

Oracle® eMail Center

User Guide

Release 11*i*

Part No. B10184-02

April 2003

Oracle eMail Center User Guide, Release 11i

Part No. B10184-02

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- Did you find any errors?
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If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle eMail Center User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle eMail Center

If you have never used Oracle eMail Center, Oracle suggests you attend one or more of the Oracle eMail Center training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle eMail Center.

- [Chapter 1, "Understanding Oracle eMail Center"](#), provides an overview of Oracle eMail Center.
- [Chapter 2, "Using Oracle eMail Center"](#), provides task-based procedures for using Oracle eMail Center to perform essential business tasks.

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle eMail Center.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle eMail Center shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle eMail Center.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle eMail Center (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle eMail Center Implementation Guide

This guide describe the features and architecture of Oracle eMail Center. It also explains the dependencies and requirements for each product. In addition, it contains task-based procedures for implementing and administering Oracle eMail Center. This guide is intended for technical end users, system administrators, consultants, system analysts, and other technical professionals.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business

Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release *11i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release *11i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release *11i*. You cannot upgrade to Release *11i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle eMail Center. This manual details additional steps and setup considerations for implementing Oracle eMail Center with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle eMail Center with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle eMail Center.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle eMail Center implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle eMail Center and reach full productivity quickly. You have a choice of educational environments.

You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle eMail Center working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle*8i* server, and your hardware and software environment.

Oracle*MetaLink*

OracleMetaLink is your self-service support connection with web, telephone menu, and email alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

Alerts: You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as

SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Understanding Oracle eMail Center

This chapter provides an overview of Oracle eMail Center. Sections in this chapter include:

- [Section 1.1, "Oracle eMail Center Concepts"](#)

1.1 Oracle eMail Center Concepts

Oracle eMail Center is a complete solution for managing email interactions with customers, partners, suppliers, employees and other entities that interact with an organization.

Topics include:

- [Agent Console](#)
- [Auto Acknowledgement](#)
- [Classifications](#)
- [Customer Matching/Searching](#)
- [Default Customer](#)
- [Email Leads](#)
- [Email Queues](#)
- [Email Tagging](#)
- [Interaction Threading](#)
- [Knowledge Base Repositories](#)
- [Message Component](#)
- [Message Search Results](#)

- [My Inbox](#)
- [Outbox Processor](#)
- [Rerouting Email](#)
- [Saving a Partially Composed Reply](#)
- [Service Requests](#)
- [Suggested Response Documents](#)
- [System Folders](#)
- [Using eMail Center Editors](#)
- [Work Activity](#)

1.1.1 Agent Console

The eMail Center Agent Console is an HTML application that allows agents to respond to inbound emails and compose outbound emails using a system of generated suggested responses and to compose original outbound email messages using standard templates.

The following features are available for agents to assist with the processing of email responses:

- The Home page displays the email accounts assigned to the agent and the classifications for each of the accounts. The Inbox Summary section displays the number of emails fetched by the agent that have not yet been resolved. The Activity container provides a summary of transactions performed by the Agent for a selected duration (day, week or since the last login). The Break container enables the Agent to go on a break and notify the system of the reason.
- Built-in access to the MES and Knowledge Management (formerly known as SMS) repositories is provided through the knowledge base tab. Agents can browse through the MES categories and search both Knowledge Management and MES for response documents and solution sets.
- Customer information is presented to the agent automatically. In the event that a matching customer is not found, eMail Center provides the ability to search the customer database and select a customer to associate with the interaction.
- Every action performed by the agent using the Agent Console is logged in the customer's unified interaction history.
- The calendar tab exposes the Foundation calendar functionality.

Outbound messages, whether original or replies can be created not only by inserting or attaching suggested responses or templates, but any document in the Knowledge Base. There is a search capability that allows agents to search for documents as well as the Marketing Encyclopedia System's (MES) category structure that can be browsed. The agent can also attach a document from the network or local file system using the Attachments link.

Agents can also use the rich-text editor to mark up documents with font changes, alignment, hyperlinks, and inline images.

The eMail Center Agent Console also provides the ability to search for historical messages. These are either inbound messages that were replied to or deleted or outbound messages that were sent. Using the same functionality agents can also search their inboxes.

All interactions are now recorded by eMail Center. When an agent is finished with a message, whether sending, deleting, or transferring, the interaction details (interactions, activities, media items, and media item lifecycle segments) and outcomes are recorded to Interaction History.

The JTF Calendar functionality is also included in the eMail Center Agent Console which allows agents to schedule reminders or lookup important dates.

1.1.2 Auto Acknowledgement

Oracle eMail Center considers an Auto Acknowledgement as a confirmation email that will be sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response from an agent. These emails will not contain any content that is used to respond to a customer enquiry.

1.1.3 Classifications

Oracle eMail Center can categorize or classify emails into different queues based on administrator defined rules. The administrator can create a rule using a combination of provided keys. These keys pertain to the email, such as account name, senders name, intent, received date, and system information such as current day and time. Classifications enable the distribution of emails into multiple queues which could also relate to the prioritization of emails. When a Classification is associated with an email account, a folder bearing the name of the classification is created for that email account. By default an "Unclassified" folder is created for every account to hold emails that do not satisfy any classification rules.

1.1.4 Customer Matching/Searching

Oracle eMail Center has extended the search for matching customer records that follow the Oracle TeleService and Oracle Telesales models (including Parties of type Person, Organization, and Relationship).

Customers and Contacts created by the business application can be easily selected by the eMail Center processing engine and/or agent console. Details of the specific eMC changes relating to Customers are below:

a. eMC Server Processing - Customer Lookup

The process for finding matching customers based on email address is initiated by the eMC server processing. Matching customer records based on an email address can result in one of the three scenarios listed below:

Scenario 1 - A single matching customer record found

Scenario 2 - Multiple matching customer records found

Scenario 3 - No matching customer records found

An attempt is made to identify the customer and contact for each incoming email message. This attempt is performed using the email address and searches for the customer in the customer database. If the customer is identified, the customer and contact records are shown on the Reply page. If there are multiple customer records found for the address, a message with a link is displayed and by clicking the link you can identify which customer and contact to use for this interaction. If the email address was not found in the customer database, eMail Center uses the default customer (see section 1.1.6), but if there is sufficient information in the inbound message, you can use the Customer search to identify the customer.

b. eMC Agent Console/Message Component - Customer Search

Oracle eMail Center allows you to search for customers on the following criteria:

- Customer name - Search only parties matching the customer name entered.
- Last Name or First Name - Search only parties matching the last/first name entered.
- Email Address - Search parties who have an "email" contact point that matches the email address entered.
- Customer Number - Search parties whose customer number matches the number entered.

- Customer ID - Search parties whose customer ID matches the ID number entered.

Note: eMC only searches for "CONTACT_OF" or "EMPLOYEE_OF" type of relationships by default. To view other types of relationships, search for one of the parties involved and then navigate to the Overview page by clicking on the name of the selected party.

c. Recording Interactions

The interaction is always recorded against the Customer. If the system processing could not find a matching customer, the agent is prompted to search for and select a customer for recording the interaction. However, if the agent wishes not to, then the "default" customer (created during the setup phase by the administrator) is selected.

1.1.5 Default Customer

To record an interaction, a customer must first be identified. In cases where the customer cannot be identified or does not exist, Oracle eMail Center provides the concept of "default" customer. A default customer is a customer created by the eMail Center administrator to be used in cases where no customer has been identified.

1.1.6 Email Leads

A key aspect of the Oracle eMail Center – Telesales integration, is the ability to convert an incoming email into a lead. The sales rep working the lead will be able to view the email contents and respond to that email inquiry if so desired.

An eMail Center agent can create a lead from the new "Lead" container in the Agent console. This container, which has been added to the Reply and Compose pages, enables an agent to create a lead for the incoming email by simply clicking the Create link. However, before that link is available for the agent to click, a customer must be selected. Once the agent clicks the link, a new lead with the description of "Lead generated via Oracle eMail Center" is created for the customer. The lead ID is then displayed in the Message Component. A create lead activity is also added for the open interaction so that the lead gets associated with the incoming email.

The "Lead" bin appears on the Reply and Compose pages only if the Email Center - Telesales integration is turned "ON" by applying the necessary prerequisite and switching the **IEM: Integration: Leads creation enabled** system profile to "Y". For information about the specific patches and steps for enabling the create leads functionality, refer to the Lead Enabling eMail Center topic in the *Oracle eMail Center Implementation Guide*.

A valid customer ID is required to be able to create a lead. This customer (party) could be of type Organization, Person or Relationship. If the email address of the incoming email does not match any valid customer, matches multiple customers, or if the agent has not yet selected a customer record while composing a new message then the message in the Lead container should ask the agent to select one prior to creating a lead. If the email address of the incoming email matches a single valid customer record or if the agent has selected a customer record while composing a new message then a "Create" hyperlink will appear in the Lead container.

When the agent clicks on the Create link above, the following actions take place:

1. The "Create Lead" API is called with following parameters:
 - a. Party ID for the customer record selected
 - b. Lead Name = "Email Center Generated Lead"
 - c. Response Channel = "Email"
 - d. Status = "New" and
 - e. CREATED_DATE = system date
2. An "Activity" will be recorded for the open interaction.

The lead ID is then displayed to the agent in the Reply/Compose screen. When the agent responds to the email inquiries, this lead ID will be tagged to the outbound email response. If the customer replies back to the email sent by the agent, then the lead ID will be extracted from the tag and displayed to the agent in the Lead container. A "Notify" hyperlink will also appear in the Lead container. The agent can click on the "Notify" link to notify the sales representative about the receipt of an email related to the lead. If the agent does click on the "Notify" link then the following actions take place:

1. The "Update Lead" API will be called using the lead ID extracted and will pass the system date for the LAST_UPDATE_DATE column.
2. The "Add Note" API will be called using the lead ID extracted to insert a standard note saying, "An email related to this lead has been received".

1.1.7 Email Queues

Email queues enables you to categorize or classify the emails so that agents can prioritize their work based on acquiring emails from a certain queue (in other words, for a specific classification). For example, if your business works with issues related to banking and insurances, you might have the following email accounts set up in your eMail Center system: `banking@mycompany.com` and `insurance@mycompany.com`. As email messages are received they are stored in queues associated with the email accounts to which they were sent.

eMail Center agents are assigned to work with specific email accounts. For example, if you are assigned to work with messages that customers send to the `insurance@mycompany.com` email account, you see the insurance account listed in the Queued Messages container on the eMail Center Home tab.

In the Queued Messages container, on the eMail Center Home tab, you might see classification names next to the account names. For example, next to the account name of insurance you might see auto insurance and life insurance listed in the Classification column. The names listed in the Classification column represent the email queues associated with the insurance account.

The queue count only reflects emails that are in queue - not assigned to a specific agent.

