

# UC for Business - Email Queuing Desktop SMTP



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## Introduction

Offer agents the ability to handle all contact center calls from Desktop, regardless of media type. NEC's UC for Business (UCB) Email Queuing Desktop SMTP allows agents to handle email queue calls from Agent Desktop. Consistency of operation for all media improves because there is no need to swap between separate applications.

Bringing agents' emails into Agent Desktop helps convert the email process into a contact center process. NEC's UC for Business Email Queuing Desktop SMTP brings the same standards, expectations and metrics to all contact center communications. It also brings additional smarts to contact center operations that can't be found in ordinary email applications.

## Overview

### How does Email Queuing Work?

UCB Email Queuing Desktop SMTP 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 Break or already dealing with calls<sup>1</sup>, 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.

Agents can be configured to handle as many concurrent queue emails as suits the 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, Novell GroupWise® and IBM 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 Exchange using the SMTP Interface. This eliminates any requirement to integrate 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. This allows 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 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.**

<sup>1</sup> 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

## 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 account<sup>2</sup>.
- 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 and the longest wait time, etc.
- 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 UCB 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. Agents can also create their own templates within Desktop<sup>3</sup>.

### Additional Features

- Standard email functions from Agent Desktop, include view, reply, forward, cc, bcc, transfer, create new email, hold, save and print.,
- Queue and agent email data is reported using the UCB Standard Reports module (included).
- Supervisors and agents<sup>4</sup> can view both details and the associated conversations of previously handled emails via the Reports Media Viewer.

- Per-queue parameters control sending and receipt of email attachments, such as blocking them altogether, allowing up to a maximum size<sup>5</sup> 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 address<sup>6</sup> and any queue in which they are currently logged.
- Customer replies can be delivered back to the original agent that handled the email using their individual (non UCB) email account or back to the next available agent in the queue. The system can also 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 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 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's 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; and pick up an email from an agent even if the agent has already answered it.

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

<sup>3</sup> An agent can only create personalized templates within Desktop if their security permissions allow

<sup>4</sup> The ability to launch the Media Viewer function is permitted by a user's security settings

<sup>5</sup> The system will allow the inbound attachment size to be configured to a maximum of 10Mb

<sup>6</sup> 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

- Auto logout of agents 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 is 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.
- New Agents and Queues can be dynamically added without the need to restart any applications.
- Hard-to-spot configuration errors, e.g., 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 Desktop<sup>7</sup>.
- 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, e.g., the time an email waited for answer; the time the agent took handling the email; and the time it was completed.
- Agents can add notes to the email call even after 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.
- Administrators can archive to any email system to which their server can send an email, 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, e.g., outside business hours.
- Email traffic can be reported 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, e.g., the ability to send a new email, create personalized templates, pick up email calls from other agents, etc.
- Standard templates guide agents in their replies, ensuring targeted responses that comply with the contact center's communications standards.

## Core Benefits

Email Queuing Desktop SMTP offers many unique benefits:

- Skills-based routing ensures emails are directed to the agent best able to handle them in the same way calls are handled. This improves customer service and reduces handling time.
- Agents handle email queue calls entirely from Desktop rather than have to switch between applications.
- Agents choosing their personal email account<sup>8</sup> as the "from" address enables them to direct the customer reply back to their personal email address rather than to a queue.
- When replying to a queue email the "from" address can be altered to provide a different reply address, otherwise the inbound queue email address will be used.
- 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.
- 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.

<sup>7</sup> The ability to launch the Media Viewer is allowed by a user's security permissions

<sup>8</sup> The ability to select a personal email account as the "from" address is set by the Administrator

- Last-called agent and preferred-agent delivery helps contact centers 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 after the email has been answered, ensures callers can still be responded to when an agent is absent.

