AAPT

Cloud Contact Centre

E-mail Reference Guide

Issue 1.0

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Cloud Contact Centre Email Reference Guide

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1. INTRODUCTION

NEC Agent 99 is a cost-effective, flexible customer contact solution that combines phone, email, live Web chat, and customer records together in an easy-to-use interface.

It is a fully featured hosted solution that delivers the functionality and benefits of a contact centre without requiring additional hardware, software or capital expenditure, Agent 99 is on demand and highly scalable.

NEC Agent 99 is self provisioning and easy to configure, including queues, agents, IVR, call recording, and CRM functions. As long as Agents have an Internet connection and a phone, they can login and accept transactions from anywhere in Australia, as if they are all sitting in the same office.

Every contact – phone, email and web – is presented in one clear view to agents and combined with the functionality to prioritise, route and track contacts, Agent 99 provides the ability to deliver consistent, end-to-end customer service.

1.1. PURPOSE

The purpose of this document is to explain how to build an email script through NEC Agent99 Configuration Manager, and to list and detail all the objects that are currently available.

1.2. SCOPE

This document targets first time Email configurations, and can also be used as a reference when making changes.

1.3. AUDIENCE

The intended audiences of the document are NEC Clients that will be required to configure the NEC Agent 99 Email and NEC Training. This document is intended to be used by:

- NEC Clients: to provide a user guide explaining the functionality of the NEC Agent99 Email.
- NEC Training: to provide a reference guide to assist with the training of the NEC Agent 99 Email.

1.4. DEFINITIONS / ABBREVIATIONS

The following abbreviations will be used throughout this document:
- Client   NEC Clients who use the NEC Agent99 application;
- NEC   NEC Australia Pty Ltd;
- SI   Systems Integration.

2. EMAIL SCRIPT

Email scripts are built by configuring and adding objects. Objects are executed sequentially from top to bottom, left to right.

Current version of the interface allows adding and deleting, but not duplicating or moving objects. Also note that there is no coherence verification between the script objects and the resources it uses. For instance if a "Forward to queue" object is configured to route emails into a given queue, and if that email queue is deleted afterwards, then the email script will fail on this object as it won't be able to route the email into the queue.

Note:	Remember to click on the Save Button each time a modification is made to the system, otherwise the information is lost.