1.1.8 Email Tagging

Email tagging is the process of inserting a tag containing the interaction ID (along with other data) into every outbound email and also extracting the same from the inbound email (customer's response).

eMail Center uses the interaction ID to track all the interactions performed on a message with a particular customer. An "interaction" is created or generated when, an agent either, responds to an incoming email, deletes an incoming email, transfers an incoming email or composes a new email. The interaction is identified using a unique interaction ID, which is associated with a one and only one customer (party) ID. Hence every time an email is received from a customer a new interaction is generated. Therefore the current interaction can only be linked to the previous interaction if we can identify the interaction ID of the previous interaction.

1.1.9 Interaction Threading

Email Interaction Threading is the process of linking one email interaction to another such that a parent-child relationship is formed between the two interactions.

An "interaction" is created or generated when, an agent either, responds to an incoming email, deletes an incoming email, transfers an incoming email, reroutes an email, or composes a new email. The interaction is identified using a unique interaction ID, which is associated with a one and only one customer (party) ID. Hence every time an email is received from a customer a new interaction is generated. Therefore the current interaction can only be linked to the previous interaction if we can identify the interaction ID of the previous interaction. This is made possible by the new feature called [Email Tagging](#). This feature inserts a tag containing the interaction ID (along with other data) into every outbound email and also extracts the same from the inbound email (customer's response). A new interaction is generated whenever an email is received and hence eMail Center will "thread" or connect the two interactions using the Oracle Interaction History schema.

With interaction threading, each "parent" interaction can have more than one "child" interaction. However a "child" interaction can belong to one and only one parent interaction.

The email interactions in a thread are displayed in chronological order, with the oldest email interaction in the thread on top.

Email Thread Example:

An agent composes a new email for a customer. An interaction ID of 1234 is assigned to that interaction and included in the tag inserted in the outbound email. When the customer responds to that email, the interaction ID from the email tag is extracted and stored. When the agent responds to the customer's reply, a fresh interaction is created (9876). This interaction is then related to 1234 using the JTF_IH_INTERACTION_INTERS table. Now the customer responds again and this time the agent fetches the email and deletes it. However, this is still recorded as an interaction, ID is 7268. Now this interaction will be related to 9876 and hence indirectly related to 1234, thus forming an (email) interaction thread as shown below.

Parent ID	Interaction ID	Activity	Media Item
	1234	Email Composed	Copy of outbound email
1234	9876	Email Responded	Inbound email
		Email Sent	Copy of outbound email
9876	7268	Email Deleted	Inbound email

Special Cases

The following require special attention:

1. **Reassigning emails** - agents have the ability to reassign an email in a number of ways, including:
 - Transferring the email to another agent
 - Routing the email to a different queue (classification)
 - Re-queueing the email in the same account and queue

When an email is reassigned, the current interaction is closed. A new interaction is opened when the new agent fetches or opens the email, because an interaction record is between two entities - the customer (party) ID and the agent (resource) ID. A new interaction is required to be created every time an agent working on the email changes. However, this does not necessarily mean that the new interaction is a "child" of the previous interaction. Rather, whenever an email is "re-assigned" the meta-data value that contains the (previous) interaction ID tag will not be overwritten.

Extending the previous example, an agent receives a response from the customer a second time around (interaction ID 7268). The agent decides to transfer it to another agent. When the second agent "opens" the email and responds to it, another interaction is recorded (interaction ID 4105). However, this interaction should be recorded as a child of the previous outbound interaction rather than the "transfer" interaction, as shown below.

Parent ID	Interaction ID	Activity	Media Item
	1234	Email Composed	Copy of outbound email
1234	9876	Email Responded	Inbound email
		Email Sent	Copy of outbound email
9876	7268	Email Transferred (agent1)	Inbound email
9876	4105	Email Responded (agent 2)	Inbound email
		Email Sent (agent 2)	Copy of outbound email

2. **Changing the customer** - Agents have the ability to change a customer (party) for any email interaction. However, interactions are tied to a customer. Therefore an interaction thread cannot contain interactions recorded against

different customer (party) IDs. If an agent changes a customer prior to sending the response, then the new interaction should not be linked to the previous interaction. Using the original example, if the agent decided to change the customer and respond back instead of deleting (interaction ID 7268) then the interaction thread should terminate as shown below.

Parent ID	Interaction ID	Activity	Media Item
	1234	Email Composed	Copy of outbound email
1234	9876	Email Responded	Inbound email
		Email Sent	Copy of outbound email
	7268	Email Responded (changed customer)	Inbound email
		Email Sent	Copy of outbound email

3. Auto-Processing - Based on certain administrator-defined rules, an email may be:

- Automatically Replied to
- Automatically Deleted
- Automatically Resolved (no action required)

The above automated processing actions each correspond to a similar manual operation and each of these actions results in opening and closing an interaction. The only difference is that during automated processing, the customer (party) ID is guaranteed to remain unchanged.

4. Replying, Resending, or Forwarding archived emails - The tag information for every email is archived. When an agent retrieves an archived email using either the interaction history or message search, the tag is extracted from the subject of the archived email. This tag contains information pertaining to the interaction ID. If the agent decides to resend an archived email then the new interaction is automatically threaded to the previous one. However if the agent decides to reply to or forward the archived message, then the new interaction should only be "threaded" if the customer (party) id is the same as the one extracted from the tag.

Limitation (exception): The only emails that would not have a tag associated with them are inbound emails from customers, which are not in response to an outbound email sent by an agent. However, that email would be part of an

interaction. The interaction ID pertaining to this media item (email) is available if the agent retrieved the email via Interaction History. If the agent retrieved the email via message search, then the corresponding interaction ID will not be available. A new interaction would then be created when the agent replies to the archived email, but "threading" would not occur.

1.1.10 Knowledge Base Repositories

As you work with email messages, you can use suggested response documents and email templates which have been stored in the knowledge base repositories set up for use by eMC.

eMail Center is integrated with two knowledge base repositories: Marketing Encyclopedia Systems (MES) and Knowledge Management (previously known as SMS). Although both of the repositories can be searched for probable responses to an incoming email, you can only publish documents into MES. Solution sets can be created in knowledge management only via Oracle iSupport. Agents can browse through all of the categories in MES or search for documents in both MES and Knowledge Management, which contain specific keywords. Either one or both of the above repositories are scanned for probable responses when processing an incoming message. This is based on the site level profile set by the administrator.

1.1.11 Message Component

To provide business applications such as Oracle TeleSales with the ability to compose new emails, view and reply to archived emails, Oracle eMail Center now provides the message composition, reply and preview functionality in a common module referred to as the Message Component (MC). All of the current Agent Console functionality relating to composing, replying or viewing messages are now encapsulated in a single browser window. The purpose of this window is to either create an outbound email message and send it, or view an inbound email message and process it. Once an action is taken on the message, the browser window will close automatically. The Message Component is not intended to replace the Agent Console, but is incorporated in it such that all functionality pertaining to a single message is now presented in a separate browser window, thus enabling multiple email messages to be open at one time. Whenever an email is opened (next message fetched from the Queue, Inbox email opened, Interaction email viewed), the email will be launched in a separate browser window. Tabs available in the Message Component are:

- Message
- Knowledge Base

- Customer

The Message Component adds a new Responsibility "eMail Center Message Component". The eMail Center Message Component responsibility must be assigned to every Agent Console user to enable them to compose or view emails using the eMC Message Component.

1.1.12 Message Search Results

After specifying your message search criteria and executing a message search, you can then perform other tasks with the message(s) found depending on the folder that you searched.

The following options, in addition to opening the original message by clicking on the subject hyperlink, are available to you from the Message Search Results page:

Folder	Buttons
Inbox	Reply, Refine Search Criteria
Deleted	Reply, Forward, Refine Search Criteria
Resolved	Reply, Forward, Refine Search Criteria
Sent	Resend, Forward, Refine Search Criteria

1.1.13 My Inbox

"My Inbox" contains emails "owned" by an agent. The emails in the inbox could have either been acquired by the agent, automatically routed to the agent, assigned to the agent by the supervisor, or transferred to the agent by another agent. The emails remain in the inbox until the agent either responds to it, deletes it, reroutes it, or transfers it to another agent. Once an agent performs one of these actions, the incoming email is moved to either a system folder for archival or to the designated agent's inbox.

A message in your inbox can not be accessed by other agents. If you want another agent to access a message you have fetched, you must transfer the message to the agent.

The My Inbox Summary container, on the eMail Center Home tab, lists the accounts to which you are assigned to work and the count of the number of messages in your inbox account queues.

1.1.14 Outbox Processor

The Outbox Processor is essentially a queue for outbound emails. When an agent clicks **Send**, the outbound message is queued and processed asynchronously. The Outbox Processor will record the Interaction History and archive a copy of the outbound email prior to sending the email. This asynchronous processing increases agent productivity because the agent no longer has to wait for the sent email to be processed before moving on to the next email message. The Outbox processor also provides a mechanism to generate outbound emails without agent intervention. This process can be used for generating auto replies as well as email notifications.

1.1.15 Rerouting Email

eMail Center allows you to reroute an email to a different classification queue within the same account or requeue the email in the same queue if either the email is incorrectly classified or if the agent is not an expert on the email subject.

1.1.16 Saving a Partially Composed Reply

When you are composing a reply to an e-mail message you can save your partially composed response message to work on later. When you select **Save** from the Action field and click **Go**, the status email message in your Inbox changes to Saved and all work you have done on the email is retained. Later, when you open the same incoming e-mail message from your inbox, the draft of the response that was composed earlier is displayed in the Reply page.

1.1.17 Service Requests

eMail Center provides its agents with the ability to create and update service requests from within the eMail Center Agent Console. This service request (SR) is associated with the email via Oracle Interaction History. In addition when the agent responds to the incoming email after creating a service request, that SR number will be inserted as part of the tag information. If the customer replies back to the agent response, this SR number is then extracted and made available to the agent who can update the service request accordingly.

Tagging is a new feature that enables you to define a set of keys and values. The encrypted set of key-value pairs is referred to as a "tag" that is automatically appended to the subject of every outbound email. When the customer replies back to an outbound email, the tag and its corresponding key-value pairs are extracted and made available to the system.

Two automated processing scenarios which are available in this release are listed below. These scenarios can be manually activated when the administrator sets the appropriate system profile option.

a. Automatic update of service requests

When processing an email, if the agent creates a service request from within eMC, the service request number is included in the tag that is appended to the response sent to the customer. If the customer replies back, then the service request number is extracted from the incoming email and can be used to update the status of the service request automatically.

b. Automatic routing of email messages to a specific agent

The ID of the agent that composes an outbound email is included in the tag by default. This agent ID will then be extracted when the customer replies and used to route the incoming email back to the agent who generated the outbound email.

1.1.18 Suggested Response Documents

When you reply to an incoming email message you can view a selection of sample email responses that eMC has identified as potentially appropriate responses. You can then determine the most appropriate response for the email, modify the response as needed, and send the email response message along with any appropriate email attachments.