## The Email Queuing Desktop SMTP Process

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

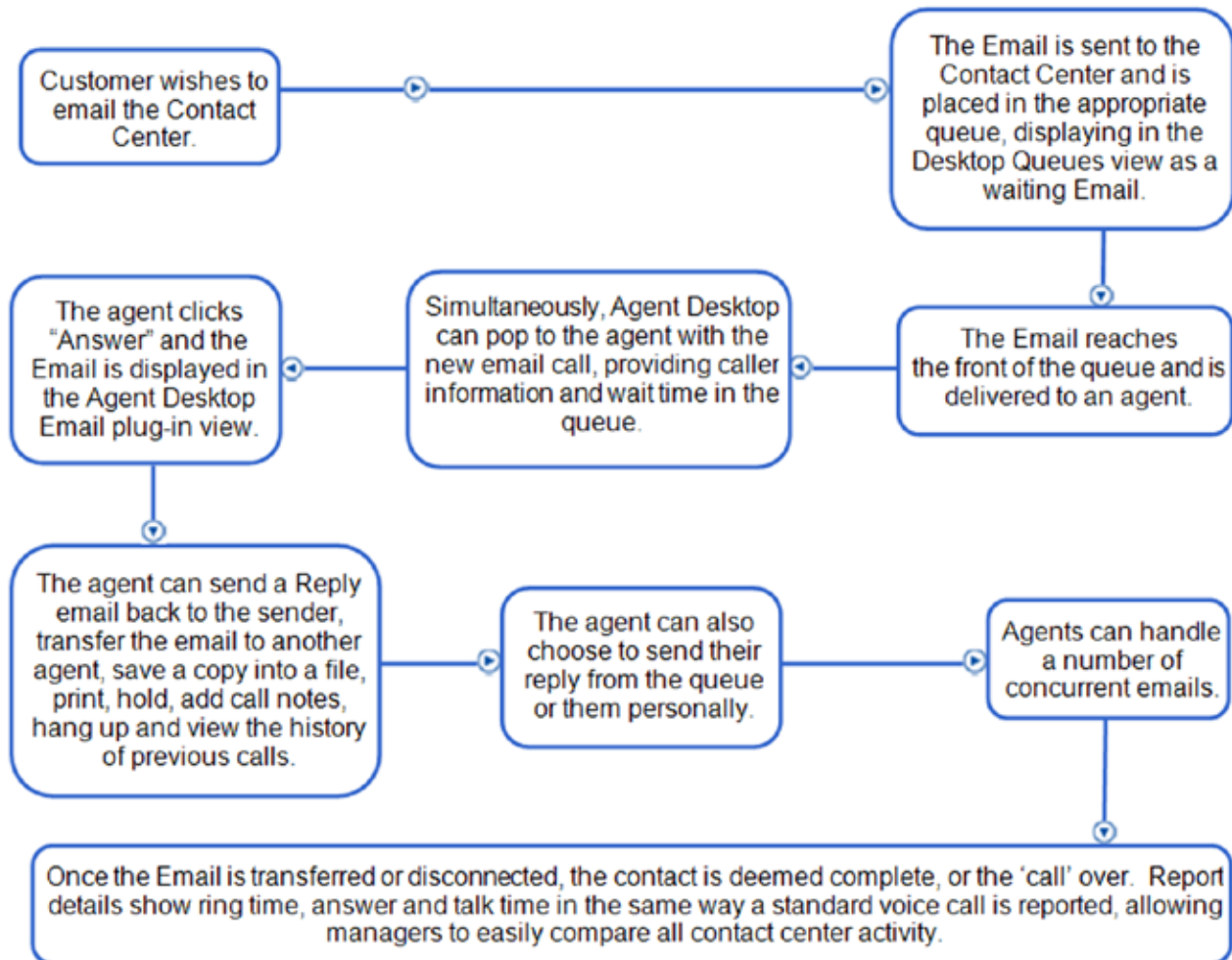


Figure 1. Email Queuing Process

### 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.

## Physical Architecture Overview

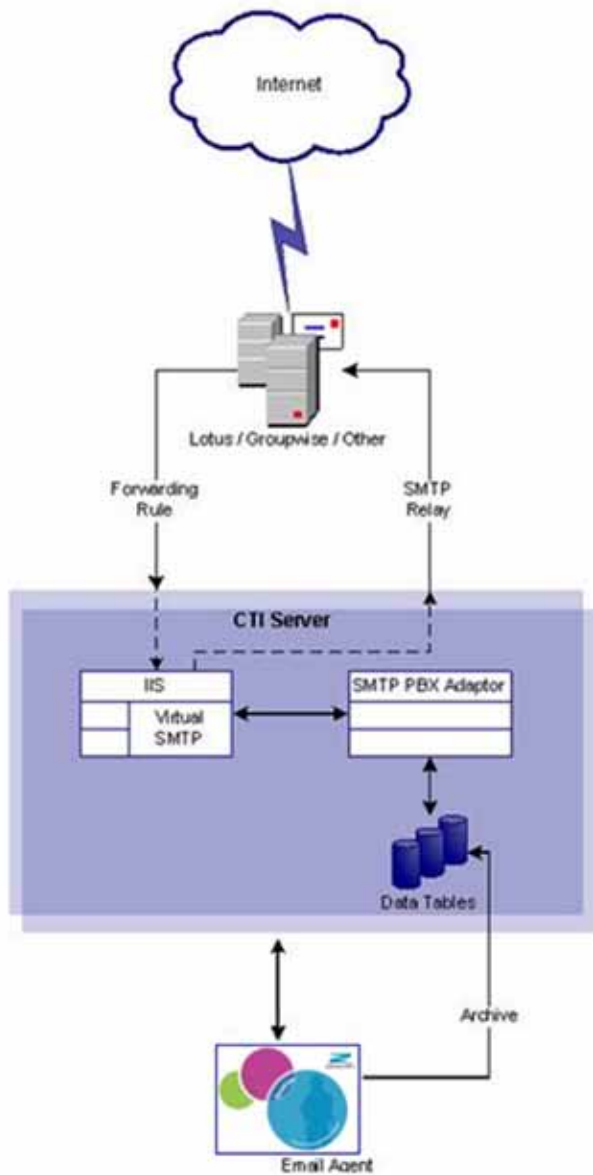


Figure 2. Email Queuing Architecture

## 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.

## Emails in Agent Desktop

### Notification of Incoming Emails

#### Features

As an email arrives at the contact center, it is queued 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.

- 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

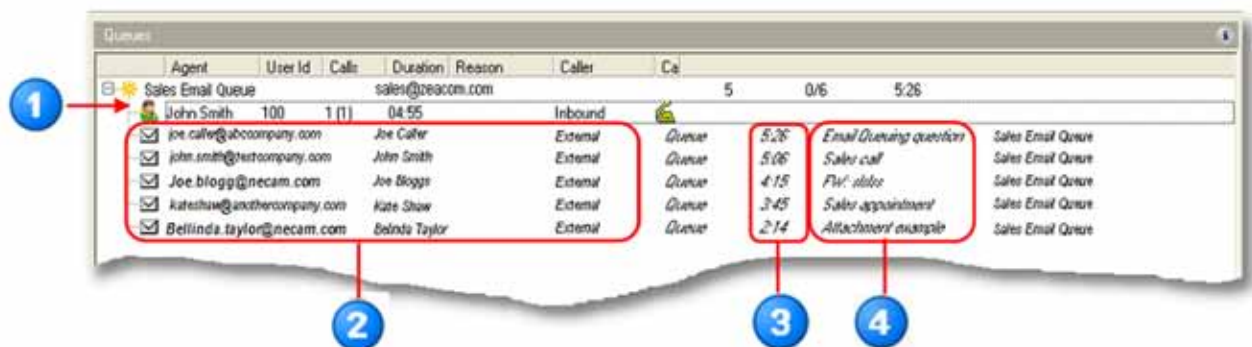


Figure 3. Queues View in Desktop

## 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 screen pops save the agent time.

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 right-click or double-click on the email to answer



