

Email Queuing Desktop SMTP

Offer your agents the ability to handle all contact center calls from Desktop regardless of media type. Email Queuing Desktop SMTP provides agents with the capability to handle their email queue calls from Agent Desktop. This provides them with consistency of operation for all media without any need to swap between separate applications.



Introduction

Bringing your agents' emails into Agent Desktop helps convert your email process into a contact center process, giving your agents the same standards and expectations and providing the same metrics that you use for all your contact center communications. It also means additional smarts, designed for contact center operation, can be applied that aren't available in an ordinary email application.

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Introduction

How does Email Queuing work?

Email Queuing provides full management and control of email traffic in a contact center environment. Emails can be queued and delivered to agents based on availability, workload and skill-set.

Calls are held by the Email queue on the UCB server and are delivered to agents only as they are ready to deal with them. Agents who are logged out, on a Break, or already dealing with calls¹, are not delivered emails until they become available. Once the email is delivered, if the agent takes too long to open the email, the UCB software pulls it back and puts it back into the queue mailbox ready to be delivered to the next available agent.

Your agents can be configured to handle as many concurrent queue emails as suits your situation.

All emails in these 'queues' are displayed in Agent Desktop as calls in a queue. Email queue 'calls' are displayed in exactly the same format as queued phone calls in Desktop. Once the agent opens the delivered email call Agent Desktop displays the agent as having answered the email. Agent Desktop continues to display the agent as being on the email call until the email is deleted or hung up. This provides further insurance against calls being lost and never dealt with.

UCB offers two options for Email Queuing:

- Email Queuing Exchange (for Microsoft® Exchange only)
- Email Queuing Desktop SMTP (for Microsoft® Exchange, GroupWise and Lotus Domino).

About the SMTP Interface

SMTP (Simple mail transfer protocol) is the standard interface for all major email applications.

UCB's Email Queuing Desktop SMTP supports Lotus Domino, GroupWise and MS Exchange

¹ Multimedia call delivery rules are configurable by agent class which determines which media types will be delivered and how many concurrent calls an agent can handle.

using the SMTP Interface. This eliminates any requirement to integrate NEC's Unified Communications for Business (UCB) with the customer's email platform and offers non Microsoft® email customers the ability to handle their email queuing entirely from Desktop.

As a fully integrated module of UCB, Email Queuing Desktop SMTP applies all the skills-based routing and queuing parameters of UCB to Emails allowing your contact center agents to treat emails in the same way as phone calls.

Email Queuing Desktop SMTP is fully integrated into UCB's comprehensive reporting package, ensuring that contact center managers have a complete picture of all customer contact, regardless of the medium used

Business Drivers

- NEC is able to offer Microsoft® and non Microsoft customers (e.g. Lotus and GroupWise) an easy to install and easy to use solution for Email Queuing.
- Platform independence is available.
- Agents handle email queue calls using only Desktop rather than having to switch between their Desktop and Email applications.
- Call delivery screen pops are standardized. I.e. an email call will pop Desktop just as a phone call does.
- Agents are provided with consistency of operation regardless of the call's media type.
- Agents do not require a personal email account to handle email queue calls as all functionality is handled within Desktop. This will offer a significant benefit to customers who do not want to allocate personal email addresses to agents.

Features and Benefits

Core Features

- All the functionality of UCB such as skills-based routing, reports, operating modes, etc. are available inside Email Queuing Desktop SMTP.

- Agents can manage all emails from email queues using Agent Desktop.
- Agents can compose new emails and choose whether to send the email from a queue or selected personal email account².
- Email Queuing Desktop SMTP offers a single administration interface for setting up agents for dedicated or blended delivery.
- Automatic archiving of queue emails.
- Agents' replies to queue emails are included in the Contact Center analogy, and are tracked and reported in the same way as inbound emails.
- Automated text announcements set by a queue's mode.
- Detailed reporting of all aspects of the Email "call".
- View emails currently awaiting delivery including sender information, how many emails are waiting, the longest wait time and more.
- Blending with all media types: Agents can be configured as dedicated email-only agents, or handle a wide variety of blended media types.
- Like all of UCB's core modules, Email Queuing Desktop SMTP is controlled by a full set of Security permissions and restrictions set by the central administrator.
 - A central repository of custom templates can be created by a system administrator. In addition agents can also create their own templates within Desktop³.

Core Benefits

Email Queuing Desktop SMTP offers some unique benefits:

- Skills-based routing ensures that emails are directed to the agent best able to handle them, in the same way that calls are. This

improves customer service and reduces handling time.

- Agents handle email queue calls entirely from Desktop rather than having to switch between applications.
- Agents choosing their personal email account⁴ as the "from" address enables them to direct the customer reply back to their personal email address rather than to a queue.
- Administrators can archive to any email system that their server can send an email to enabling them to keep additional copies of queue emails. They can choose to archive emails in the following states: when it arrives in the queue, when it is forwarded or when it is replied to. In addition to archiving options all conversations can be accessed by the Reports Media Viewer (included).
- Mode announcements offer the option to send an automatic message back to a caller as soon as their email arrives in a queue. This feature helps preserve customer satisfaction particularly if there is likely to be a delay in the caller receiving a reply, for instance - outside business hours.
- Email traffic can be reported on for contact center performance analysis. This allows supervisors and managers to apply standard contact center analysis to this media type.
- Delivery and blending options allow managers to customize how emails are delivered to best meet their particular environment.
- Customized security per agent allows an Administrator to manage the many different functions an agent can access, for example - the ability to send a new email, create personalized templates, pick up email calls from other agents etc.
- The use of standard templates guides agents in their replies, ensuring targeted responses that comply with the contact center's communications standards.

² The ability to select a personal email account as the from address is dependent on the user's security permissions

³ An agent can only create personalized templates within Desktop if their security permissions allow

⁴ The ability to select a personal email account as the from address is set by the Administrator

Additional Features

- Standard email functions from Agent Desktop such as view, reply, forward, cc, bcc, transfer, create new email, hold, save and print are available using the functions of Email Queuing Desktop SMTP.
- Queue and agent email data is reported using UCB's Standard Reports module (included).
- Supervisors and agents⁵ can view both details and the associated conversations of previously handled emails via the Reports Media Viewer.
- Per queue parameters which control sending and receipt of email attachments, such as blocking them altogether, allowing up to a maximum size⁶ or restricting attachments of a certain type (e.g. an executable).
- Agent Desktop provides an attachment indication and allows the agent to choose whether to open or save the attachment.
- Agents can save an email in the following formats: .eml, .html, .txt
- When agents reply to emails from the queue, they can alter their sender address and choose between their personal email address⁷ and any queue they are currently logged in to.
- Customer replies can be delivered back to the original agent that handled the email using their individual (non UCB) email account, back to the next available agent in the queue or the system can attempt to deliver the email to the most recent available agent.
- Agents can include attachments with new emails or replies.
- Wrapup (call resolution) information for email calls can be performed via Agent Desktop.
- Based on Security permissions, agents can use Demand to request immediate delivery of a specific email in the queue or an email already delivered to another agent.
- Last called agent functionality which attempts to deliver emails to the most recent available agent that answered an email from each CLI.
- Last called information agent for a specified number of previous calls can be displayed within the delivered email.
- Preferred agent functionality which allows administrators to select one or more agents who will be preferred for delivery of emails from each CLI.
- Transferring agents can select a recall option to recall the email if the destination agent fails to answer within a specified time.
- Within the Agent Desktop Email window, agents have a toolbar, providing Answer, Transfer, Hold, and Hangup functionality. The current state of each email is represented by a customized Email Queuing icon.
- Queue emails can be transferred to another agent – even if they are not currently logged in, or to another Email Queue, with the option to include transfer notes. These transfer notes are incorporated in Reports.
- Supervisors can view the current status of each agent, call and caller information for an agent's calls of all media types (whether answered or not), log agents in and out of queues, allocate Worktime, pick up an email from agent even if the agent has already answered it and more.
- Auto logout of agents which ensures emails do not remain unopened longer than the acceptable wait time. An agent is automatically logged out, or placed on a Break or Worktime, as pre-specified by the Administrator and the unanswered email delivered to the next available agent.
- Configurable settings allow contact center managers to determine delivery rules for agents for each media. E.g. handle one contact at a time, or five emails, three faxes and one phone call etc.

