



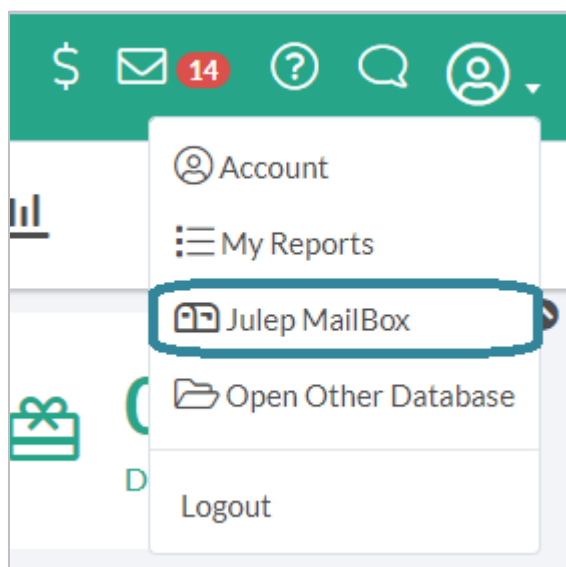
BCC Tool

Julep users can utilize the Julep **Mailbox Pickup Service** tool to quickly forward and record email conversations with prospects, donors, and staff in their Julep database.

NOTE: Emails must derive from existing Julep users based on the email address assigned to their user account. Contact Support@julepcrm.com if you need assistance.

Where Do I Access My “Julep MailBox”?

The **Julep MailBox** is unique to each individual user per database they have access to. It can be located under their “My Account” menu at the top/right corner of Julep.





What Email Address Should I BCC?

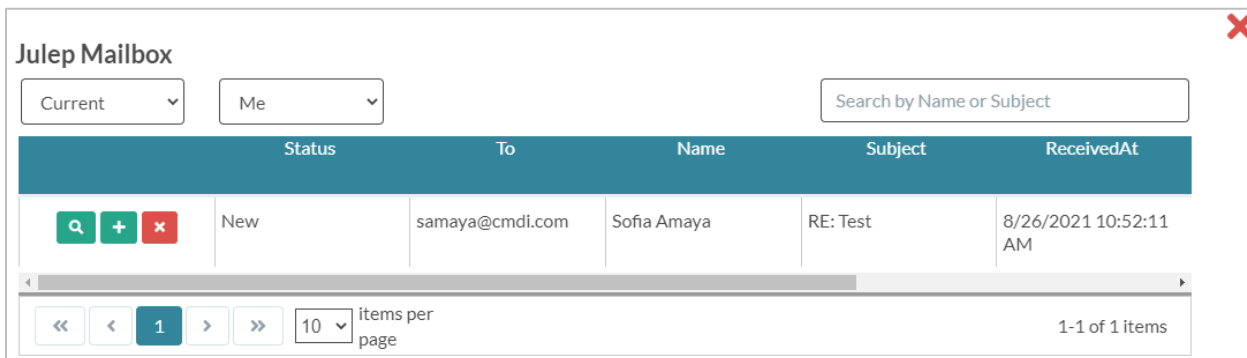
Julep users should BCC email@julepcrm.com.

How Do I Use the Mailbox Pickup Service?




1. Julep User sends an email to a donor/prospect and BCC's email@julepcrm.com.
2. If a match is made for the user sending the email and the contact receiving it, then the message will be received in the user's **Julep MailBox** found under **My Account**.
 - A notification email will be sent to the sender from Julep to confirm the message has been received in their Julep MailBox with a link to access the details.

NOTE: See **Matching Logic** below if no match is made or if you need additional details for how messages are matched to the correct Julep MailBox.


3. Click on  (**My Account**) in the top right corner of Julep.
4. Then select  **Julep MailBox** from the dropdown menu.
5. The user's **Julep MailBox** will open.



Messages sent to it can be reviewed. Inbox review options include:

- **Message Status**
 - **Current** – This is the default view and will display all matched messages currently in the user's Mailbox for the database selected.
 - **New** – This will display new, unread, messages only.
 - **Read** – This will display read messages only.
 - **No Matching** – If no donor profile is matched in any of the databases the user has access to, the message will be marked as "No Matching" and displayed in every database the user has access to with this status.
 - **Message Recipient**
 - This feature allows admin users for the database to review other user's emails forwarded. Select a user's name from the dropdown to review their unique messages.
 - By Default, the messages of the user logged in will display under "Me".
 - **Search**
 - This feature allows users to search for messages by name and subject.
6. The user will have the following options per message:
 - They can click  to view the complete message details forwarded.
 - They can click  to create a **Note** for the matched people record. From here, they can edit the **Note** details before clicking .



- They can click  to delete the message from the Julep Mailbox.

Matching Logic

When an email is sent to Julep use the MailBox Pickup Service the following logic is applied:

The Mailbox Pickup Service will first check if the sender's email address is found in the Julep user table.

1. If it is not found:
 - a. The message will be marked as "Invalid" and will not be processed further. User will not see the message in any database.
2. If it is found:
 - a. The tool will then check which database(s) the user has access to.
 - b. After, it will search for the original/first email recipient's email address with the People Records for each database matched.
 - c. If a match is found, then the message will be added to the user's "Julep MailBox".

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