Oracle Fusion Service

How do I set up email in Fusion Service?

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1 Get Email Up and Running in Fusion Service

Intial Setup

Enable Configuration of Email Communications

Before you start your configuration, you must enable the tasks required to configure inbound and outbound email communications for service requests.

1. Sign in as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area and select the **Service** offering.
3. Click the **Change Feature Opt In** link.

   The Opt In: page is displayed.
4. In the **Communication Channels** row, click **Edit** in the **Features** column.

   The Edit Features: Communication Channels page is displayed.
5. For the **E-mail Communications** feature, select the **Enable** check box.
6. Click **Done**.

How do I configure an email channel?

To send emails to your customers and to receive emails from them, you must first set up an email channel.

You can create separate email channels for different application stripe codes. For example, one for CRM and one for HCM. However, you can use the same email channel for both inbound and outbound emails:

Note: You can add attachments totaling 10MB to an email.

- **Inbound email**: Indicates the service emails received from your customers. As part of your implementation, you must set up a forwarding rule on your company email server to redirect these emails to Oracle's inbound email ID. This is the same email account that Oracle provided at the time of provisioning. For example, all the support emails that are sent to `TechSupport@mycompanydomain.com` are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing. The SVC_INBOUND_EMAIL_ADDRESSES profile option indicates the Oracle email ID to which the support mails must be forwarded.

  If it's required for your company, you can also create different support email channels for different business units or divisions. For example, `TechSupportDiv1@mycompanydomain.com`, `TechSupportDiv2@mycompanydomain.com`,

and so on. All the support emails sent to these different support email channels are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing.

> **Note:** If you're implementing HR Help Desk or Internal Help Desk, then you must define a channel with the appropriate application stripe. The account name of the channel must match the email address of your mailbox from which you're redirecting or forwarding emails to the Oracle mailbox mentioned above. If you don't define the appropriate channel, the requests created for the emails are set with the CRM application stripe. In such cases, you must run an ODI import process to update the application stripes of the SRs.

The SVC_INBOUND_EMAIL_ADDRESSES profile option contains two email IDs:

- For CRM, use the email ID that contains the text 'extservice' as a part of the ID, as the forwarding email ID.

> **Note:** You must avoid updating these inbound email addresses. If you need to update these inbound email addresses for some reason, you must complete the following steps:
>
> - Update the corresponding forwarding rule.
> - Ensure that you register the updated inbound email addresses as access points for inbound email. See *How do I register or unregister access points for inbound email?*

- **Outbound email**: Indicates the emails that are sent by the Service application from the service request. For example, when an agent responds to the primary customer contact.

  To ensure that your outbound email is delivered successfully to your external recipients, you must set up a Sender Policy Framework (SPF) policy on your domain.

  To enable Oracle to send out an email on your behalf, you must do the following:

  - Set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, `v=spf1 include:spf_c.oraclecloud.com ~all`.
  - To set the support agent's name as the **From Name** in outbound emails, set the value for the SVC_USE_RESOURCE_NAME_IN_OUTBOUND profile option to **Yes**. For more information, see *How do I set the From Name in outbound emails?*

To configure an email channel for the customer:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Communication Channels
2. In the **Service Channels** page, click **Create Channel**.
3. In the **Create Channel** window:
   a. Select a **Stripe Code**.

      Select **CRM** to process emails from and to external customers. Select **HCM** to process emails from and to internal employees, through the HCM Help desk support.
   b. The **Purpose** field is set to **Support** by default.

c. Select the **Channel Type** as **Email**.
d. Specify the support email ID of your company as the **Account Name**. For example:
`support@mycompanydomain.com`

   If a forwarding rule is configured, all the mails that are sent to the specified support email ID are forwarded to Oracle's inbound email ID. If an outbound email is configured, Oracle can send mails to the customer as the specified support email ID, on your behalf.
e. Verify whether the generated **Channel Code** is unique.

   The channel code is autogenerated and it uniquely identifies a communication channel when exporting or importing channels from one environment to another.

   - If the auto-generated channel code is unique, you can leave it unchanged.
   - If the auto-generated channel code isn't unique, add a set of characters to the code to make it unique.
f. (Optional) Specify a **Display Name** to indicate any information about the channel, such as the name of the deploying company for which the channel is being configured.
g. When a new channel is being created, it's active by default. To deactivate it, clear the **Active** option.
h. (Optional) From the **Business Unit** drop-down list, select a Business Unit (BU).

   The BU set in the scope is selected by default, but you can select a different BU. This column appears only if the multiple business units feature is turned on.
i. Click **Save**.

How do I set up inbound and outbound email?

You can configure email to use a single email channel to handle both inbound and outbound email messages. Inbound messages are the messages that you receive from your customers. Outbound messages are the messages that you send to your customers.

> **Note:** When your customers receive an email from your company, they can reply directly to the email. They don't have to change the **To** address in the reply. The To address already displays the account name field of the channel that the agent uses in the outbound message.

Use the following tasks in Setup and Maintenance to set up inbound and outbound email.

No.	Task	Describes how to
1.	Enable Configuration of Email Communications	Enable the tasks required to configure inbound and outbound email communications for service requests.
2.	Configure an Email Channel	Configure an email channel for your organization.
3.	(Optional) Create and Update Inbound Message Filters	Set up email filters. Filters enable you to set one or more criteria based on which an incoming

No.	Task	Describes how to
		message from a customer or a partner can be accepted or rejected.
4.	Configure Profile Options for Inbound and Outbound Email	Configure inbound and outbound email profile options.
5.	(Optional) Define Email Templates	Define email templates.
6.	(Optional) Modify Acknowledgment Messages for Inbound Email	Modify the predefined acknowledgment messages provided by the application according to your company's requirement.
7.	Access Point Setup for Inbound Emails: This section consists of multiple topics.	The procedures in this section describe how to verify your email channel configurations and how to register the correct access points with the UMS.
8.	Configure a Job to Process Inbound Emails	Configure a job to process inbound emails to retrieve emails from the customer at regular intervals.

How do I configure profile options for inbound and outbound email?

You can set options for incoming and outgoing emails by configuring email profile options. For example: In the SVC_OUTBOUND_EMAIL_FROM profile option, you can set the From email ID that you use to respond to a customer's email.

Configure the inbound email profile options as specified in the following table.

Inbound Profile Options	Description
SVC_ENABLE_INBOUND_EMAIL_DEFAULT_PROCESSING	Indicates whether inbound emails from customers must be processed automatically by creating or updating an SR. If this option is disabled, only the inbound message object is created, without creating an SR.
SVC_INBOUND_EMAIL_ADDRESSES	Indicates the inbound email IDs that are monitored by the Service application. The email IDs are separated by a comma and are automatically populated during provisioning. You must use the address to set a forwarding rule. Try to avoid updating these inbound email addresses. If you update these inbound email addresses for some reason, you must complete the following steps: • Update the corresponding forwarding rule. • Ensure that you register the updated inbound email addresses as access points for inbound email.

Inbound Profile Options	Description
SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS	Enables the display of images inline within the SR messages in the UI. The default value is Yes.
SVC_INBOUND_EMAIL_MAX_ATTACH_SIZE	Indicates the maximum size in MB of attachments that are allowed in an inbound email. The default value is 10 MB. Here are some key points to note: • The recommended maximum limit for the email size is 15 MB. Email size includes email headers, attachments, and the email content. **Note:** You can increase the size of the attachments past 15 MB, but this isn't recommended as it might cause server issues • If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. So when your users send emails that exceed a total size of 15 MB, such emails aren't processed by the server.
SVC_INBOUND_MESSAGE_BATCH_SIZE	Indicates the number of emails that can be processed at a given time. This is the maximum number of emails retrieved by every run of the Retrieve Inbound Email Messages scheduled process. The default value is 10.
SVC_EMAIL_PROCESS_UNKNOWN_CUST	Indicates whether an SR must be created for emails sent by unknown customers.
SVC_ENABLE_INBOUND_EMAIL_ACKNOWLEDGEMENT	Indicates whether an acknowledgment must be sent for an incoming email. If you prefer not to have emails sent when SRs are created, disable this profile option. To disable it, use the Manage Administrator Profile Values task in Setup and Maintenance. Search for the SVC_ENABLE_INBOUND_EMAIL_ACKNOWLEDGEMENT profile option, and then set the profile value to **No**.
SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER	Specifies the maximum number of emails to be sent to one user within a specific time interval. This time interval is specified in the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option. The default value is 3. **Note:** Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a high value such as 100. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL profile option to a low value such as 5 minutes. This profile option also helps to prevent the creation of infinite email loops.
SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL	Specifies the time interval for which the limit check is applied for the maximum number of emails to be sent to a user. This means that only the maximum number of emails specified in the SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER profile option can be sent to one user in this time interval.

Inbound Profile Options	Description
	The default value is 60 minutes. **Note:** Let's say you don't want to use this feature, and you want to send an acknowledgment email for every email received from a user. In that case, you can set this profile option to a low value such as 5 minutes. It's a good idea to simultaneously set the SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER profile option to a high value such as 100. This profile option also helps to prevent the creation of infinite email loops.
SVC_INBOUND_EMAIL_PATTERN_TO_STOP_ACK	Specifies the email patterns that must be blocked, so that the application stops sending acknowledgment emails to email addresses having those patterns. The default email pattern is `postmaster@.*.oraclecloud.com`.
ORA_SVC_ENABLE_FAILED_INBOUND_MESSAGE_PROCESSING	Enables the automatic processing of inbound messages that weren't processed earlier because of internal issues. The default value is Yes. To stop the retrieval of unprocessed messages at any time, you can set the value to No.
ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE	Enables the agents to see the images or attachments from the first email received on an SR in both the SR header and the SR message. The default value is No.
ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY	Enables viewing of images and logos inline within the body of the SR message, but the inline images aren't captured as regular SR attachments. The default value is No. When it's set to Yes: • Documents received as attachments to inbound emails are included in the SR attachments. • Images such as logos in the sender's signature and inline images aren't included in the SR attachments. **Note:** When you set this value to Yes, the ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE profile option is automatically set to Yes.
ORA_SVC_INBOUND_MSG_LAST_REPROCESSING_DAYS	Specifies the number of days before the current date when the failed inbound messages are to be reprocessed. The default value is 1.
ORA_SVC_ENABLE_INBOUND_PARTIAL_STATUSES_FOR_REPROCESSING	Enables the reprocessing of unprocessed inbound emails from the past. The default value is No. When it's enabled, reprocessing starts from the last point where the processing stopped earlier.

Inbound Profile Options	Description
ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR	Enables you to choose whether to add the sender and recipients of inbound emails as an SR contact or SR team member. For a new SR, the recipients in the To or Cc lists are added as SR contacts or SR team members, if their email IDs exist as valid party records in the application. For a reply email to an existing SR, the sender and the contacts or team members in the To or Cc lists are added as SR contacts or SR team members if they don't already exist in the SR. The default value is Yes. When you set the value to No, the sender and recipients of inbound emails aren't added to the SR. **Note:** The sender of the first email is always added as the primary contact on the SR, irrespective of the value of this profile option.
ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT	Specifies whether to make the **Unregister** button available. The default value is No. When it's set to the default value, the **Unregister** button isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.
ORA_SVC_INBOUND_REPROCESSING_OFFSET_IN_MINUTES	Used to reprocess inbound emails when it fails to create customer message on the SR. The default value of this profile option is set to 120 (2 hours). After this duration, the reprocessing logic will try to create customer message again on the SR.
SVC_INBOUND_EMAIL_REGEX_TO_EXTRACT_SR_NUMBER	Used to create and send a new message for an existing SR. **Note:** If the default value can't extract the SR number from the inbound email body, then try adding an extra # to the default value.
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_BATCH_SIZE	Specify the maximum number of inbound messages to read from Microsoft Exchange online in one ESS Job iteration. The default value is 10 The maximum value is: 200
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_FETCH_SIZE_PER_BATCH	Specify the maximum number of inbound messages to be processed from Microsoft Exchange online in one subset of a batch. The default value is 10 The maximum value is: 20
ORA_SVC_INBOUND_MSG_EXCHANGE_ONLINE_DELETE_SIZE	Specify the maximum number of inbound messages to be deleted from Microsoft Exchange online in one subset of a batch. The default value is 10 The maximum value is: 20

Configure the outbound profile options for Service as specified in the following table.