⁵ The ability to launch the Media Viewer function is permitted by a user's security settings

⁶ The system will allow the inbound attachment size to be configured to a maximum of 10Mb.

⁷ An agent is able to select their personal email address only if they have an email account on their (non UCB) Email server and if security permissions allow.

- New Agents and Queues can be dynamically added without the need to restart any applications.
- Hard-to-spot configuration errors, for example incorrectly formatted Email Addresses etc., are reported back to the Administrator immediately.
- Emails can be automatically archived to a local or off-site email address specified and/or viewed in the Reports Media Viewer, which can be launched within the Reports application or within Agent Desktop⁸.
- Email Queuing Desktop SMTP is included in UCB's comprehensive Online Help for both Agent Desktop and UCB Administrator.
- Detailed reporting of all facets of the email call. For instance, the time an email waited for answer, the time the agent took handling the email, the time it was completed and so on.
- Agents can add notes to the email call even once the email is completed. These notes are incorporated in the Reports Media Viewer.
- Agents can choose to answer multiple queue emails at once, or answer each individually – up to the maximum number set.
- UCB provides a fully integrated single solution for voice and email contacts.
- Centralizing email management assists managers to set and then achieve a consistently high level of response times and customer service levels.
- Customer service and sales revenues can be dramatically improved by offering online customers the ability to contact a representative directly.
- Wrapup information can be analyzed which assists in the management of both the contact center and the business
- Last called agent and preferred agent delivery assists contact centers to manage their customers more effectively by directing repeat callers to the agent or agent groups they have dealt with previously.
- The ability to transfer an email to another agent even if they are not logged in means callers can be directed to the most appropriate agent skilled to handle their email call. Recall timers ensure emails do not remain unanswered if an agent has not responded within the specified time.
- Configurable delivery settings can be automated by time of day, day of week or manually activated which assists supervisors to more effectively manage busy periods.
- The ability for a supervisor to view and retrieve an email from an agent even once the email has been answered ensures that callers can still be responded to when an agent is absent.

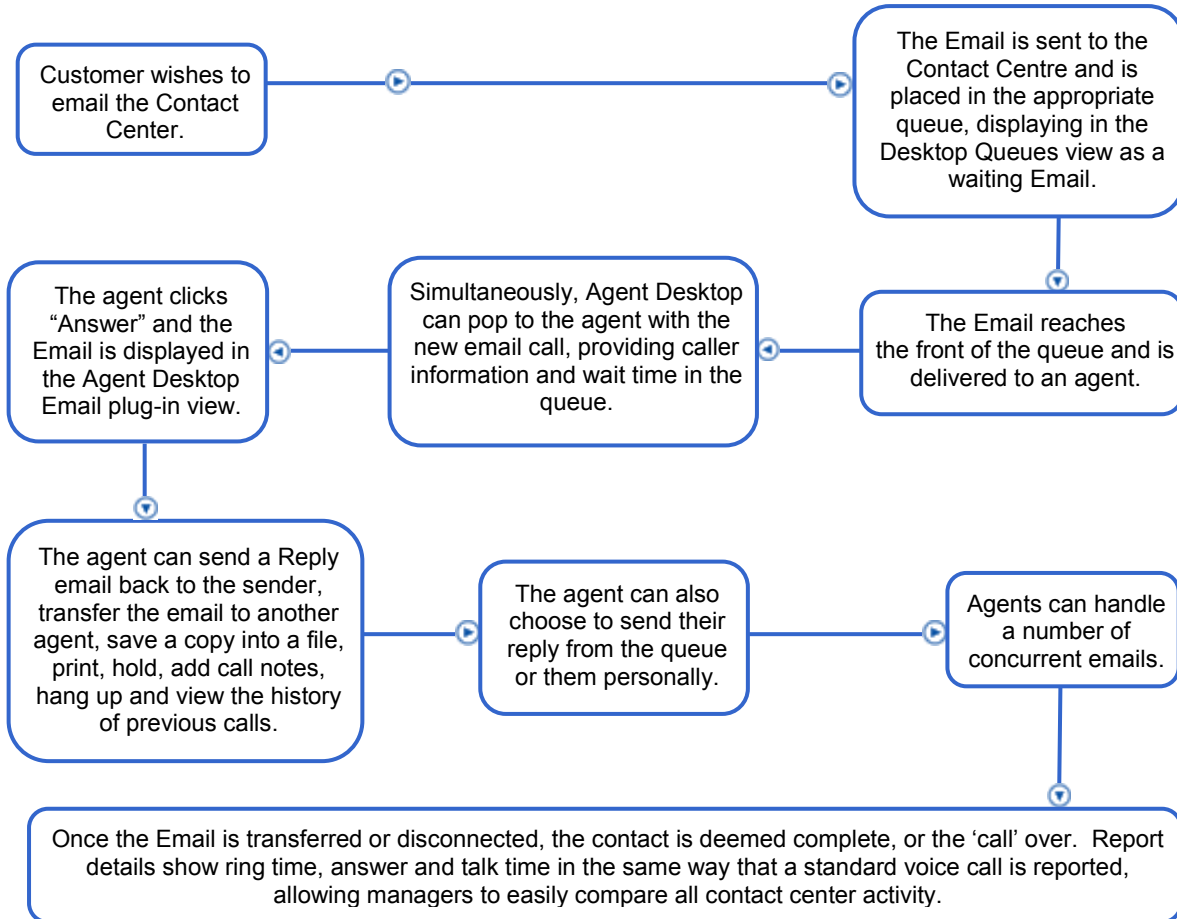
Benefits

- Email Queuing Desktop SMTP is easy to use for both the customer and the agent, saving the time and expense associated with training.
- Queuing of emails with automatic delivery to the next available agent improves response times.
- An agent's ability to view the details of previous conversations with the caller allows them to handle emails more proficiently.
- The efficiency of the queue is maintained, as workload is evenly distributed throughout the contact center.

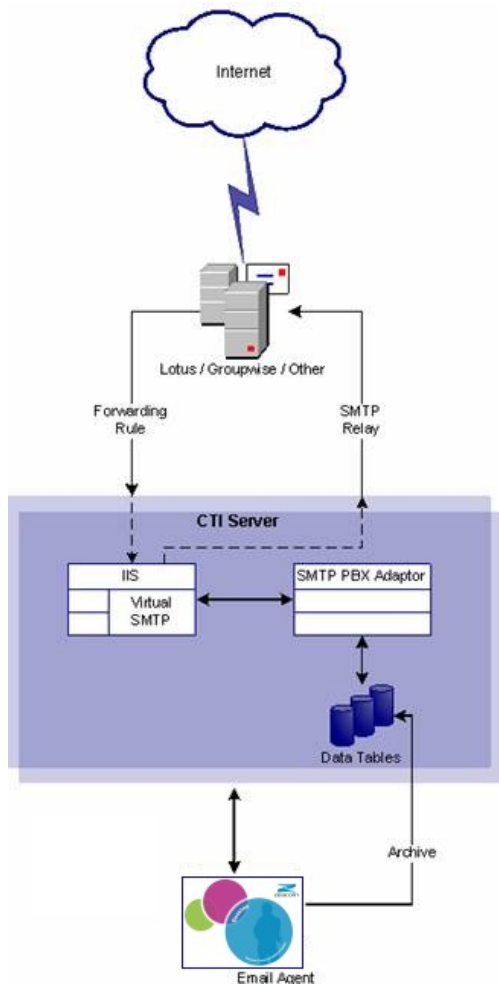
⁸ The ability to launch the Media Viewer is allowed by a user's security permissions

The Email Queuing Desktop SMTP Process

The following is a typical example of the Email Queuing process:



Physical Architecture Overview



Requirements

Email Queuing Desktop SMTP requires Microsoft® Windows 2003 Server on the CTI Server which must stand behind a customer site email server for Virus and SPAM protection.

For Microsoft® Exchange Email platforms the Email Server also requires Microsoft® Exchange Server 2003 as a minimum requirement.

The Email Queuing Desktop SMTP process in brief

Emails sent to the customer's Email Server use forwarding rules to redirect the email to an internal address on the UCB Server.

