

Volume

3

**TECHNOLOGY FOR BUSINESS**

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Administration of Agent eMail for TFB Media Server

# Agent eMail Administration

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CORPORATE COMMUNICATIONS

# Agent eMail Administration Manual

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# Agent eMail Overview

*This manual presents a description of the administration procedures related to Agent eMail.*

**T**he TFB *Media Server* is the standard Windows based server platform required to run Agent eMail. Agent eMail application provides convenient, rules-based routing that gets email to the right agents, while “blending” email messages with phone ACD phone activity.

Email messages are received by Media Server, identified, and routed to individual agents or agent groups (splits). Email messages are queued, and delivered to the agent desktop. Simultaneously, the agent’s telephone is placed in a designated ‘break’ mode to prevent the phone from ringing while the agent handles the email. By designating a ‘break’ mode for email contacts, ACD reporting accurately reflects agent email activity.

TFB’s multimedia approach means email messages are treated like other forms of customer contact, so agents easily handle email interspersed with other forms of customer contact.

## Agent eMail Architecture

Agent eMail does not replace your existing email server, it works in conjunction with it, taking mail from designated accounts and assigning it to queues and then to the agents logged into those queues. Mail is sent using your existing SMTP server.

The TFB *Media Server* is the standard Windows based server platform required to run Agent eMail. Note that any combination of Agent eMail, Agent Chat, ACD Reports may be run on the same server.

## Agent eMail Configuration Process

Agent eMail is administered and configured using the TFB Configuration Tool. You can make configuration changes with the system in production and post them instantly.

Using the Configuration Tool there are several main areas that relate directly to Agent eMail.

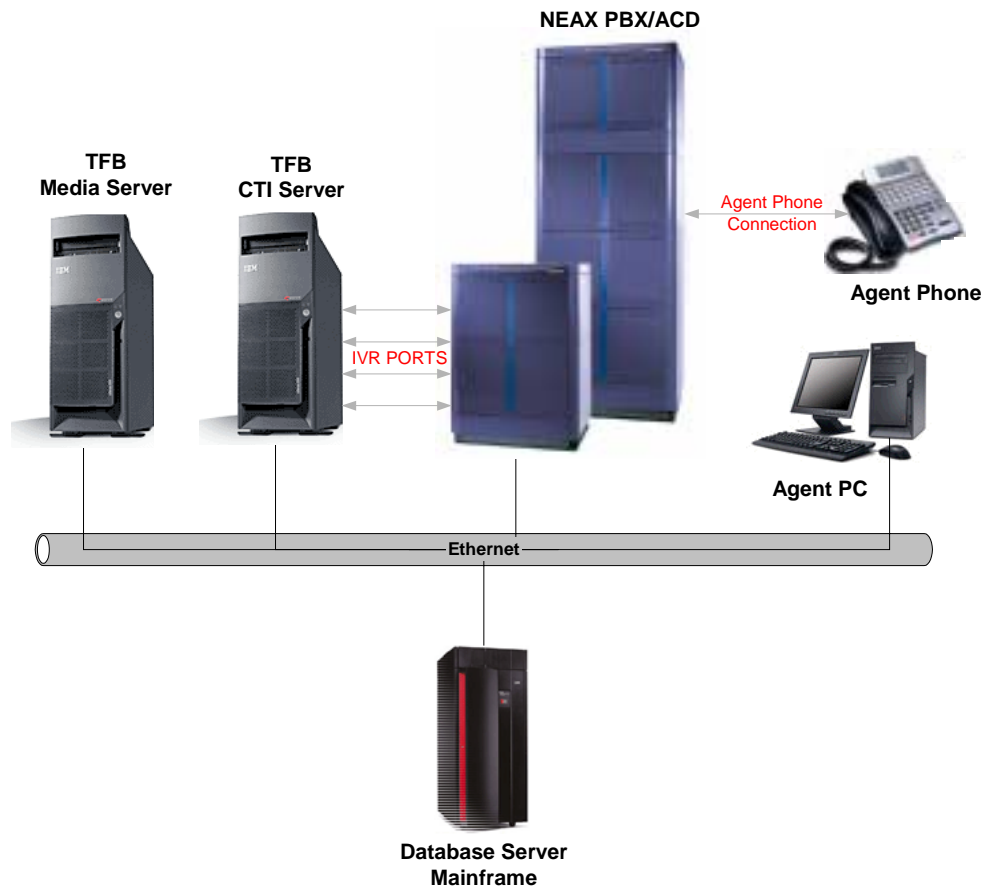
- GROUPS
- AGENTS
- QUEUES
- EMAIL

You can set up email queues without configuring agents and groups but it is recommended that at least a few agents are entered into the system so they can be assigned to email queues.

