

Configuring Bizeo to read values from an email

There are some situations where you receive metrics sent to you via email. For example, many banking systems include an option to have your bank balance emailed to you on a daily basis. Sales pipeline systems can send you regular emails giving you sales statistics, and a lot of device monitoring systems do likewise.

The way you normally handle these situations if you want to record the history of these metrics is to have somebody manually open the email, extract the data and type it in to a spread sheet. Fortunately with Bizeo there is a much better way.

Bizeo supports a facility where you can direct these emails to Bizeo and Bizeo will automatically read the emails, extract the metrics you are looking for and automatically record them within Bizeo. There are some limitations in this process. The emails must be sent in a reasonably consistent format (not changing dramatically each time) and some HTML-based emails may be too complex for Bizeo to read. However Bizeo can handle most email formats.

There are a few steps to setting up this process.

1. Configure your system or device to send you the emails.
2. Setup an external KPI within Bizeo.
3. Direct the email notifications to your Bizeo task.

Step 1

Before you can set Bizeo you need to make sure that the system you are getting the data from can send it to you via an email. Online banking systems often have an option to send you bank balances but this option needs to be set up in your online banking system. Other systems such as your frequent flyer program might already be sending you emails on a regular basis. Set the email notifications up and wait until you have received at least one email with the data you wish to capture.

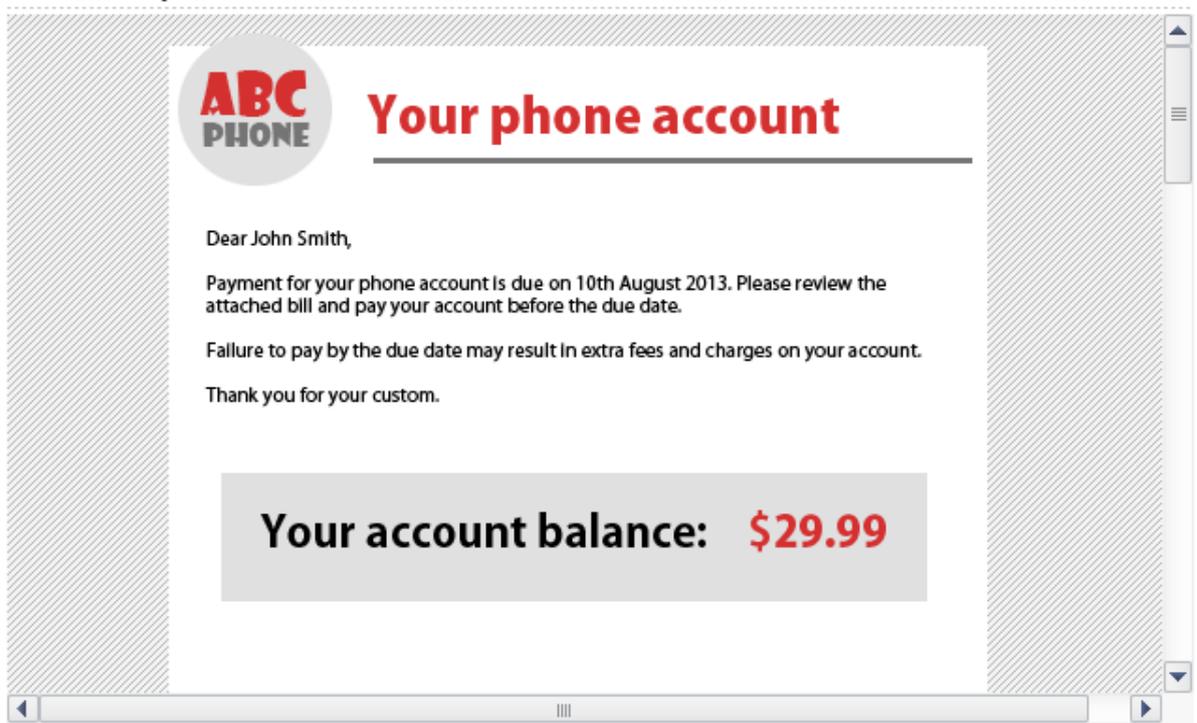
Your ABC account balance

ABC Phone Co. Limited <no-reply@abcphonecoltd.com>

 If there are problems with how this message is displayed, [click here to view it in a web browser.](#)

Sent: Sun 28/07/2013 10:02 PM

To: You@youremailaddress.com



The screenshot shows an email interface with a header area containing the sender's name and a subject line. The main body of the email contains a personalized message to John Smith, a payment due date of 10th August 2013, and a warning about late payment. A prominent grey box at the bottom of the email displays the account balance.

ABC PHONE **Your phone account**

Dear John Smith,

Payment for your phone account is due on 10th August 2013. Please review the attached bill and pay your account before the due date.

Failure to pay by the due date may result in extra fees and charges on your account.

Thank you for your custom.

Your account balance: \$29.99

Step 2

In Bizeo navigate to the folder you wish to create the KPI and click on Add new task. Enter the name of the KPI then select the drone 'Bizeo Cloud Drone', the data source 'External KPI' and the KPI 'Read email details'.

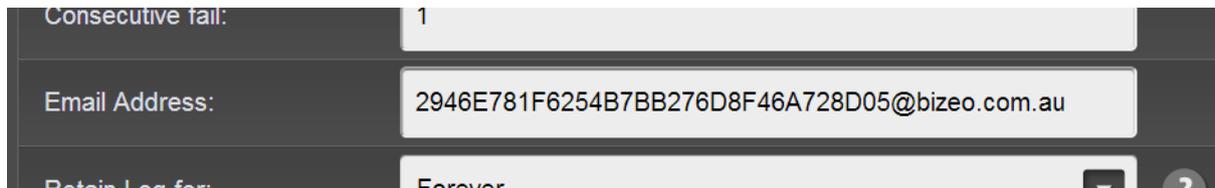
The Filter field allows you to check the subject line of an email to make sure that it contains certain words. For example, your phone company might send you many other emails other than just the account balance. If you examine the emails they are sending with the balance it contains the words 'Your ABC account balance' and so this can be used as a filter. It is not always necessary to use a filter.

The Text field value needs to be populated with a piece of text that will immediately precede the metric you are trying to capture. Again referring to the email example you will note the words 'Your account balance:' immediately precede the number we want to capture. Examine your email format for a similar piece of text that Bizeo can use as a reference.

Note that some HTML-based emails might not be laid out in a simple way e.g. just because a piece of text is being displayed above or to the left of the metric you wish to capture it doesn't necessarily mean it immediately precedes the metric in the body of the email. You need to find text which is physically before the metric you wish to capture in the email body. This might require you to review the HTML code behind the email.

Step 3

Save your task. Once the task is saved, go to the settings tab and review the 'Email Address' field. Copy this email address. You will need to configure your external system (bank account, phone account, device etc.) to send the notification emails to this email address.



Consecutive fail:	1
Email Address:	2946E781F6254B7BB276D8F46A728D05@bizeo.com.au
Retain Log for:	Forever

Some systems like banking systems might not be able to forward the emails to your Bizeo address directly. In which case in your email application set up an automatic email forwarding rule e.g. to forward all emails from your banking provider through to the email address noted in the previous step.

Other systems, particularly devices and other services will allow you to change their configuration so that their emails are sent directly to your Bizeo account.

That's all there is to it. As your emails are sent to Bizeo, Bizeo will interrogate them and extricate your metrics. Now you can track these KPIs automatically, recording their history and receiving notifications of issues automatically.