Outbound Profile Options	Description
SVC_OUTBOUND_EMAIL_FROM	Indicates the From email that's used for sending outbound emails to customers. The default value is **noreply@oracle.com**. You must set the value to the no reply address for your company to prevent auto-replies from creating unintended SRs. This profile option can have the no reply email address with or without the display name. Example without display name: **noreply@mycompanydomain.com**. Example with display name: Acme Support **<noreply@mycompanydomain.com>**. If the profile option value doesn't contain a display name, the display name of the email channel is used in the From address. Let's say you set the value of this profile option as your support email ID such as **support@mycompanydomain.com**. If your From email address isn't displayed in your email received by your customer, then you'd receive a verification email at **support@mycompanydomain.com**. You must follow the instructions in that email to verify the account. If you don't have access to the inbox for **support@mycompanydomain.com**, then you must do one of the following: • Contact Oracle support to get your email account verified. • Set the value of this profile option to another valid email address that you can access. Now when you send your first email to a customer, you receive a verification email. You must click the confirmation link in the email to complete the verification.
SVC_SR_FORWARD_TEMPLATE_NAME	Indicates the email template name for SR messages of type Forward.
SVC_SR_RESPONSE_TEMPLATE_NAME	Indicates the email template name for SR messages of type Response.
SVC_SR_SYSTEM_RESPONSE_TEMPLATE_NAME	Indicates the template name for SR messages of type System Response.
ORA_SVC_SR_EMAIL_ATT_SIZE	Indicates the maximum permitted total size in MB of all the attachments in an outbound email that's sent from the Service application. Oracle recommends keeping this value less than or equal to 10 MB. The default value is 10 MB. Here are some key points to note: • The maximum limit for the email size is 15 MB. Emails greater than 15 MB in size aren't processed by the email server. Email size includes email headers, attachments, and the email content. If an email contains non text content or attachments, that gets base64 encoded, and this can increase the overall size of the email. • Use this profile option to restrict the email attachment size such that the total email size doesn't exceed 15 MB.
SVC_ENABLE_ACKNOWLEDGMENT_TO_ALL	Indicates whether an acknowledgment must be sent to users both in the To and Cc lists for every inbound email that's received.
SVC_ENABLE_DEEPLINKS_IN_OUTBOUND_EMAIL	Indicates whether the deep links to KM articles are enabled in outbound emails and email previews. When the deep links are enabled, this helps to translate and populate the complete URL to view the articles.
ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND	Enables the use of the resource name as the sender name in outbound emails. The default value is No.
ORA_SVC_ENABLE_RESOURCE_EMAIL_USAGE_IN_OUTBOUND	Enables the use of the resource email as the sender email in outbound emails. The default value is No.

Outbound Profile Options	Description
ORA_SVC_ENABLE_INLINE_ ATTACHMENTS_IN_OUTBOUND_EMAIL	This profile option only impacts inline attachments, not regular attachments.

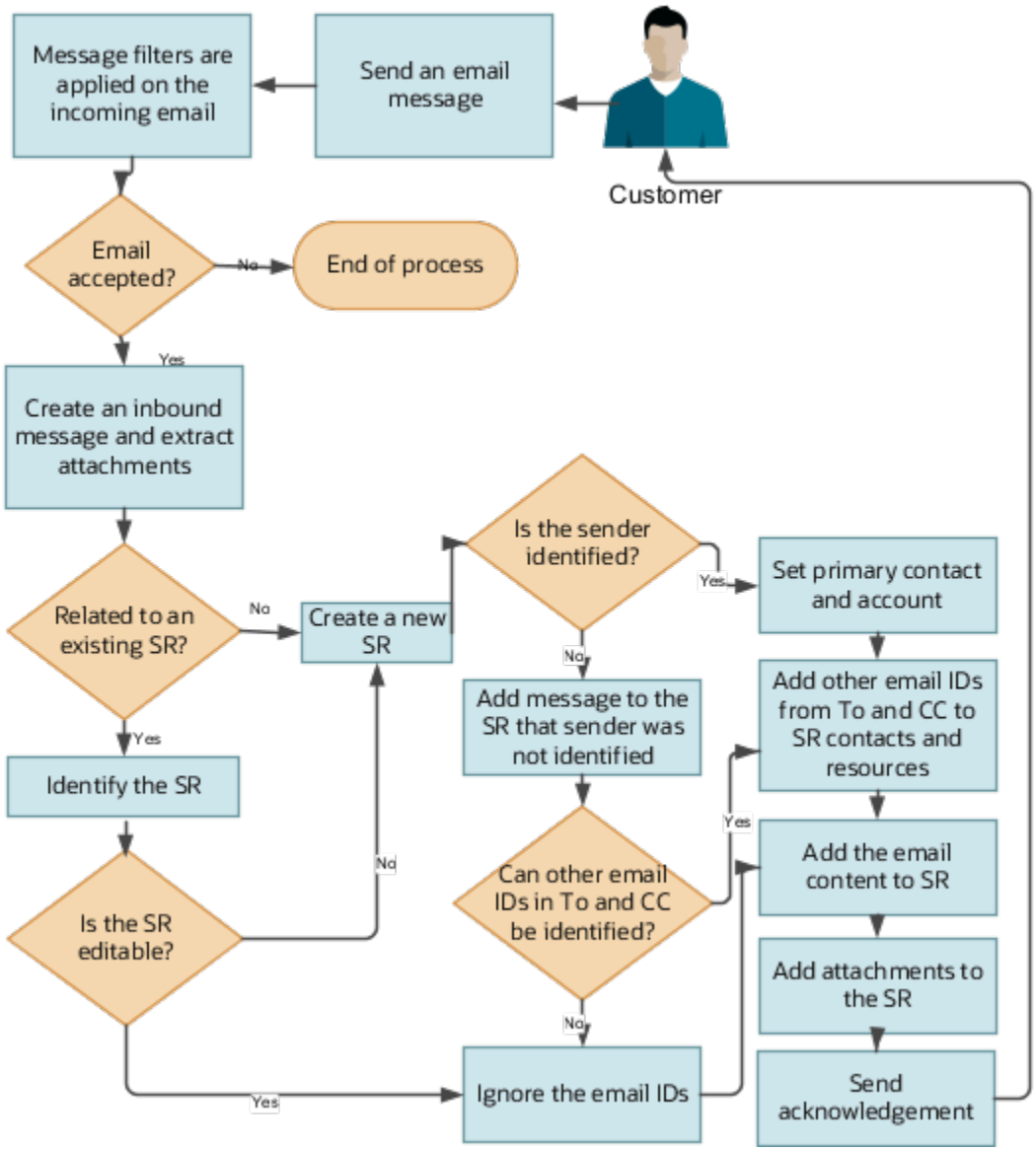
To configure email profile options:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Inbound Email Profile Options, or Manage Outbound Email Profile Options
2. Click the name of the profile option to be set.
3. In the **Manage Email Profile Options** page, in the **Profile Values** section, click the plus icon to add a value.
4. Click **Save**.

Note: Alternatively, you can click the **Manage Email Profile Options** task to display the Email Profile Options page. On this page, you can view the list of all inbound and outbound email profile options and set their values. You can also search for a specific profile option code using the search bar.

How are inbound messages processed?

An inbound message is created when you receive an incoming service email from a customer or a partner. This flowchart describes the process flow for an incoming customer email:



1. A customer or a partner sends an email requesting support.
2. If an inbound message filter exists, then the filter is applied to the incoming message.
3. If the message is accepted, then an inbound message is created, and any associated attachments are extracted.
4. The message is verified to see if it's related to an existing Service Request (SR).
    - If the inbound message is related to an existing SR:

      The related SR is identified. If the related SR can be edited, then the email content and attachments are added to the SR. If the original SR can't be edited, then a new SR is created.
    - If the inbound message isn't related to an existing SR, then a new SR is created.
5. The email ID of the sender is validated against the customer or partner records in the database.
    - If the email ID of the sender exists in the records, then the primary contact and the account are updated on the SR.
    - If the From email ID doesn't exist in the database, then a message is added to the SR that the sender can't be identified.

- If an SR is created with no contact or account populated.
- If more than one contact with the same email ID exists in the database, then the following scenarios are possible:

Scenario	Primary Contact in the SR	Acknowledgment Sent
Sender's email address matches the email address of 1 contact, 1 partner, and 1 resource.	The matching contact is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 contacts.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 2 contacts and 1 partner.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 partner and 1 resource.	The matching partner is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.
Sender's email address matches the email address of 2 partners and 1 resource.	No primary contact is set in the SR.	An acknowledgment email is sent to the sender. The email states that the sender couldn't be identified because multiple contacts were found with the email address of the sender. More information is requested from the sender.
Sender's email address matches the email address of 1 resource.	The matching resource is set as the primary contact in the SR.	An acknowledgment email is sent to the sender.

6. All other email IDs in the **To** and **CC** fields in the message are checked to see whether they exist as resources or contacts in the application.
   - If they exist as contacts, they're added to the SR contacts.

- If they exist as resources, they're added to the SR team.

> **Note:** If the other email IDs don't match any resource or contact in the application, then those IDs aren't added to the SR. But they're displayed in the SR message.

7. If the primary contact set in the SR is associated with only one account, then that account is associated with the SR. If the primary contact is associated with more than one account, then the primary account of the primary contact is set as the account on the SR.
8. The incoming message content and the attachments are added to the new SR.

How do I use inbound message filters?

Based on the inbound message filter criteria you set, incoming messages from customers or partners can be accepted or rejected.

Message filter patterns are specified using regular expressions. For example, to specify a filter pattern to accept all emails from Oracle employees, the regular expression is given as: **^[A-Za-z0-9._%+-]*@oracle\.com**

You can set more than one filter. Filters are arranged in the descending order of priority on the Manage Email Filters page. The topmost filter has the highest priority. When a message comes in, the filter criteria are checked in the order of priority. If the first filter criterion doesn't apply to a message, the next ones are checked. If any of the filter criteria match the incoming message, the message is accepted or rejected based on the filter specifications.

> **Note:** It's important that you pay special attention while setting up email filters. If the User Messaging Service (UMS) setup rejects any email due to the filter setup, the rejected email can't be processed again by the application and it's lost.

To view the existing inbound message filters or to reorder their priorities:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage Email Filters

   The Inbound Message Filters page displays a list of the existing inbound message filters.
2. To change the priority of a filter:
   a. Select the filter whose priority you want to change.
   b. Click anywhere on the empty spaces in the selected row, and then drag the row to the required position.

Overview of Access Point Setup for Inbound Emails

When your customers send emails to your support channel, the User Messaging Service (UMS) reads those emails from your inbox and delivers them to registered access points.

Access points are registered clients that are authorized to read emails from your inbox. The application then reads those emails from the access points.

For inbound email to be processed successfully, it's important to register the correct access points with the UMS. You can use the Access Point Setup region of the Inbound Email Configuration and Validation page to register access points. When you register an access point, emails are permitted to be processed further. For example, to create a service request. When you unregister an access point, further processing of emails is stopped, and the emails in your inbox are also lost without being processed.

Related Topics

- How do I validate my inbound and outbound email setup?
- How do I configure an email channel?

How do I change acknowledgment messages for inbound email?

When you receive an email from your customer or an employee to open a service request, an acknowledgment message is sent to them automatically. Based on your company's requirement, you can change the predefined acknowledgment messages provided by the application.

Note: You can't add new tokens to these messages. Only the predefined tokens are used in these messages.

For CRM, the following predefined messages are provided:

- SVC_EMAIL_ACK_FOR_KNOWN_CUST
- SVC_EMAIL_ACK_FOR_MULTI_CUST
- SVC_EMAIL_ACK_FOR_UNKOWN_CUST

To change the acknowledgment messages that you send out to your customers or employees when you receive an inbound email:

1. In the Setup and Maintenance work area, go to the **Tasks** panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** window, enter Manage Messages.
4. Click the **Manage Messages** task that's displayed.
5. In the **Manage Messages** window, in the **Message Name** field, enter `%SVC%ACK%`.
6. From the list of acknowledgment messages displayed, select the message that you want to edit and click **Edit**.
7. In the **Edit Message** window, navigate to the **Message Text** region.
8. Edit the **Short Text** and **User Details** the way you want.
9. Click **Save**.
10. To translate the changed messages, click **Translation Editor**.

    The **Edit Translations** window displays the list of available languages for translating the messages.

    Note: Inbound email can't detect the language. So it always uses the default language for your deployment.
11. Select a row and click in the **Short Text** field.
12. In the **Short Text** window, edit the message and click **OK**.
13. Click in the **User Details** field, edit the text, and click **OK**.
14. Select another row and repeat the same steps to edit the messages for all the available languages.
15. Click **OK** in the **Edit Translations** window to save the changes.
16. Click **Save and Close** in the **Manage Messages** window.