Emails arriving at the queue are treated as new calls, then queued and delivered to agents as they become available. The subject of each email and a list of any file attachments are displayed in Agent Desktop.

The agent handles the email call in Agent Desktop using the Email window.

Emails in Agent Desktop

Notification of Incoming Emails

Features

As an email arrives at the contact center, it is queued, waiting for delivery to the next available agent.

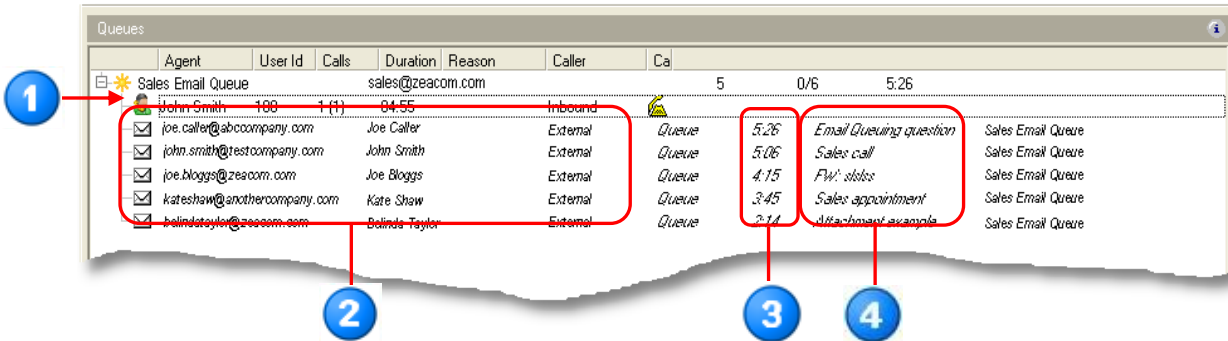
- Agents can be configured to handle just emails, or to take a blend of multimedia and phone calls.
- Agents and managers can view waiting emails via the Agent Desktop Queues View screen (see example below).

Benefits

Viewing emails using Agent Desktop has several benefits:

- By showing all waiting emails in the queue, managers can see at a glance how many are waiting and which agents are available to handle them.
- Emails from recognized contacts can be selected for immediate delivery by the appropriate agent.

Example: Queues View in Desktop



- 1 Agents appear under each queue they are logged into
- 2 Caller Information including whether the call is external or internal
- 3 Current wait time in the queue
- 4 Subject line of the email

Email Delivery to Agent

Features

When the email is delivered to an agent:

- Agent Desktop will display the details of the email, such as the sender's name and how long it has been waiting in the queue.
- Agent Desktop can be configured to pop to the front of any open applications.

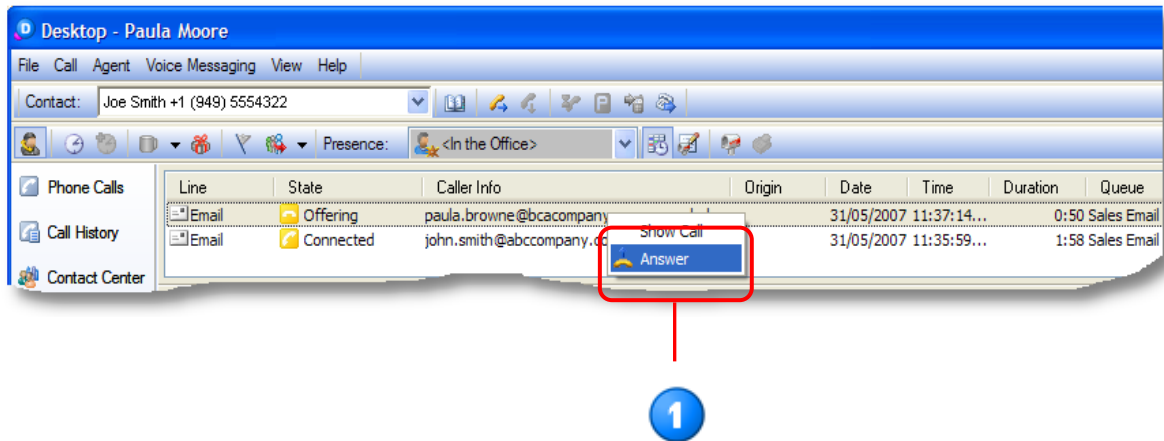
Benefits

The benefits of delivering emails in this way include:

- Email queue calls are shared between available agents, distributing their workload equally and efficiently.
- Automatic delivery and the use of screenpops save the agent time.

Example: Delivery to an agent

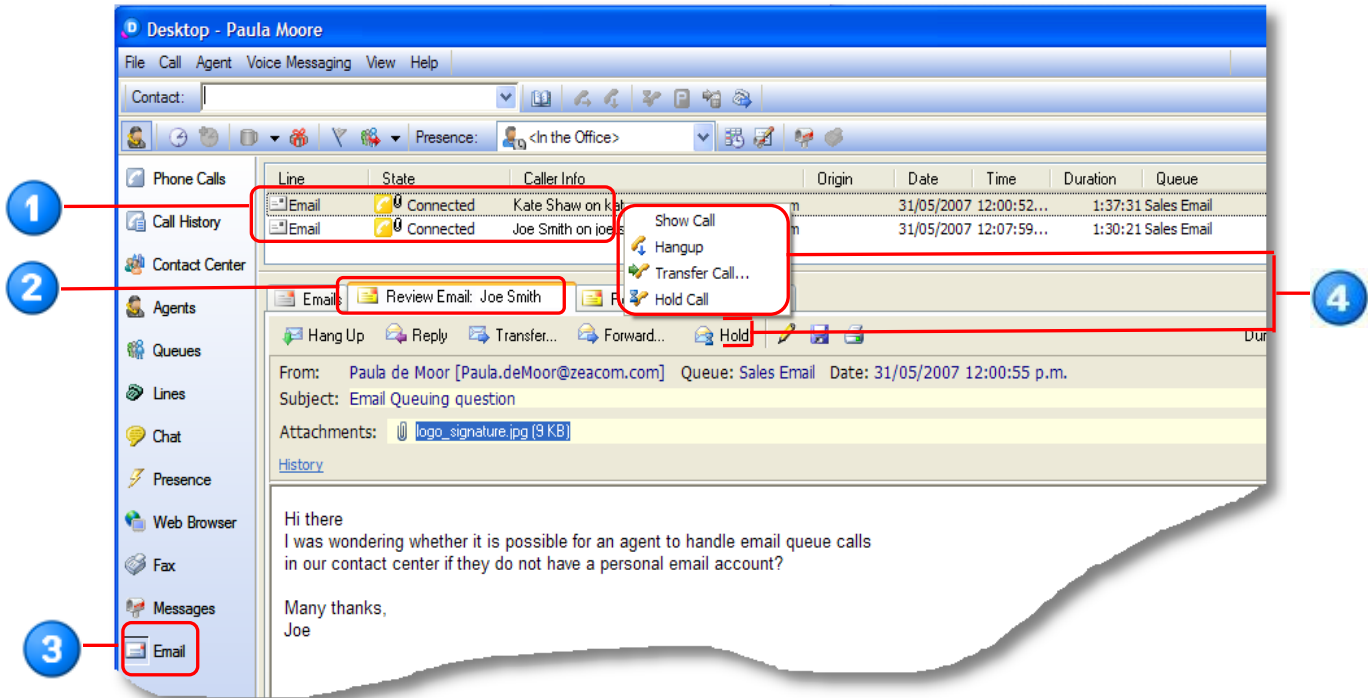
The agent can answer the email contact from the Active Calls window (as shown), or choose to answer using the Email window.



- 1 The agent can use the right click option (as shown), or double click on the email to answer.

The Email window

Example: Review Email



In this example the agent is handling two email calls concurrently (emails are identified by the envelope icon). The number of concurrent calls (for any media) an agent can handle is set by the system administrator.

Each email the agent is handling has its own tab in the Email window. The agent simply clicks on the tab to review each email. Emails are available to be reviewed even once the agent has hung up.