As incoming email messages are received, the eMail Center system determines the intent of the message and identifies suitable responses for the message. eMail Center automatically lists a selection of the potentially appropriate responses in the Top Suggested Response Documents container on the Reply page. You can choose one or more of the suggested response documents listed and customize an email response using a full feature editor. You can quickly and efficiently respond to inbound email messages by using suggested response documents to compose your email responses.

1.1.19 System Folders

As you process email messages using eMail Center, copies of the messages you receive, send, and delete are stored in the appropriate system folders. You can access the system folders, associated with the email accounts to which you are assigned to work, to perform searches for messages. Agent Inbox folders are used to store all incoming messages, that they have fetched from the Messages Queue and have not yet processed.

When an inbound email message has been processed by an agent, it ends up in either the Resolved or Deleted folder, and all outbound email messages get copied to the Sent folder.

1.1.20 Using eMail Center Editors

Oracle eMail Center provides you with two types of editors - a plain text editor and a rich-text editor. A rich text editor enables you to format the font of the email, and include an image or hyperlink in the email. You should use the "Rich Text" editor for all HTML documents. You, can switch from one editor to another by clicking on the link provided above the text box. By default the plain text editor will be displayed. However if the you want to make the "Rich Text" editor the default, you can do so by setting the corresponding profile option.

1.1.21 Work Activity

As you process email messages, eMail Center records the number of message transactions you have performed during selected time periods. On the eMail Center Home tab, the Work Activity container lists the current count of the transactions you have performed for each type of message activity recorded by eMail Center. The Work Activity container can be set for the following periods:

- Today
- This Week
- Since Last Login

These time periods can be selected by clicking **Profile > eMail Center > General**.

The message activities recorded are:

- Fetched - Messages which you have fetched from the Queued Messages container.
- Responded - Messages you have fetched or been transferred and to which you have responded.
- Deleted - Messages which you have deleted.
- Transferred - Messages which you have transferred to another agent.
- Composed - Messages you have composed.
- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

The Work Activity container also contains a Pending column. This column provides a count of the messages that have been finished by the agent and are currently queued for processing by the Outbox Processor.

Note: As these messages are processed by the Outbox Processor, the item count should drop to zero. If the count remains the same for an extended period of time, this may indicate an error.

Using Oracle eMail Center

This chapter provides task-based procedures for using Oracle eMail Center to perform essential business tasks. Sections in this chapter include:

- [Section 2.1, "eMail Center Home"](#)
- [Section 2.2, "eMail Center Messages Inbox"](#)
- [Section 2.3, "eMail Center Messages Search"](#)
- [Section 2.4, "eMail Center Messages"](#)
- [Section 2.5, "Knowledge Base Categories"](#)
- [Section 2.6, "Knowledge Base Search"](#)
- [Section 2.7, "eMail Center Customer Search"](#)
- [Section 2.8, "Supervising Messages"](#)
- [Section 2.9, "Supervising Accounts"](#)
- [Section 2.10, "Supervising Documents"](#)
- [Section 2.11, "Supervising Queries"](#)

Identical topics can be found in the online help for Oracle eMail Center.

2.1 eMail Center Home

Use the Home tab to view a summary of your message activity, work on messages, or take a break.

The Home page contains three containers:

- The Message Summary container

The Message Summary container allows you to view information about the messages waiting in each queue or classification, as well as the messages in your Inbox.

For each queue or classification, the Message Summary container shows you the number of messages currently in the queue or classification, the amount of time the oldest message has been in the queue or classification, and permits you to retrieve the next message from any of the queues or classifications that have email messages waiting in them. The Get Next Message icon is only activated when there is an inbound message waiting in the corresponding queue. When no messages are present in a particular queue, the icon is greyed out.

For your Inbox, the Message Summary container shows you the current message count for each account or classification, the amount of time the longest message has been in your Inbox for each account or classification, and provides an icon allowing you to create a new email message for any of the accounts listed. If you have an unread email in your inbox, the number in the count column will be bolded.

- The Work Activity container

The Work Activity container lists the current count of the transactions you have performed for each type of message activity recorded by eMail Center. The Work Activity container can be set for the following periods by clicking **Profile > eMail Center > General**:

- Today
- This Week
- Since Last Login

The recorded message activities are:

- Fetched - Messages which you have fetched from the Queued Messages container.
- Responded - Messages you have fetched or been transferred and to which you have responded.
- Deleted - Messages which you have deleted.
- Transferred - Messages which you have transferred to another agent.
- Composed - Messages you have composed.
- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

The Work Activity container also contains a Pending column. This column provides a count of the messages that you have finished and are currently queued for processing by the Outbox Processor.

Note: As these messages are processed by the Outbox Processor, the item count should return to zero. If the count remains the same for an extended period of time, this may indicate an error.

- The Break container

The Break container provides you with a means of indicating when you are going on a break and for what reason.

Tasks

You can perform the following tasks:

- [Viewing a Summary of Your Message Activity](#)
- [Getting a Message from an Email Account](#)
- [Composing a Message](#)
- [Opening Your Inbox](#)
- [Taking a Break](#)

2.1.1 Viewing a Summary of Your Message Activity

Use this procedure to view a summary of your message activity for a selected time period.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Select the Home tab.

The Work Activity container can be set for the following periods:

- Today
- This Week
- Since Last Login

These time periods can be selected by clicking **Profile > eMail Center > General**.

The message activities recorded are:

- Fetched - Messages which you have fetched from the Queued Messages container.
- Responded - Messages you have fetched and to which you have responded.
- Deleted - Messages which you have deleted.
- Transferred - Messages which you have transferred to another agent.
- Composed - Messages you have composed.
- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

The Work Activity container also contains a Pending column. This column provides a count of the messages that you have finished and are currently queued for processing by the Outbox Processor.

Note: As these messages are processed by the Outbox Processor, the item count should return to zero. If the count remains the same for an extended period of time, this may indicate an error.

See Also

- [Getting a Message from an Account](#)
- [Composing a Message](#)
- [Opening Your Inbox](#)
- [Taking a Break](#)

2.1.2 Getting a Message from an Email Account

The Queued Messages container displays the number of messages in each email account by classification.

Use this procedure to obtain a message from an account in the Queued Messages container.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Select the Home tab.
2. You can request the next message at the account level or from a specified classification within an account. In the Account/Classification column of the Queued Messages container, click the drill-down arrow to expand an account to show the classifications within it.
3. In the Get Next Message column, click the icon for the appropriate account or classification.

The Reply page appears in a new browser window. The Home tab refreshes and the message counts in the Work Activity, Queued Messages, and My Inbox Summary containers are adjusted.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Viewing the Original Message](#)
- [Deleting a Message](#)

2.1.3 Composing a Message

Use this procedure to compose a message from the Home tab.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Select the Home tab.
2. In the Compose New Message column, click the Compose New Message icon for the account from which you want to send the message.

The Compose page appears in a new browser window.
3. In the From list, ensure the correct account is listed.
4. If you know the email address of the recipient, type it in the To field. Otherwise, use the Customer Search feature to locate the desired recipient and associate the recipient with the email message.

See the [eMail Center Customer Search](#) topic for more information on the Customer Search feature.

5. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will be displayed to other recipients.

6. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will not be displayed to other recipients.

7. In the Subject field, type a subject for the message.
8. Click the Edit Attachments hyperlink if you want to include or attach a file to the message.

See the [Managing Inserts and Attachments](#) topic for more information on attachments.
9. Depending on which mode you have set as your default, click the Change to Plain Text Mode, or Change to Rich Text Mode hyperlink.

See the [Selecting the Message Composition Mode](#) topic for more information on the two text modes.

See the [Setting Message Preferences](#) topic for more information on selecting a default text mode.
10. Type your message body in the provided field.
11. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)

2.1.4 Opening Your Inbox

The My Inbox Summary container displays the number of messages that you have obtained from the Queued Messages container, but have not processed.

Use this procedure to open your inbox.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Select the Home tab.
2. In the Count column of the My Inbox area, click the hyperlinked count number for the appropriate account or classification.

The My Inbox page appears.

3. If you want to list messages for a different account, select a different account from the list in the Switch Account field and click **Go**.
4. If you want to reply to a message, click a subject hyperlink in the Subject column.

The Reply page appears in a new browser window.

See Also

- [Viewing a Summary of Your Message Activity](#)
- [Getting a Message from an Account](#)
- [Composing a Message](#)
- [Taking a Break](#)

2.1.5 Taking a Break

Use this procedure to take a break from working with Oracle eMail Center.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Select the Home tab.
2. From the Reason list in the Break container, select a reason for taking a break.
3. Optionally, if you want to end your eMail Center session, select **End Session** and you will be logged out of the eMail Center Agent console.

Important: If you select **End Session**, you will not be able to return to eMail Center by selecting **End Break**. You must log in again.

4. Click **Go on Break**.

The On Break page appears. The page displays the elapsed time and refreshes every minute.

5. If you want to return to work, click **End Break**.

The Home tab appears.

See Also

- [Viewing a Summary of Your Message Activity](#)
- [Getting a Message from an Account](#)
- [Composing a Message](#)
- [Opening Your Inbox](#)

2.2 eMail Center Messages Inbox

Your inbox contains messages that you have obtained from the Queues, messages that have been assigned or transferred to you by a supervisor or another agent, and messages that have been automatically routed to you.

The list in the Switch Account field allows you to quickly switch between the accounts to which you are assigned. The My Inbox container functions on a per

account basis; therefore, you will only see the messages you have in your inbox from the account selected in the Switch Account field.

The My Inbox container displayed on the Messages page provides the following columns to aid you in your work:

- **Select** - You can select this box to indicate which message(s) you want to transfer or delete. If you are doing a batch delete or batch transfer, you can use the Select All or Select None hyperlinks at the bottom of the container.
- **Read** - The Read column contains an icon that lets you know, at a glance, whether a message has been read or not. The icon will appear as a closed envelope for all unread messages and as an opened envelope for messages you have read.
- **Priority** - This column shows you which messages have been flagged by the by agent who transferred or assigned the message as high priority. Using this column will help you determine which message(s) to handle first.
- **From** - The From column shows you the email address of the sender.
- **Subject** - The Subject column displays the subject line from the message.
- **Classification** - The Classification column shows you which classification the message belongs to or if the message is unclassified.
- **Date** - The Date column displays the date on which the message was originally sent.
- **Status** - The Status column shows you the current status of the message. This column lets you see whether a message is new, or has been read, transferred, or assigned.

Use the My Inbox subtab to open messages in your inbox.

Tasks

You can perform the following tasks:

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)
- [Composing a New Message](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)

- [Escalating a Message](#)

2.2.1 Listing Messages in Your Inbox by Account

Use this procedure to list messages in your inbox:

Prerequisites

You must first have a message in your Inbox.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.

The My Inbox page appears.

2. From the list in the Switch Account field, ensure you have selected the appropriate account. If not, select it from the list and click **Go**.