Figure 4. Delivery to an Agent

## The Email Window

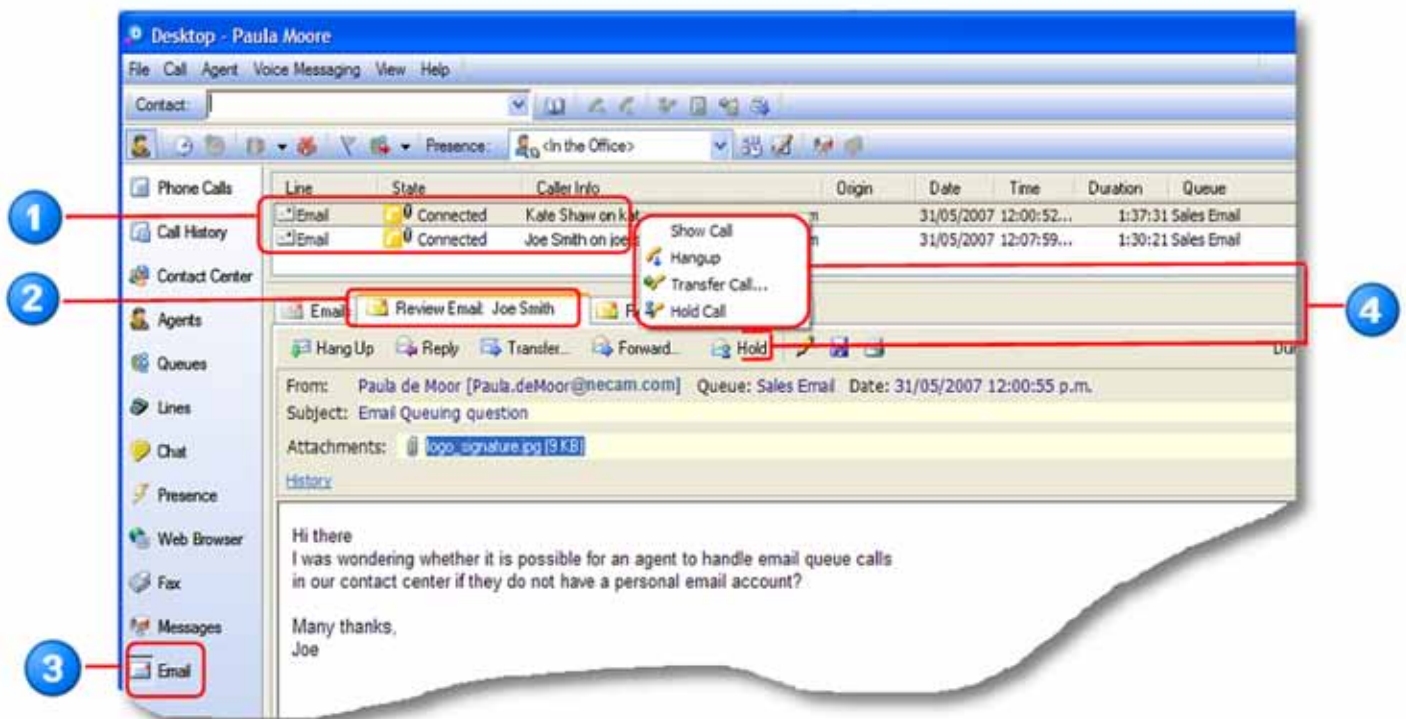


Figure 5. Review Email

1 This 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.

2 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 after the agent has hung up.

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

4 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.

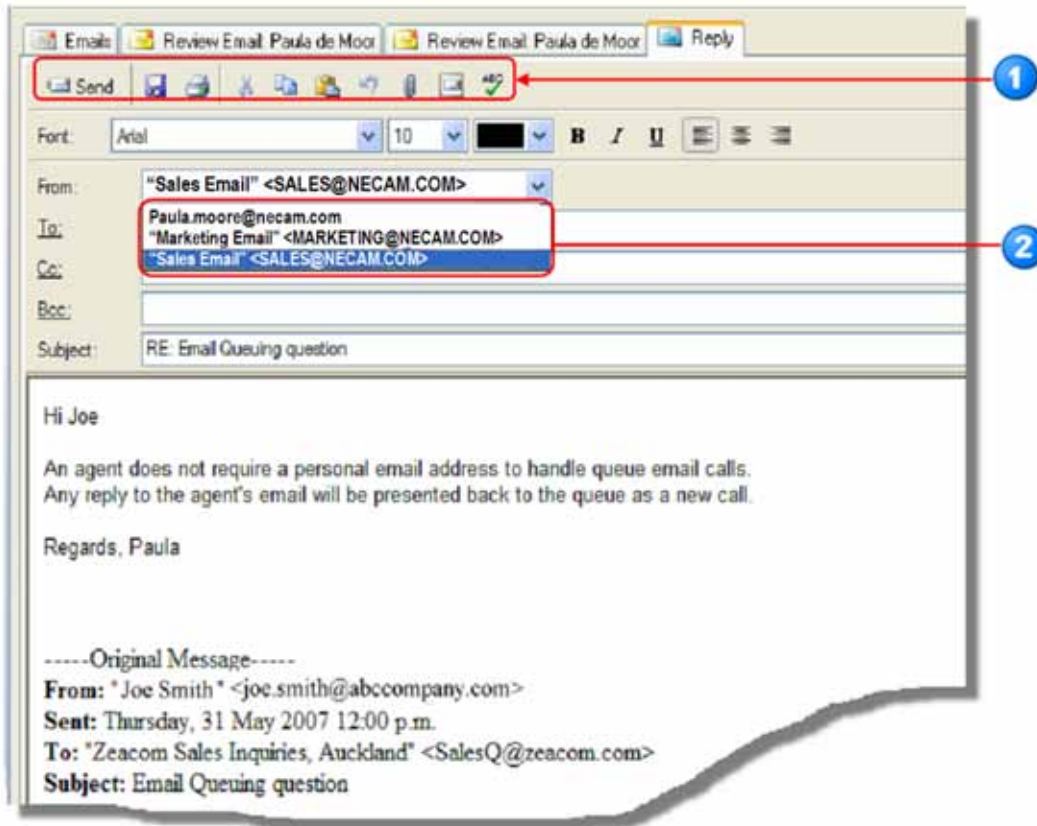


Figure 6. Replying to a Queue Email

- 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 the 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.