How do I configure a job to process inbound emails?

You can configure a new job to retrieve emails at regular intervals, based on the specified frequency.

> **Note:** Inbound email is an asynchronous channel. When you have a high volume of emails, the emails are queued up and processed. Inbound email processing can take anywhere from 10 minutes up to 1 hour from the time the user sends an email depending on your inbound email volume and the frequency at which you've scheduled ESS job to process inbound emails.

To configure a job to process inbound emails:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the **Scheduled Processes** screen, click **Schedule New Process**.
3. In the **Schedule New Process** dialog box, select **Job** as the **Type**.
4. Search for and select the **Retrieve Inbound E-mail Messages** option from the **Name** drop-down list.
5. Click **OK**.
6. In the **Process Details** dialog box, click **Advanced**.
7. In the **Schedule** tab, in the **Run** options, select the **Using a schedule** option.
8. Select **Frequency** and specify a **Start Date**.

   > **Note:** You must ensure that you always select a frequency, whether you're using your test or your production environment. You can select a higher frequency if required. If you run a job manually without setting a frequency, the process might not retrieve all the emails. When you schedule the job to run periodically, it pulls all the emails from all the servers. After scheduling the ESS job your application may take few iterations of the job to refresh the caches that are required for the successful execution of inbound email processing. As a result, email processing might be delayed until the required caches are fully refreshed.

9. Click **Submit**.

A job is scheduled to process inbound emails.

> **Note:** Inbound emails work properly only for SRs whose reference numbers have the following characters: [A-Z], [a-z], [0-9], and the special characters hyphen (-), colon (:), period (.), comma (,), or underscore (_). So you can use only one of these characters as the prefix for an SR reference number. You can't use any other special character in the prefix apart from the ones mentioned.

Purge Inbound Email Messages

As an administrator, you must periodically purge the older inbound email messages after the SRs are created successfully.

Again, you may sometimes have unprocessed emails for which the corresponding SRs couldn't be created. They're typically retained so that the source of messages isn't lost. You must also review them periodically and take suitable corrective action. Once that's done, you can purge those emails.

> **Note:** You can use Oracle BI Publisher to create periodic reports for unprocessed emails.

To purge the unprocessed inbound messages periodically, you have to complete a few simple processes:

- Configure profile options to purge inbound email messages
- Schedule a job to purge inbound email messages

Configure Profile Options to Purge Inbound Email Messages

You must configure the following profile options for purging inbound email messages.

Profile Option	Description
SVC_INBOUND_MSG_RETENTION_DAYS	Indicates the number of retention days for inbound email messages. After the specified number of retention days, the successfully processed email messages are deleted from the inbound message table, inbound message parts table, and inbound message batch table. The default value is 30.
SVC_INBOUND_ENABLE_FAILED_MESSAGE_PURGE	Indicates whether to enable purging of inbound email messages that fail or aren't processed successfully. The default value is No. When the value is No, inbound email messages that fail or aren't processed successfully, are retained. After you review such email messages and take corrective action, you can set the value to Yes. When the value is set to Yes, the purge job deletes the corresponding records from the following tables: • Inbound message table • Inbound message parts table • Inbound message batch table

1. Navigate to the Setup and Maintenance work area and open the **Tasks** panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type **Manage Administrator**.
4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the Search: Profile Option region.
6. In the **Profile Option Code** field, type `SVC_INBOUND_%`.
7. Click **Search**.

   The Search Results: Profile Options region displays a list of profile options.
8. Select **SVC_INBOUND_MSG_RETENTION_DAYS**.
9. In the Profile Values region, specify the values in the **Profile Value** column for the Site **Profile Level** as described in the table.
10. Select **SVC_INBOUND_ENABLE_FAILED_MESSAGE_PURGE** and repeat the previous step.
11. Click **Save**.

Schedule a Job to Purge Inbound Email Messages

You can schedule a job that purges the successfully processed email messages from the inbound message database tables, based on the retention policy.

The retention days are set in the SVC_INBOUND_MSG_RETENTION_DAYS profile option. If you also want this job to purge inbound email messages that fail or aren't processed successfully, you must set the value of the SVC_INBOUND_ENABLE_FAILED_MESSAGE_PURGE profile option to Yes. For more information, see "Configure Profile Options to Purge Inbound Messages".

This job runs periodically to purge inbound email and related records from the following database tables, based on the above two profile options:

- Inbound message
- Inbound message parts
- Inbound message batch

You can schedule the job to run once daily. Or, depending on your company's requirements, you can decide another frequency for the job.

To set up a scheduled process to purge data from the three inbound message tables:

1. In the Navigator for your service application, click **Scheduled Processes**.
2. In the Overview page, click **Schedule New Process**.
3. Select **Job** as the **Type** option.
4. In the **Name** drop-down list, click **Search**.
5. Search for and select **Purge Inbound Messages**.
6. Click **OK**.
7. In the **Process Details** dialog box, click **Advanced**.
8. On the Schedule tab, select **Using a schedule** as the **Run** option.
9. Schedule the job to execute on a recurring basis by specifying the frequency and other details as required.
10. Click **Submit**.

How do I set the From Name in outbound emails?

When you send emails to your customers, the **From Name** in the outbound email is typically the channel name. But you have the option to set the resource name as the **From Name** in outbound emails.

You can do this by configuring the **ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND** profile option.

To set the service agent's name as the From name in emails sent to your customers:

1. Ensure that you've configured the SPF policy to enable outbound email so that your emails aren't rejected by your customer's mail server.
2. Sign in as a setup user or administrator.
3. Navigate to the **Setup and Maintenance** work area and open the **Tasks** panel tab.
4. Click **Search** from the list of displayed tasks.
5. Search for and click **Manage Administrator Profile Values**.
6. On the Manage Administrator Profile Values page, navigate to the Search region.
7. In the **Profile Option Code** field, type `ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND`.
8. Click **Search**.

The ORA_SVC_ENABLE_RESOURCE_NAME_USAGE_IN_OUTBOUND profile option is displayed in the Search Results: Profile Options region.

9. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **Yes**.
10. Click **Save and Close**.

How do I define email templates?

You can create email templates for the Forward, Response, and System Response messages of a service request (SR).

You can create templates using HTML to send email notifications for an SR using Application Composer.

To define an email template:

1. Sign in to the application as an administrator.
2. Navigate to Application Composer.
3. In the **Application** field, select **CRM Cloud** from the drop-down list.
4. In the **Common Setup** region, click **Email Templates**.
5. On the Email Templates page, click the plus icon to create a new template.
6. In the **Object** field, select **Service Request** from the drop-down list.
7. Specify a name for the template.
8. (Optional) Specify a description.
9. To add any attachments, click the plus icon, browse to the file location, and select the file.
10. A template is active by default. To disable the template, clear the **Active** option.
11. Specify the email subject.

    You can use SR field names in the subject. For example, the subject can be `Resolved issue [$Title$].`
12. Edit the message HTML as required. Add the #MessageContent# tag anywhere in the HTML code. This tag is replaced by the SR message content.
13. (Optional) To enable the display of the email thread, insert the #PastConversation# tag in the template.

    Add this tag within the email body at the place where you want to insert the previous messages from the email thread. When an agent replies to a customer from the Messages tab in an SR, the email thread is displayed.
14. In email templates that are meant for forwarding to internal users, you can include a link to the SR within the template. Include the link in the following format:

    ```
    <Link to company's Fusion Service site>/service/faces/FuseOverview?
    fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=<SR Number>.
    ```

    For example, `https://company123.mycompanydomain.com:10616/service/faces/FuseOverview?fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=SR0000029093.`
15. Click **Save and Close**.

Note: When an SR is created, it might be with or without a queue. So it's possible that an email notification is sent before the SR is assigned to a queue. To avoid a blank field value in the email notification, you must not use the **Queue Name** field in your email template.

Optimize Sending Emails in Bulk

You may sometimes have situations where a major incident occurs, such as the network going down in the West Coast of the US. So a huge number of your customers would report issues triggered by this incident.

The root cause for all these issues would be the same incident. In such cases, you can compose multiple outbound messages or SR messages in bulk mode. You can then send out these bulk messages in batches without affecting the normal email communication with customers. Using groovy scripts or REST APIs, application developers can send outbound emails in bulk.

To optimize sending emails in bulk using groovy scripts:

In Application Composer, create an After Create trigger on the service request Message object and add the following groovy script in the **Edit Script** field:

```
Trigger: Create

if (ChannelTypeCd == "ORA_SVC_EMAIL") {

setAttribute('ProcessingStatusCd', "ORA_SVC_BATCH_READY");

}
```

To optimize sending emails in bulk using REST APIs:

1. Go to Oracle Help Center.
2. Drill down to your apps service area of interest.
3. Go to the APIs and Schema section.
4. Review the REST service definition in the REST API guides available here.

Note: If you're new to Oracle's REST services, you may want to begin with the Quick Start section.

Here are some key pointers:

- If you're using REST APIs to create outbound messages and want to send them out in batch: You must set the value of the `DeliveryTypeCd` attribute to ORA_SVC_BATCH.
- If you're using REST APIs to create outbound SR messages and want to send them out in batch: You must set the value of the `ProcessingStatusCd` attribute to ORA_SVC_BATCH_READY.
- After you create all the outbound messages or SR messages, you can run the Send Outbound Messages scheduled process to send these messages in batch.

Detect Your Unprocessed Inbound Emails

The records that are read from the email server are stored as records in the database table of your service application. The Detect Unprocessed Emails scheduled process checks the status of the records in the email server from the time that it starts.

It compares the data between the email server and the database tables of your service application. It then identifies the unprocessed records. Every time it runs, it starts checking from the first remaining unprocessed record.

Some emails may be present in the email server, but they may not have reached your service application because the application is down or because of some other issue. Every time the scheduled process runs, it checks the status of these pending emails, starting from the first remaining pending email. After a certain specified time limit, if a pending email has still not reached your service application, it will remain unprocessed.

Note: You can also use BIP reports to check whether you have any unprocessed emails.

Detect Your Unprocessed Outbound Emails

The Detect Unprocessed Emails scheduled process detects any unprocessed outbound emails, and it also tries to resend these mails. This retry option is available only for outbound emails.

When you send an outbound email from your service application, it first goes to the email server. And then the email server sends the email. Sometimes, the service application is unable to send the email because of a network connectivity issue, an outage, or some other issue. But for your users, it would appear as if the mail is sent.

The unique message IDs for such emails that couldn't be sent successfully from the email server is stored, and the scheduled process tries to resend them. After the maximum number of retries are completed, an error message appears in the SR message UI, stating that the email couldn't be delivered.

Configure Profile Options to Detect Unprocessed Emails

You must configure the following profile option for detecting unprocessed emails.

Profile Option	Description
ORA_SVC_MAX_DURATION_FOR_PENDING_EMAIL	Indicates the maximum duration in hours for which an inbound email can remain in the pending status. The default value is 6 hours. The Detect Unprocessed Emails scheduled process keeps on checking the pending inbound email records for this duration. After this duration, the records that still remain pending are classified as a failure.

To configure the profile option for detecting the unprocessed inbound emails:

1. Navigate to the **Setup and Maintenance** work area and open the **Tasks** panel tab.
2. Search for and click the **Manage Administrator Profile Values** task.
3. On the Manage Administrator Profile Values page, navigate to the Search: Profile Option region.
4. Search for and select the profile option in the table.
5. In the Profile Values region, specify the values in the **Profile Value** column for the Site **Profile Level** as described in the table.
6. Click **Save**.

Email FAQs

Frequently Asked Questions (FAQs) for Service Email

This section contains some frequently asked questions (FAQs) when setting up and maintaining service email. Scroll or search to find answers to common questions.

What happens when a customer sends a service email?

If a customer sends an email, then the email ID in the From field is validated against the customer record in the database. If a match is found, and the email is for a new service, then a new service request (SR) is created.

If a match to the email ID isn't found in the database, then the following applies:

- The value for the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is selected. This option specifies how to process an incoming email from unknown customers.
- If the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is set to **Y**, a new SR is created. However, a message is sent to customers indicating that they can't be identified and must provide valid information for further processing of the SR.
- If the SVC_EMAIL_PROCESS_UNKNOWN_CUST profile option is set to **N**, no SR is created.

Note: All the recipients of the incoming email, including the unknown contacts are listed in the SR Messages tab.

How can I detect and prevent email loops?

You can prevent your service application from creating additional service requests (SRs) when there's an out-of-office reply from one of the recipients of the email.