The My Inbox page refreshes to display all the messages you have in your inbox for the selected account.

See Also

- [Replying to a Message in Your Inbox](#)
- [Composing a New Message](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)

2.2.2 Replying to a Message in Your Inbox

Use this procedure to reply to a message in your inbox.

Prerequisites

- [Get a message from an account.](#)

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. From the list in the Switch Account field, select an account.
The My Inbox page appears, displaying a list of all messages in your inbox for the selected account.
3. In the Subject column click a subject hyperlink.
The Reply page appears in a new browser window.
4. Optionally, in the Cc field, type the email address of the secondary recipients of the message.
Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will be displayed to other recipients.

5. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.
Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will not be displayed to other recipients.

6. Click the Edit Attachments hyperlink if you want to include or attach a file to the reply message.

See the [Managing Inserts and Attachments](#) topic for more information on attachments.

7. Depending on which mode you have set as your default, click the [Change to Plain Text Mode](#), or [Change to Rich Text Mode](#) hyperlink.

See the [Selecting the Message Composition Mode](#) topic for more information on the two text modes.

See the [Setting Message Preferences](#) topic for more information on selecting a default text mode.

8. Type your reply in the provided field.
9. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Composing a New Message](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)

2.2.3 Composing a New Message

Use the steps below to compose a new message from the Messages tab.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. From the list in the Switch Account field, select the account from which you want to send the message.
3. Click **Compose New Message**.

The Compose page appears in a new browser window.

4. In the From list, ensure the correct account is listed.
5. If you know the email address of the recipient, type it in the To field. Otherwise, use the Customer Search feature to locate the desired recipient and associate the recipient with the email message.

See the [eMail Center Customer Search](#) topic for more information on the Customer Search feature.

6. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will be displayed to other recipients.

7. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will not be displayed to other recipients.

8. In the Subject field, type a subject for the message.
9. Click the Edit Attachments hyperlink if you want to include or attach a file to the message.

See the [Managing Inserts and Attachments](#) topic for more information on attachments.

10. Depending on which mode you have set as your default, click the Change to Plain Text Mode, or Change to Rich Text Mode hyperlink.

See the [Selecting the Message Composition Mode](#) topic for more information on the two text modes.

See the [Setting Message Preferences](#) topic for more information on selecting a default text mode.

11. Type your message body in the provided field.
12. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)

2.2.4 Transferring a Message

Use the steps below to transfer a message on the Messages tab.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.

2. From the list in the Switch Account field, select the account containing the email message you want to transfer.
3. In the Select column, select the box for the appropriate message and click **Transfer**.
The Transfer page appears.
4. In the Search field, select **Agent** or **Supervisor**.
5. In the select column, select the radio button for the appropriate agent or supervisor to whom you want to transfer the message.
6. From the Message Priority field, select **High**, if you want to indicate to the recipient that the message is urgent.
7. From the list in the Transfer Reason field, select the appropriate reason you are transferring the message.
8. Click **Apply**.

The selected message is transferred and you return to the My Inbox page.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)
- [Composing a New Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)

2.2.5 Deleting a Message

Use the steps below to delete a message on the Messages tab.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. From the list in the Switch Account field, select the account containing the email message you want to delete and click **Go**.
3. In the Select column, select the box for the appropriate message and click **Delete**.

The selected message is deleted and you return to the My Inbox page.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)
- [Composing a New Message](#)
- [Transferring a Message](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)

2.2.6 Rerouting or Requeueing a Message

Once an inbound email message is in your Inbox, you can use the eMail Center Agent Console to reroute or requeue the message. Rerouting a message involves placing the message back into another classification queue and requeueing involved placing the message back into the same queue from which you requested it.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. From the list in the Switch Account field, select the account containing the email message you want to reroute or requeue and click **Go**.
3. Click the hyperlinked subject heading for the appropriate email message.
The Reply page appears.
4. From the list in the Action field, select **Reroute** and click **Go**.
The Reroute page appears.
5. If you want to requeue the message:
 - a. From the list in the Classification field, select the same classification that is listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for requeueing the message.
6. If you want to reroute the message:
 - a. From the list in the Classification field, select a different classification you believe the message belongs in. For a reroute to occur, you **MUST** select a different classification than the one listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for rerouting the message.
7. Click **Apply**.
The reply page closes and the message is rerouted or requeued.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)
- [Composing a New Message](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Escalating a Message](#)

2.2.7 Escalating a Message

Use the steps below to escalate a message to a supervisor.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. From the list in the Switch Account field, select the account containing the email message you want to escalate and click **Go**.
3. Click the hyperlinked subject heading for the appropriate email message.
The Reply page appears in a new window.
4. From the list in the Action field, select **Transfer** and click **Go**.
The Transfer page appears.
5. From the list in the Search field, select **Supervisor** and click **Go**.
The Transfer page refreshes to display a list of all supervisors.
6. In the Select column, select the radio button for the supervisor to whom you want to escalate the message.
7. From the list in the Message Priority field, select **Escalated**.
8. From the list in the transfer Reason field, select the appropriate reason for escalating the message.
9. Click **Apply**.

The transfer page closes and the message is escalated to the selected supervisor.

See Also

- [Listing Messages in Your Inbox by Account](#)
- [Replying to a Message in Your Inbox](#)

- [Composing a New Message](#)
- [Transferring a Message](#)
- [Deleting a Message](#)
- [Rerouting or Requeueing a Message](#)

2.3 eMail Center Messages Search

Use the Search subtab to search for messages in your inbox or an account folder. Your inbox contains messages that you have obtained from the Queues, messages that have been assigned or transferred to you by a supervisor or agent, and messages that have been automatically routed to you.

There are a variety of fields you can use to search for messages in your inbox, however, the two required fields are the Account and Folder fields.

Use the Account field to indicate which email account you want to search.

Use the Folder field to indicate which folder for the selected account you want to search. The account folders contain messages that are currently in your Inbox (INBOX folder), have been deleted (Deleted folder), have been replied to (Resolved folder), or have been composed and sent (Sent folder).

Tasks

You can perform the following tasks:

- [Searching for a Message](#)
- [Viewing a Message](#)
- [Resending a Message](#)
- [Forwarding a Message](#)
- [Replying to a Message](#)

2.3.1 Searching For a Message

Use this procedures to search for a message in your inbox or in a folder for an account.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. Click the Search subtab.

The Message Search page appears.

3. Enter the search criteria.

You must select an account and folder. All other fields are optional.

The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.

4. Click **Search**.

The Message Search Results page appears. The following table lists the actions that you can perform in each folder.

From this folder...	You can...
Inbox	<ul style="list-style-type: none"> ■ View a message. ■ Reply to a message.
Deleted	<ul style="list-style-type: none"> ■ View a message. ■ Reply to a message. ■ Forward a message.
Resolved	<ul style="list-style-type: none"> ■ View a message. ■ Reply to a message. ■ Forward a message.
Sent	<ul style="list-style-type: none"> ■ View a message. ■ Resend a message. ■ Forward a message.

5. If you want to refine your search criteria, click **Refine Search Criteria**.
The Message Search page appears.
6. If you want to view a particular message from the search results, click the appropriate hyperlinked subject heading in the Subject column.
The message is displayed in a new window.

See Also

- [Viewing a Message](#)
- [Resending a Message](#)
- [Forwarding a Message](#)
- [Replying to a Message](#)

2.3.2 Viewing a Message

Use this procedure to view a message from the search results.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. Click the Search subtab.
The Message Search page appears.
3. Search for a message.
The Message Search Results page appears.
4. If you want to refine your search criteria, then click **Refine Search Criteria**.

The Message Search page appears.

5. If you want to view the original message, click the subject hyperlink in the Subject column.

The message is displayed in a new window.

See Also

- [Searching for a Message](#)
- [Resending a Message](#)
- [Forwarding a Message](#)
- [Replying to a Message](#)

2.3.3 Resending a Message

Use this procedure to resend a message in the Sent folder for an account.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. Click the Search subtab.
The Message Search page appears.
3. Search for a message in the Sent folder.
The Message Search Results page appears.
4. If you want to refine your search criteria, then click **Refine Search Criteria**.
The Message Search page appears.

5. If you want to view the original message, click the subject hyperlink in the Subject column.

The Original Message page appears.

6. Select the radio button next to the message and then click **Resend**.

The Message Search Results page refreshes. The resent message appears in the list of search results.

See Also

- [Searching for a Message](#)
- [Viewing a Message](#)
- [Forwarding a Message](#)
- [Replying to a Message](#)

2.3.4 Forwarding a Message

Use this procedure to forward a message in the Sent, Resolved, or Deleted folder for an account to another agent.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. Click the Search subtab.

The Message Search page appears.
3. Search for a message in the Sent, Resolved, or Deleted folder.

The Message Search Results page appears.

4. If you want to refine your search criteria, then click **Refine Search Criteria**.
The Message Search page appears.
5. If you want to view the original message, click the subject hyperlink in the Subject column.
The Original Message page appears.
6. Select the radio button next to the message and then click **Forward**.
The Compose page appears.

See Also

- [Searching for a Message](#)
- [Viewing a Message](#)
- [Resending a Message](#)
- [Replying to a Message](#)

2.3.5 Replying to a Message

Use this procedure to reply to a message in your Inbox or in the Resolved or Deleted folders for an account.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Messages tab.
2. Click the Search subtab.
The Message Search page appears.

3. Search for a message in the INBOX, Resolved, or Deleted folder.
The Message Search Results page appears.
4. If you want to refine your search criteria, then click **Refine Search Criteria**.
The Message Search page appears.
5. If you want to view the original message, click the subject hyperlink in the Subject column.
The Original Message page appears.
6. Select the radio button next to the message and then click **Reply**.
The Reply page appears.

See Also

See Also

- [Searching for a Message](#)
- [Viewing a Message](#)
- [Resending a Message](#)
- [Forwarding a Message](#)

2.4 eMail Center Messages

The Message Component provides the message composition, reply and preview functionality in a common module. The purpose of this component is to either reply, send, transfer, reroute, or delete an outbound email message, or view an inbound email message and process it. Once an action is taken on the message, the browser window will close automatically. The Message Component is incorporated in the Agent Console such that all functionality pertaining to a single message is now be presented in a separate browser window. This enables multiple email messages to be open at one time. Whenever an email is opened (next message fetched from the Queue, Inbox email opened, Interaction email viewed), the email will be launched in a separate browser window.

Tasks

You can perform the following tasks:

- [Addressing the Message](#)

- [Attaching a File from the Local File System](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)
- [Setting Message Preferences](#)
- [Viewing an Interaction Thread](#)

2.4.1 Addressing the Message

eMail Center has the capability to auto-populate the To field if the customer is known. If you search for and select a customer to be associated with the email, eMail Center will auto-populate the To field. For more information on searching for and associating a customer with an email, see the [Associating a Customer with the Message](#) topic.