FIGURE 1: EMAIL SCRIPT

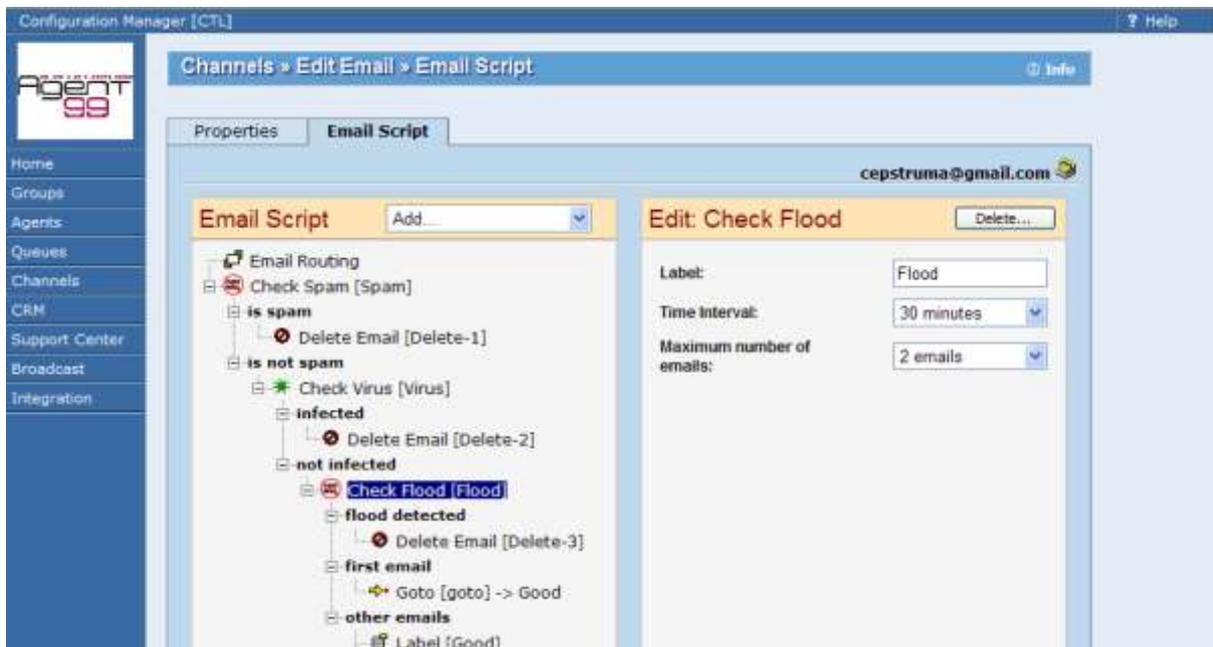### 2.1. "CHECK CRM" OBJECT

The purpose of the Check CRM object is to perform some identification checks against the CRM database to determine if the email is coming from a known contact or not, and if yes, to see if the email is a brand new case or a follow-up to an existing one.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.

Exit Points:

Feature	Description
New Customer	The email has been sent by a brand new contact.
New Case	The email is a new case sent by an existing contact.
Follow Up	The email is a follow-up to an existing case.

This is used every time it is required to run some specific actions based on the identity of the sender (new contact or not), or based on the fact that a new case has been created or just a follow-up to an existing case.

Note:	The object can be instantiated several times in the script.

2.2. "CHECK PRIORITY" OBJECT

The Check Priority object compares the priority of the email to a priority level set in the Priority value attribute. If no Priority header field in the email header is found, the email priority is set to the default value of "Normal". The email priority is set by the customer when an email is sent.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Priority Value	Sets the value of the priority to which the email priority will be compared to. The possible values are: 1 – Highest 2 – High 3 – Normal 4 – Low 5 – Lowest
Negate Comparison	Enabling this attribute will reverse the effect of the comparison.

Exit Points:

Feature	Description
Matched	The priority of the email matches the criterion set in the Check Priority object.

Not Matched	The priority of the email doesn't match the criterion set in the Check Priority object.

Note:	Different Mail User Agents have different ways to format the Priority header field in the email header. The Check Priority object will search for the following names: "X-Priority", "Importance", and "Priority" in the email header. If none of these are found, it considers that the email priority is 3 – Normal

2.3. "CHECK RECIPIENT" OBJECT

The Check Recipient object compares the recipient email address of the email to a pattern. Several options allow changes to the way the comparison operates.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Select Field	Able to specify which header field should be used for comparison. The possible choices are: To Cc
Select Operator	Allows more precise tuning of the comparison. The possible choices are: Contains Begins with Ends with Is equal to
Pattern	Specifies the pattern to which the header field selected in the 'Select field' text box is compared to.
Use Pattern as a Regular Expression	If enabled, instructs the comparison engine to treat 'Pattern' as a regular expression.
Negate Comparison	Enabling this attribute reverses the effect of the comparison.
Case sensitive	Enabling this attribute makes the comparison case sensitive.

Exit Points:

Feature	Description
Matched	The recipient of the email matches the criterion set in the Check Recipient object.
Not Matched	The recipient of the email doesn't match the criterion set in the Check Recipient object.

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Examples: The following examples illustrate the effect of the different comparison options. The examples will focus on the To field (the principle is exactly the same for the Cc field).

Operator	Pattern	RegExp	Negate	Case	Recipient	Result
Contains	support@agent99	Disabled	Disabled	Not sensitive	support@agent99.net.au	Match
Begins with	support@	Disabled	Disabled	Not sensitive	support@agent99.net.au	Match
Ends with	agent99.net.au	Disabled	Disabled	Not sensitive	support@agent99.net.au	Match
Is equal to	support@agent99.net.au	Disabled	Disabled	Not Sensitive	support@agent99.net.au	Match
Is equal to	support@agent99.net.au	Disabled	Disabled	Sensitive	support@agent99.net.au	Not Match
Is equal to	support@agent99.net.au	Disabled	Enabled	Sensitive	support@agent99.net.au	Match
Is equal to	support@.*.net.au	Enabled	Disabled	Disabled	support@agent99.net.au	Match
Begins with	support	Enabled	Disabled	Disabled	support@agent99.net.au	Match
Ends with	support	Enabled	Disabled	Disabled	support@agent99.net.au	Match
Contains	Agent99	Enabled	Disabled	Disabled	support@agent99.net.au	Match
Contains	Agent99	Enabled	Disabled	Enabled	support@agent99.net.au	Not Match
Contains	Agent99	Enabled	Enabled	Enabled	support@agent99.net.au	Match