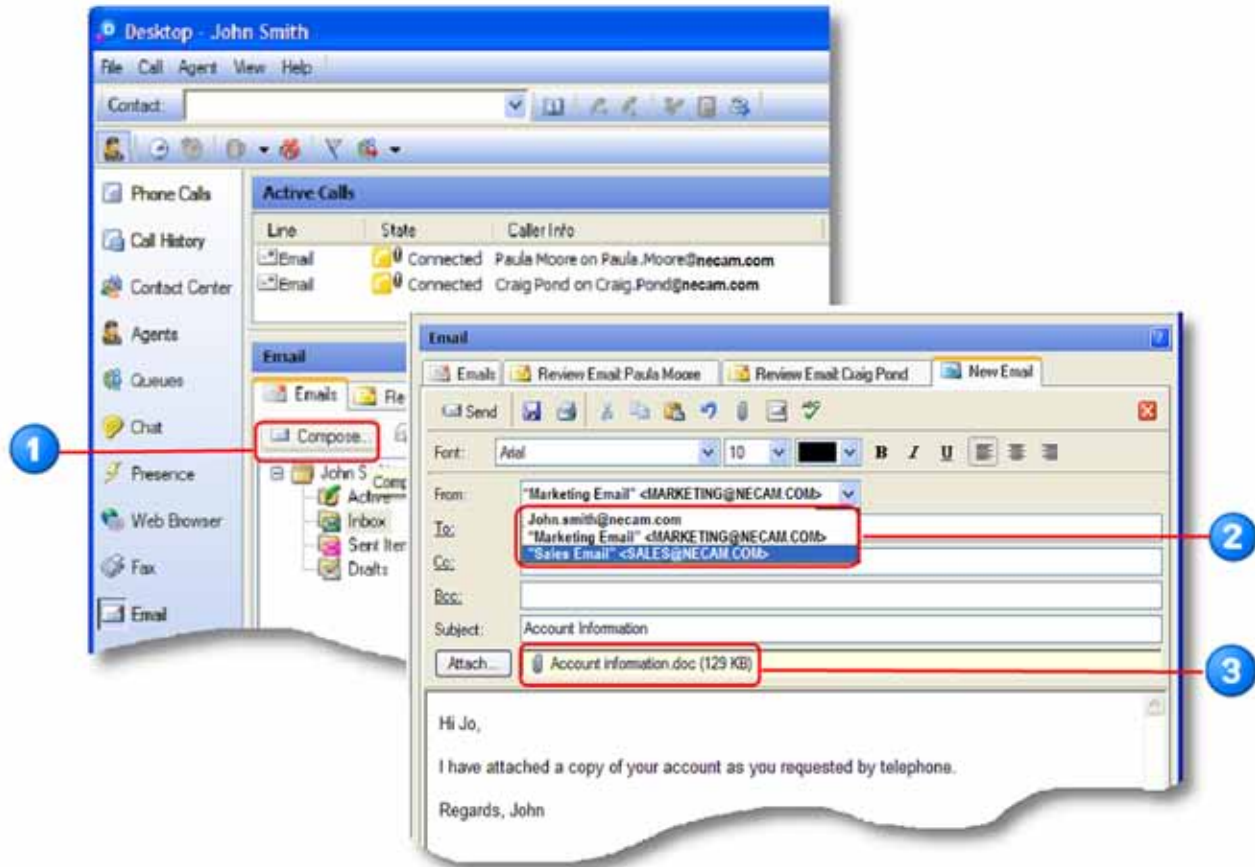


Figure 7. Composing a New Email

- 1 Choose Compose to activate the "New Email" tab within the Email window
- 2 Select the queue from which the email is to be sent; an agent can choose any of the queues they are currently logged into or their personal email address<sup>9</sup>)
- 3 The agent can include attachments with replies or new emails up to 2MB in size