Agent Groups are set up quickly and additional groups can be added as required. Groups are typically given short descriptive names. The GROUPS configuration dialog is located under **Multimedia | Groups** in the left hand navigation tree.

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Major System Components



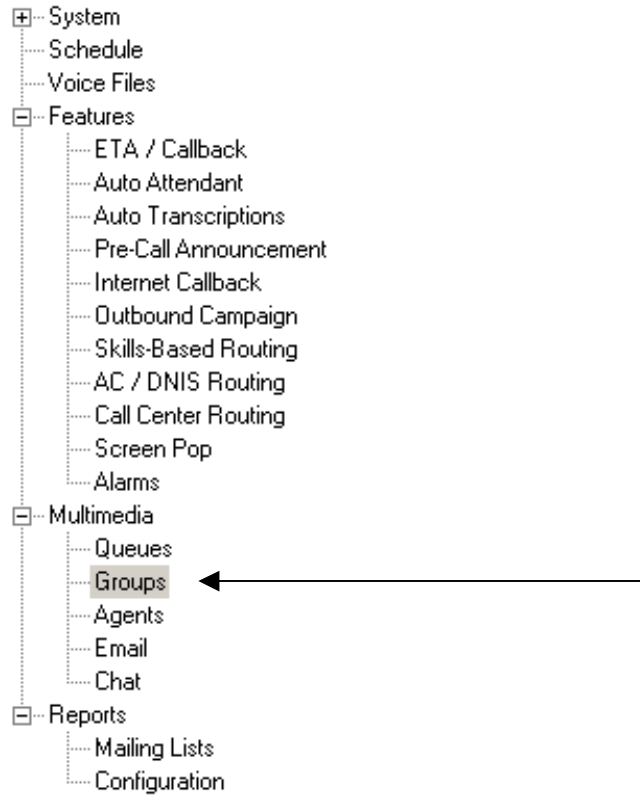
# Administration of Agent Groups and Agents

**B**efore setting up Agent eMail queues and queue parameters, agent and group association should be configured. If you already have agents in the system you can go to Module 3 to set up email queues and parameters. If this is a new system being configured for the first time, it is recommended that you first set up at least a few agents and groups for the purposes of testing. After initial set up of Groups are there is typically not a lot of maintenance required for the Group, and agents can be added or deleted easily.

For configuration purposes each agent must be assigned with a Group. Agent Groups are a convenient way of categorizing types of agents independently of their queue or split assignments. Agents can belong only to a single group. How you use and name groups is entirely determined by the user and by organizational requirements.

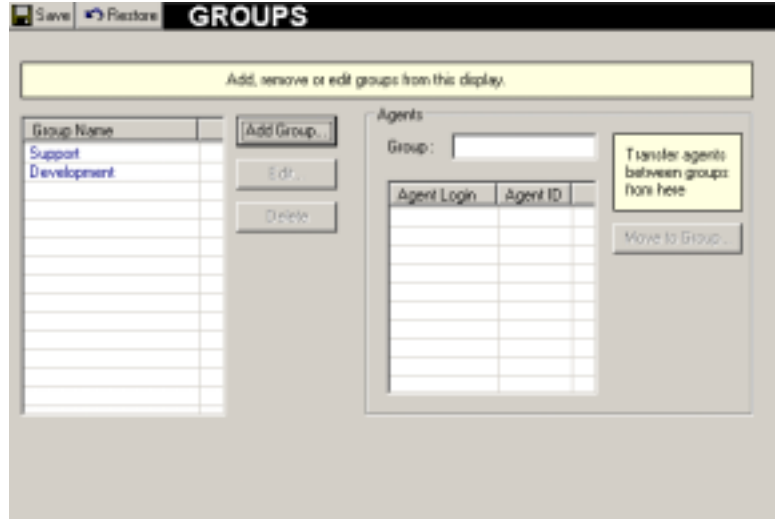
## Setting Up Groups

Agent Groups are set up quickly and additional groups can be added as required. Groups are typically given short descriptive names. The GROUPS configuration dialog is located under **Multimedia | Groups** in the left hand navigation tree.