If the customer is not known, then you must type the customer address in the To field.

Use this procedure to address the message.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. If you are composing a message, then select an account from the From list.

Note: If you are replying to a message, then the message will automatically be sent from the account in which the original message was received.

2. In the To field, type the email address of the primary recipients of the message.

If you are composing an initial message and the customer has not been associated with the email, then the To field is blank. If you are replying to a message, then the To field contains the email address of the sender of the original email.

Use a comma or semi-colon to separate multiple addresses in the same field.

3. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will be displayed to other recipients.

4. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

Note: These email addresses will not be displayed to other recipients.

See Also

- [Attaching a File from the Local File System](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)

- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)
- [Setting Message Preferences](#)
- [Viewing an Interaction Thread](#)

2.4.2 Attaching a File from the Local File System

Use this procedure to attach a file from the local file system.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the **Edit Attachments** link.

The Edit Attachments page appears.

2. In the File Name field, type the path to the file or click **Browse** to choose the path.
3. Click **Add**.

The Edit Attachments page refreshes. The filename appears in the list of attachments.

4. If you want to view or edit an attachment, click the filename hyperlink in the Attachment column.

Depending on the type of file, you may not be able to edit the attachment.

5. If you want to remove the attachment, select the box in the Remove column for the file that you want to remove from the message.
6. Click **Update**.
The Edit Attachments page refreshes. The attachment is removed from the list of attachments.
7. If you want to return to the message composition page, click **Done**.
A filename hyperlink appears near the Attachments field.

See Also

- [Attaching a File from the Knowledge Base](#)
- [Inserting a File from the Knowledge Base](#)

2.4.3 Selecting the Message Composition Mode

Oracle eMail Center provides you with two types of editors - a plain text editor and a rich-text editor. A rich text editor enables you to format the font of the email, and include an image or hyperlink in the email. You should use the "Rich Text" editor for all HTML documents. You can switch from one editor to another by clicking on the link provided above the text box. By default the plain text editor will be displayed. However if you want to make the "rich text" editor the default, you can do so by setting the corresponding profile option.

Note: You can set your default mode by clicking **Profile > General** and, under the Editing area, selecting or deselecting the box that activates the rich text editing mode.

Use the steps below to change the text editing mode from the Compose or Reply pages.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. If you want to compose the message using plain text, click the **Change to Plain Text Mode** hyperlink.
2. If you want to compose the message using formatted text, click the **Change to Rich Text Mode** hyperlink.

A formatting tool bar appears.

See Also

- [Addressing the Message](#)
- [Attaching a File from the Local File System](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)
- [Rerouting or Requeueing a Message](#)
- [Escalating a Message](#)
- [Setting Message Preferences](#)
- [Viewing an Interaction Thread](#)

2.4.4 Managing Customer Information

Oracle eMail Center divides customers or "Parties" into three categories - organization, contact, and person.

The concept of "Party" enables the customer model to treat all business entities equally. This means that each customer, regardless of type (organization, relationship, or person), is handled in the same way by the model. Because all

business entities are treated alike, the customer model can easily handle B2B, B2C, or mixed business models. Although the model tracks attributes for people differently from those it tracks for organizations (for example: date of birth, title, and gender for people; DUNS number, SIC code, and fiscal year end for organizations), both people and organizations are parties, and their records are therefore stored in the same physical table in the database.

The relationship between two parties may be viewed as a party in its own right. For example, if John works at Oracle, three parties could exist: John (party of type Person), Oracle (party of type Organization), and John@Oracle (party of type Contact of or party of type Employee of). Because John@Oracle is a party in its own right, addresses, phone numbers, and customer accounts can be directly associated with the John@Oracle entity.

The customer model separates the business entity (Party) from the business relationship (Contact of or Employee of). This allows each party to have multiple customer accounts. Using the example in the previous paragraph, John could have two distinct accounts. One account as John (type "Person") which could contain a personal email address and personal information, and one as John@Oracle (type "Employee of"), which would have a business email address, and business related information. As well, John may be recognized as the contact person for his organization, therefore, aside from having an account of type "Employee of," he may also have an account of type "Contact of."

Customers and Contacts created by the business application can be easily selected by the eMail Center processing engine and/or agent console. Details of the specific eMC changes relating to Customers are below:

a. eMC Server Processing - Customer Lookup

An attempt is made to identify the customer and contact for each incoming email message. This attempt is performed using the email address and searches for the customer in the customer database. If the customer is identified, the customer and contact records are shown on the Reply page. If there are multiple customer records found for the address, a message with a link is displayed and by clicking the link you can identify which customer and contact to use for this interaction. If the email address was not found in the customer database, eMail Center uses the default customer, but if there is sufficient information in the inbound message, you can use the Customer search to identify the customer.

b. eMC Agent Console/Message Component - Customer Search

Oracle eMail Center allows you to search for customers on the following criteria:

- Customer name - Search only parties matching the customer name entered.
- Last Name or First Name - Search only parties matching the last/first name entered.
- Email Address - Search parties who have an "email" contact point that matches the email address entered.
- Customer Number - Search parties whose customer number matches the number entered.
- Customer ID - Search parties whose customer ID matches the ID number entered.

Note: eMC only searches for "CONTACT_OF" or "EMPLOYEE_OF" type of relationships by default. To view other types of relationships, search for one of the parties involved and then navigate to the Overview page by clicking on the name of the selected party.

c. Recording Interactions

The interaction is always recorded against the Customer. If the system processing could not find a matching customer, the agent is prompted to search for and select a customer for recording the interaction. However, if the agent wishes not to, then the "default" customer (created during the setup phase by the administrator) is selected.

Topics include:

- [Associating a Customer with the Message](#)
- [Viewing Customer Details and Interactions](#)
- [Selecting the Email Address for the Customer](#)
- [Creating a Lead](#)

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)

- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)

2.4.5 Associating a Customer with the Message

Use this procedure to associate a customer with the message.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. In the Customer container, click the **Search** hyperlink.
The Customers page appears.
2. In the Customer Search area, select a criteria radio button and enter the search criteria.
The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.
3. If you want to return to the message composition window, then click the Message tab.
4. If you want to perform the search, click **Go**.
The search results appear.
5. Select the radio button next to the customer.

6. Select **Associate to message** from the list and click **Go**.

The message composition window appears. The information for the selected customer is displayed in the Customer container.

See Also

- [Viewing Customer Details and Interactions](#)
- [Selecting the email Address for the Customer](#)
- [Managing Customer Information](#)

2.4.6 Viewing Customer Details and Interactions

Use this procedure to view the details or interactions for a customer. Customer details include the address and relationships.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. In the Customer container, click the name or contact hyperlink.

The Overview page appears. It displays the customer details, relationships, and interactions.

Note: To view additional items in the Relationships and Interactions sections, use the hyperlinks at the end of each section.

2. If you want to search for a another customer, then click **Search**.
3. If you want to return to the message composition window, then click the Message tab.

See Also

- [Associating a Customer with the Message](#)
- [Selecting the email Address for the Customer](#)
- [Managing Customer Information](#)

2.4.7 Selecting the Email Address for the Customer

Use this procedure to select the email address for the customer when sending a new email.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. In the Email column of the Customer container, click **Search**.
2. In the Customer Search area, click the radio button for the search type you want to use and click **Go**.

The Customers area refreshes to display the search results.

3. From the list in the Customers area, click the radio button for the customer you want to use and next to the Associate to Message field, click **Go**. If your search results are organizations, click the desired organization name hyperlink, click the contact name you want, click the Associate to Message box, and click **Go**.

The email address for the selected customer appears in the To: field.

See Also

- [Associating a Customer with the Message](#)
- [Viewing Customer Details and Interactions](#)

- [Managing Customer Information](#)

2.4.8 Creating a Lead

The eMail Center Agent console provides you with a means of designating a customer as a potential sales lead.

Use the steps below to create a lead.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. If you are composing a new message:
 - a. Search for a customer.
 - b. Associate the customer with the email message.
 - c. From the Lead container, click **Create**.
2. If you are replying to a message, from the Lead container, click **Create**.

A lead number is assigned to the selected customer.

2.4.9 Managing Service Requests

Topics include:

- [Creating a Service Request](#)
- [Updating a Service Request](#)

See Also

- [Addressing the Message](#)

- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)

2.4.10 Creating a Service Request

Use this procedure to create a service request.

Prerequisites

Before you can create a service request, a valid customer and contact must be selected and the customer's information must be displayed in the Customer bin.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. In the Service Request container, click the **Create** hyperlink.

The Create Service Request page appears. The contact and customer details are from the customer selected on the Message tab.

2. Select a request type.
3. Enter the request details
 - Request Status
 - Request Severity

- Summary - If you are creating a service request when replying to a message, the Summary field is automatically populated with the contents of the incoming message, otherwise a summary must be entered.
4. Optionally, enter a note.
 - Note Type
 - Note Status
 - Notes
 5. If you want to return to the message page, click Cancel or click the Message tab.
 6. Click **Apply**.

See Also

- [Updating a Service Request](#)
- [Managing Service Requests](#)

2.4.11 Updating a Service Request

Use this procedure to update a service request.

Steps

1. In the Service Request container, enter the service request number.
2. Click the **Update** hyperlink.

The Update Service Request page appears, displaying the current service request for the selected customer.
3. You can update the following fields:
 - Request Type - If the type of service request is inaccurate or has changed, you can select the appropriate type from the list.
 - Request Status - If the status of the service request has changed, you can select the appropriate status from the list.
 - Request Severity - You can upgrade or downgrade the severity level.
 - Summary - You can update the summary information as appropriate.
4. When done, click **Apply**.

The updates to the service request are saved.

See Also

- [Creating a Service Request](#)
- [Managing Service Requests](#)

2.4.12 Viewing the Original Message

If you are replying to a message, use this procedure to view the original message.

Steps

1. Scroll down to the bottom of the page.

2. Click **View Original Message**.

The Original Message page appears.

3. If you want to return to the reply, click **Return**.

The Reply page appears.

4. If you want to cancel the reply, click **Cancel**.

The message composition window closes. Your message is not saved. However, selected customer remains associated with the reply.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)

2.4.13 Saving a Draft of a Reply

Use this procedure to save a draft of a reply.

Steps

1. Click **Save**.

The reply is saved and the message composition window closes.

2. If you want to resume working on the reply, select the original message from your inbox.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Transferring a Message from Your Inbox](#)
- [Deleting a Message from Your Inbox](#)

2.4.14 Transferring a Message from Your Inbox

Use this procedure to transfer a message to another agent.

Steps

1. Click **Transfer**.

The Select Transfer Agent page appears.

2. If you want to return to the message composition window, click **Cancel**.
3. In the Select column, click the radio button for the agent to whom you want to transfer the message.
4. From the list in the Transfer Reason field, select a reason for the transfer.
5. Click **Apply**.

The message is removed from your inbox and transferred to the inbox of the agent.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Deleting a Message from Your Inbox](#)

2.4.15 Deleting a Message

Use this procedure to delete a message.