For outbound SR emails, the recommended best practice is to have your administrator set the From address to a no-reply option, such as `noreply@mycompanydomain.com`. This way, even if one or more recipients have their out-of-office notification turned on, the out-of-office reply isn't received by your service application. So a new SR isn't created.

But let's say your administrator sets the From address to your Support email account. This could cause an infinite loop of emails and new SRs. That's because a new SR sends an automatic acknowledgment email, which would trigger an out-of-office reply. This reply would in turn trigger the creation of another new SR, and so on.

Your business requirements may not permit the use of a no-reply email address, and you may use your Support email account instead. To accommodate this requirement, the following profile options are provided to detect and prevent the creation of infinite email loops:

- SVC_INBOUND_ACK_EMAIL_LIMIT_PER_USER
- SVC_INBOUND_ACK_EMAIL_TIME_INTERVAL

- SVC_INBOUND_EMAIL_PATTERN_TO_STOP_ACK

You can configure these profile options and set the values based on your company's requirement. For more information, see Configure Profile Options for Inbound and Outbound Email.

Related Topics

- How do I configure profile options for inbound and outbound email?

Why do some emails show as delivered in the configuration menu, but the SRs aren't created?

Sometimes, you may see that some emails appear as delivered when you click the Manage Email Configuration, Registration, and Validation task, but you don't see the service requests (SRs).

These emails also don't appear on the inbound email reports. This is especially true if you implement HR Help Desk.

Let's see why this happens. Suppose you're implementing HCM or HR Help Desk for your deployment. Then you must create two email channels: one with the CRM application stripe and the other with the HCM or HR Help Desk application stripe. But let's say you forget to create the HCM or HR Help Desk email channel. Then the SRs created from the emails are set with the CRM application stripe. So the HCM or HR Help Desk SRs aren't visible, and only the CRM SRs are visible.

To make the HCM or HR Help Desk SRs visible:

1. Create the HCM or HR Help Desk channel.
2. Run an ODI import process to update the stripe code for such SRs from CRM to HCM or HR Help Desk.

After the ODI import, these HCM or HR Help Desk SRs are visible.

Related Topics

- How do I configure an email channel?

Can I use the problem description of an SR as the subject in an outbound email?

You must not use the problem description of a service request (SR) as the subject in an outbound email.

Problem descriptions for SRs can be very long, sometimes up to 1000 characters. So they can span across multiple lines and also include the ENTER key. That's why it's not valid to use them as the subject in the email template.

Why is the channel ID set to the default email channel for some of my inbound emails?

Let's say your customer sends an email to your support email ID such as `support@mycompanydomain.com`, and it's redirected to the Oracle mailbox. Here's what happens:

- If either the **To** or **CC** address specified by your customer matches the account name of any channel defined in the application, that channel ID is set on the service request (SR).
- If neither the **To** or **CC** address specified by your customer doesn't match the account name of any channel defined in the application, then the channel ID on the SR is set to the default channel, which is Email.

How can I prevent a new SR from being created when a customer replies to an email notification that's set up using groovy scripts or object workflow?

For all outbound emails generated by your service application, the message ID is automatically added at the end of the email in the format `{##Messageid##}`. When someone replies to such an outbound email or forwards it, the application uses these values to identify the parent SR.

But let's suppose you've created a Groovy script or an object workflow to send an email notification when an SR is resolved. And this notification doesn't have the `{##Messageid##}` or `{##SrNumber##}` tags at the end of the message. So when your customer's SR is resolved, they receive a notification without the identifying tags. Now let's say the issue recurs for the customer. Instead of replying to an earlier mail thread, they might reply to this notification. Then the application isn't able to identify the original SR because it doesn't contain the tags at the end of the notification. So the application considers it as a new SR. The same issue occurs if someone forwards that notification back to the application.

To prevent the application from creating new SRs in such situations, you must do the following. At the end of the message content of your outbound email notification, ensure that you add either the message ID in the format `{##MessageId##}` or the SR number in the format `{##SrNumber##}`.

> **Note:** You can verify the exact format of these tags from any sample acknowledgment email that's sent after an SR is created from an inbound email.

How can I facilitate customers to reply to email notifications created using object workflow?

When you're creating the Email Notification action on an object workflow in Application Composer, ensure that you set the **Reply To Address** to the email address of a channel that's defined in the application. You would specify this email address in the **Specific email addresses** field. For example: `support@mycompanydomain.com`. Customers can then reply to these email notifications created using object workflow.

How can the errors be logged and tracked when a service request is not created through email?

If an email is received by Oracle Engagement Cloud but fails to create a service request due to validation issues on the SR, or for another reason, the failure is captured in the InboundMessage object.

Go to Service Infolets > Inbound Messages to see if a failure occurred. To see the reason for the failure, export the data from the Inbound Messages object, then check the StatusDetails attribute which shows the reason of the failure.

Notes

Enable Users to Edit Internal Notes and Customer Entry Messages that They've Authored

You may want to allow an agent to edit messages they've authored of Type Internal Notes or Customer Entry.

For this option to be available to your users, you must enable the SVC_ENABLE_MESSAGE_CORRECTION profile option. The default value of this profile option is No.

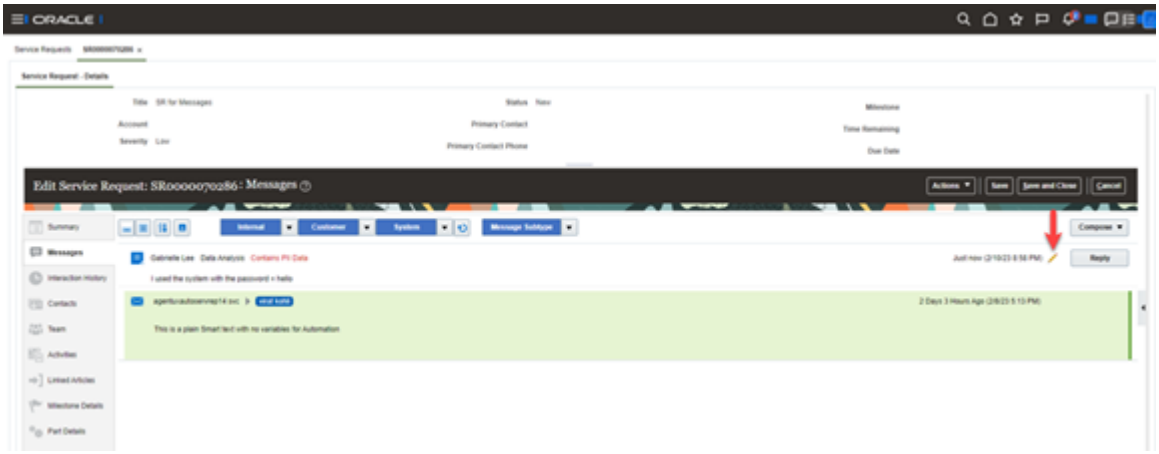
To enable the SVC_ENABLE_MESSAGE_CORRECTION profile option:

1. Sign in as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the **Tasks** panel tab and click **Search**.
4. Search for and select the **Manage Administrator Profile Values** task.
5. On the Manage Administrator Profile Values page, navigate to the **Search** region.
6. In the Profile Option Code field, type **SVC_ENABLE_MESSAGE_CORRECTION**, and then click **Search**.

   The SVC_ENABLE_MESSAGE_CORRECTION profile option is displayed in the **Search Results: Profile Options** region.
7. In the Profile Option Levels region, set the **Profile Value for the Site Profile Level** as **Yes**.

8. Click **Save**.

   After setting this profile option to **Yes**, the user will see a pencil icon for any Internal Notes and Customer Entry Messages they have Authored as shown in the following graphic:



Enable Users to Mark a Message as Containing Personal Information (PII) and Set the Message Subtype Value

You may want to allow an agent to mark a message as containing Personal information and provide additional classification by setting the subtype value on the message.

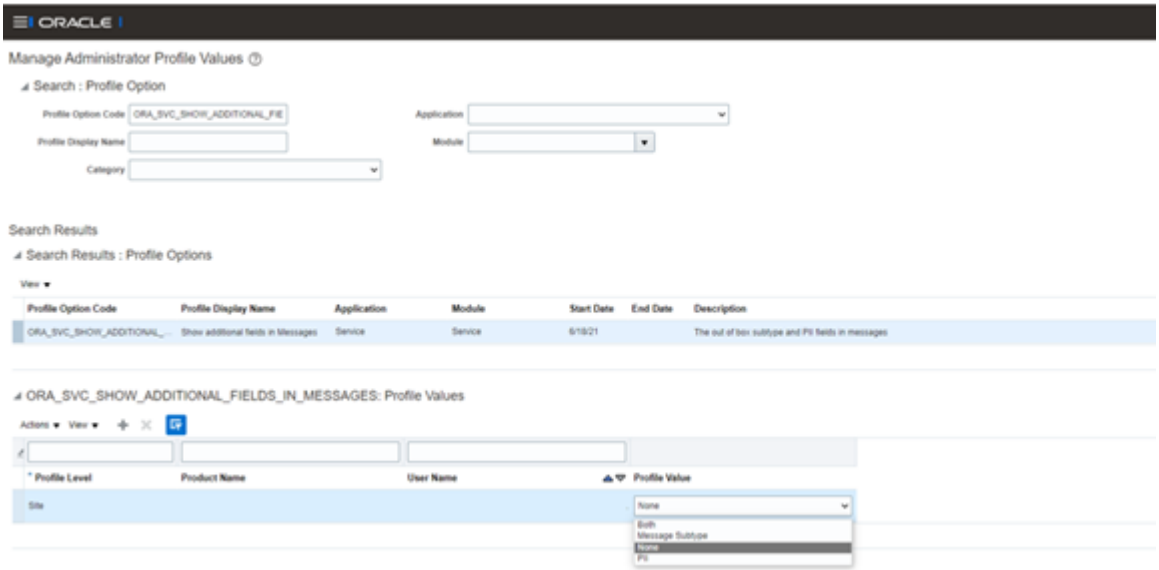
For these options to be available to users, you must enable the ORA_SVC_SHOW_ADDITIONAL_FIELDS_IN_MESSAGES profile option. The default value of this profile option is None.

To enable the ORA_SVC_SHOW_ADDITIONAL_FIELDS_IN_MESSAGES profile option:

1. Sign in as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the **Tasks** panel tab and click **Search**.
4. Search for and select the **Manage Administrator Profile Values** task.
5. On the Manage Administrator Profile Values page, navigate to the **Search** region.
6. In the Profile Option Code field, type **ORA_SVC_SHOW_ADDITIONAL_FIELDS_IN_MESSAGES**, and then click **Search**.

   The ORA_SVC_SHOW_ADDITIONAL_FIELDS_IN_MESSAGES profile option is displayed in the **Search Results: Profile Options** region.

7. In the Profile Option Levels region, set the **Profile Value for the Site Profile Level** to one of these values:
    - **Both**: Show both PII and Subtype fields in the message header.
    - **Message Subtype**: Show just the Subtype field in the message header.
    - **None**: The default value. Do not show any additional fields in the message header.
    - **PII**: Show only PII field in the message header.