2.4. "CHECK SENDER" OBJECT

The Check Sender object compares the sender's email address to a pattern. Several options allow tuning the way the comparison should operate.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Select Operator	Allows more precise tuning of the comparison. The possible choices are: Contains Begins with Ends with Is equal to
Pattern	Specifies the pattern to which the "From:" header field is compared to.
Use Pattern as a Regular Expression	If enabled, instructs the comparison engine to treat 'Pattern' as a regular expression.
Negate Comparison	Enabling this attribute reverses the effect of the comparison.
Case Sensitive	Enabling this attribute makes the comparison case sensitive.

Exit Points:

Feature	Description
Matched	The email address of the sender of the email matches the criterion set in the Check Sender object.
Not Matched	The email address of the sender of the email doesn't match the criterion set in the Check Sender object.

Note:	This object is used and configured similarly to the Check Recipient Object.

2.5. "CHECK SUBJECT" OBJECT

The Check Subject object compares the emails subject to a pattern. Several options allow changes to how the comparison occurs.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Select Operator	Allows more precise tuning of the comparison. The possible choices are: Contains Begins with Ends with Is equal to
Pattern	Specifies the pattern to which the subject of the email is compared to.
Use Pattern as a Regular Expression	If enabled, instructs the comparison engine to treat 'Pattern' as a regular expression.
Negate Comparison	Enabling this attribute reverses the effect of the comparison.
Case Sensitive	Enabling this attribute makes the comparison case sensitive.

Exit Points:

Feature	Description
Matched	The subject of the email matches the criterion set in the Check Subject object.
Not Matched	The subject of the email doesn't match the criterion set in the Check Subject object.

Note:	This object is used and configured similarly to the Check Recipient Object.

2.6. "CHECK FLOOD" OBJECT

The purpose of the Check Flood object is to detect flooding attacks. The detection mechanism raises a flooding attack alarm if more than a set number of emails shares some properties (same sender/same recipient/same subject) are processed within a certain unit of time.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Time Interval	Allows the specifying of the sliding observation interval during which no more than "Maximum number of emails" "identical" emails can be received. The possible choices are: • Disabled • 15 minutes • 30 minutes • 45 minutes • 1 hour • 2 hours • 3 hours • 4 hours • 5 hours • 6 hours • 12 hours • 1 day
Maximum Number of Emails	Specifies the maximum number of emails than can be received within a time interval which length is defined by the Time Interval attribute above. The possible values are: • 2 • 5 • 10 • 20 • 50

Exit Points:

Feature	Description
Flood Detected	More than the maximum number of "identical" emails has been received during the last Time Interval.
First Email	The current processed email is the first of "its kind" over the last Time Interval.
Other Emails	The current processed email is similar to at least one other email processed within the specified Time Interval, but will not trigger the flooding alarm.

Note:	The three parameters taken into account to determine if emails are « identical » are: From address, To address, and Subject.

2.7. "CHECK SPAM" OBJECT

The purpose of the Check Spam object is to try to determine if an email is junk or not. The object uses SpamAssassin, which can be configured in the Configuration Manager (Home→Profile→Spam threshold level) to be more or less lenient.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.

Exit Points:

Feature	Description
Is Spam	The current processed email is considered to be spam.
Is Not Spam	The current processed email is not considered to be spam.

Note:	The spam detector is not infallible. It is safer to avoid deleting emails based only on the assertion of the Check Spam object. Emails should be routed to a junk queue for later manual discarding. False positives could then be re-injected in the system, or processed directly.

2.8.   "CHECK VIRUS" OBJECT

The purpose of the Check Virus object is to determine if an email is infected by a virus or not. The object uses McAfee VirusScan and is regularly kept uptodate by NEC.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.

Exit Points:

Feature	Description
Infected	The current processed email is infected by a virus.
Not Infected	The current processed email is not infected by a virus.

Note:	If a virus is detected in an email, all its attachment files are stripped.