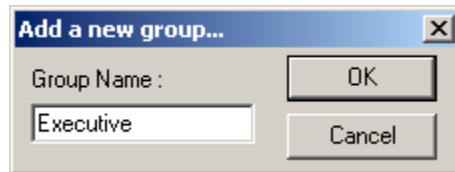


**TO SETUP GROUPS**

- 1 From the GROUPS dialog, click the **Add Group** button.



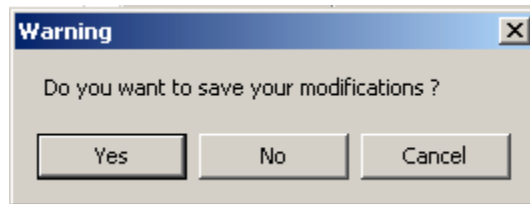
- 2 The *Add Group* dialog appears. Enter the desired group name and click **OK**.



- 3 Add additional groups as desired. To revert to the previous configuration, click the **Restore** button in the upper left.

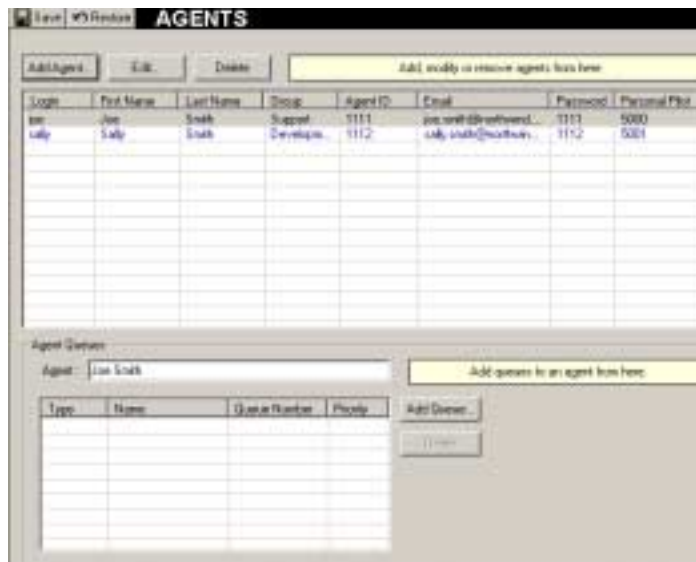
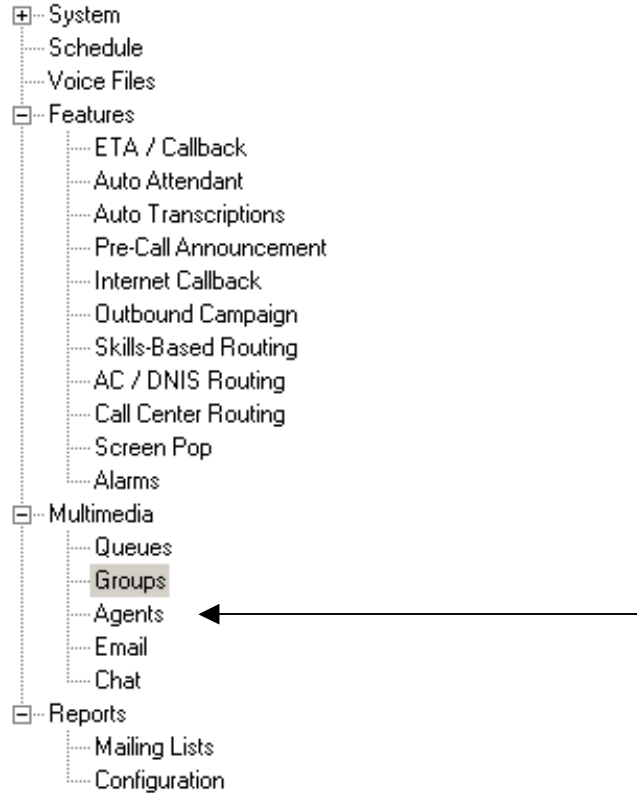
- 4 After all groups are added click the **Save** button in the upper left corner.

- 5 A warning dialog appears if you try to exit the GROUPS screen without saving the configuration.