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

## Spell Check

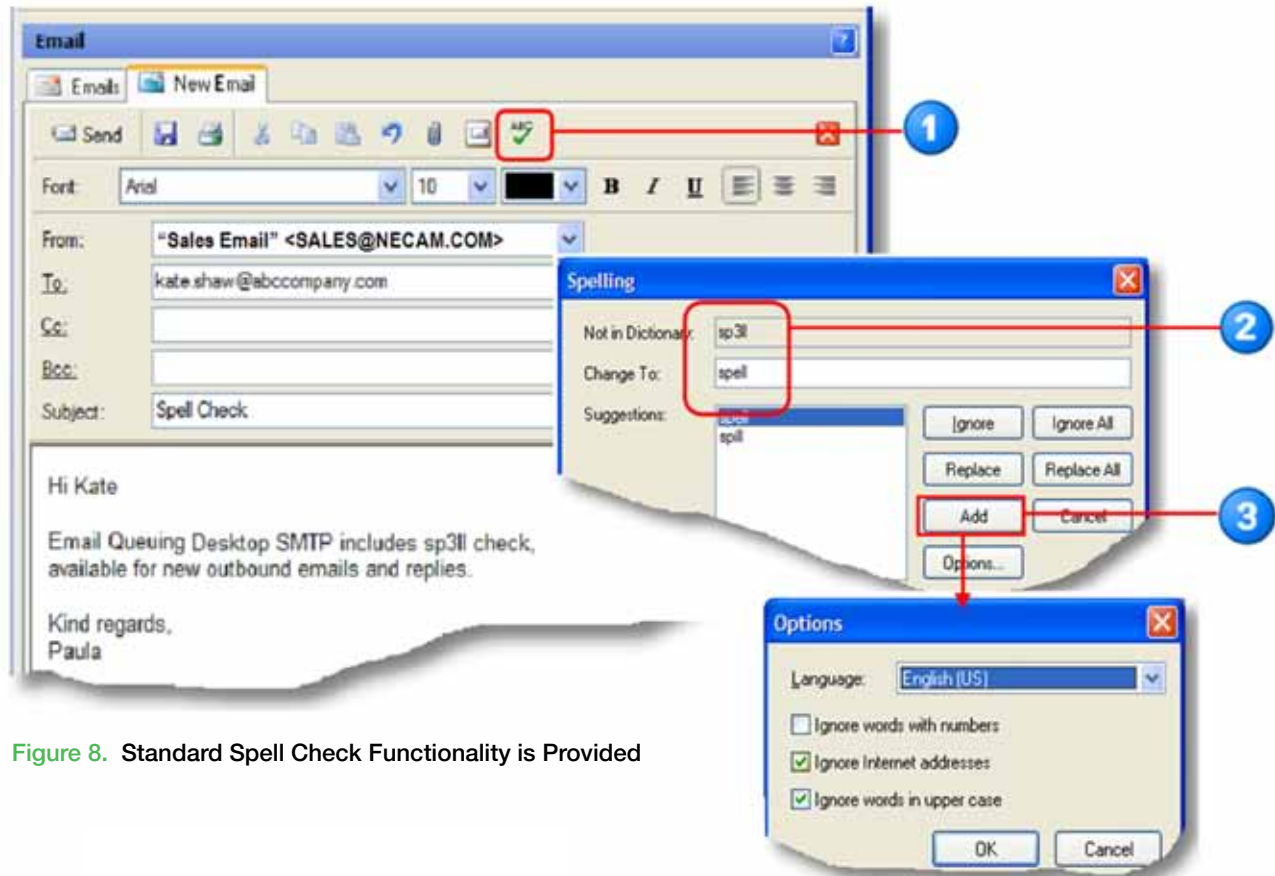


Figure 8. Standard Spell Check Functionality is Provided

- 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 in both Agent Desktop and Reports. These emails can be viewed and recovered (represented to the queue) by users with appropriate security permissions.

- 1 Right-click the email to be deleted.

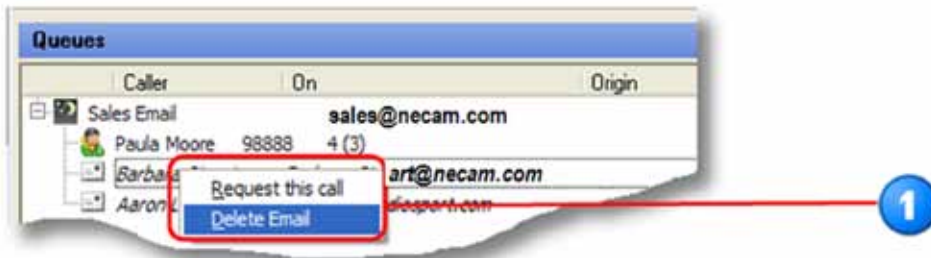


Figure 9. Delete Single Junk Email

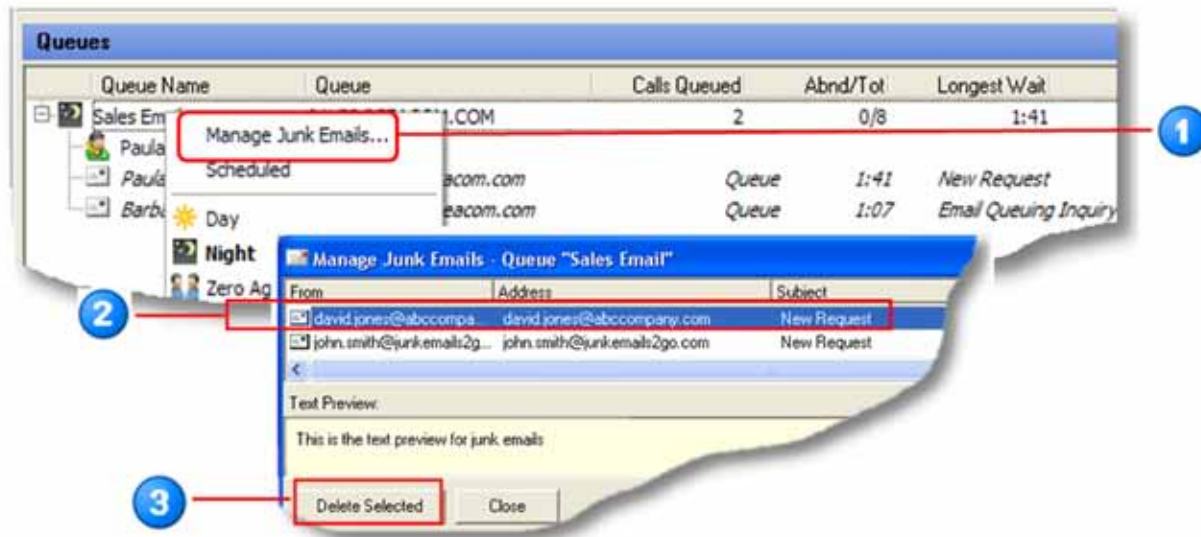


Figure 10. Delete Multiple Junk Emails

- 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 and forwarding email calls. In addition, agents with appropriate security permissions (configured in Administrator) can create their own Personal templates from Agent Desktop.