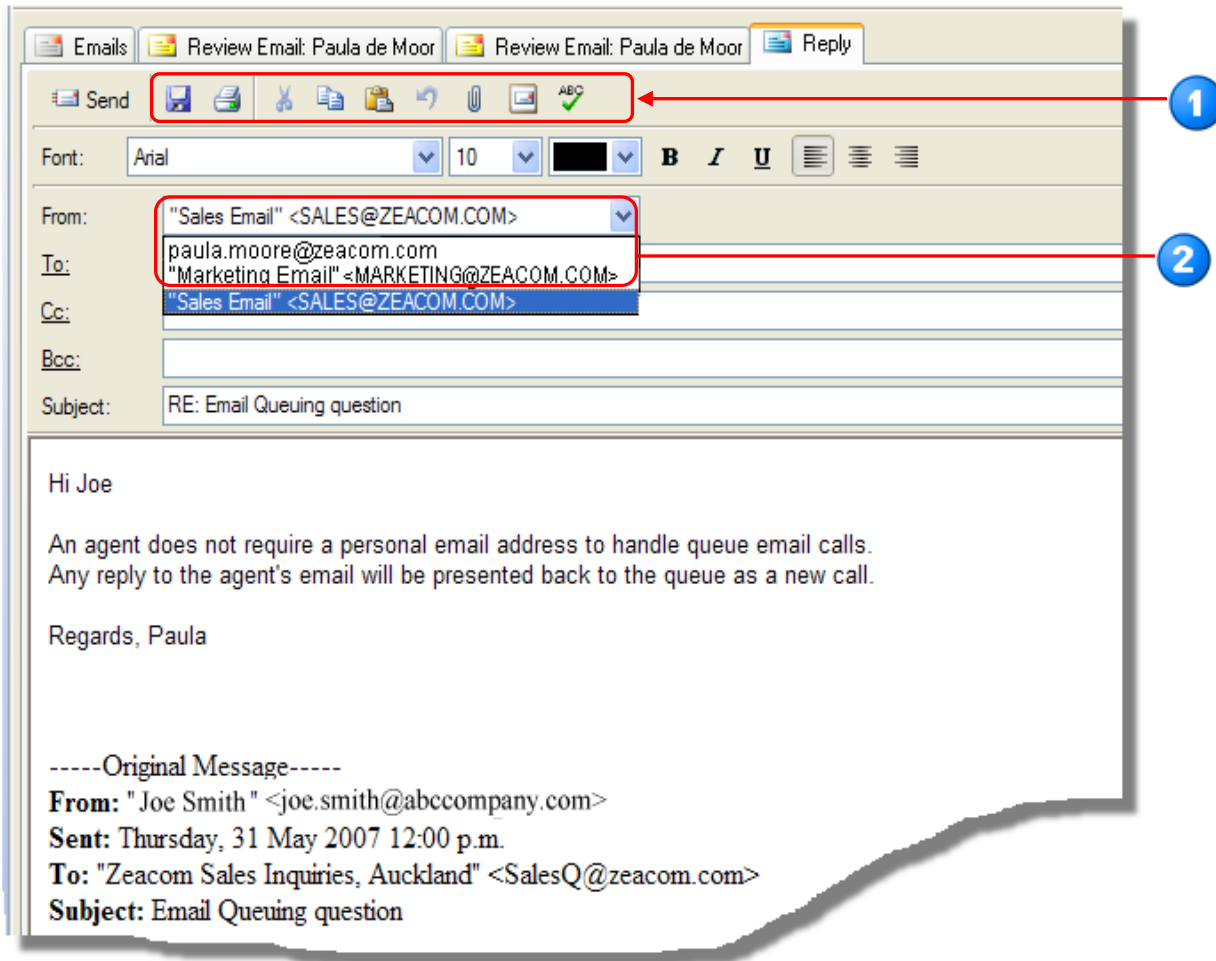
Clicking on this object activates the Email window for the agent to handle email calls.

The agent can hang up, reply, transfer, forward, hold, save or print the email (by clicking the appropriate button or right clicking on the call in the Active Calls screen).

Email Queuing Reply

Agents can immediately reply to emails delivered to them from email queues.

Example: Replying to a queue email



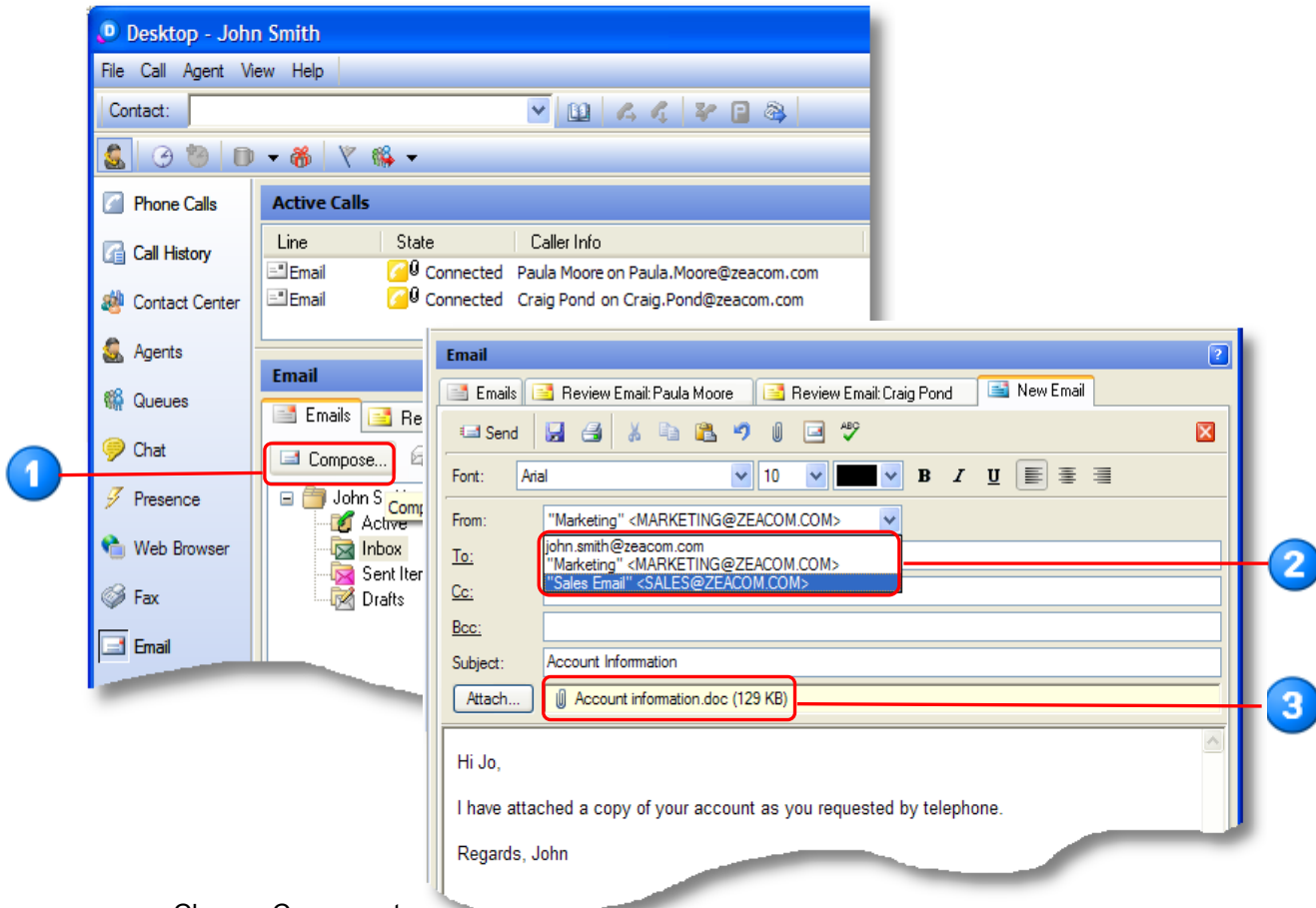
1 Save, Print, cut, copy, paste, undo and spell check buttons are available. An agent can include an attachment of up to 2MB. These limits are set by the System Administrator.

2 The agent can choose whether their reply is sent from the queue or their personal email address (if the agent has a personal email account). The ability to do this is set by security permissions. All queues the agent is logged into are available as the reply from address.

Compose new outbound email

An agent can generate new outbound emails from within the Desktop Email window.