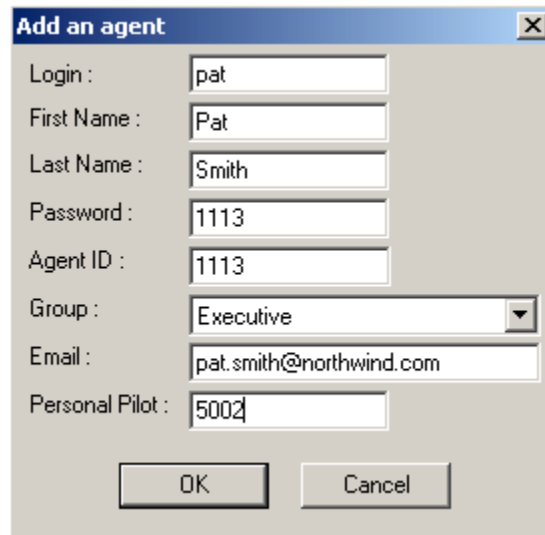
## Setting Up Agents

With Groups configured you are ready to add agents to the system. Any agent that will be assigned to an Agent eMail queue must first be entered into the AGENTS dialog. The AGENT configuration dialog is located under **Multimedia | Agents** in the left hand navigation tree.



**TO ADD AGENTS**

- 1 From the AGENTS dialog, click the **Add Agent** button.
- 2 The *Add Agent* dialog appears. Enter the agent Login, First Name, and Last Name, Password, and Agent ID. Do not leave these fields blank.



The screenshot shows a dialog box titled "Add an agent" with a close button in the top right corner. The dialog contains the following fields and values:

- Login : pat
- First Name : Pat
- Last Name : Smith
- Password : 1113
- Agent ID : 1113
- Group : Executive (dropdown menu)
- Email : pat.smith@northwind.com
- Personal Pilot : 5002

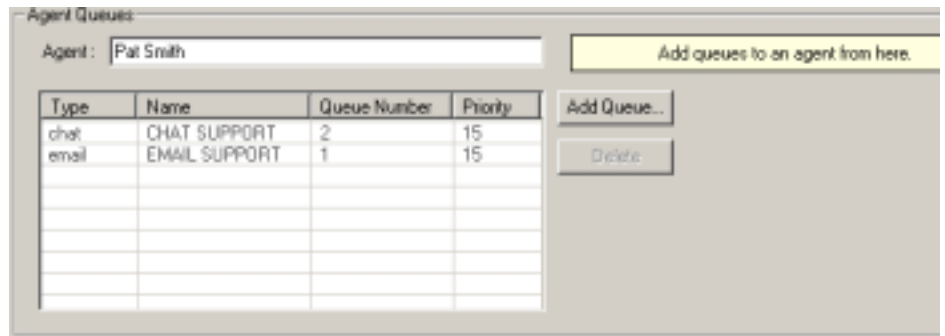
At the bottom of the dialog are two buttons: "OK" and "Cancel".

- 3 From the Group dropdown box, assign the agent to the desired the Group.
- 4 Enter the regular company email address for the agent. This is used to automatically cc that agent on their outgoing mail.
- 5 Enter the agent personal pilot.
- 6 Review the entries and click **OK**.
- 7 Add additional agents as desired. To revert to the previous configuration, click the **Restore** button in the upper left.
- 8 After all agents are added click the **Save** button in the upper left corner.

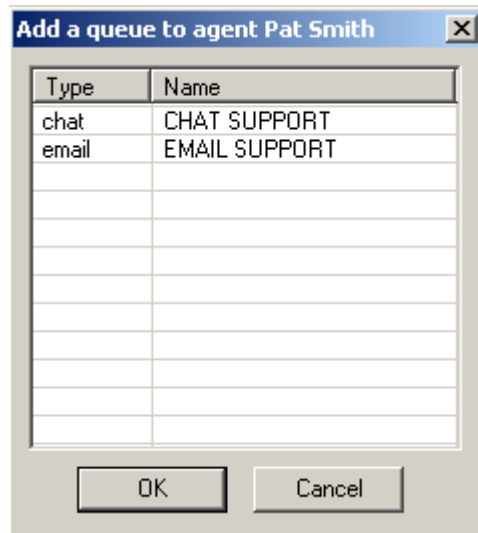
With some agents in the system, you are allowed to assign queues to each agent. From the AGENT dialog. If no queues are currently configured, skip to the next section to set up queues. The QUEUES dialog also lets you assign agents to queues, so you are not required to add them here.

### TO ADD QUEUES TO AGENTS

- 1 From the AGENTS dialog, select an agent from the list in the upper window.
- 2 From the AGENTS dialog, click the Add Queue button.



- 3 The *Add Queue to Agent* dialog appears. Select the desired queues and click **OK**.



- 4 Repeat this until the desired queues are added to each agent.
- 5 After all agents are added click the **Save** button in the upper left corner.