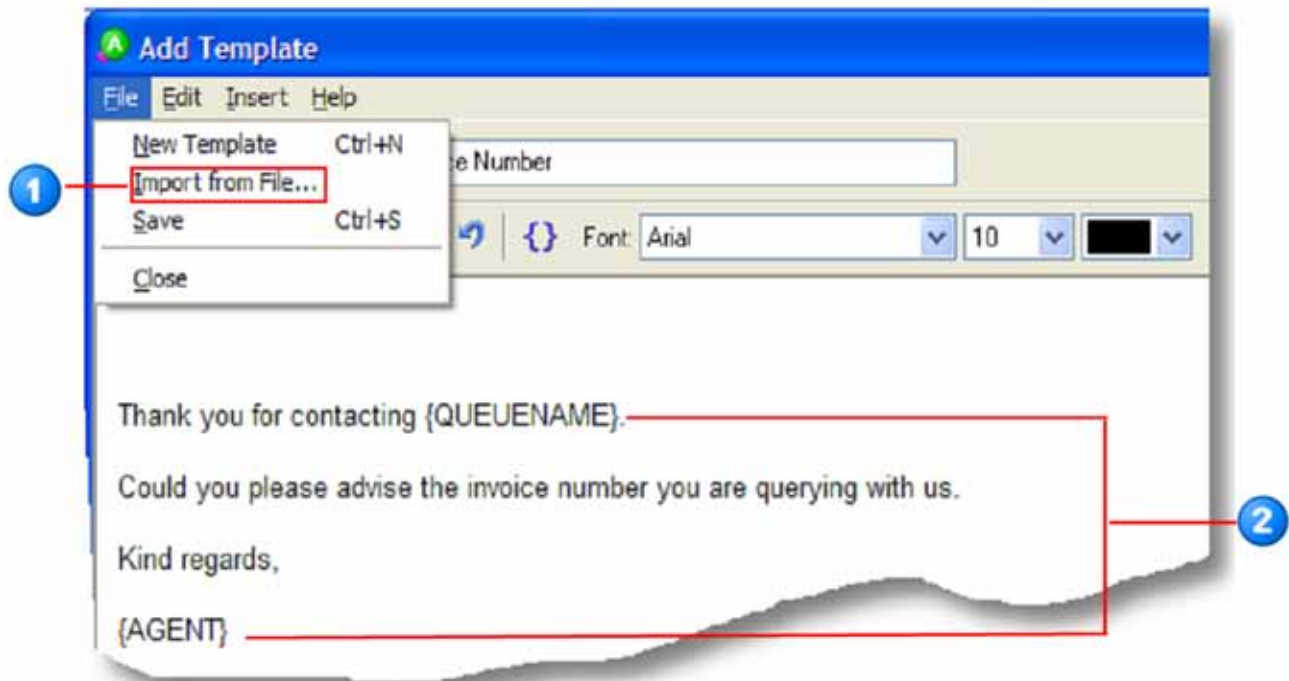


Figure 11. Add Template

- 1 A template from an existing file can be imported into a Personal template
- 2 Automatically populated fields can be inserted into a template

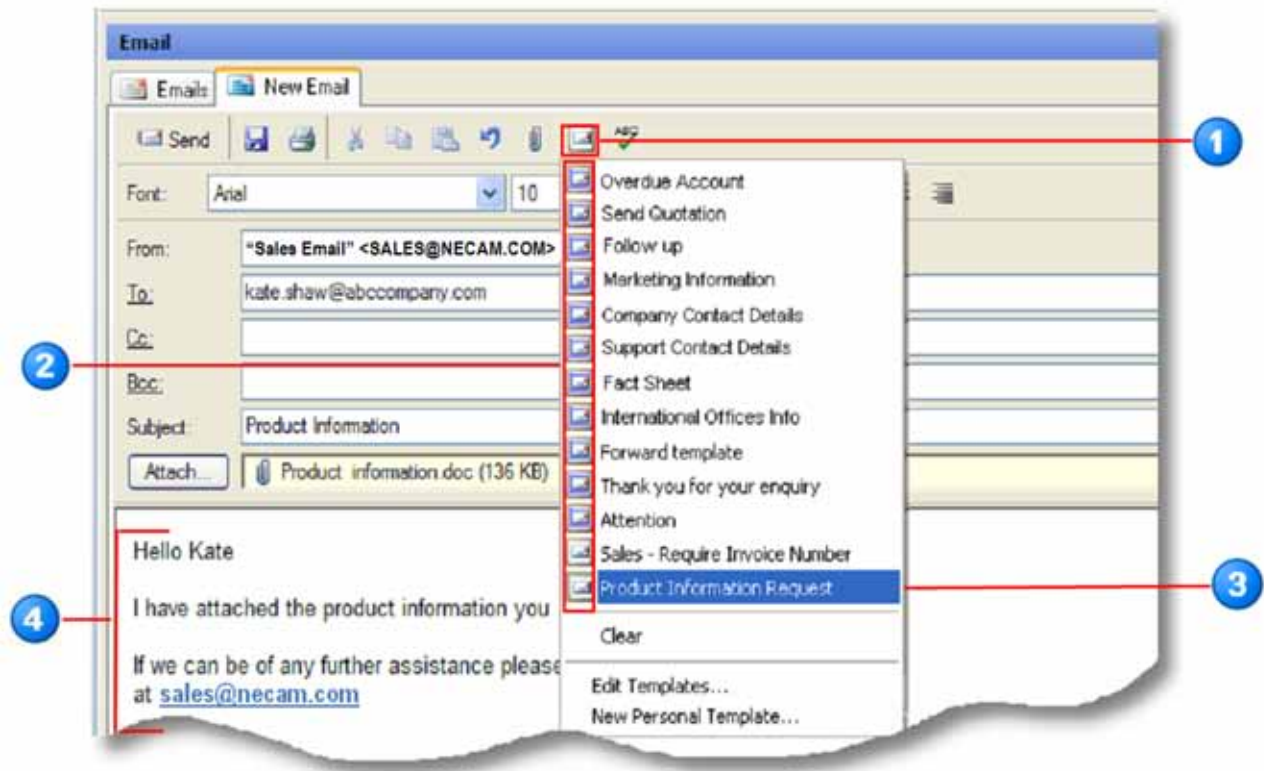


Figure 12. Choosing a Template for a New Email or Reply

- 1 Select the Template button to activate the drop-down list of available templates  
Agents can choose from Global templates or any personal templates they have created<sup>10</sup>, which are identified by different icons
- 2 Choose the template to insert into the Email body
- 3 The template is inserted into the Email body

<sup>10</sup> 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 supervisors to review “conversations” for specific call media.