When you delete a message from your inbox, the message is moved to from your inbox to the Delete folder for the particular account to which the message was sent. The message is not physically deleted from the eMail Center system.

Use the following procedure to delete a message.

Steps

1. Click **Delete**.

The message composition window closes. The message is removed from your inbox.

See Also

- [Addressing the Message](#)
- [Managing Inserts and Attachments](#)
- [Selecting the Message Composition Mode](#)
- [Managing Customer Information](#)
- [Managing Service Requests](#)
- [Viewing the Original Message](#)
- [Saving a Draft of a Reply](#)
- [Transferring a Message from Your Inbox](#)

2.4.16 Rerouting or Requeueing a Message

Once an inbound email message is in your Inbox, you can use the eMail Center Agent Console to reroute or requeue the message. Rerouting a message involves placing the message back into another classification queue and requeueing involves placing the message back into the same queue from which you requested it.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. From the list in the Action field, select **Reroute** and click **Go**.
The Reroute page appears.
2. If you want to requeue the message:
 - a. From the list in the Classification field, select the same classification that is listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for requeueing the message.
3. If you want to reroute the message:
 - a. From the list in the Classification field, select a different classification you believe the message belongs in. For a reroute to occur, you **MUST** select a different classification than the one listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for rerouting the message.
4. Click **Apply**.
The reply page closes and the message is rerouted or requeued.

2.4.17 Escalating a Message

Use the steps below to escalate a message to a supervisor.

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. From the list in the Action field, select **Transfer** and click **Go**.
The Transfer page appears.
2. From the list in the Search field, select **Supervisor** and click **Go**.
The Transfer page refreshes to display a list of all supervisors.
3. In the Select column, select the radio button for the supervisor to whom you want to escalate the message.
4. From the list in the Message Priority field, select **Escalated**.
5. From the list in the transfer Reason field, select the appropriate reason for escalating the message.
6. Click **Apply**.
The transfer page closes and the message is escalated to the selected supervisor.

2.4.18 Setting Message Preferences

Use the steps below to set your message preferences.

Steps

1. Click the Message Preferences hyperlink.
The Message Preferences page appears.
2. Use the provided fields to select the following:
 - a. Default account.
 - b. Whether or not you want to automatically add the primary address to the message when selecting a customer.
 - c. Number of editor rows to display.

- d. Rich text or plain text preferred editor.
- e. The viewing time zone.

2.4.19 Viewing an Interaction Thread

Use the steps below to view an interaction thread from the Reply page.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. In the Customer bin of the Reply page, click the hyperlinked customer name.
The Overview page appears, displaying a list of all message interactions for that customer.
2. In the Threads column, click the icon for the appropriate message interaction.
The Interaction Threads page appears, displaying a historical list of all actions for the selected interaction.

Interactions are grouped together by interaction number. There can be multiple actions associated with a single interaction number.
3. Optionally, if you want to view the original message, click the appropriate hyperlinked subject heading from the Reference Data column.

2.5 Knowledge Base Categories

The knowledge base is a repository for files, such as email templates and informational documents. You can insert a file into or attach a file to a message.

Use the Categories hyperlink on the side panel to browse files in the knowledge base.

Tasks

You can perform the following tasks:

- [Browsing Files in the Knowledge Base](#)
- [Inserting a File from the Knowledge Base into a Message](#)
- [Attaching a File from the Knowledge Base to a Message](#)

2.5.1 Browsing Files in the Knowledge Base

Use this procedure to view files in the knowledge base repository.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

eMail Center Supervisor

Steps

1. If you are logging in as an eMail Center agent, from the Message Component, click the Knowledge Base tab. If you are logging in as an eMail Center supervisor, click the Supervisor tab, then click the Knowledge Base subtab.
2. From the side panel, click **Categories**.
The Categories page appears.
3. Click the category or the subcategory hyperlink.
A page appears. The page lists hyperlink to any subcategories or files.

Note: It is only possible to view text and HTML documents.

4. If you want to view a file, click the title hyperlink.

The file appears.

See Also

- [Searching for a File in the Knowledge Base](#)
- [Inserting a File from the Knowledge Base into a Message](#)
- [Attaching a File from the Knowledge Base to a Message](#)

2.5.2 Inserting a File from the Knowledge Base into a Message

Use the following procedure to insert file from the knowledge base into a message.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Browse or search for a file in the knowledge base.

Note: It is only possible to view text and HTML documents.

2. Click the title hyperlink.

The file appears.

3. Type information in all required fields.
4. Click **Preview** to preview the document, or click **Insert**.

The page in the Message tab appears. The document is in the body of the message.

5. Optionally, replace the merge fields with the appropriate information.

See Also

- [Searching for a File in the Knowledge Base](#)
- [Browsing Files in the Knowledge Base](#)
- [Attaching a File from the Knowledge Base to a Message](#)

2.5.3 Attaching a File from the Knowledge Base to a Message

Use the following procedure to insert or attach a suggested response document from the knowledge base.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Browse or search for a file in the knowledge base.

Note: While a file/document of any type can be attached to a message, it is only possible to preview the contents of text or HTML documents.

2. Click the title hyperlink.

The file appears.

3. Click **Preview** to preview the document, or click **Attach**.

The page in the Message tab appears. The file is listed in the Attachments section.

See Also

- [Searching for a File in the Knowledge Base](#)

- [Browsing Documents in the Knowledge Base](#)
- [Inserting a File from the Knowledge Base into a Message](#)

2.6 Knowledge Base Search

The knowledge base is a repository for files, such as email templates and informational documents. You can insert a files into or attach a file to a message.

Use the Search subtab to search for files in the knowledge base.

Tasks

You can perform the following tasks:

- [Searching for a File in the Knowledge Base](#)
- [Inserting a File from the Knowledge Base into a Message](#)
- [Attaching a File from the Knowledge Base to a Message](#)

2.6.1 Searching for a Document in the Knowledge Base

Use this procedure to search for documents in your knowledge base respiratory.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Knowledge Base tab.
2. Click the Search subtab.

The Knowledge Base Search page appears.

3. If you want to search the Marketing Encyclopedia System repository, select the **MES** option.
4. If you want to search the Oracle Knowledge Management (formerly the Solution Management System) repository, select the **SMS** option.
5. In the Search String field, type a string of text. This text will be used to search the title, description and content of documents stored in Marketing Encyclopedia System (MES) or Solution Sets stored in Knowledge Management.
The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.
6. If you want to clear the page, then click **Reset**.
7. If you want to search for a file, then click **Search**.
The Knowledge Base Search Results page appears.
8. If you want to modify your search criteria, then click **Refine Search Criteria**.
The Knowledge Base Search page appears.

See Also

- [Browsing Documents in the Knowledge Base](#)
- [Inserting a Document from the Knowledge Base](#)
- [Attaching a Document from the Knowledge Base](#)

2.7 eMail Center Customer Search

eMail Center classifies customers in three categories:

Organization - a business.

Contact - an employee of or contact for a business.

Person - any person.

Use the Search subtab to search for a customer. You can view the details for a customer or compose a message.

Tasks

You can perform the following tasks:

- [Searching for a Customer](#)

- [Viewing Customer Details](#)
- [Composing a Message](#)
- [Viewing an Interaction Thread](#)

2.7.1 Searching For a Customer

Use the following procedure to search for a customer.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Customer tab.
2. In the Customer Search container, click the appropriate radio button and type the search criteria.

The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.

3. If you want to search for customers, click **Go**.

The Customer Search results appear.

See Also

- [Viewing Customer Details](#)
- [Composing a Message](#)
- [Viewing an Interaction Thread](#)

2.7.2 Viewing Customer Details

Use the following procedure to view the details for a customer. Customer details include the complete name, email addresses, phone numbers, and primary address.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Customer tab.
2. In the Customer Search container, click the appropriate radio button and type the search criteria.

The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.
3. Click **Go**.

The Customer Search results appear.
4. Click the name hyperlink for the customer for whom you want to view details.

The Customer Detail page appears.

See Also

- [Searching for a Customer](#)
- [Composing a Message](#)
- [Viewing an Interaction Thread](#)

2.7.3 Composing a Message

Use the following procedure to compose a message after a customer search.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Customer tab.
2. In the Customer Search container, click the appropriate radio button and type the search criteria.

The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.
3. Click **Go**.

The Customer Search results appear.
4. select the radio button for the appropriate customer.
5. From the list at the top of the container, select **Create a message**, and click **Go**.

The Compose page appears in a new browser window.

See Also

- [Searching for a Customer](#)
- [Viewing Customer Details](#)
- [Viewing an Interaction Thread](#)

2.7.4 Viewing an Interaction Thread

Use the steps below to view an interaction thread from the Customer tab.

Prerequisites

None

Login

HTML Login URL

Responsibility

eMail Center Agent Console

eMail Center Message Component

Steps

1. Click the Customer tab.
2. In the Customer Search container, click the appropriate radio button and type the search criteria.

The percent (%) character may be used as a wildcard in a character string (for example, john%). However, you may not use a wildcard as the first character of a search criterion.
3. Click **Go**.

The Customer Search results appear.
4. Click the hyperlinked name for the appropriate customer.

An overview page for the selected customer appears.
5. In the Threads column, click the icon for the appropriate message interaction.

The Interaction Threads page appears, displaying a historical list of all actions for the selected interaction.

Interactions are grouped together by interaction number. There can be multiple actions associated with a single interaction number.
6. Optionally, if you want to view the original message, click the appropriate hyperlinked subject heading from the Reference Data column.

See Also

- [Searching for a Customer](#)
- [Viewing Customer Details](#)
- [Composing a Message](#)

2.8 Supervising Messages

The Supervisor tab provides you with a variety of tools to better manage eMail Center activities.

You can click **Refresh** (located on the upper right hand side of the Current Email Volume Activity container) to ensure all the information displayed in it is current.

The Current Email Volume Activity container has the following columns:

- **Focus** - By default, the Current Email Volume Activity container displays information for every account/classification assigned to you. The Focus icon allows you to narrow your view down to a particular account. You can click the **All Accounts** hyperlink displayed at the top of the container to revert back to the default view of all accounts.
- **Account/Classification** - This column displays the name of each account and classification to which you are assigned. The default view is at the account level; however, if there are multiple classifications under a particular account, you can expand the view by clicking the expand arrow.
- **Emails in Queue** - The Emails in Queue column displays a count of the current number of emails that are currently waiting in the queue. Each of these numbers is a hyperlink that, when clicked, takes you to the Queued Messages page for the particular account/classification.
- **Total Unresponded Emails** - The number in this column indicates how many emails are sitting in agent's inboxes that have yet to be handled, as well as the total number of queued messages in the account or classification. This is a cumulative number for all agents assigned to the particular account.
- **Longest Wait in Queue** - This column displays the amount of time the oldest message has been waiting in the queue.
- **Agents Assigned** - This column displays a count for the total number of agents assigned to a particular account. Each of these numbers is a hyperlink that, when clicked, takes you to the Agents and Accounts Assignment page.