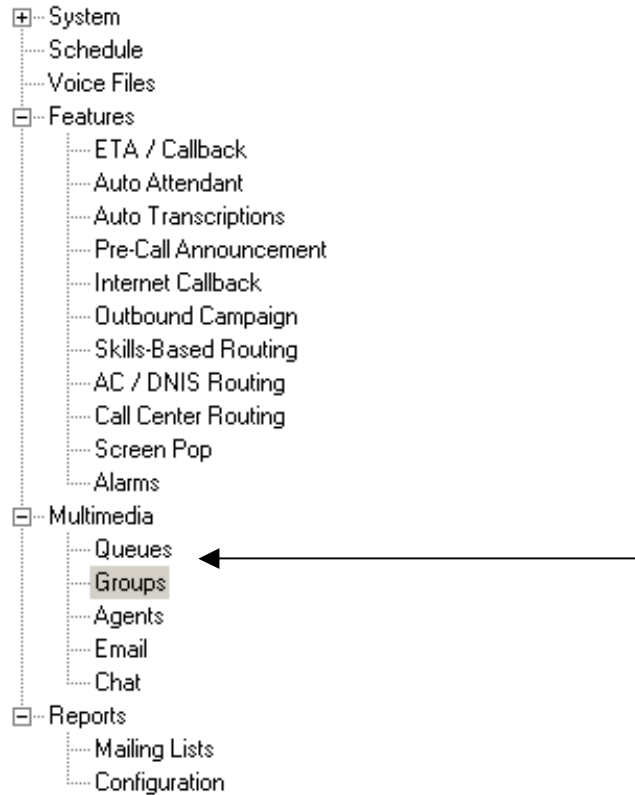
# Administration of Queues

**T**he TFB system provides for all contact channels, not just phones, to queue inbound and outbound media. Parameters for set up and management of Agent eMail queues is accessed through the general QUEUES dialog and the EMAIL dialog.

General queue setup is administrated from the QUEUE dialog. Parameters specific to email queues are administrated through the AGENT dialog. Each account to be used with agent email should only be accessed by a single email queue.

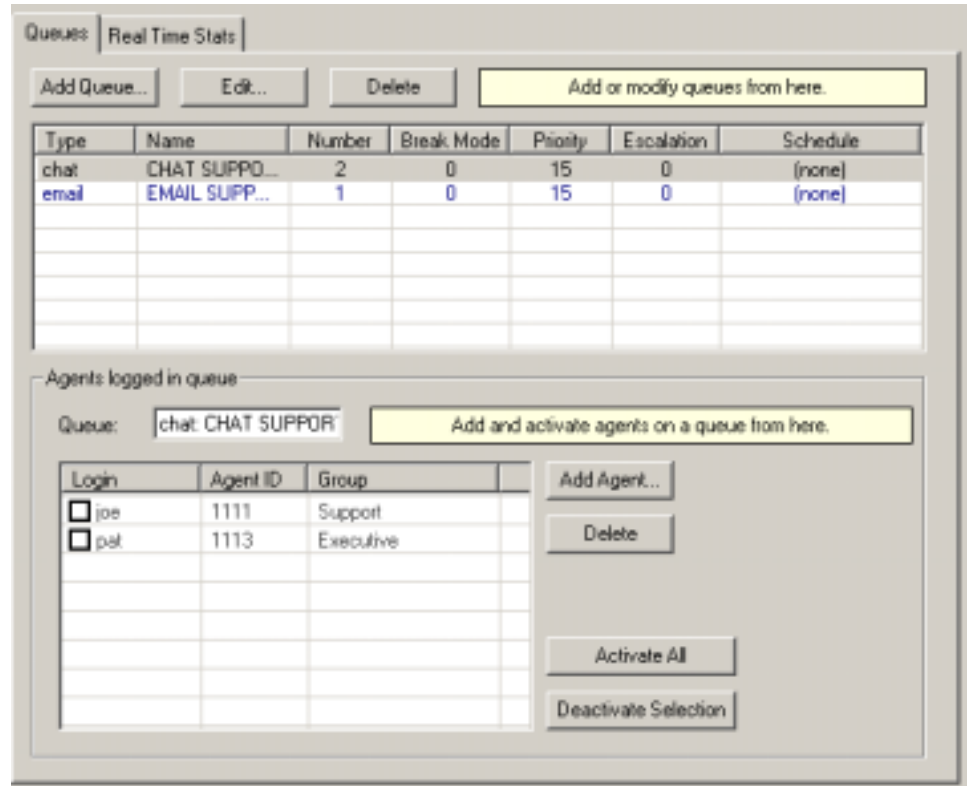
## Setting Up Queues

The appropriate queues are easy to add to the system. First general queue parameters are configured, then email specific parameters. The QUEUES configuration dialog is located under **Multimedia | Queues** in the left hand navigation tree.