8. Click **Save**.

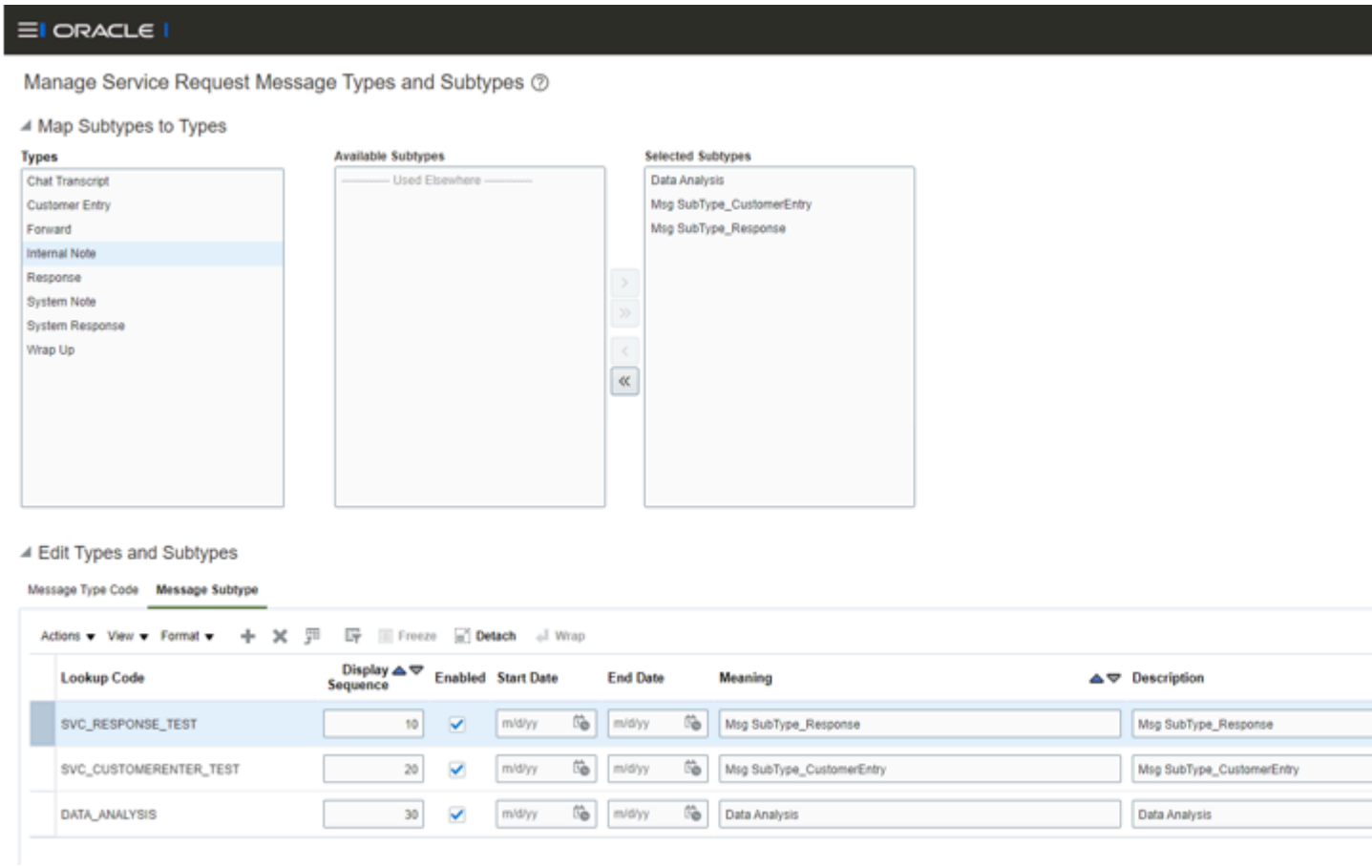
Configure Message Sub Type Values

You can create and select subtype values for the different message types that will be shown in the message subtype field when it is exposed in the message header.

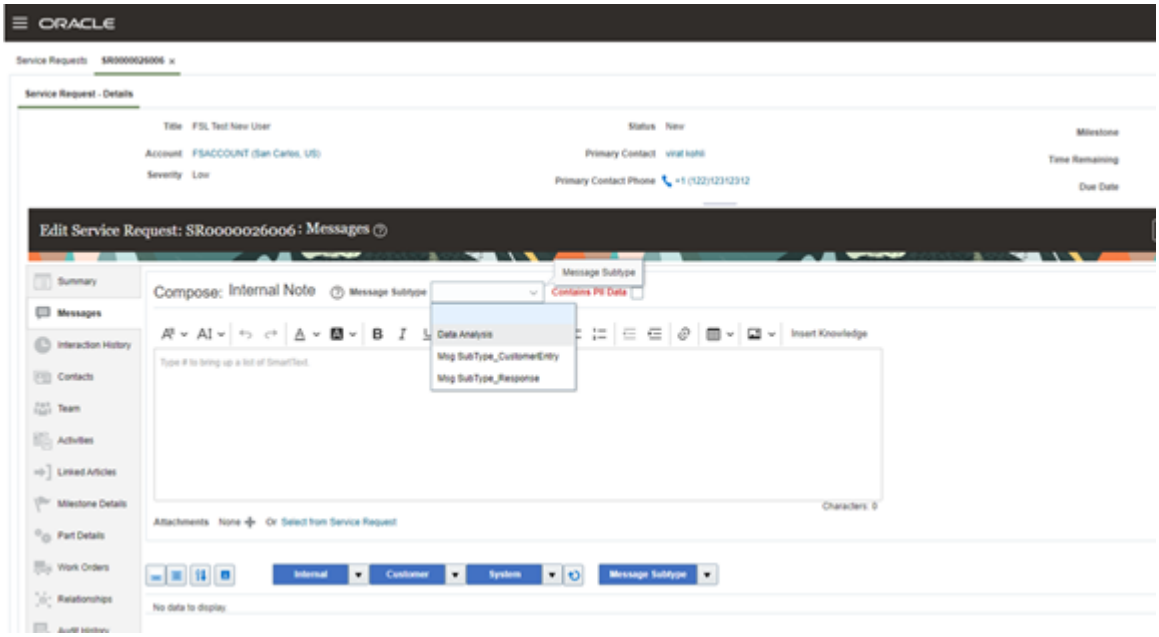
To configure these message subtype values do the following:

1. Sign in as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the **Tasks** panel tab and click **Search**.
4. Search for and select the **Manage Service Request Message Types and Subtypes** task.

5. Create new records for the message subtype and then map them to the appropriate message type by moving them into the **Selected Subtypes** panel as displayed in the following example:



And here's what the agent will see when these fields are exposed in the message header:



Configure Inbound Email

What are some examples of inbound message filters?

Here are some examples of regular expressions for filter patterns of inbound message filters.

Note: Use the ".*" wildcard characters to match 0 or more occurrences of any character.

Filter Type	Regular Expression Example
File attachment	Attachments that are files with either .pdf, .txt, or .html file extensions: .pdf|.txt|.html
Header	Emails with headers that contain the string Gentle Reminder: • ^Gentle Reminder[A-Za-z0-9._%+-]* • ^Gentle Reminder.*
Mime attachment	Content Type header with values such as text/plain, text/html, image/jpeg, or application/octet-stream: text/plain|text/html|image/jpeg|application/octet-stream

Filter Type	Regular Expression Example
Reply to	Emails that are sent by the support team: • support_[A-Za-z0-9._%+-]*@company\.com • support_.*@company\.com
Sender	Emails that are sent by an Oracle employee: • [A-Za-z0-9._%+-]*@oracle\.com • .*@oracle\.com
Subject	Email subjects with string AutoReply: • ^Auto Reply: [A-Za-z0-9._%+-]* • ^Auto Reply.*

Update an Inbound Message Filter

To update an inbound message filter:

1. In the Setup and Maintenance work area, go to the following:
2. On the **Inbound Message Filters** page, click the filter type that you want to update.
3. On the **Update Message Filter** page, update the filter properties. You can update all the properties except the filter type.

   > **Note:** If you want to disable a filter, select **Yes** in the **Disabled** field. The default value is **No**.

4. After you modify the filter properties, click **Save and Close**.

Related Topics

- How are inbound messages processed?
- How do I use inbound message filters?
- How do I create an inbound message filter?
- What are some examples of inbound message filters?
- How do I update existing setup data?

How do I create an inbound message filter?

To create an inbound message filter:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels

- Task: Manage Email Filters

2. On the **Inbound Message Filters** page, click **Create**.
3. On the **Create Message Filter** page, select a filter type. Filter type indicates the message part on which the filter is applied. A filter type can be one of the following:
   - File attachment: A filter is applied to the file type of an attachment.
   - Header: A filter is applied to a message header.
   - Mime attachment: A filter is applied to the mime type of an attachment.
   - Reply to: A filter is applied to the Reply To address.
   - Sender: A filter is applied to the sender of the message.
   - Subject: A filter is applied to the subject of the message.

   > **Note:** File attachment and Mime attachment filters prevent attachments from getting added to a Service Request (SR) or SR message. But they don't prevent the creation of the SR or SR message.

4. Specify a **Field Name**. The field name is required only for Header filters.
5. Specify an alphanumeric **Filter Pattern**. For examples, see "Examples of Inbound Message Filters".
6. Select an **Action on Pattern Match** to Accept or Reject.
7. Specify an optional **Description**.
8. Click **Create**.

> **Note:** All filters are enabled by default. To disable a filter, update the properties as described in "Update an Inbound Message Filter."

How do I change acknowledgment messages for inbound email?

When you receive an email from your customer or an employee to open a service request, an acknowledgment message is sent to them automatically. Based on your company's requirement, you can change the predefined acknowledgment messages provided by the application.

> **Note:** You can't add new tokens to these messages. Only the predefined tokens are used in these messages.

For CRM, the following predefined messages are provided:

- SVC_EMAIL_ACK_FOR_KNOWN_CUST
- SVC_EMAIL_ACK_FOR_MULTI_CUST
- SVC_EMAIL_ACK_FOR_UNKOWN_CUST

To change the acknowledgment messages that you send out to your customers or employees when you receive an inbound email:

1. In the Setup and Maintenance work area, go to the **Tasks** panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** window, enter Manage Messages.
4. Click the **Manage Messages** task that's displayed.
5. In the **Manage Messages** window, in the **Message Name** field, enter `%SVC%ACK%`.
6. From the list of acknowledgment messages displayed, select the message that you want to edit and click **Edit**.

7. In the **Edit Message** window, navigate to the **Message Text** region.
8. Edit the **Short Text** and **User Details** the way you want.
9. Click **Save**.
10. To translate the changed messages, click **Translation Editor**.

    The **Edit Translations** window displays the list of available languages for translating the messages.

    > **Note:** Inbound email can't detect the language. So it always uses the default language for your deployment.

11. Select a row and click in the **Short Text** field.
12. In the **Short Text** window, edit the message and click **OK**.
13. Click in the **User Details** field, edit the text, and click **OK**.
14. Select another row and repeat the same steps to edit the messages for all the available languages.
15. Click **OK** in the **Edit Translations** window to save the changes.
16. Click **Save and Close** in the **Manage Messages** window.

Decide Whether to Add Email Recipients as Service Request Contacts or Team Members

You can decide whether the recipients of an inbound email must be added as service request (SR) contacts or SR team members.

The sender of the first email is always added as the primary contact on the SR. For the follow-up emails, you can choose not to add the sender of the email as an SR contact or SR team member. You can do this by configuring the ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR profile option.
When you set this profile option to No, the sender of the follow-up emails isn't added to the SR.

> **Note:** The sender of the first email is always added to the SR, irrespective of the value of this profile option.

1. Sign in as an administrator.
2. Navigate to the **Setup and Maintenance** work area.
3. Open the **Tasks** panel tab and click **Search**.
4. Search for and select the **Manage Administrator Profile Values** task.
5. On the Manage Administrator Profile Values page, navigate to the Search region.
6. In the **Profile Option Code** field, type `ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR`.
7. Click **Search**.
   The **ORA_SVC_ADD_EMAIL_RECIPIENTS_TO_SR** profile option is displayed in the Search Results: Profile Options region.
8. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **No**.
9. Click **Save**.

How do I enable the ability to add all contacts and team members or add additional email recipients?

Sometimes while composing an email, an agent might want to add extra email recipients who aren't contacts or resources (team members), or an agent might want to add all the contacts and team members of the service request.

For these options to be available to them, you must enable the SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option. The default value of this profile option is No.

To enable the SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option:

1. Sign in as a setup user or administrator.
2. Navigate to the Setup and Maintenance work area.
3. Open the Tasks panel tab and click **Search**.
4. Search for and select the **Manage Administrator Profile Values** task.
5. On the Manage Administrator Profile Values page, navigate to the Search region.
6. In the **Profile Option Code** field, type `SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS`.
7. Click **Search**.

   The SVC_ENABLE_ADDITIONAL_EMAIL_RECIPIENTS profile option is displayed in the Search Results: Profile Options region.
8. In the Profile Option Levels region, set the **Profile Value** for the Site **Profile Level** as **Yes**.
9. Click **Save**.

Create and populate contact details for unknown inbound email IDs

If an inbound message is received from an unknown email ID, the contact details won't be populated in the inbound record or service request.

To create a new contact during inbound email processing, you can use the following steps. The first script shows the initial trigger notification, the second script can be used to populate the newly created contact as the primary contact in the service request.

1. In Application Composer, select **Objects > Standard Objects > Inbound Message > Server Scripts**.
2. Create custom fields on the Inbound Message object to store the contact id and sender email address using the following:
   - Field Name: **ContactId Type:** Number.
   - Field Name: **SenderEmail Type:** Text.
3. Click **Triggers > Object Triggers > Add a New Trigger** .
4. Select **Before Insert in Database** for trigger and provide a trigger name.