Example: Composing a new email



1 Choose Compose to "New Email" tab within the Email window.

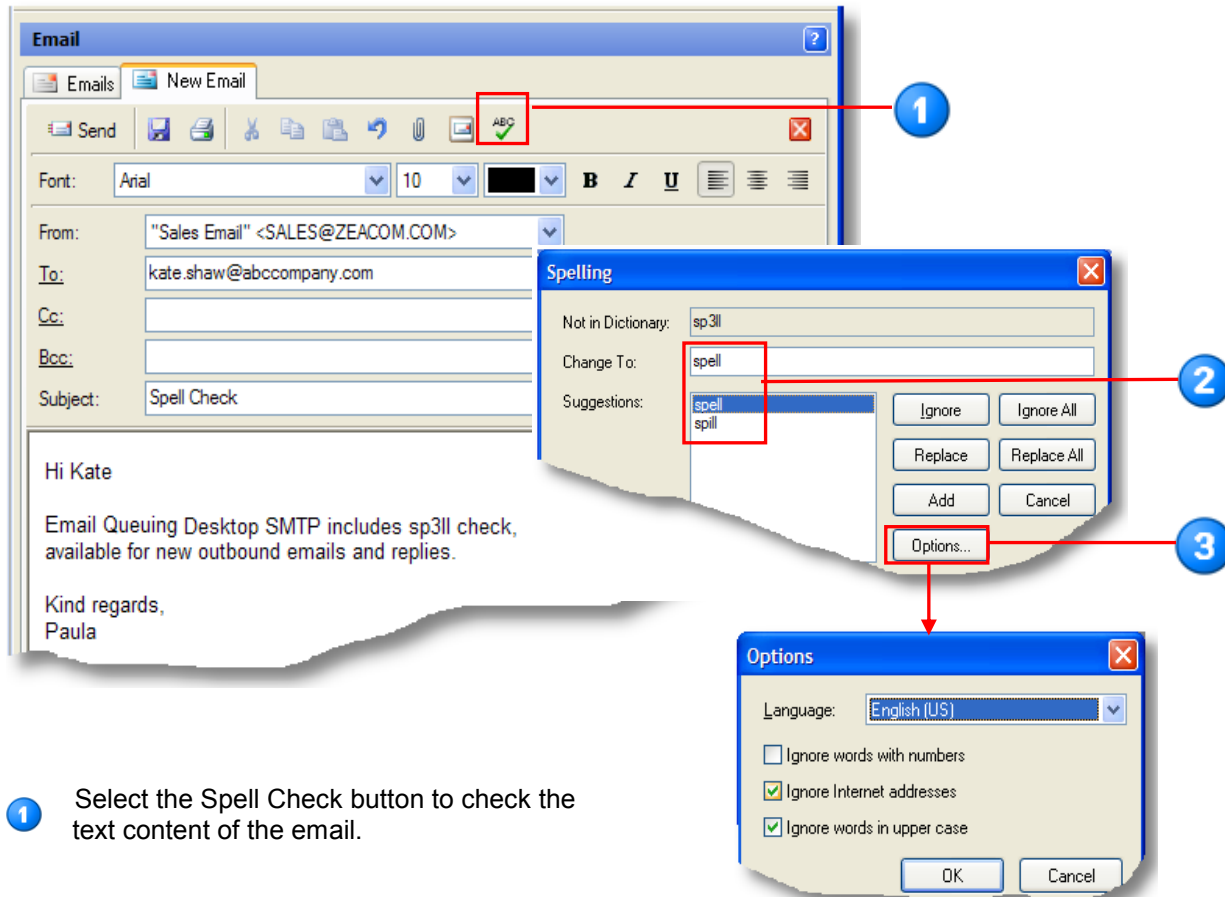
2 Select the queue the email is to be sent from (an agent can choose any of the queues they are currently logged into or their personal email address⁹).

3 The agent can include attachments with replies or new emails up to 2MB in size).

⁹ An agent must have a personal email account and appropriate user security permissions to select a personal email address

Spell Check

Example: Spell Check

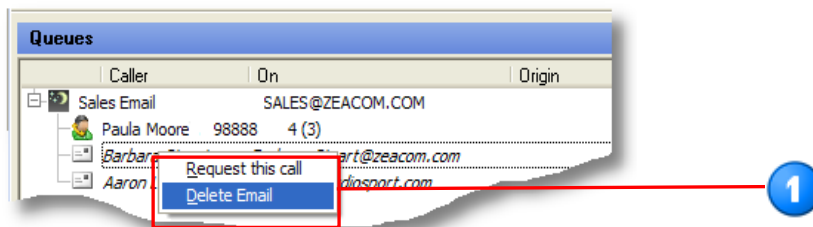


- 1 Select the Spell Check button to check the text content of the email.
- 2 Choose the appropriate suggestion or enter the correct spelling manually.
- 3 Each agent can customize their personal spell check options by selecting the Options button within the Spelling window.

Manage Junk Emails

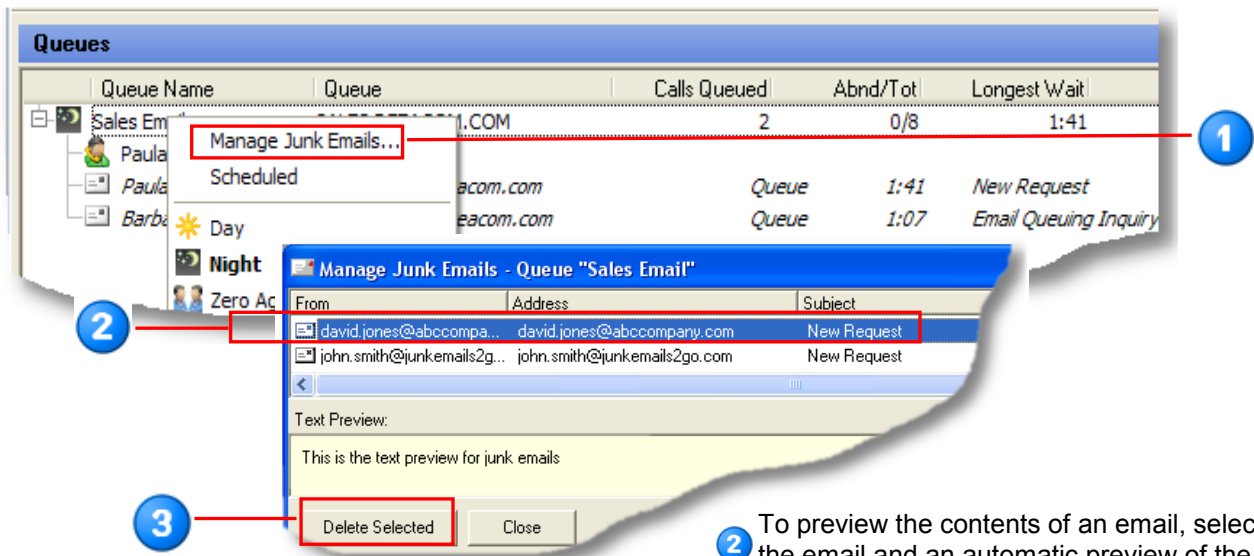
Agents with appropriate security permissions can delete junk emails from email queues without the need to log in. Using Manage Junk Emails removes the emails from the queue statistics, both in Agent Desktop and Reports. These emails can be viewed and recovered (represented to the queue) if necessary by users with appropriate security permissions.

Example: Delete Single Junk Email



- 1 Right click on the email you wish to delete and choose Delete Email.

Example: Deleting Multiple Junk Emails



- 1 To remove junk emails from the queue select Manage Junk Emails by right clicking on the queue.