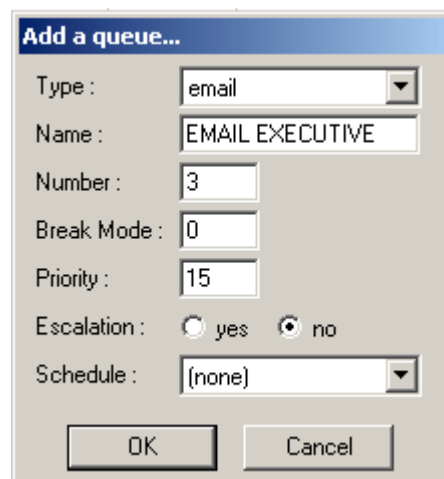


## TO SET UP EMAIL QUEUES

- 1 From the QUEUES dialog, click the **Add Queue** button.



- 2 The Add queue dialog appears. Select email from the **Type** dropdown box. Also name the queue.



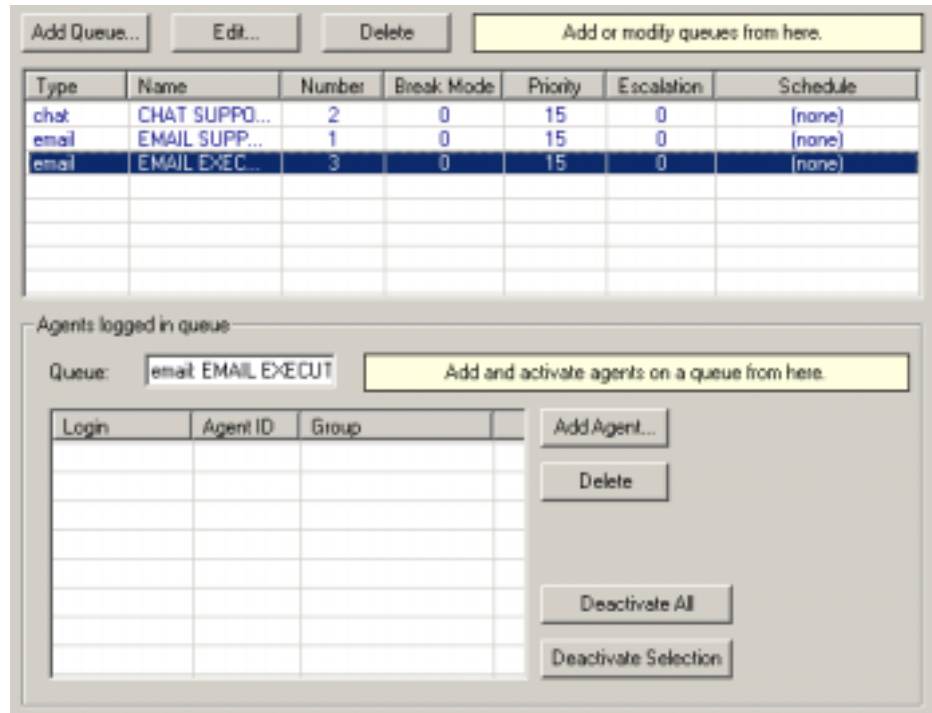
- 3** Enter a logical unique queue number. This can be any integer provided it is not already in use.
- 4** Enter a break mode. The break mode is used to indicate to the ACD that the agent is handling email. There may already be break modes defined in your ACD, so the particular break mode assigned to email should be chosen in consultation with the appropriate manager.
- 5** Select priority from 1 to 250. The lower the number, the higher the priority given to email in this queue.
- 6** Select whether this is a standard queue or an escalation queue.
- 7** For email, Schedule should be set to [none].
- 8** Click **OK**.

## Adding Agents to Queues

With the appropriate queues setup, you should then assign the desired agents to each queue. Agents can be assigned to multiple queues or a single queue as required. Recall that you can also assign agents to queues from the AGENTS dialog.

### TO ADD AGENTS TO QUEUES

- 1 From the QUEUES dialog, select a queue from the upper Window.