   See the following groovy script for Trigger definition.:

```
try{
 def email = nvl(Sender,'noreply@xxx.com');

 def pProfileVO = newView('PersonProfile')
 pProfileVO.appendViewCriteria("PrimaryEmailAddress = '${email}'")
 pProfileVO.executeQuery()
```

```
//Check if the contact already exists
if (!(pProfileVO.hasNext())) {

def firstname = substringBefore(Sender,'@')
def lastname = substringBefore(Sender,'@');

//Create Contact Party
def ContactPartyObject = newView('PersonParty');
def ContactParty = ContactPartyObject.createRow();
ContactParty.setAttribute('CreatedByModule','FUSE');

//Create Contact Profile
def ContactPartyProfile = ContactParty.PersonProfile;
def ContactProfileRow = ContactPartyProfile.createRow();
ContactProfileRow.setAttribute('CreatedByModule','FUSE');
ContactProfileRow.setAttribute('DeceasedFlag','N');
ContactProfileRow.setAttribute('PersonFirstName',firstname);
ContactProfileRow.setAttribute('PersonLastName',lastname);

//Create Contact Usage assignment
def ContactPartyUsageAssignment = ContactParty.PartyUsageAssignment;
def ContactPuaRow = ContactPartyUsageAssignment.createRow();
ContactPuaRow.setAttribute('CreatedByModule','FUSE');
ContactPuaRow.setAttribute('PartyUsageCode','CONTACT');

//Create Contact Email
def emailcollection = ContactProfileRow.Email;
def Emailrec = emailcollection.createRow();
Emailrec.setAttribute('EmailAddress',email);
Emailrec.setAttribute('CreatedByModule','FUSE');

//Insert rows
emailcollection.insertRow(Emailrec);
ContactPartyUsageAssignment.insertRow(ContactPuaRow);
ContactPartyProfile.insertRow(ContactProfileRow);
ContactPartyObject.insertRow(ContactParty);

//Set contact id and email
def partyId = ContactProfileRow.PartyId;
this.setAttribute('SenderEmail_c',email);
this.setAttribute('ContactId_c',partyId);

 }
} catch(Exception e){
 println(e.getMessage())
}
```

5. In Application Composer, select **Objects > Standard Objects > Service Request > Server Scripts**.
6. Click **Triggers > Object Triggers > Add a New Trigger**.
7. Select **Before Insert in Database** for trigger and provide a trigger name.

   See the following groovy script for Trigger definition.

```
try{
 if (SourceCd=='ORA_SVC_INBOUND_MSG' && ChannelTypeCd=='ORA_SVC_EMAIL'){
 def viaVo = this.getAttribute("channelCommunication");
 def inbdMsgId;
 def strRoutingCd = "";
 while(viaVo.hasNext()){
 def r = viaVo.next();
 strRoutingCd = r.getAttribute("RoutingCd");
 if (strRoutingCd == "ORA_SVC_FROM")
 inbdMsgId = r.getAttribute("InboundObjectId");
 break;
```

```
 }

 def inboundMsgVO=newView('InboundMessagesVO');
 def voRows = inboundMsgVO.findByKey(key(inbdMsgId),1)
 def voInboundRow = voRows[0]
 def partyId = voInboundRow.getAttribute("ContactId_c");
 this.setAttribute('PrimaryContactPartyId',partyId);
 }
} catch(Exception e){
 println(e.getMessage())
}
```

8. Publish your sandbox.

Access Point Setup for Inbound Emails

Overview of Access Point Setup for Inbound Emails

When your customers send emails to your support channel, the User Messaging Service (UMS) reads those emails from your inbox and delivers them to registered access points.

Access points are registered clients that are authorized to read emails from your inbox. The application then reads those emails from the access points.

For inbound email to be processed successfully, it's important to register the correct access points with the UMS. You can use the Access Point Setup region of the Inbound Email Configuration and Validation page to register access points. When you register an access point, emails are permitted to be processed further. For example, to create a service request. When you unregister an access point, further processing of emails is stopped, and the emails in your inbox are also lost without being processed.

Related Topics

- How do I validate my inbound and outbound email setup?
- How do I configure an email channel?

How do I validate my inbound and outbound email setup?

You can verify your inbound and outbound email configurations by using the Inbound Email Configuration and Validation page.

On this page, you can proactively take corrective actions to fix any wrong or missing configuration. The validations on this page save you the trouble of raising a support ticket or checking the logs.

Use the Inbound Email Configuration and Validation page to do the following validations:

- Inbound email channel profile options
- Channel setup
- Access points for inbound email
- Outbound email flow
- Inbound email flow

To verify your email channel configurations:

1. In the Setup and Maintenance work area, go to the following:

- Offering: Service
- Functional Area: Communication Channels
- Task: Manage Email Configuration, Registration, and Validation

The Inbound Email Configuration and Validation page is displayed.

2. In the Email Configuration region, click **Validate**.

   The following validations happen in this region:

   - **Channel Setup**: Checks whether you've done the following:
     - Configured at least one non predefined channel.
     - Specified a Business Unit for every channel.
   - **Profile Option**: Reads the SVC_INBOUND_EMAIL_ADDRESSES profile option for email addresses and displays an error message if email addresses aren't defined.
   - **Access Point Setup**: Checks whether the access points are registered appropriately. It's important to register the correct access points.

   For each setup or configuration that's valid, a tick mark is displayed.

   If the configuration is invalid or the setup isn't done correctly, a cross mark is displayed. A suitable message is displayed, describing the corrective action that you must take.

3. In the Email Flow region, in the **Recipient** field, enter your company's test mail ID.

   The email flow for the outbound and inbound emails is validated here.

4. Click **Validate**.

   The following validations happen in this region:

   - Outbound Email Validation:

     An outbound email is sent to the specified email address and it's verified whether the message is delivered successfully.

     - If the host, port, or password are incorrect, a suitable error message is displayed and the status is displayed as DELIVERY_TO_GATEWAY_FAILURE.
     - If the email is delivered successfully, the status code is displayed as DELIVERY_TO_GATEWAY_SUCCESS.
   - Inbound Email Validation:

     The following validations happen:

     i. Test emails are sent to all the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option and the delivery status is verified for each message.
     ii. If an email address isn't registered as an access point, then you can't receive emails from that email address. The status appears as DELIVERY_TO_CLIENT_FAILURE. An error message is displayed, explaining the suitable action to be taken.
     iii. For each email address specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option, a success or failure message is displayed along with the status.

     The status is displayed as:

     - DELIVERY_TO_CLIENT_SUCCESS: When the inbound email is received successfully by the access point.
     - DELIVERY_TO_CLIENT_PENDING: When the message is received but not yet processed. You must verify whether the inbound poll job is scheduled.
     - DELIVERY_TO_CLIENT_FAILURE: When the access point isn't registered.
5. Click **Reset** to clear the **Recipient** field and all the messages related to the recipient.

How do I register or unregister access points for inbound email?

For your inbound emails to be processed successfully, you must register the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option as access points. If your inbound email address changes for some reason, then you must register the new inbound email address as an access point.

Sometimes, you might must unregister a wrong email address that was registered by mistake. The **ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT** profile option controls the ability to unregister access points. Its default value is No. When it's set to the default value, the Unregister button for an access point isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.

CAUTION: When you register or unregister access points, they don't reflect in all the server instances, and some inbound emails might not be received. To prevent this from happening, you can do one of the following:

- Restart the servers to reflect the registering or unregistering of access points. You must contact Oracle Support for restarting the servers.
- Configure the **Retrieve Inbound E-mail Messages** job to run at a suitable frequency. See *How do I configure a job to process inbound emails?*

To register the access points for inbound email:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Email Configuration, Registration, and Validation
2. On the Inbound Email Configuration and Validation page, in the Email Configuration region, click **Validate**.

    The access point setup is validated in this region.

    The following email addresses are displayed in the **Access Point Value** column of the Access Point Setup region:

    - Email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option.

        Suppose one or more of these email addresses aren't registered as an access point with the UMS. In such cases, a **Register** button appears in the **Action** column for these email addresses.
    - Email addresses that are registered as access points in the UMS.

        All email addresses that are registered as access points with the UMS are displayed in this section. An **Unregister** button appears in the **Action** column for each email address.

        Note: Don't click **Register** and **Unregister** at this stage. You must complete the remaining steps.
3. Verify whether the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option are correct.
4. If the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option aren't correct, update them to show the correct values.
5. Refresh the Inbound Email Validation and Configuration page.
6. If you still see a **Register** button, click the button to register the email address with the UMS.
7. If you still see an **Unregister** button, click the button, because the email address is wrong.

    The wrong email address is unregistered, and is no longer an access point with the UMS.

    Note:
    - When you unregister an email address, all inbound emails to that email address are lost.
    - If the **Unregister** button appears grayed out and you can't click it, set the ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT profile option to Yes as explained earlier in this topic. Now you can click the **Unregister** button.

Overview of Times Displayed for the Access Points

This table describes the meaning of the different times displayed for each email address.

Column Name	Description
Last Read Time	When a time is displayed in this column, and the other two columns are blank, this indicates the following: An email address is configured with the UMS server, but the access point isn't registered. So, the UMS reads the email from the inbox but isn't able to deliver it to the access point, because an access point doesn't exist. Maps to the DELIVERY_TO_CLIENT_FAILURE status of the UMS server.
Last Successful Read Time	When the Last Successful Process Time is blank, this indicates that the access point is registered, but the scheduled inbound poll job hasn't run. The UMS reads the email from the inbox and delivers it to the access point, but the scheduled job hasn't run. Maps to the DELIVERY_TO_CLIENT_PENDING status of the UMS server.
Last Successful Process Time	Indicates the last time when the email was read by the scheduled inbound poll job. Maps to the DELIVERY_TO_CLIENT_SUCCESS status of the UMS server.

How You Interpret the Times Displayed for the Access Points

This table shows some examples of times displayed for each sample email address in the Access Point Setup region.

No.	Access Point	Last Read Time	Last Successful Read Time	Last Successful Process Time
1.	`inbound_email1@oracle.com`	7/17/2018 3:00 a.m.	7/17/2018 3:06 a.m.	7/17/2018 3:06 a.m.
2.	`inbound_email2@oracle.com`	7/19/2018 7:30 a.m.		
3.	`inbound_email3@oracle.com`	7/19/2018 7:36 a.m.	7/18/2018 7:36 a.m.	7/18/2018 7:36 a.m.
4.	`inbound_email4@oracle.com`	7/19/2018 7:36 a.m.	7/19/2018 7:36 a.m.	
5.	`inbound_email5@oracle.com`			

Here's how you interpret the above examples of times displayed for the access points in the Access Point Setup region:

Possible scenarios	What this means	What you need to do
inbound_email1@oracle.com in the previous table: • Last Read Time has a value. • Last Successful Read Time has a value. • Last Successful Process Time has a value. • One of the following conditions is satisfied: o All the values are synchronized. o The Last Successful Read Time and Last Successful process time values aren't earlier than the Last Read Time.	The process works correctly without any issues.	You don't need to do anything.
inbound_email2@oracle.com and **inbound_email3@oracle.com** in the previous table: One of the following conditions is satisfied: • Last Read Time is later than the Last Successful Read Time. • Last Read Time has a value, but Last Successful Read Time and Last Successful Process Time are blank.	An email is read by the UMS server, but the email isn't delivered to the access point. **Note:** After you register the access point, emails are successfully delivered to the access point.	Do the following: 1. Starting from the Last Successful Process Time, verify till the current time and see if any Last Successful Read Time exists. o For **inbound_email2@oracle.com**, starting from about 30 to 40 hours earlier than the Last Read Time, verify whether anything is wrong with respect to the access point. For example, the initial setup may be wrong. o For **inbound_email3@oracle.com**, a Last Successful Read Time is displayed, and it's later than the Last Successful Process Time. This implies that a mail has been read recently, but hasn't been processed successfully. 2. See if any records have the DELIVERY_TO_CLIENT_FAILURE or DELIVERY_TO_CLIENT_PENDING status. For more information about searching for records, see "Troubleshoot Access Point Issues". 3. Register the access point.
inbound_email4@oracle.com in the previous table: Last Successful Process Time is blank.	The scheduled inbound poll job has never received an email.	Do the following: 1. Check whether the inbound poll job called Retrieve Inbound Email Messages is scheduled or if an error is occurring. 2. If the job isn't scheduled, then schedule a new job by going to Scheduled Processes from the menu in the application.
inbound_email5@oracle.com in the previous table: All the columns are blank.	The UMS is unable to read emails from your inbox either because the UMS setup isn't done or the UMS configuration is wrong.	Do the following: 1. Verify whether the UMS setup is completed. Complete the setup if required.