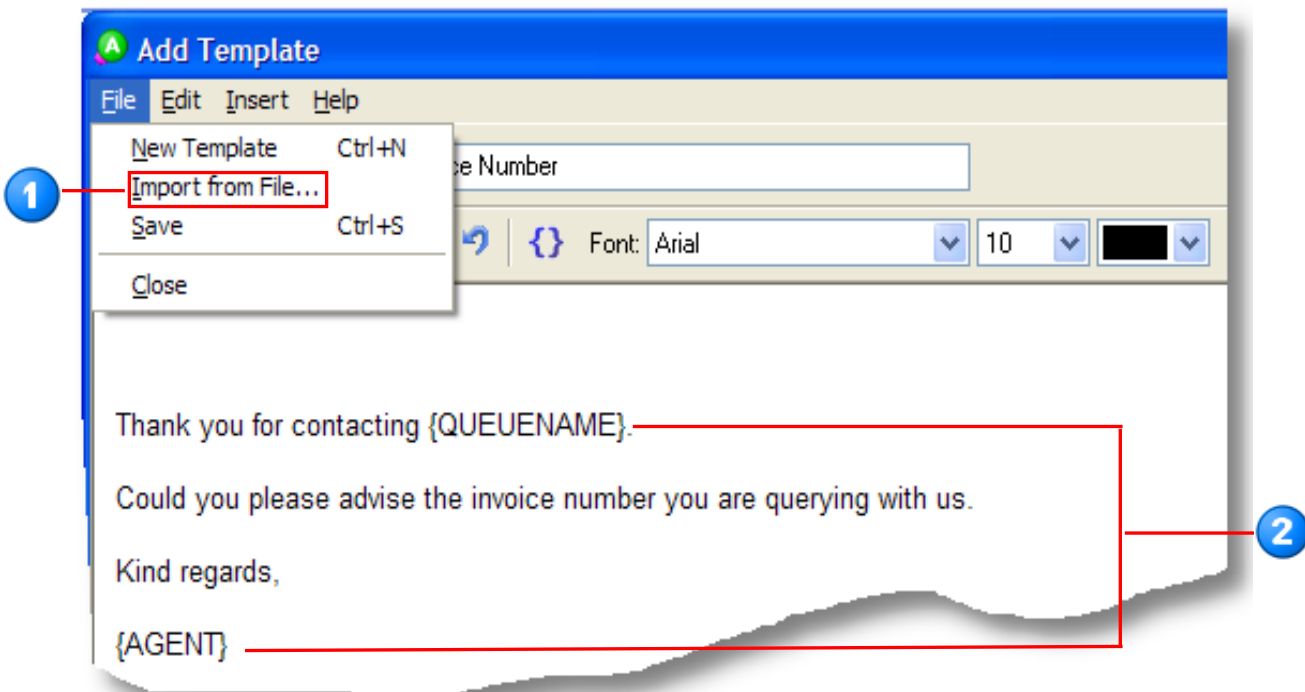
- 2 To preview the contents of an email, select the email and an automatic preview of the contents is displayed in the Text Preview pane.

- 3 Click the Delete Selected button to delete the selected (or multiple selected) email/s to be removed from the queue.

Email Templates

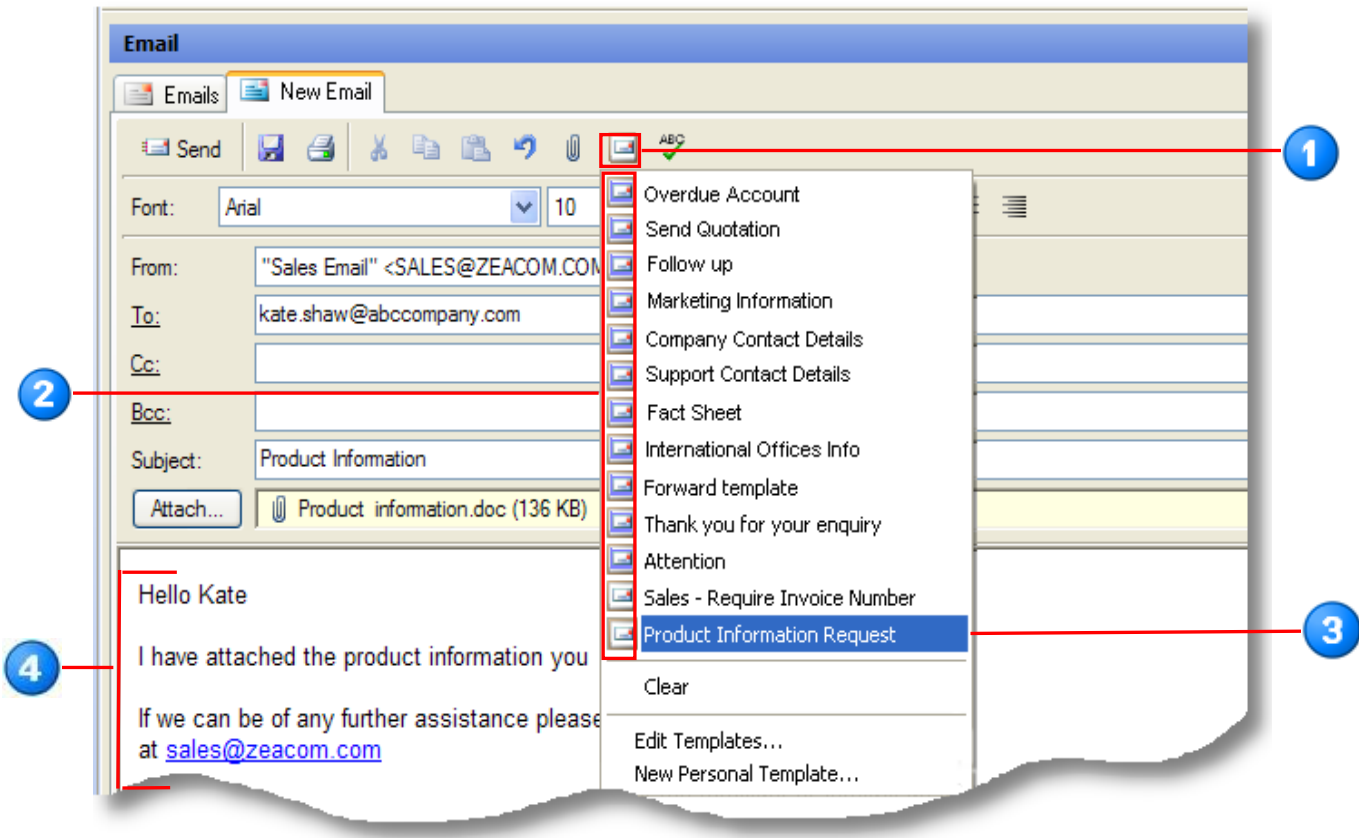
Global Templates can be created and assigned to inbound email queues for agents to use when composing, replying to and forwarding email calls. In addition, agents with appropriate security permissions (configured in Administrator) can create their own Personal templates from Agent Desktop.

Example: Add Template



- 1 When creating a Personal template you can import a template from an existing file.
- 2 You can also insert automatically populated fields into a template

Example: Choosing a Template for a New Email or Reply



- 1 Select the Template button to activate the drop down list of available templates.
Agents can choose from the Global templates or any personal templates they have created¹⁰, which are identified by different icons.
- 2 Choose the template you wish to insert into the Email body.
- 3 The Template is inserted into the Email body.

¹⁰ The ability to create personal templates is set by a user's security permissions