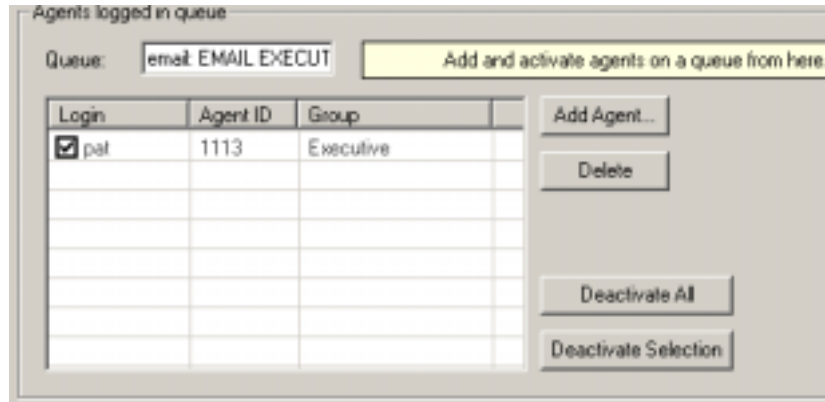


- 2 With a queue selected, click the **Add Agent** button. The Add Agents dialog appears with a list of available agents. Select the agents to add to the selected queue and click **OK**.

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- 3 The selected agents should appear in the agent list for that queue. You can activate and deactivate any agents in the queue by simply checking or un-checking the box next to the agent login.

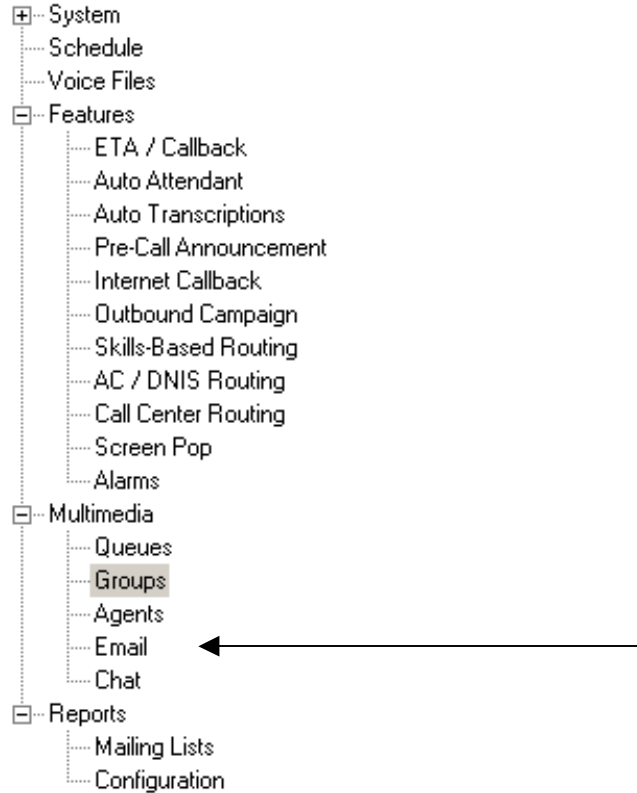


The checkboxes allow you to maintain an agent group and activate or deactivate agents based on email volume.

| Login                                   | Agent ID | Group     |
|---|----------|-----------|
| <input checked="" type="checkbox"/> joe | 1111     | Support   |
| <input checked="" type="checkbox"/> pat | 1113     | Executive |

## Setting Up Email Queue Parameters

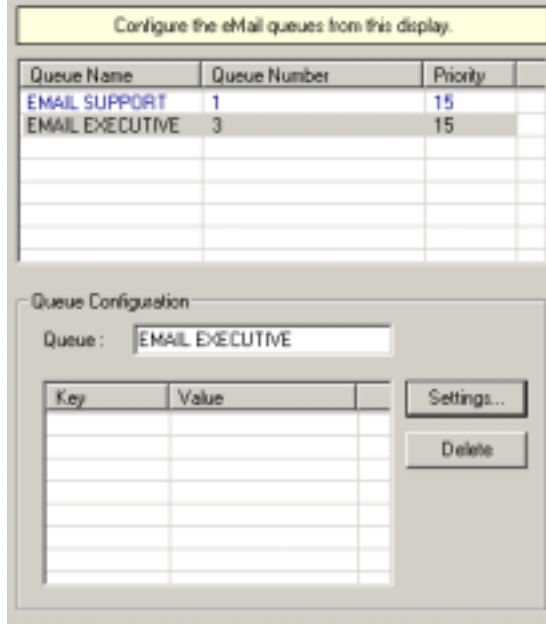
Agent eMail uses your existing email and SMTP servers transparently. Email queues must be configured to pull email from the correct server and account, and which SMTP server to use. The EMAIL configuration dialog is located under **Multimedia | Email** in the left hand navigation tree.