Possible scenarios	What this means	What you need to do
		2. Verify whether the UMS configuration is correct. Correct the configuration if required.

Summary of Tips to Interpret the Times Displayed for Access Points

Here's a brief summary of tips to interpret the different times displayed for each access point and the status of the records in the UMS:

How the Times Are Displayed for an Access Point	What this indicates
One of the following conditions is true: • Only the Last Read Time has a value and the other columns are blank. • The values in other columns are earlier than the value in Last Read Time.	The access point is probably not registered and you may be losing emails.
The Last Successful Process Time is blank or earlier than the Last Successful Read time.	The emails aren't being processed by the inbound scheduled job.
The difference between the times listed in all the three columns is less.	The access point is working fine.

Troubleshoot Access Point Issues

If some emails aren't processed for a particular access point, a particular sender, or within a time range, you can search for those specific records. The records retrieved from the UMS are sorted by date and they show the status in the UMS.

Use the search icon in the Access Point Setup region to search for specific records in the UMS based on the following: From Time, To Time, Sender, or Receiver. You can filter the retrieved records by the access points that are registered, by sender, or by receiver.

To troubleshoot access point issues:

1. On the Inbound Email Configuration and Validation page, navigate to the Access Point Setup region.
2. Click the **Search** icon.
3. Depending on your requirement, enter the details in one or more of the following fields in the **Search Message** window: **From Time**, **To Time**, **Sender**, and **Receiver**.

4. Click **Search**.
   The Search Results are displayed. The records are sorted in the descending order of time, with the latest ones on top. The following details are displayed for each record that is retrieved:
   - Message ID
   - Recipient
   - Date
   - Status
5. View the details and take suitable action.

Example of a Scenario Where Inbound Email Fails

This is an example of a case where inbound email may fail.

Let's say that your support mailbox is support@mycompanydomain.com and you have set up a forwarding rule. When your customer sends an email to support@mycompanydomain.com, the mail is forwarded to mycompanydomain.extservice@oraclecloud.com. The email address mycompanydomain.extservice@oraclecloud.com is registered as an access point. So, the inbound emails work fine.

However, suppose you upgrade your installation and a password error occurs after the upgrade. If someone changes the email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option to `mycompanydomain2.extservice@oraclecloud.com`, then your inbound emails stop working for the following reasons:

- The updated email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option isn't registered as an access point with the UMS.
- The email address in the forwarding rule doesn't match the updated email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option.

When the email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option is changed, the following changes are reflected in the Access Point Setup section of the Inbound Email Configuration and Validation page:

- For the new email address that's added to the SVC_INBOUND_EMAIL_ADDRESSES profile option, a **Register** button appears.
- For the old email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option, an **Unregister** button appears.

> **Note:** It's important that you first correct the email addresses and refresh the Inbound Email Configuration and Validation page. And only after that, you must click **Register** and **Unregister** as required.

Job to Process Inbound Emails

How do I configure a job to process inbound emails?

You can configure a new job to retrieve emails at regular intervals, based on the specified frequency.

> **Note:** Inbound email is an asynchronous channel. When you have a high volume of emails, the emails are queued up and processed. Inbound email processing can take anywhere from 10 minutes up to 1 hour from the time the user sends an email depending on your inbound email volume and the frequency at which you've scheduled ESS job to process inbound emails.

To configure a job to process inbound emails:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the **Scheduled Processes** screen, click **Schedule New Process**.
3. In the **Schedule New Process** dialog box, select **Job** as the **Type**.
4. Search for and select the **Retrieve Inbound E-mail Messages** option from the **Name** drop-down list.
5. Click **OK**.
6. In the **Process Details** dialog box, click **Advanced**.
7. In the **Schedule** tab, in the **Run** options, select the **Using a schedule** option.
8. Select **Frequency** and specify a **Start Date**.

> **Note:** You must ensure that you always select a frequency, whether you're using your test or your production environment. You can select a higher frequency if required. If you run a job manually without setting a frequency, the process might not retrieve all the emails. When you schedule the job to run periodically, it pulls all the emails from all the servers. After scheduling the ESS job your application may take few iterations of the job to refresh the caches that are required for the successful execution of inbound email processing. As a result, email processing might be delayed until the required caches are fully refreshed.

9. Click **Submit**.

A job is scheduled to process inbound emails.

> **Note:** Inbound emails work properly only for SRs whose reference numbers have the following characters: [A-Z], [a-z], [0-9], and the special characters hyphen (-), colon (:), period (.), comma (,), or underscore (_). So you can use only one of these characters as the prefix for an SR reference number. You can't use any other special character in the prefix apart from the ones mentioned.

Overview of Access Point Setup for Inbound Emails

When your customers send emails to your support channel, the User Messaging Service (UMS) reads those emails from your inbox and delivers them to registered access points.

Access points are registered clients that are authorized to read emails from your inbox. The application then reads those emails from the access points.

For inbound email to be processed successfully, it's important to register the correct access points with the UMS. You can use the Access Point Setup region of the Inbound Email Configuration and Validation page to register access points. When you register an access point, emails are permitted to be processed further. For example, to create a service request. When you unregister an access point, further processing of emails is stopped, and the emails in your inbox are also lost without being processed.

Related Topics

- How do I validate my inbound and outbound email setup?
- How do I configure an email channel?

How do I validate my inbound and outbound email setup?

You can verify your inbound and outbound email configurations by using the Inbound Email Configuration and Validation page.

On this page, you can proactively take corrective actions to fix any wrong or missing configuration. The validations on this page save you the trouble of raising a support ticket or checking the logs.

Use the Inbound Email Configuration and Validation page to do the following validations:

- Inbound email channel profile options
- Channel setup
- Access points for inbound email
- Outbound email flow
- Inbound email flow

To verify your email channel configurations:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Email Configuration, Registration, and Validation

    The Inbound Email Configuration and Validation page is displayed.
2. In the Email Configuration region, click **Validate**.

    The following validations happen in this region:
    - **Channel Setup**: Checks whether you've done the following:
        - Configured at least one non predefined channel.
        - Specified a Business Unit for every channel.
    - **Profile Option**: Reads the SVC_INBOUND_EMAIL_ADDRESSES profile option for email addresses and displays an error message if email addresses aren't defined.
    - **Access Point Setup**: Checks whether the access points are registered appropriately. It's important to register the correct access points.

    For each setup or configuration that's valid, a tick mark is displayed.

    If the configuration is invalid or the setup isn't done correctly, a cross mark is displayed. A suitable message is displayed, describing the corrective action that you must take.
3. In the Email Flow region, in the **Recipient** field, enter your company's test mail ID.

    The email flow for the outbound and inbound emails is validated here.
4. Click **Validate**.

    The following validations happen in this region:
    - Outbound Email Validation:

        An outbound email is sent to the specified email address and it's verified whether the message is delivered successfully.
        - If the host, port, or password are incorrect, a suitable error message is displayed and the status is displayed as DELIVERY_TO_GATEWAY_FAILURE.
        - If the email is delivered successfully, the status code is displayed as DELIVERY_TO_GATEWAY_SUCCESS.
    - Inbound Email Validation:

        The following validations happen:

i. Test emails are sent to all the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option and the delivery status is verified for each message.
ii. If an email address isn't registered as an access point, then you can't receive emails from that email address. The status appears as DELIVERY_TO_CLIENT_FAILURE. An error message is displayed, explaining the suitable action to be taken.
iii. For each email address specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option, a success or failure message is displayed along with the status.

    The status is displayed as:

    - DELIVERY_TO_CLIENT_SUCCESS: When the inbound email is received successfully by the access point.
    - DELIVERY_TO_CLIENT_PENDING: When the message is received but not yet processed. You must verify whether the inbound poll job is scheduled.
    - DELIVERY_TO_CLIENT_FAILURE: When the access point isn't registered.

5. Click **Reset** to clear the **Recipient** field and all the messages related to the recipient.

How do I register or unregister access points for inbound email?

For your inbound emails to be processed successfully, you must register the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option as access points. If your inbound email address changes for some reason, then you must register the new inbound email address as an access point.

Sometimes, you might must unregister a wrong email address that was registered by mistake. The **ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT** profile option controls the ability to unregister access points. Its default value is No. When it's set to the default value, the Unregister button for an access point isn't available. This setting helps to prevent unregistering of access points accidentally. Only when you specifically need to unregister an access point, you can change the value to Yes so that the **Unregister** button is available. After unregistering the access point, you can set the value of this profile option back to No.

> **CAUTION:** When you register or unregister access points, they don't reflect in all the server instances, and some inbound emails might not be received. To prevent this from happening, you can do one of the following:
> - Restart the servers to reflect the registering or unregistering of access points. You must contact Oracle Support for restarting the servers.
> - Configure the **Retrieve Inbound E-mail Messages** job to run at a suitable frequency. See *How do I configure a job to process inbound emails?*

To register the access points for inbound email:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Email Configuration, Registration, and Validation
2. On the Inbound Email Configuration and Validation page, in the Email Configuration region, click **Validate**.

    The access point setup is validated in this region.

    The following email addresses are displayed in the **Access Point Value** column of the Access Point Setup region:

- Email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option.

  Suppose one or more of these email addresses aren't registered as an access point with the UMS. In such cases, a **Register** button appears in the **Action** column for these email addresses.
- Email addresses that are registered as access points in the UMS.

  All email addresses that are registered as access points with the UMS are displayed in this section. An **Unregister** button appears in the **Action** column for each email address.

  > **Note:** Don't click **Register** and **Unregister** at this stage. You must complete the remaining steps.

3. Verify whether the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option are correct.
4. If the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option aren't correct, update them to show the correct values.
5. Refresh the Inbound Email Validation and Configuration page.
6. If you still see a **Register** button, click the button to register the email address with the UMS.
7. If you still see an **Unregister** button, click the button, because the email address is wrong.

   The wrong email address is unregistered, and is no longer an access point with the UMS.

> **Note:**
> - When you unregister an email address, all inbound emails to that email address are lost.
> - If the **Unregister** button appears grayed out and you can't click it, set the ORA_SVC_UNREGISTER_INBOUND_ACCESS_POINT profile option to Yes as explained earlier in this topic. Now you can click the **Unregister** button.

Overview of Times Displayed for the Access Points

This table describes the meaning of the different times displayed for each email address.

Column Name	Description
Last Read Time	When a time is displayed in this column, and the other two columns are blank, this indicates the following: An email address is configured with the UMS server, but the access point isn't registered. So, the UMS reads the email from the inbox but isn't able to deliver it to the access point, because an access point doesn't exist. Maps to the DELIVERY_TO_CLIENT_FAILURE status of the UMS server.
Last Successful Read Time	When the Last Successful Process Time is blank, this indicates that the access point is registered, but the scheduled inbound poll job hasn't run. The UMS reads the email from the inbox and delivers it to the access point, but the scheduled job hasn't run. Maps to the DELIVERY_TO_CLIENT_PENDING status of the UMS server.

Column Name	Description
Last Successful Process Time	Indicates the last time when the email was read by the scheduled inbound poll job. Maps to the DELIVERY_TO_CLIENT_SUCCESS status of the UMS server.

How You Interpret the Times Displayed for the Access Points

This table shows some examples of times displayed for each sample email address in the Access Point Setup region.

No.	Access Point	Last Read Time	Last Successful Read Time	Last Successful Process Time
1.	`inbound_email1@oracle.com`	7/17/2018 3:00 a.m.	7/17/2018 3:06 a.m.	7/17/2018 3:06 a.m.
2.	`inbound_email2@oracle.com`	7/19/2018 7:30 a.m.		
3.	`inbound_email3@oracle.com`	7/19/2018 7:36 a.m.	7/18/2018 7:36 a.m.	7/18/2018 7:36 a.m.
4.	`inbound_email4@oracle.com`	7/19/2018 7:36 a.m.	7/19/2018 7:36 a.m.	
5.	`inbound_email5@oracle.com`			

Here's how you interpret the above examples of times displayed for the access points in the Access Point Setup region:

Possible scenarios	What this means	What you need to do
`inbound_email1@oracle.com` in the previous table: • Last Read Time has a value. • Last Successful Read Time has a value. • Last Successful Process Time has a value. • One of the following conditions is satisfied: o All the values are synchronized. o The Last Successful Read Time and Last Successful process time values aren't earlier than the Last Read Time.	The process works correctly without any issues.	You don't need to do anything.