Media Viewer

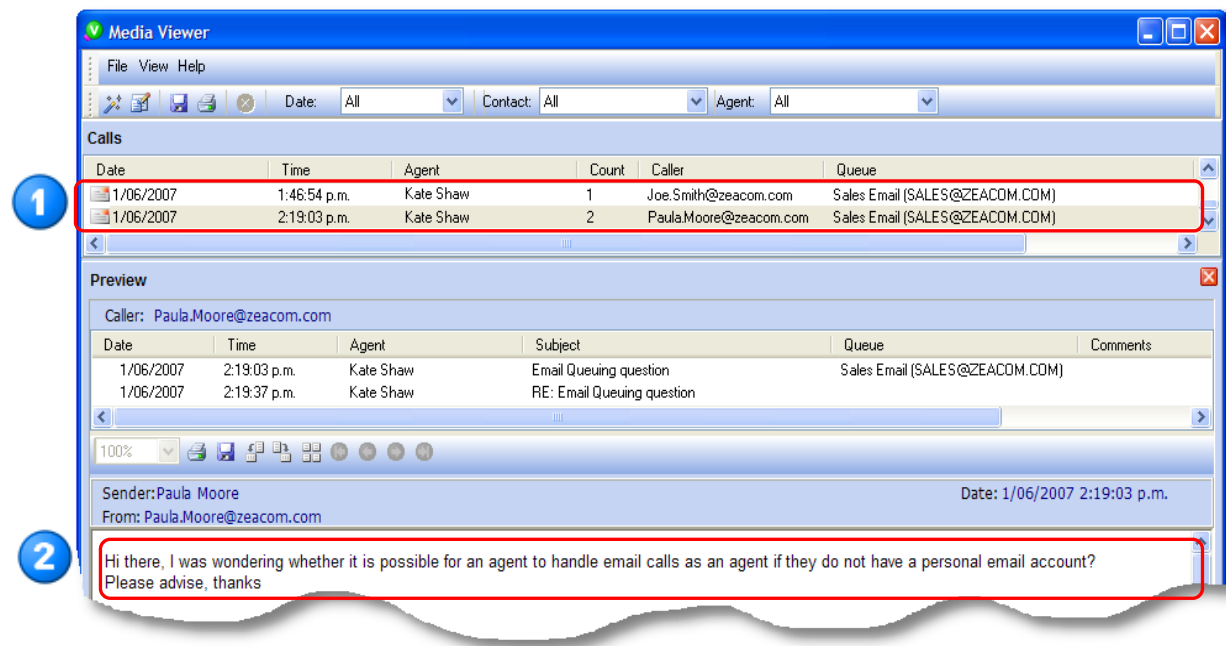
Features

The Media Viewer allows supervisors to view details in and about previously handled multimedia contacts as well as the content. Launched from the main Tools menu, this application provides the ability to review details of chat, email, and fax conversations.

- Media Viewer allows you to go back and review the “conversations” that occur for specific call media.

The Media Viewer is divided into two areas, the Calls window and the Preview window, shown in the example below.

Example: Reports Media Viewer



Benefits

Media Viewer is both the “safety net” and “filing system” for a paperless office.

- Supervisors can attend to customer complaints relating to 'missing' faxes easily by utilizing the central media viewer tool.
- Fax traffic becomes yet another medium that can be reported on for contact center performance analysis.

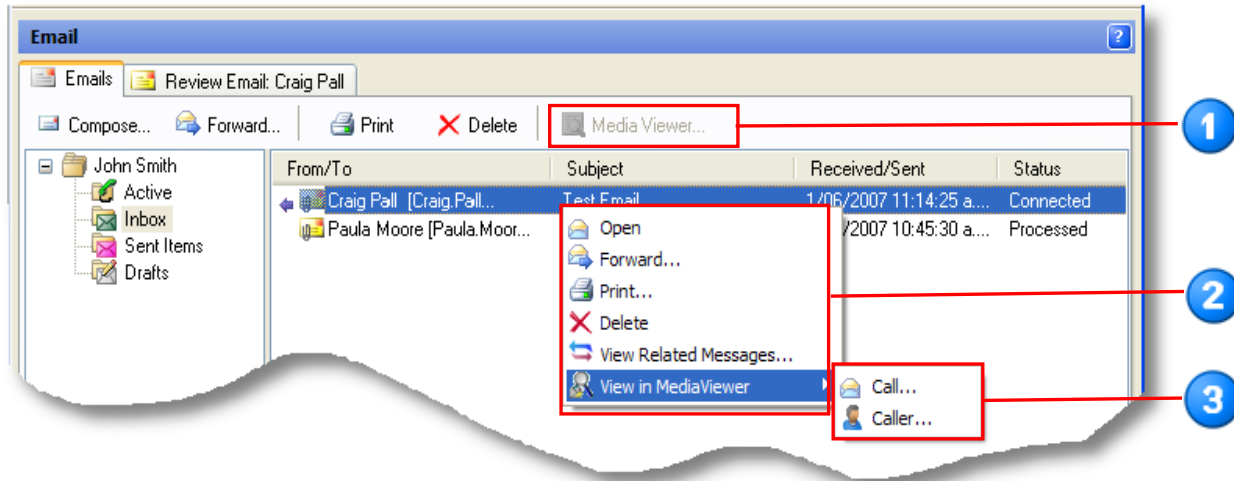
1 The Calls window lists the calls (based on search criteria), providing an overview of the call details: the agent who answered the call, Caller ID (Email address) and queue name/number that the call was delivered from.

2 The Preview window shows specific “call” information, i.e., in the case of Email Queuing; they can view a copy of the email.

Media Viewer Access from Desktop

Selected agents¹¹ can access the Reports Media Viewer from Desktop, allowing them to review previous email queue conversations.

Example – Launching Media Viewer from Desktop



1 Agents can access the Media Viewer using the Media Viewer Button in the Email screen.

2 Media Viewer is also available by right clicking on an email in the Email tab.

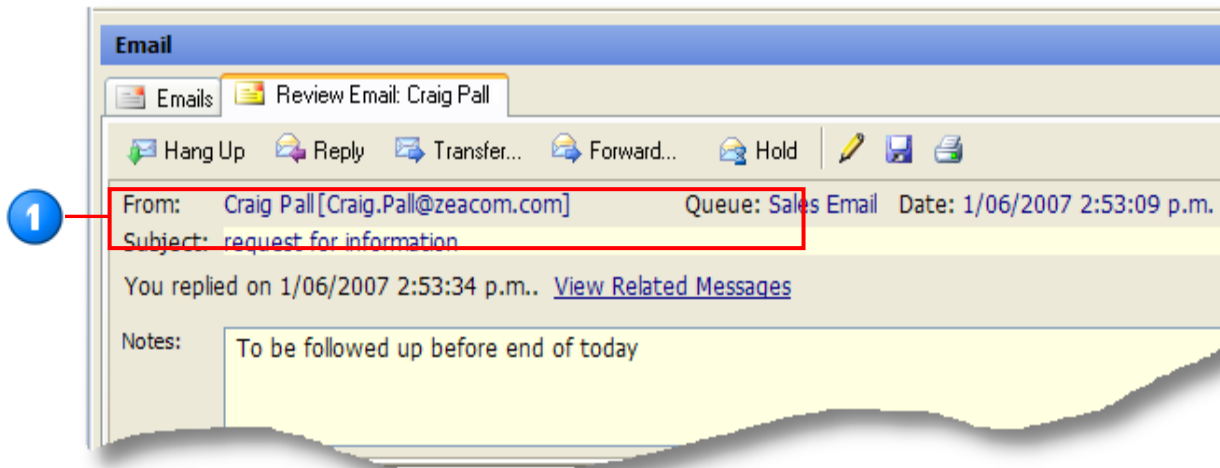
3 Agents can search for all related messages for the current email (Call), or select Caller to search for all emails related to the caller within a specified date range.

¹¹ An agent's ability to launch the Media viewer and/or view conversations for other agents is controlled by their user security permissions.

Last Reply Information

To prevent busy agents from sending a reply to an email that has already been replied to, the **Review Email** tab displays the reply information.

Example: Last Reply Information Display



- 1 The last reply information is shown. Click on [View Related Messages](#) for a list of all associated emails.

Email Folders

Email Queuing Desktop SMTP features folders that assist an agent to easily manage their email calls and quickly access them.

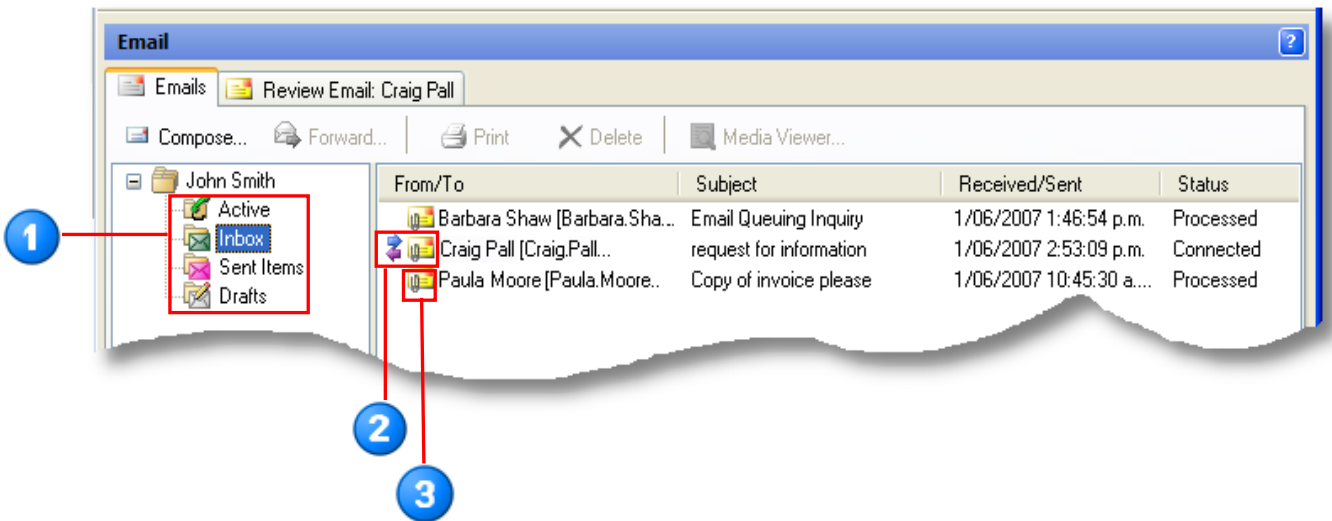
The **Active** Folder contains all inbound emails currently Active.