Tasks

You can perform the following tasks:

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)

- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.1 Searching Queued Messages

Use the steps below to search for queued messages.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

None

Steps

1. Click the Supervisor tab.

The Supervisor console appears.

2. From the side panel, click **Queued**.

3. From the list in the account field, select the email account for which you want to search messages.

4. Click **Go**.

The Queued Messages page refreshes to display all of the messages for the selected email account.

5. Alternately, you can use the **Advanced Search** hyperlink to narrow down your search parameters.

The Advanced search function provides the following search parameters:

- **Account** (drop-down list)- list of available email accounts. This search parameter is required (i.e user must indicate an email account); all other search parameters are optional.

- **Classification** (drop-down list)- list of available classifications for selected email account
- **Subject** (text field)- subject of email
- **Customer** (lookup field)- Customer Name who sent email (if successfully identified by eMail Center processing). Customer Lookup should be identical to the one currently offered in Site Profile Options page (Default Customer Number field), with the only difference that the value returned is Customer Name, not Customer Number.
- **Sender's Email Address** (text field) - email address from sender (does not include email aliases).
- **Sent Date From** (date lookup)- Sent date (as stamped in incoming message)
- **Sent Date To** (date lookup) - Sent date (as stamped in incoming message). Can only be filled when a Sent Date From is specified. Default to SYSDATE if Sent Date From is specified and 'Sent Date To' is left blank.
- **Resource Group** (drop-down list) - The Resource Group list is dependent on the account selected.

This is a very useful tool to use when you have different groups of individuals associated with each resource group. It allows you to identify how many queued messages a particular group has available or if there is a backlog for a particular resource group. Also if a resource group has been end dated, this is an effective way of identifying all queued messages associated with that resource group. You can then reassign the emails as appropriate.

Note: If you select either:

- **All Groups** - this will return all queued messages matching the search criteria that have the group "All Groups" assigned. When processing an email, if none of the routes are found to be applicable for the email, then the email is assigned a resource group of "All Groups", thereby denoting that the email is available to all agents assigned to the email account.
 - **Blank** - this will return all queued messages matching the search criteria that have ANY resource group (including "All Groups") assigned.
-
-

Note: When using the Advanced Search tool, the Cancel Button resets search parameters.

Note: When using the Advanced Search tool, you can go back to basic search mode by clicking the Messages>Queued hyperlink in the side panel.

Queued Messages Summary

After a basic or advanced search is executed, the search results are displayed in a search results table that contains the following columns:

- **From** - Sender's email address. If available, display sender's name instead of email address.
- **Subject** - Email's subject. You can preview email by clicking on the subject's link.
- **Classification** - Email's classification as assigned by eMail Center processing.
- **Customer** - If the customer who sent the email can be identified by eMail Center processing, then Customer's Name will be displayed. If no customers were identified by eMail Center, the column value is left blank. If multiple matches were identified, column value is also left blank.
- **Resource Group** - Lists the Resource Group to which the message has been routed. "All Groups" means the message is not routed to a specific group. It is opened up to All Groups.
- **Date** - Sent Date as marked in incoming email. By default, search results will be sorted by this column (oldest emails displayed first).

See Also

- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.2 Previewing Queued Messages

You can preview any queued message in the Queued Messages Summary by clicking the hyperlinked subject line in the Subject column. When you click the subject hyperlink, the eMail Center message component opens in a separate window, displaying the message in preview mode. At this point, you can return to the search result summary page by clicking **Close**, or you can reply to the email by clicking **Reply**.

See Also

- [Searching Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.3 Replying to Queued Messages

After previewing a queued message, you may decide to reply to it. To do so, you must click **Reply**. Upon clicking **Reply**:

- Supervisor takes ownership of email as it is effectively removed from the classification folder to the supervisor's inbox folder.
- A new interaction is opened.
- Display of inbound message switches from preview mode to reply mode (standard eMail Center Message Component's Reply page) where supervisor can proceed with composing and sending the response.

When you are composing a reply to an incoming email message you can do the following:

- If you want to view a list of all the suggested response documents with their scores, other than the ones displayed in the Top Suggested Response Documents container, click the **More** hyperlink.

By default, the content of the top suggested response (based on score) for the top intent is displayed whenever you select to view additional response documents.

The message intents (and their scores) pertaining to the inbound message and the list of suggested response documents (and their scores) for each intent are displayed on the left hand side of the page that displays the contents of the suggested response documents. The scores listed with the documents indicate the relative level of confidence that the document matches the intent of the email message.

You should select a suggested response document with a high confidence score to use in composing a response message. However, you should read the email message to ensure that you select the most appropriate suggested response document.

- If you want to insert a suggested response document without viewing the contents, click the **Insert** hyperlink under the name of the suggested response document that you want to insert.
- If you want to attach a suggested response document, click the **Attach** hyperlink under the name of the suggested response document that you want to attach.
- If you want to view the contents of a suggested response document, click the document title hyperlink of the suggested response document you want to view.

After you select a suggested response document, if the document contains merge fields, field input boxes are displayed at the top of the page for each of the merge fields contained in the document. If Oracle eMail Center is able to automatically populate the values of the field input boxes with information extracted from the email, the values for the merge fields appear in the input boxes. However, if the merge fields values cannot be identified automatically, then you have to type the values into the merge fields.

The following options are available:

- **Preview:** Allows you to view the document with the merge fields populated.
- **Insert:** Inserts the selected document into the response and displays a confirmation.
- **Attach:** Attaches the selected document into the response and displays a confirmation.

See Also

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)

- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.4 Assigning Queued Messages to an Agent

Supervisors can reduce email backlog, expedite the response of specific messages sitting in the queue, or balance the agent's workload by assigning or 'pushing' queued emails to agents.

Use the steps below to push or 'Assign' queued messages to agents.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

None

Steps

1. Perform a queued email search.
2. From queued message search results, select the appropriate message(s) by selecting the radio button for one or more messages.
3. Click **Assign to Agent**.
The Assign Message(s) to Agent page appears.
4. Select an agent to whom you want to assign queued emails to (you can only select one agent at a time). You can use the following two pieces of information about the agents to help select the appropriate one(s):
 - a. **Email Count** - # of unanswered emails sitting in the agent's inbox across accounts.
 - b. **Last Login Time** - Indicates Date/Time of agent's last login to eMail Center Agent Console.

Note: Only agents assigned to the email account from which emails are being pushed from are eligible assignees.

Note: By default, the Assign Message(s) page is sorted alphabetically by Agent's Last Name. All three columns (Agent, Email Count, and Last Login Time) are sortable.

5. Click **Assign**. At this point:
 - The selected emails are effectively removed from the queue and moved to the agent assignee's inbox folder.
 - An Assign Confirmation Message is displayed at the top of the page.

See Also

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.5 Assigning Queued Messages to a Group

You can now search for and assign queued messages based on resource group.

For implementations with different groups of individuals associated to each resource group, this is a very useful tool for identifying:

- how many queued messages a particular group has available
- if there is a backlog for a particular resource group
- all queued messages associated with an end dated resource group, thereby allowing a supervisor to reassign those messages to another group.

The list of resource groups to which you can assign messages is dependent on the account you selected.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

None

Steps

1. Perform a queued email search.
2. From queued message search results, select the appropriate messages by clicking the radio button for one or more messages.
3. Click **Assign to Group**.
The Assign Message(s) to Agent Group page appears.
4. Select a resource group to whom you want to assign queued emails to (you can only select one group at a time). You can use the following two pieces of information about the agents to help select the appropriate one(s):
 - a. **Email Count** - Indicates the number of queued messages in the Inbox(es) of the agents assigned to that resource group.
 - b. **Assigned Agents** - Indicates number of agents assigned to the resource group.

Note: By default, the Assign Message(s) to Agent Groups page is sorted alphabetically by resource group name. All three columns (Resource Group, Email Count, and Assigned Agents) are sortable.

5. Click **Assign**.
At this point:
 - The selected emails are effectively removed from the queue and moved to the agent assignee's inbox folder.
 - An Assign Confirmation Message is displayed at the top of the page.

See Also

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to an Agent](#)
- [Deleting Queued Messages](#)
- [Rerouting or Requeueing Messages](#)

2.8.6 Deleting Queued Messages

To clean up unwanted emails and save agent's time, you can delete queued messages. From the queued messages summary, you can select one or more messages and click **Delete**. Upon clicking **Delete**:

- The selected emails are effectively removed from the queue (account's classification folder) and moved to the account's delete folder.
- An interaction is created.
- An "Email Deleted" activity is created.
- MLCS is created indicating 'EMAIL_DELETED'.
- A Delete Confirmation message appears at top of page.

See Also

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Rerouting or Requeueing Messages](#)

2.8.7 Rerouting or Requeueing Messages

You can use the Supervisor console to reroute a message in any queue to which you have been assigned. Rerouting a message involves placing the message back into

another classification queue and requeueing involved placing the message back into the same queue from which you requested it.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Steps

1. Click the Supervisor tab.
2. From the Email in Queue column of the Current Email Volume Activity container, click the numbered hyperlink for the appropriate account.

The Queued Messages page appears, displaying all the messages in the queue for the selected account.
3. Click the hyperlinked subject heading for the appropriate email message.

The Original Message page appears.
4. Click **Reply**.

The Reply page appears.
5. From the list in the Action field, select **Reroute** and click **Go**.

The Reroute page appears.
6. If you want to requeue the message:
 - a. From the list in the Classification field, select the same classification that is listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for requeueing the message.
7. If you want to reroute the message:
 - a. From the list in the Classification field, select a different classification you believe the message belongs in. For a reroute to occur, you **MUST** select a different classification than the one listed in the Inbound Message Details area.
 - b. From the list in the Reroute Reason field, select the appropriate reason for rerouting the message.

8. Click **Apply**.

The reply page closes and the message is rerouted or requeued.

See Also

- [Searching Queued Messages](#)
- [Previewing Queued Messages](#)
- [Replying to Queued Messages](#)
- [Assigning Queued Messages to an Agent](#)
- [Assigning Queued Messages to a Group](#)
- [Deleting Queued Messages](#)

2.9 Supervising Accounts

The Agents and Accounts page on the Supervisor console allows you to assign accounts to agents or assign agents to accounts. This page contains an Assign field that you can use to select whether you want to assign an agent to an account or assign an account to an agent.

If you select to assign agents to accounts, you will see the Email Account field that you can use to choose the email account to which you want to assign the agent. You will also see an Available Agents field and an Assigned Agents field. You can use these fields to review existing assignments and to determine which agents to assign to the selected account.

If you select to assign accounts to agents, you will see a set of agent selection criteria fields. You can use these fields to search for and select the agents to whom you want to assign an account. Once you select the agent(s) and click **Assign Email Account**, the page refreshes to display an Available Email Accounts and an Assigned Email Accounts field. You can use these two fields to review existing assignments and to determine which accounts to assign to the selected agent(s).