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

### Benefits

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

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

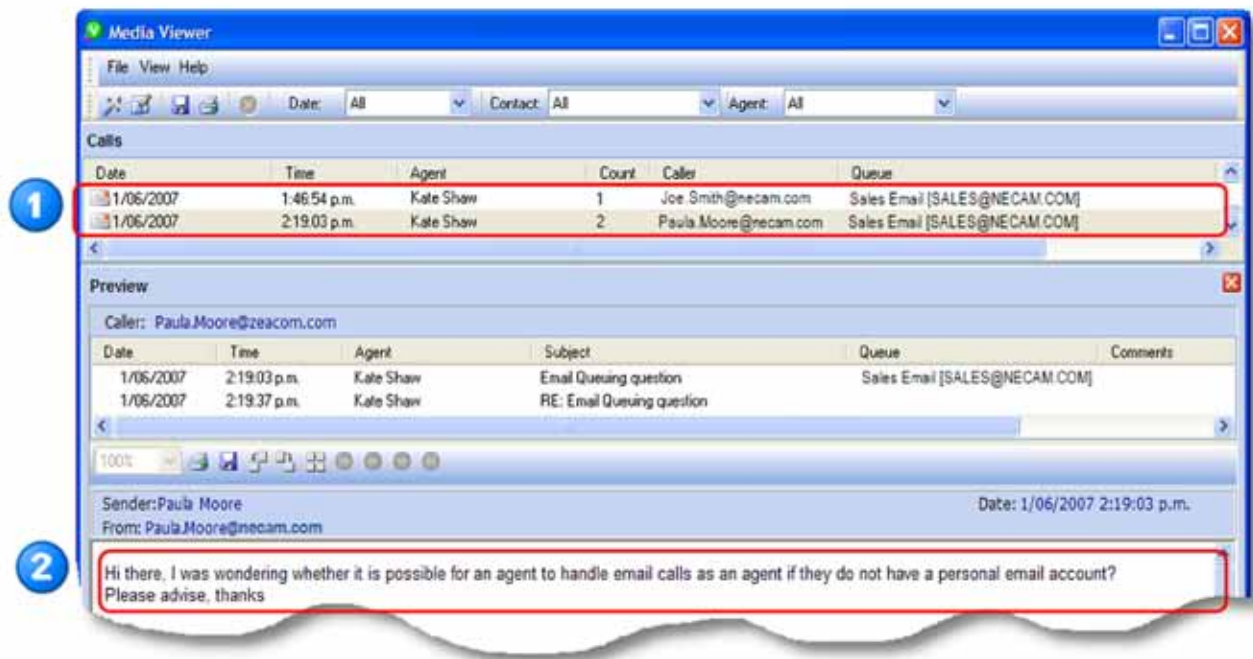


Figure 13. Reports Media Viewer

- 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 from which the call was delivered
- 2 The Preview window shows specific “call” information, i.e., they can view a copy of the email

## Media Viewer Access from Desktop

Selected agents<sup>11</sup> can access the Reports Media Viewer from Desktop, allowing them to review previous email queue conversations.

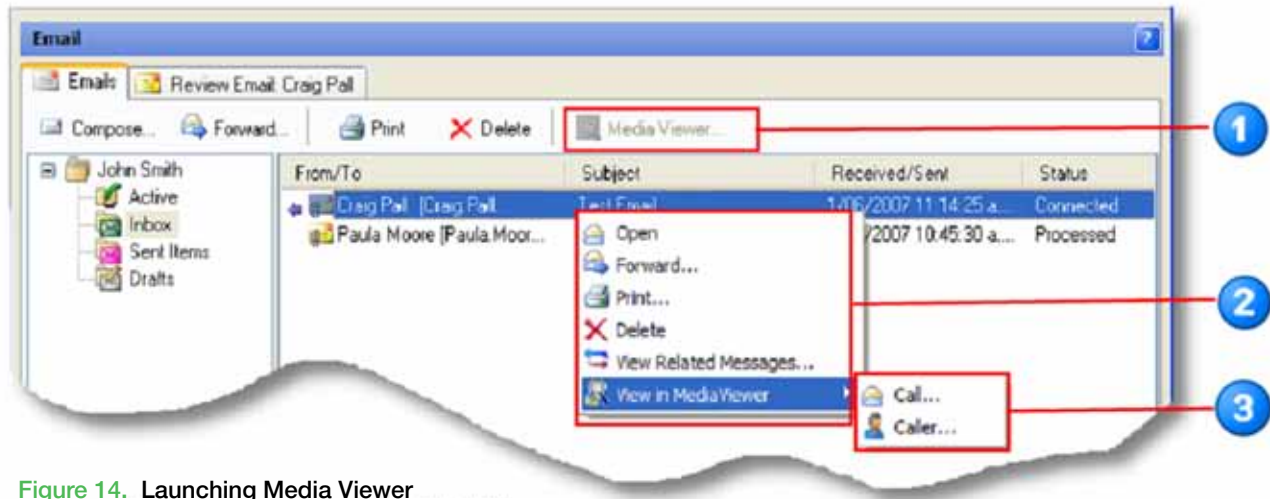


Figure 14. Launching Media Viewer

- 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 from Desktop

<sup>11</sup> 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

The Review Email tab displays reply information to prevent busy agents from sending a reply to an email that has already received a reply.

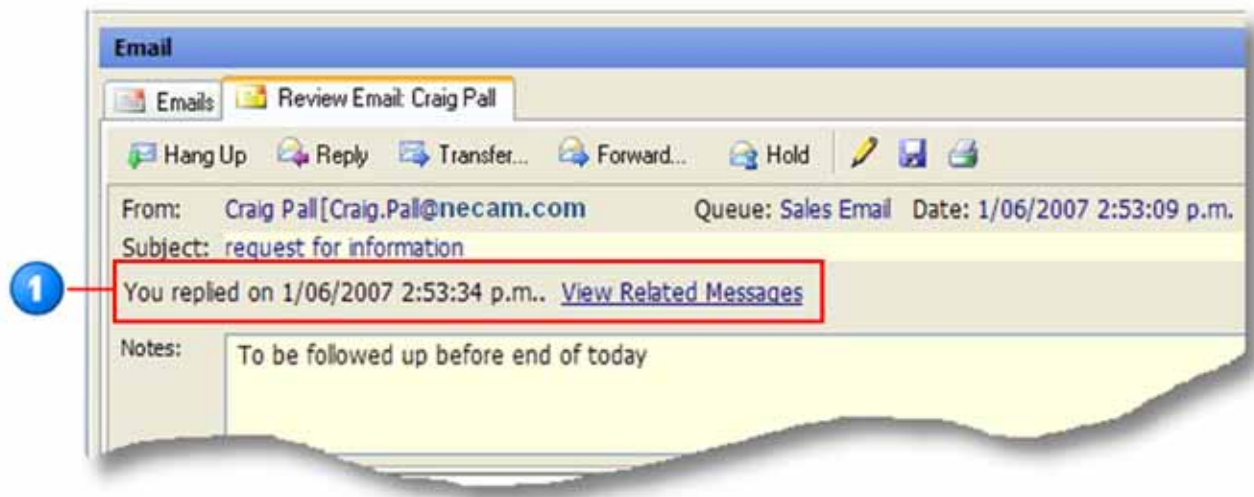


Figure 15. Last Reply Information Display

- 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 but not yet sent. This allows an accurate measure of handle time from the time the agent selects compose, forward or reply to when the agent presses send.