The **Inbox** Folder contains all inbound emails not yet deleted by an agent, including both active and completed (hung up) emails.

Sent email messages are saved under the **Sent Items** folder, including replies, forwards and outbound emails.

The **Drafts** folder contains email messages currently being composed not yet sent, allowing an accurate measure of handle time from the time the agent selects compose, forward, or reply to when the agent presses send.

Example: Inbox Folder

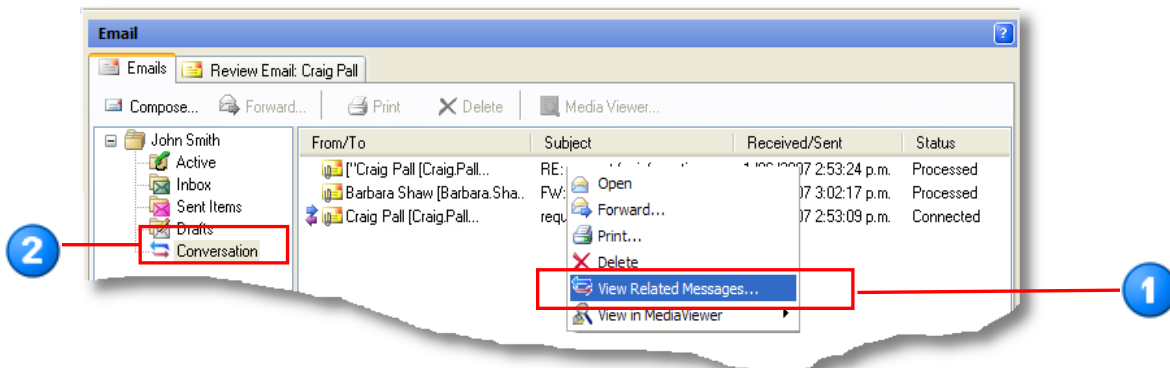


- 1 Select the appropriate folder to view its contents.
- 2 Arrows indicate whether the agent has replied or forwarded an email. In this example the agent has done both.
- 3 The paperclip indicates an attachment.

View Related Messages

Email agents can review previous communication between specific agents and customers through a **Conversation** thread generated by the **View Related Messages** option in their Email screen.

Example: The Email Conversation view

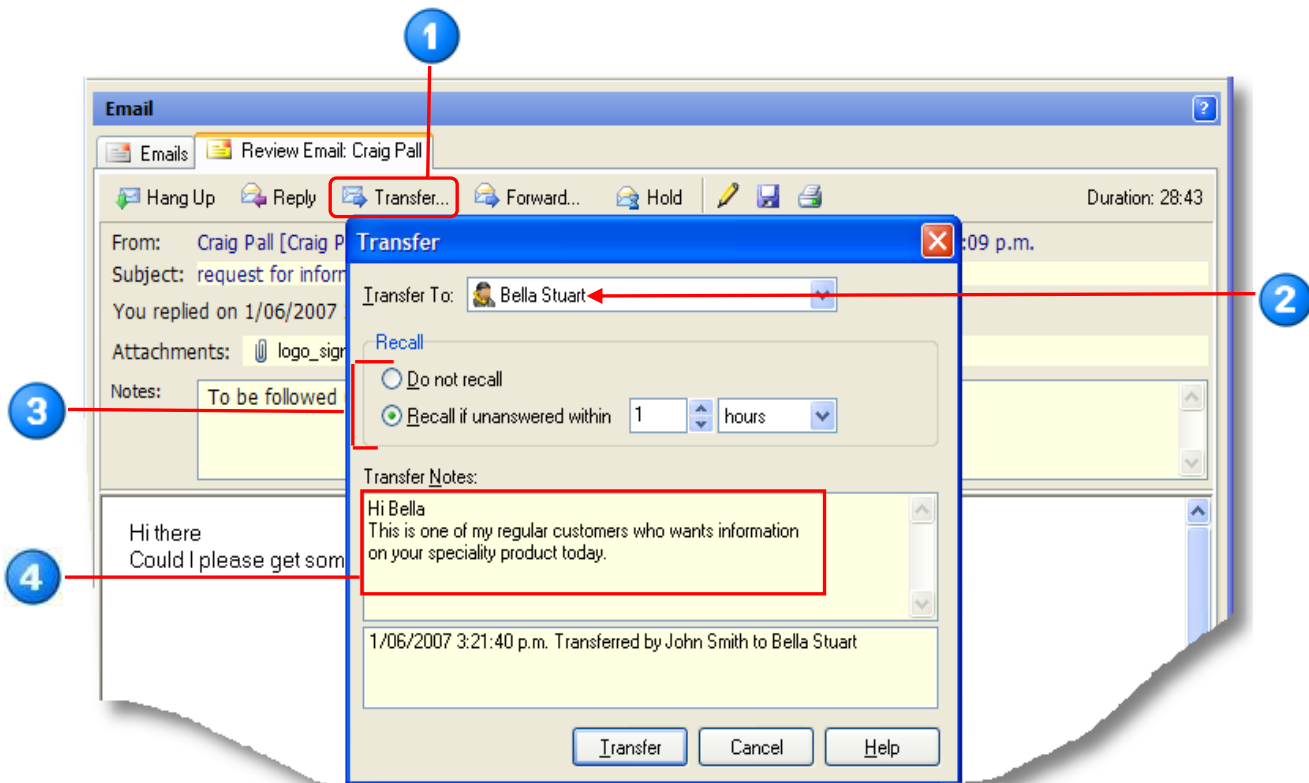


- 1 From the **Emails** tab, right click on an email from either your **Inbox** or **Active** view. Choose **View Related Messages** to display all messages related only to the conversation thread for the email you have selected.
- 2 The conversation thread displays in the **Conversation** view.

Transfer an Email

An agent can transfer a queue email call to any other email agent, including agents not currently logged in.

Example: Transfer to another agent



- 1 The agent selects the transfer button to transfer the email
- 2 Select the agent to transfer the email to from the list of available logged in agents (including agents on a break)

Agents can choose whether they wish the email to recall if it is not answered by the agent they have transferred the email to. They can also choose how long the email will wait for the other agent before recalling to them. If the transferring agent is still logged in when the call recalls it will recall to them, otherwise it will recall to the queue.

Transfer notes can be optionally included for the new agent. These notes are not included in the reply email to the customer; however an agent can use copy and paste functions to include them if required.
- 3
- 4

Queue Traffic Comparison	Call Type Analysis	Agent Historical Average
Queue Service Level	Wrapup Code	Agent Setup
Queue Multimedia Report	Agent Wrapup Code	Queue Setup
Agent Performance	Queue Wrapup Code	Wrapup Setup
Agent Activity	Queue Historical	Delivery Pattern Setup
Agent Summary		

Reports

Reports Features

Reports offered for Email Queuing Desktop SMTP and Email Queuing Exchange fit within the standard Reports structure, allowing managers to compare activity and performance across all agents and media in the contact center.

The following standard reports are available for use with Email Queuing:

Reports valid for use with Email Queuing

Queue Performance	Agent Multimedia	Queue Historical Average
Queue Traffic Analysis	X Seconds	Agent Historical