Tasks

You can perform the following tasks:

- [Assigning Agents to Email Accounts](#)
- [Assigning Email Accounts to Agents](#)

2.9.1 Assigning Agents to Email Accounts

Use this procedure to assign agents to an email accounts from the Supervisor Console.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

Create the email account.

Steps

1. Click the Supervisor tab.
2. In the side panel, click **Accounts**.
The Assign an Agent to an Email Account page appears.
3. From the list in the Assign field, select **Agents to Accounts** and click **Go**.
4. From the list in the Email Account field, select the email account to which you want to assign an agent and click **Go**.

The Assign an Agent to an Email Account page refreshes with the list of available agents displayed in the Available Agents list. The Assigned Agents list displays the list of agents that had previously been assigned to the email account.

Note: A number is listed in brackets next to agent names displayed in the Assigned Agent list. This number represents the number of email messages that are currently sitting in the agent's Inbox.

5. If you want to assign selective agents to the email account, do one of the following.
 - a. From the Available Agents list, click to select the agent that you want to assign to the email account.

- b. From the Available Agents list, select the agent(s) that you want to assign to the email account and then click the Move icon.

Note: You can select multiple agents by holding down the Shift key or the Ctrl key.

6. If you want to assign all available agents to the email account, click the Move All icon.
7. If you want to save your work and assign the agent(s) to the email account, click **Apply**.

A confirmation message appears indicating that the agent(s) has been successfully assigned to the email account.

See Also

- [Assigning Email Accounts to Agents](#)

2.9.2 Assigning Email Accounts to Agents

Use this procedure to assign email accounts to agents from the Supervisor Console.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

None

Steps

1. Click the Supervisor tab.
2. In the side panel, click **Accounts**.
The Assign an Email Account to an Agent page appears.
3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.

4. Enter the search criteria to search for the agent(s) you want to assign to an email account.
 - a. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.
 - b. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.
 - c. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.
 - d. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.
 - e. If you want to search for an agent based on their assigned eMail Center resource roles, from the Resource Role list, select the resource role.

5. Click **Search**.

The agent search results appears listing the agents which were found to match the given search criteria.

6. In the Select column, select the box next to the agent user name of the user you want to assign to email accounts.

7. Click **Assign Email Account**.

The Assign an Email Account to an Agent page reappears with the list of available email accounts displayed in the Available Email Account list. The Assigned Email Account list displays the list of email accounts that had previously been assigned to the agent.

Note: A number is listed in brackets next to email account names displayed in the Assigned Email Account list. This number represents the number of email messages that have been fetched by that agent from the account.

8. If you want to assign selective email accounts to the agent, do one of the following.
 - a. From the Available Agents list, click to select the agent that you want to assign to the email account.
 - b. From the Available Email Account list, select the account(s) that you want to assign to the agent and then click the Move icon.

Note: You can select multiple accounts by holding down the Shift key or the Ctrl key.

9. If you want to assign all available email accounts to the agent, click the Move All icon.
10. If you want to save your work and assign the email account(s) to the agent, click **Apply**.
A confirmation message appears indicating that the email account(s) has been successfully assigned to the agent.

See Also

- [Assigning Agents to Email Accounts](#)

2.10 Supervising Documents

The Supervisor tab provides you with a variety of tools to search, browse, import, edit, publish, and create hierarchies for MES documents.

Tasks

You can perform the following tasks:

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.1 Searching for MES Documents

Use the steps below to search for a particular MES document.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. Click the Supervisor tab.
2. Click the Knowledge Base subtab.
3. From the side panel, click **Document > Search**.
The Search Documents page appears.
4. In the Document Search Criteria field, type the name or partial name with a wildcard (%).
5. Click **Search**.
The Document Search Results table refreshed to display the results of the search.

See Also

- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.2 Browsing the MES Document Categories

Use the steps below to browse the MES categories for a particular document.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. Click the Supervisor tab.
2. From the side panel, click **Document > Browse**.
The Browse Documents page appears, displaying a summary view table of all the MES categories.
3. In the MES Category column, click the expansion icon to view sub-categories under a particular MES category (if applicable).
The summary view table expands to show the sub-categories for the selected MES category.
4. In the View column, click the appropriate icon to view the documents in a particular MES category or sub-category.

See Also

- [Searching for MES Documents](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.3 Updating MES Documents

Note: You can only update documents that you published. You cannot update documents that have been published by other user names.

Use the steps below to update MES documents.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. Click the Supervisor tab.
2. Search or browse for the document you want to update by clicking **Document > Search** or clicking **Document > Browse** from the side panel.
3. In the Update column, click the update icon for the document you want to update.

The Publish Document page appears.

4. Update the document title, description, category, or upload a new file as necessary.
5. Click **Update**.

The Publish Document page refreshes to display a confirmation message stating that the document was updated.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)

- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.4 Removing MES Documents

Use the steps below to remove a MES document you published.

Note: You can only delete documents that you published. You cannot delete documents that have been published by other user names.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. Click the Supervisor tab.
2. Search or browse for the document you want to remove by clicking **Document > Search** or clicking **Document > Browse** from the side panel.
3. In the Select column of the table, select the box for the document you want to remove.
4. Click **Remove**.

The page refreshes to display a confirmation message stating that the selected document was deleted.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.5 Creating and Publishing MES Documents

Use the steps below to create and publish a document for MES by using the template editor.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. Click the Supervisor tab.
2. From the side panel, click **Document > Editor**.
The Create Document page appears.
3. In the Title field, type a name for your document.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category in which you want to create your document.

6. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.

Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.

7. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:
 - One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.
 - One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.
8. To preview the document before you publish it, click **Preview**.
9. Click **Publish**.

A conformation message appears, stating that you successfully published the document.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.6 Uploading and Publishing MES Documents

Use the steps below to import and publish a document for MES.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. Click the Supervisor tab.
2. On the side panel, click **Document > Publish**.
The Publish Document page appears.
3. In the Title field, type a title for the document you are going to upload.
4. In the Description field, provide a short description of the document.
5. In the Category field, search for and select the appropriate MES category for your document.
6. Click **Upload File**.
The Upload File browse box appears.
7. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.
8. Click **Upload**.
The Publish Document page refreshes and the selected file appears in the Files field.
9. Click **Publish**.
A confirmation message is displayed, stating that the new document has been published.

Note: If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild the Oracle Text index for MES. Log in as the eMail Center Standalone Monitoring Administration user in the forms application, and submit a request to run the Rebuild Help Search Index concurrent process (refer to the Business Data Checkpoint section).

To publish another document you must start by clicking Publish hyperlink in the side panel again. Do not try to use (re-cycle) data entered for a previous file.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Creating Categories in MES](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.7 Creating Categories in MES

Use the steps below to add new MES categories.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. Click the Supervisor tab.
2. From the side panel, click **Document > Categories**.
The Category Manager page appears.
3. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.
4. In the provided fields, type the name of the new category, a description of it, and select its parent category.
5. Click **Update**.

Guidelines

Read the content of the latest IEM readme and HTML file for important information about new features, post installation steps and other changes introduced with the release.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Defining a Hierarchy Among the Categories](#)

2.10.8 Defining a Hierarchy Among the Categories

Use the steps below to create a hierarchy of MES categories.

Login

HTML Login URL

Responsibility

eMail Center Supervisor

Prerequisites

The user must have an MES Administrator resource role.

Steps

1. Click the Supervisor tab.
2. From the side panel, click **Categories**.
The Category Manager page appears, displaying a list of categories.
3. In the Name column, select the row, which displays the appropriate sub-category name.
4. From the list in the Parent Category column, select the desired parent category.

5. Click **Update**.

See Also

- [Searching for MES Documents](#)
- [Browsing the MES Document Categories](#)
- [Updating MES Documents](#)
- [Removing MES Documents](#)
- [Creating and Publishing MES Documents](#)
- [Uploading and Publishing MES Documents](#)
- [Creating Categories in MES](#)

2.11 Supervising Queries

Use the Query page to set up and maintain queries.

Tasks

You can perform the following tasks:

- [Viewing Queries](#)
- [Creating Queries](#)

2.11.1 Viewing Queries

Use this procedure to view an existing query.

Prerequisites

You must be assigned the JTF_FM_ADMIN role to view queries.

Login

HTML Login URL

Responsibility

eMail Center Self Service Setup or eMail Center Supervisor

Steps

1. If you are logging in with the eMail Center Self Service Setup responsibility, click the Knowledge Base subtab. If you are logging in with the eMail Center Supervisor responsibility, click the Supervisor tab then click the Knowledge Base subtab.
2. From the side panel, click **Query**.
The Query List page appears.
3. In the Query Title column, click the query name hyperlink of the query you want to view.
The Query Details page appears.
4. Click **Back** when you have finished viewing the selected query.

See Also

- [Creating Queries](#)

2.11.2 Creating Queries

Use this procedure to create a query.

Prerequisites

You must be assigned the JTF_FM_ADMIN role to create queries.

Login

HTML Login URL

Responsibility

eMail Center Self Service Setup or eMail Center Supervisor

Steps

1. If you are logging in with the eMail Center Self Service Setup responsibility, click the Knowledge Base subtab. If you are logging in with the eMail Center Supervisor responsibility, click the Supervisor tab then click the Knowledge Base subtab.
2. From the Side panel, click **Query**.
The Queries page appears.

3. From the side panel, click **Create**.
The Create Query page appears.
4. In the Query Title field, type a unique name for the query that you want to create.
5. In the Query Description field, type any free-form text that you want to use to describe the query that you are creating.
6. In the Query String field, type the SELECT statement for the query.

Note: The alias for each column used in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, eMail Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

For example, if the document had following merge fields:

Dear ((*FIRST_NAME*)) ((*LAST_NAME*)),

Thank you for your interest in ((*PRODUCT*)). This product will be released on ((*DATE*)).

The query to populate these fields would have the following SELECT statement:

```
SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",  
CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",  
PRODUCT_NAME "((*PRODUCT*)) ",  
RELEASE_DATE "((*DATE*)) "  
FROM ...  
WHERE ...
```

Warning: Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used.

7. In the SQL Merge Field field, type the name of the merge field and click **Insert**.

An alias name for the column that matches the merge field is inserted at the end of the text in the Query String Editor.

Note: When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (_).

Tip: Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately after typing the corresponding column name.

When the user selects a document that includes SQL merge fields, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In which case the bind variable will be populated automatically. The SQL query will get executed using the value for the bind variable when the associated document is previewed, inserted or attached.

8. Click **Validate SQL.**

You will be prompted to enter a value for the bind variables used in the query.

9. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL.**

You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

10. If you want to save your work and create the query, click **Create.**

11. If you do not want to save your work and want to clear all of the input fields, click **Cancel.**

See Also

- [Viewing Queries](#)