2.9.   "FORWARD TO QUEUE" OBJECT

The Forward to Queue object is used to route an email into an email queue. The Forward to Queue object can be instructed not to route the email to queue if there are already more than a certain number (configurable) of emails waiting. This feature allows queue saturation to be bypassed by running an alternate process.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
Select Queue	Name of the queue to which the email has to be routed.
Maximum Number of Emails Waiting	Specifies the maximum number of email that can be waiting in the queue selected in the previous attribute.

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Exit Points:

Feature	Description
Routed	The current processed email has been routed into the queue.
Overload	The current processed email has not been routed into the queue because the queue is full.

Note:	An email queue has a maximum capacity of 700 emails. Even though it is possible to set the « Maximum number of emails waiting » attribute value to up to 999, the hard cap of 700 always triggers the overload exit point as soon as it is reached. • As a rule of thumb, the lowest value between the maximum capacity of the queue and the threshold set in the Forward to queue object will trigger the overload exit point first. • When an email is routed to a queue, a contact, a case or a follow up have been created in the CRM database. This sets the conditions to flush the email at the end of the script, as we don't want to have an email cause the creation of duplicates.

2.10. "LABEL" OBJECT

Labels are used to limit duplicating sections of a script. It works in-conjunction with the GoTo Object.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree

Exit Points: There are no exit points.

2.11. "GOTO" OBJECT

The Goto object works in conjunction with a Label object. To be able to insert a Goto object in a script, a Label object must already exist. The purpose of the Goto object is to alter the normal flow of execution of the script by forcing execution to restart at the designated Label.

Note:	It is not possible to jump to a Label that would be located above the Goto object. This is meant to avoid loop situations.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree

Exit Points: There are no exit points.

2.12.   "REPLY TO EMAIL" OBJECT

The Reply to email object is used to send outgoing emails to customers. This object is used usually to notify a customer that their request has been received and will be processed soon (auto-acknowledgment). It is also possible to use this object to send to customers their account information after their account has been created.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.
From	Value that appears in the From field of the email that will be sent.
Use Channel Email Address as From	This flag, if activated, automatically sets the From header field to the email address of the channel to which the current processed email has been sent.
CC	List of email addresses (separated by a semicolon) to which the reply email will be CC'd.
BCC	List of email addresses (separated by a semicolon) to which the reply email will be BCC'd.
Subject	Subject of the reply email. The two following keywords have a special meaning when used in the subject text box: _CASEID_ and _SUBJORIG_ _CASEID_ is replaced by the id of the case / follow-up that was created in response to the current processed email. _SUBJORIG_ is replaced by the subject of the current processed email (original subject).
Content	Body of the reply email. The two following keywords have a special meaning when used in the context text area: @account@ and @password@ @account@ is replaced by the account number of the contact that sent the current processed email.

	@password@ is replaced by the password of the contact that sent the current processed email.

Exit Points:

Feature	Description
Sent	The email was sent without error.
Not Sent	The email was not sent.

Note:	Activation of the 'sent' exit point does not mean that the email has been received by its recipient. Many problems can occur after the email has been correctly sent.

2.13. "DELETE EMAIL" OBJECT

The Delete Email object is used whenever one wants to explicitly discard an email. This can be necessary when an email must not be forwarded into a queue and still must be fetched from the email server. This only solution to flush an email from the server without forwarding it to a queue (and thus creating a case in the CRM database) is to explicitly delete it by calling the Delete Email object. This object can be typically used on the "infected" exit point of the Check Virus object.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.

Exit Points: There are no exit points.

Note:	Once the Delete Email object has been called, there is no sense in working on the email anymore. Therefore, any object that needs information from the email to be able to run properly will not work (Forward to queue, Check Subject, and Check Spam). The only object that should be called after a Delete Email object is Stop Processing.

2.14. "STOP PROCESSING" OBJECT

The Stop Processing object is used to prematurely interrupt the execution of the script. Without this object, the execution would continue until the end of the script is reached. In some situation, only one branch of the script has to be executed among several ones. Using the Stop Processing object at the

end of each branch ensures that only one of them will be executed. Recommended to use this option with the "Check Flood" object.

Parameters:

Feature	Description
Label	Label to identify the object in the graphical tree.

Exit Points: There are no exit points.

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