in. The server where target databases reside do not need to have HTTP(S) running but the server where the configuration application is running on must be a "trusted" server for the other servers. Data is transferred using the regular NRPC calls with the Notes API.

IMPORTANT: Preparing the Domino Server

In addition, the Domino server needs some extra configuration to run the Domino connector NSF app as it uses certain Java libraries to manage the incoming requests. As of version 8.5.2FP6, Domino is delivered with a very restrictive setting of the Java Virtual Machine (JVM) that prevents loading of third-party libraries. To allow usage of those libraries you must add an entry to the Java security settings file. The file of interest is located in

`<DominoProgram>/jvm/lib/security`

Depending on the version of Domino, this file to be used is either `java.pol` (Domino 10 or before) or `java.policy` (Domino 11 or later). Using the file `java.policy` has a bad side effect: it will be overwritten every time you update the server or the JVM with patches, so please repeat the following steps after you update your server in the future. If you are using older versions than 11 and the `java.pol` file, the following settings won't be overwritten.

There are two ways to grant permissions to the third-party libraries the Domino Connector uses:

- for this Domino Connector NSF app only
- a global setting for the whole server

To grant permission to the particular NSF, append the following lines to your Java security policy file:

```
grant codeBase "xspnsf://server:0/<pathToTheNSF>/<fileName>.nsf/-" {
 permission java.security.AllPermission;
};
```

Replace `<pathToTheNSF>` and `<fileName>` with the corresponding path and file name of your Domino Connector NSF app.

A slightly easier way is to grant permission in general by appending these lines to the Java security policy file:

```
grant { permission java.security.AllPermission; };
```

Some say this is an insecure setting though this does not mean that code can be executed without any restriction, it just allows usage of third-party libraries in XPages-based applications which however was allowed by default prior to the above mentioned release.

For more information please consult the official docs: https://hclpnpsupport.hcltech.com/csm?id=kb_article&sys_id=d397e86c1b6df30083cb86e9cd4bcb01

CONFIGURATION OF THE CONNECTOR SERVICE IN THE MIDDLEWARE

Depending on if you use the Node.js connector part or not, the setup of the connector service is different at the URL part. If you use the Node.js part, please refer to the documentation on how to set up a Node.js based connector.

When running the connector natively on Domino without Node.js, your URL has to point to the NSF file and a certain XPage:

```
http(s)://<yourDominoHostName>/<pathToTheNSF>/<fileName>.nsf/domino.xsp
```

SETTING UP THE CONFIGURATION APPLICATION

Either you can work with a pre-built template (.ntf) or you can use the ODP (on-disk project) that is shipped with the Domino connector. Once you have the .nsf up and running, you have to set the ACL. User need at least read-access. Administrators should have at least editor access and servers should be manager. Please add a role `[Admin]` and assign this role to your administrator's account or group.

The Configuration Application

The goal of the generic Domino connector is to allow non-developers to connect to any Domino database by just configuring target databases, views and how to store the mail.

The configuration knows only three types of documents:

- Database Connections
- View Configurations
- Localizations

The minimum configuration is to set up a Database Connection. A View Configuration is only used to allow users to search for existing documents, to select one of the found documents and to relate the mail to this document.

Open the app in your Notes client. You will be presented with the start view, which displays document of the type "Database Connection".

Database Connection

Create a new Database Connection by clicking the action in the view.

Only the fields in the first section are required.

Field	Purpose
Unique Key	Free text value, this key will be used to assign view configurations later. You should not use spaces or other special characters
Category	Define or select a category for this connection. The category will be displayed later in the list of "Configurations". This value is used as a display value for the English locale.
Category (localized)	Same as above, but defines the category for a certain locale. The format is `locale~category`, e.g. `de~Kundendaten`
Title	Free title for the connection. This will also be the display name for the user. This value is used as a display value for the English locale.
Title (localized)	Same as above, but defines the title for a certain locale. The format is `locale~title`, e.g. `de~Kontakte`
Server	Domino server name (full canonical or abbreviated name is recommended) where the target database is located
Full Path	The full file path including the .nsf filename of the target database
Enabled	Only enabled databae connections will be visible later. With this you can temporarily hide a connection.
Read Access	Reader field to determine who should see and use this connection. Valid names are users, groups and roles.

MAPPING

These sections allow to map the mail data to custom fields. If you leave them blank, the default field names from a standard Notes mail (subject, from, sendto, body, …) will be used ("Memo" is used as form name).

If you need to have a different form name for the document that contains the mail, define the form name for the form field here.

RELATION

If you want to allow the stored mail to have a relation to an existing document, you can define the field name here where the connector will store the UNID of the existing document. The UNID will be stored as text. Using a relation will show an additional step during the transfer where the user has to select the existing document. Usually it is located using a search. How a search will be performed is controlled by the view configuration (see next section).

EXECUTE AGENT

This field allows to define an agent's name. This agent must reside in the target database. This allows you to do more with the stored mail document if you need to.