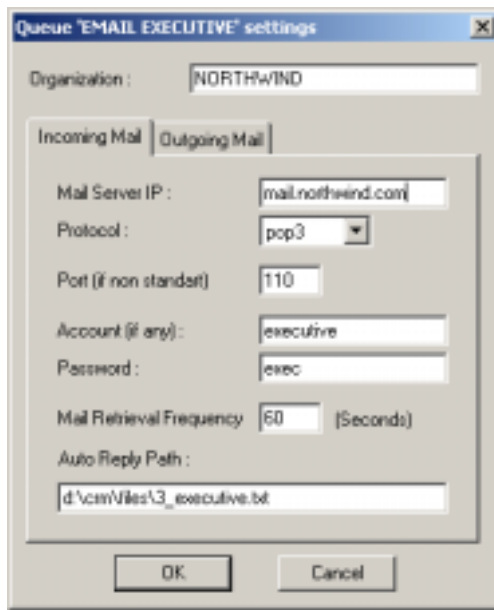
You should not assign more than one Agent eMail to pull mail from the same account on your existing email server.

**TO SETUP INBOUND EMAIL QUEUE PARAMETERS**

- 1 From the EMAIL dialog, select a queue from the upper Window.



- 2 With a queue selected, click the **Settings** button. Select the Incoming Mail tab.



- 3 On the **Incoming Mail** tab, enter your mail server IP address.
- 4 Select the inbound mail protocol from the drop down list. POP3 and IMAP are supported.

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**NOTE** This configuration is by queue so you are allowed to use POP3 for some queues and IMAP for others if your email server environment has multiple servers with different protocols.

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- 5 The port defaults to 110. Check with your email administrator to ensure this is the port configured on your email server.
- 6 Enter the account and password for the POP3 mailbox you want to pull mail from.
- 7 Enter the mail retrieval interval. This should be a minimum of 60 seconds. This value can be adjusted upward based on your volume and agent capacity. There is no set maximum.
- 8 Enter the path to the appropriate Auto Reply text file for this queue. Note that the Auto Reply can be different for each queue.
- 9 Review your settings and click **OK**.

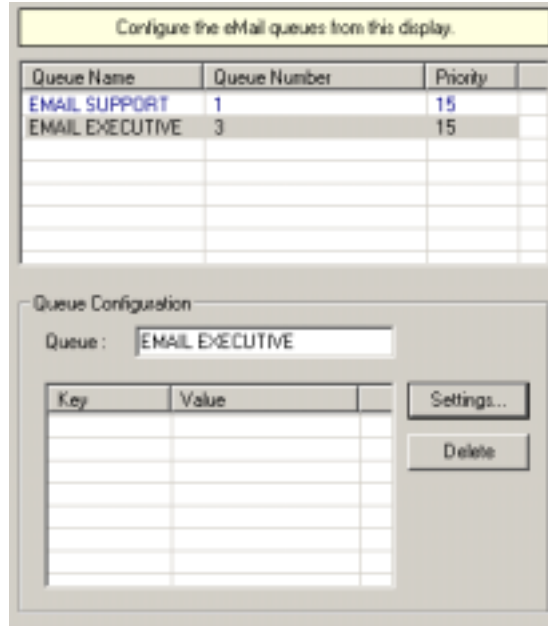
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**NOTE** Ensure the Auto Reply text file is in the correct path

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**TO SETUP OUTBOUND EMAIL QUEUE PARAMETERS**

- 1 From the EMAIL dialog, select a queue from the upper Window.



- 2 With a queue selected, click the **Settings** button. Select the Outgoing Mail tab.



- 3 Enter the SMTP server to use for sending mail from this queue.
- 4 Enter the text signature to append to outgoing mail from this queue.
- 5 Enter the email address to send mail errors. This feature allows you to track errors in a separate queue or even send to a personal email address.
- 6 Enter the appropriate return address. This is typically the same inbound address assigned in the Account field on the Incoming Mail tab, but it could be any address.
- 7 Review your settings and click **OK**.

Email parameters are shown in the Queue configuration box.