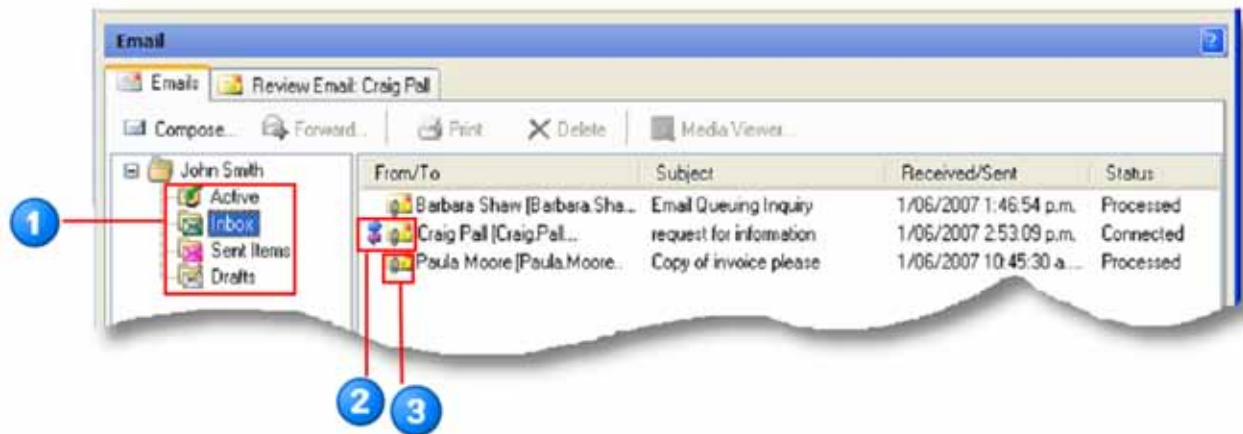


Figure 16. Inbox Folder

- 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.



Figure 17. The Email Conversation View

- 1 In the Emails tab, right click on an email from either Inbox or Active view. Choose View Related Messages to display all messages related only to the conversation thread for the email 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.

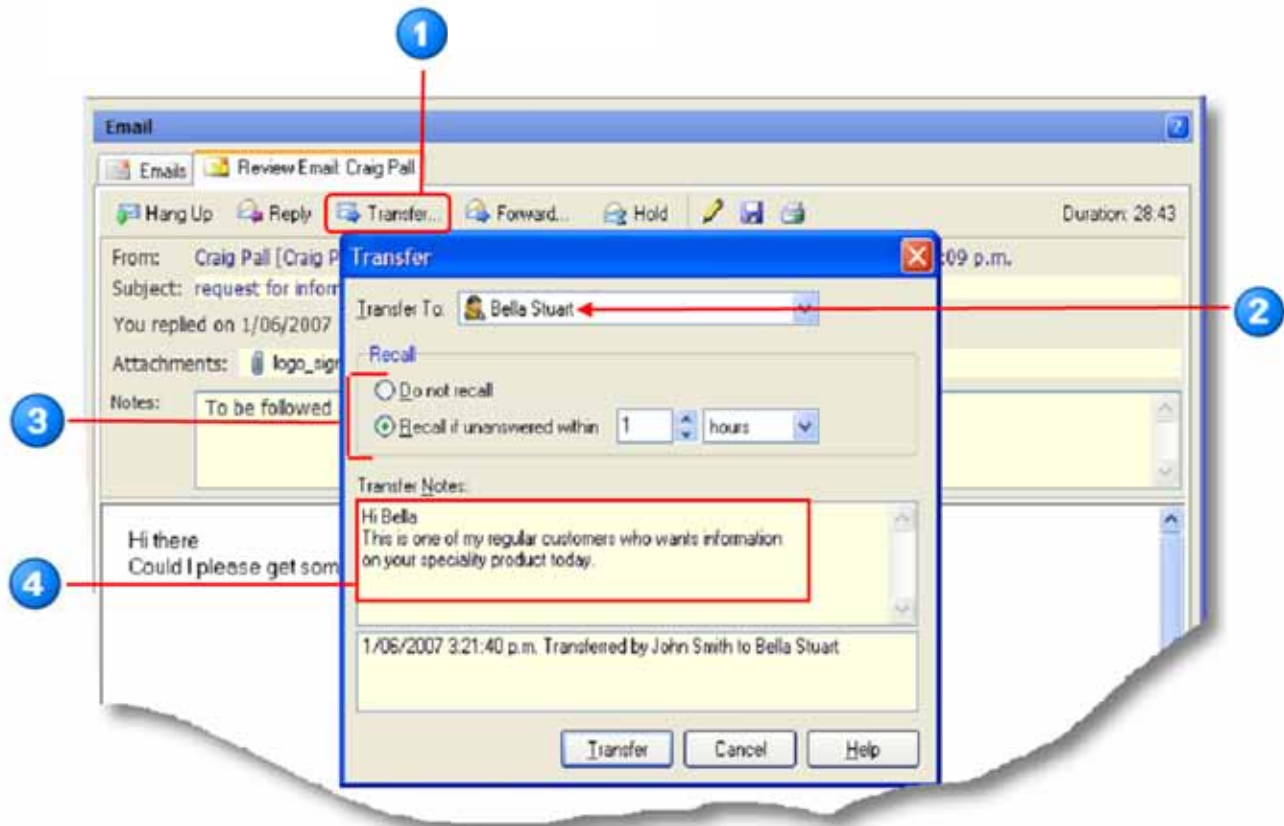


Figure 18. Transferring a Queue Email

- 1 The agent selects the transfer button to transfer the email.
- 2 Select the agent to whom to transfer the email 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 to whom they have transferred the email.

- 3 They can also choose how long the email will wait for the other agent before recalling the email. If the transferring agent is still logged in when the call recalls, it will recall to them; otherwise it will recall to the queue.

- 4 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.

## 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
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

GroupWise is a registered trademark of Novell, Inc., in the United States and other countries.

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Lotus is a registered trademark of IBM Corporation.

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