The agent is executed with a DocumentContext. To access the stored mail document, you have to use the DocumentContext. This is an example in LotusScript:

```
Option Public
Option Declare

Sub Initialize
  Dim session As New NotesSession
  Dim doc As NotesDocument
```

```
    Set doc = session.Documentcontext
    MsgBox("Mail subject: " + doc.subject(0))
End Sub
```

This will just print the subject of the stored mail to the server console.

The agent must be set as "Run as Webuser" and must be signed with an appropriate ID.

View Configuration

The view configuration is mainly used to define how a search over existing data is performed and how the search result is displayed. This type of configuration is only needed if your Database Connection offers the relation to an existing document (by defining a field name accordingly).

Field	Purpose
Database	Select the Database Connection you created earlier where this View Configuration will belong to
Display Name	View names usually have technical names, so you can define the display name here. This is presented to the user. This value is used a the display name for the English locale.
Display Name (localized)	Same as above, but defines the display name for a certain locale. The format is `locale~display name`, e.g. `de~Firmen`
View Name	Technical name of the view in the selected database which you want to use
Column values in search result	Defines the values that will be displayed for each entry in the search result. Each line in this field will be used as a separate value. These act as a formula, so you can use just field names or complex formulas to format the individual value
Column names for search result	For now you can leave this field blank. If you plan to search within the results, you have to define a real list of column names here. The number of names here must be equal to the number of column values from above.
Fields to search in	Define field names here which are used to generate a full-text search formula. Attention: avoid using long field names and/or a large number of field names here to prevent full-text syntax errors. Full-text search terms are limited in length.
Summary	When the user selects a document, the UNID will be used in the transfer process, but the summary value here is displayed in the connector pane. You can also use a formula to combine and/or format field values

Customizing the labels (Non-Node.js only)

If you are using the Domino Connector without Node.js, you have a decent localization option for the labels used. Labels are pre-defined for English and German, however you can also customize these locales and also add new locales for your own language.

In the Connector Configuration NSF you find the localization options in the navigation area under "Localization". This will open the configuration form. This contains a field for each label in which you define the locales - one per line.

You can decide if you want to define/override a label or not. To define a label, add a new entry in the corresponding field like

`en~Please select the target application`

This could be the label for "Select Target Database". Another example is shown here:

| Close | Save | Save and Close |

We4IT

Locales

Locales	
"Select Target Database"	⌈en~Please select the target application de~Bitte wählen Sie die Zielanwendung⌋
"Relate to existing document"	⌈ ⌋
"Yes"	⌈de~Ja, bitte⌋
"No"	⌈de~Nein, danke⌋
"Select View"	⌈ ⌋
"Search Term"	⌈ ⌋
"Search in View"	⌈ ⌋

If you do not specify a localized text here, the default text will be used (for `en` and `de`). For all other languages that are not defined, English will be used.

4.2.5 Freshdesk

> **Notice**
>
> You have to use an API-Key to log into the connector. An API-Key can be retrieved as described in the following post:
> https://support.freshdesk.com/support/solutions/articles/215517
>
> In Mailissa you have to use your API-Key as username, the password can be anything.

Required Adjustments

Property	Description
`Account`	Please enter your account name. For example, if your Freshdesk instance runs on 'https://mailissa.freshdesk.com', type in 'mailissa'

Optional Adjustments

Property	Description
`Default priority`	Default value of the 'Priority' input

Optional Actions

There are no optional actions.

4.2.6 Saleforce

Required Adjustments

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

Optional Adjustments

Property	Description
`Create relation`	Default value of the 'Create relation?' input

Optional Actions

There are no optional actions.

4.2.7 Slack

Required Adjustments

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

Optional Adjustments

There are no optional adjustments.

Optional Actions

There are no optional actions.

4.2.8 Teamleader

Required Adjustments

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

Optional Adjustments

Property	Description
`Show only my deals (default)`	Default value of the 'Show only my deals' input
`Search company (default)`	Default value of the 'Search company' input
`Deal phase (filter) (default)`	Default value of the 'Deal phase' input
`Update deal (default)`	Default value of the 'Update deal' input
`Folder name`	The name of the folder where the files will be uploaded. Only 100 normal cases, whitespaces or hyphen (no Ä,Ö,Ü, e.g.)
`Deal source (default)`	Default value of the 'Deal source' input
`Currency (default)`	Default value of the 'Currency' input
`File type (default)`	Default value of the 'File type' input

Optional Actions

There are no optional actions.

4.2.9 Trello

Required Adjustments

There are no required adjustments. Every option will be filled with a default value if needed and the connector is ready to use.

Optional Adjustments

There are no optional adjustments.

Optional Actions

There are no optional actions.

4.2.10 Zendesk

Required Adjustments

Property	Description
`Subdomain`	Please enter your subdomain. For example, if your Zendesk instance runs on 'https://mailissa.zendesk.com', type in 'mailissa'

Optional Adjustments

There are no optional adjustments.

Optional Actions

There are no optional actions.