Possible scenarios	What this means	What you need to do
`inbound_email2@oracle.com` and `inbound_email3@oracle.com` in the previous table: One of the following conditions is satisfied: • Last Read Time is later than the Last Successful Read Time. • Last Read Time has a value, but Last Successful Read Time and Last Successful Process Time are blank.	An email is read by the UMS server, but the email isn't delivered to the access point. **Note:** After you register the access point, emails are successfully delivered to the access point.	Do the following: 1. Starting from the Last Successful Process Time, verify till the current time and see if any Last Successful Read Time exists. o For `inbound_email2@oracle.com`, starting from about 30 to 40 hours earlier than the Last Read Time, verify whether anything is wrong with respect to the access point. For example, the initial setup may be wrong. o For `inbound_email3@oracle.com`, a Last Successful Read Time is displayed, and it's later than the Last Successful Process Time. This implies that a mail has been read recently, but hasn't been processed successfully. 2. See if any records have the DELIVERY_TO_CLIENT_FAILURE or DELIVERY_TO_CLIENT_PENDING status. For more information about searching for records, see "Troubleshoot Access Point Issues". 3. Register the access point.
`inbound_email4@oracle.com` in the previous table: Last Successful Process Time is blank.	The scheduled inbound poll job has never received an email.	Do the following: 1. Check whether the inbound poll job called Retrieve Inbound Email Messages is scheduled or if an error is occurring. 2. If the job isn't scheduled, then schedule a new job by going to Scheduled Processes from the menu in the application.
`inbound_email5@oracle.com` in the previous table: All the columns are blank.	The UMS is unable to read emails from your inbox either because the UMS setup isn't done or the UMS configuration is wrong.	Do the following: 1. Verify whether the UMS setup is completed. Complete the setup if required. 2. Verify whether the UMS configuration is correct. Correct the configuration if required.

Summary of Tips to Interpret the Times Displayed for Access Points

Here's a brief summary of tips to interpret the different times displayed for each access point and the status of the records in the UMS:

How the Times Are Displayed for an Access Point	What this indicates
One of the following conditions is true: • Only the Last Read Time has a value and the other columns are blank.	The access point is probably not registered and you may be losing emails.

How the Times Are Displayed for an Access Point	What this indicates
• The values in other columns are earlier than the value in Last Read Time.	
The Last Successful Process Time is blank or earlier than the Last Successful Read time.	The emails aren't being processed by the inbound scheduled job.
The difference between the times listed in all the three columns is less.	The access point is working fine.

Troubleshoot Access Point Issues

If some emails aren't processed for a particular access point, a particular sender, or within a time range, you can search for those specific records. The records retrieved from the UMS are sorted by date and they show the status in the UMS.

Use the search icon in the Access Point Setup region to search for specific records in the UMS based on the following: From Time, To Time, Sender, or Receiver. You can filter the retrieved records by the access points that are registered, by sender, or by receiver.

To troubleshoot access point issues:

1. On the Inbound Email Configuration and Validation page, navigate to the Access Point Setup region.
2. Click the **Search** icon.
3. Depending on your requirement, enter the details in one or more of the following fields in the **Search Message** window: **From Time**, **To Time**, **Sender**, and **Receiver**.
4. Click **Search**.

   The Search Results are displayed. The records are sorted in the descending order of time, with the latest ones on top. The following details are displayed for each record that is retrieved:

   - Message ID
   - Recipient
   - Date
   - Status
5. View the details and take suitable action.

Example of a Scenario Where Inbound Email Fails

This is an example of a case where inbound email may fail.

Let's say that your support mailbox is support@mycompanydomain.com and you have set up a forwarding rule. When your customer sends an email to support@mycompanydomain.com, the mail is forwarded to mycompanydomain.extservice@oraclecloud.com. The email address mycompanydomain.extservice@oraclecloud.com is registered as an access point. So, the inbound emails work fine.

However, suppose you upgrade your installation and a password error occurs after the upgrade. If someone changes the email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option to `mycompanydomain2.extservice@oraclecloud.com`, then your inbound emails stop working for the following reasons:

- The updated email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option isn't registered as an access point with the UMS.
- The email address in the forwarding rule doesn't match the updated email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option.

When the email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option is changed, the following changes are reflected in the Access Point Setup section of the Inbound Email Configuration and Validation page:

- For the new email address that's added to the SVC_INBOUND_EMAIL_ADDRESSES profile option, a **Register** button appears.
- For the old email address in the SVC_INBOUND_EMAIL_ADDRESSES profile option, an **Unregister** button appears.

> **Note:** It's important that you first correct the email addresses and refresh the Inbound Email Configuration and Validation page. And only after that, you must click **Register** and **Unregister** as required.

Configure Outbound Email

How do I enable deep links to KM articles in outbound emails?

When your service agents reply to customers by email, they might sometimes need to add links to Knowledge Management (KM) articles or other related service requests (SRs). These articles can help resolve the issue faced by the customers in that SR, or they can provide more information.

These internal links to KM articles work in the SR Messages tab. But for these internal links to work in emails sent to customers, they must be translated to external links that open on the customer service application.

Your customers typically have access to one or more customer service applications. These customer service applications provide them access to their SRs and relevant knowledge articles through a web interface. They might use multiple customer service applications for various reasons. For example, customers often use different customer service applications for different business units (BUs).

Here's what you need to do to convert the internal links to external links that open in the customer service application:

- Enable the SVC_ENABLE_DEEPLINKS_IN_OUTBOUND_EMAIL profile option.
- Use the Manage Service Request Dynamic Links task to configure the **External URL** field, as described in the following table.

This table shows how the links work, depending on how the agent links to the article.

Type of link created to the KM article	What to append to the external URL to make the link work	How the link works
Article link format:	`?kmContentId={0}&page=shell&shell=kno article`	The parameter {0} is replaced by the internal document ID of the selected KM article, and a clickable link to the article is inserted in the

Type of link created to the KM article	What to append to the external URL to make the link work	How the link works
When the agent uses either the "Insert as link" in RHP or the "Insert Knowledge" button KM application.		email message. The title of the KM article is used as the label for the link. The article opens in the customer service application in a separate nested tab.
Knowledge article format: When the agent composes a message and provides a reference to a KM article. For example, if the agent types in the text FAQ1234, this text is linked in the email message.	`?kmExternalId={0}&page=shell&shell=kn article`	The parameter {0} is replaced by the internal document ID of the selected KM article. The article is linked by using the typed text as the label for the link. Example of typed text: FAQ1234. The article opens in the customer service application in a separate nested tab.

Note: The deep links don't work if they contain the # character. Also, special characters such as @, ^, and * can be used only if preceded with the backslash character \. For example, you must use * instead of * in your regular expression. For more information about using special characters in regular expressions, see the open source documentation for regular expressions. After you change the regular expression, remember to use a validator to ensure that it's still working.

To enable deep links to KM articles in outbound emails and email previews to open in the customer service application:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Productivity Tools
    - Task: Manage Service Request Dynamic Links

    Note: Optionally, you can search for the Manage Service Request Dynamic Links task from the Tasks panel tab in the Setup and Maintenance work area.
2. On the Manage Dynamic Links page, repeat steps 3 to 12 for each of the business units (BUs) for your deployment.

    That's because you might have different customer service applications for different BUs. If you only have a single BU, you need to do the steps only once.
3. Select the row that has **ARTICLE_LINK** in the **Object Type** field.
4. Click **Add** to add a row.
5. From the **Business Unit Name** drop-down list, select a BU.
6. In the **External URL** field, do the following:
    a. Enter the external URL provided to you.
    b. Append the following string at the end, after the slash: `?kmContentId={0}&page=shell&shell=knowledge-article`

    This string is explained in the first row of the table.

    Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmContentId={0}&page=shell&shell=knowledge-article`

7. Click **Save**.
8. Select the row that has **KNOWLEDGE_ARTICLE** in the **Object Type** field.
9. Click **Add** to add a row.
10. From the **Business Unit Name** drop-down list, select the same BU as in step 5.
11. In the **External URL** field, do the following:
    a. Enter the external URL provided to you.
    b. Append the following string at the end, after the slash: `?kmExternalId={0}&page=shell&shell=knowledge-article`

       This string is explained in the second row of the table.

       Example of how the final URL looks: `https://myvbinstance.builder.ocp.oc.com/ic/builder/rt/KMEXTID297/1.0/webApps/dcs/?kmExternalId={0}&page=shell&shell=knowledge-article`
12. Click **Save**.

Add Deep Links to Third Party Applications from Service Request Messages

You can add custom object types and provide dynamic links to third party applications within the service request message content. The user can drill down directly from dynamic links in a service request message into specific records in non Fusion applications.

You can define regular expression patterns that convert to a URL link, when the user types text matching that pattern. For example, when a user types text matching the pattern for a service request reference, the text in the SR message is automatically converted into a link to that SR. This means that a user can, for example, type in `FAQ123`, `SR123`, or `Bug123`, and if the pattern matches, it creates a link in the SR message, to the corresponding FAQ knowledge article, SR, or bug tracking application.

Here's how you configure the third party link for custom objects:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Productivity Tools
   - Task: Manage Service Request Dynamic Links
2. On the Manage Dynamic Links page, click **Add**.

   The **Add** dialog box is displayed.
3. In the **Object Type** field, enter a name for the custom object (for the third party application) you want to create.
4. To automatically generate dynamic link patterns for links that point to the third party application, select the **Generate pattern** check box.

   Use this option in case you aren't sure how to reference an object. You can't edit this pattern.
5. Click **OK**.
6. Select the custom object row you added, and click **Add**.
7. From the **Business Unit Name** drop-down list, select a BU.
8. In the **External URL** field, enter the URL that's needed to deep link on the selected custom object.

   The external URL should also contain `{1}`, which is the parameter that's replaced with the text or number adhering to the pattern.

   For example, if you add a pattern such as `(?i)\b(txt)([0-9]{3})\b` that opens in a URL such as `<a target="_blank" href="https://abc.com/edit_info?rpt=txt123">https://abc.com/edit_info?rpt=txt123</a>`,

then the external URL should be `<a target="_blank" href="https://abc.com/edit_info?rpt=">https://abc.com/edit_info?rpt=</a>{1}`

9. In the **Internal URL** field, enter the internal URL for the third party application (for the selected custom object).
10. Click **Save**.

> **Note:** To delete a custom object type, click **Delete** (the X icon) for the corresponding row. You can't delete the ready to use object types such as service request, article link, and knowledge article.

Here's some more examples that show how to configure other deep links:

- SRs:
  - Pattern: `(?i)\b(SR)([0-9]{10})\b`
  - External URL: `https://<fusion application URL>/deeplink?objType=SVC_SERVICE_REQUEST&objKey=srNumber%3D{0}&action=EDIT_IN_TAB`
  - Internal URL: Not applicable
- HR Help Desk articles:
  - Knowledge_Article (for example, `HFAQ123`): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=docId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`
  - Article_Link (for example, `HFAQ123`): `https://<fusion application URL>/deeplink?objType=CSO_ARTICLE_CONTENT_HCM&objKey=articleId%3D{0}%3Blocale%3D{1}&action=EDIT_IN_TAB`

Display Email Thread in Preview and Outbound Email

How do I display email thread of past conversations?

When an agent responds to a customer's email from the Messages tab in a service request (SR), it's a good idea to display the email thread with the past conversations. This way, the customer easily understands the context.

This is also useful for agents as the email thread is included when the email is previewed. Past conversations can be viewed in the thread latest replies can be written as required.

To enable the display of the email thread, you need to complete a few simple processes:

- Configure a few profile options
- Change email templates to display the email thread

Related Topics

- How do I configure profile options to display an email thread?
- How do I change email templates to display the email thread?
- How do I define email templates?

How do I configure profile options to display an email thread?

When an agent responds to a customer's email from the Messages tab in a service request, it's good to display the email thread. To enable the display of the email thread, you must configure the following profile options.

Profile Option	Description
SVC_EMAIL_ENABLE_PAST_CONVERSATIONS	Indicates whether to display past conversations. To enable past conversations, set the value to Yes. The default value is No, so it's disabled by default.
SVC_EMAIL_NO_OF_PAST_CONVERSATIONS	Indicates the number of past conversations to be included in the email thread. The default value is 1. You can specify a value from 1 to 10. If you set the value to 0, no past conversations are included. And even if you set a value greater than 10, only a maximum of 10 conversations are displayed.
SVC_EMAIL_PAST_CONVERSATION_START_MARKER	Indicates the start marker for each conversation in the email thread. This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
SVC_EMAIL_PAST_CONVERSATION_END_MARKER	Indicates the end marker for each conversation in the email thread. This value is fixed and is displayed in English by default. To translate and display this value in the language of your choice, you must set the required locale in the ORA_SVC_EMAIL_DEFAULT_LANGUAGE profile option.
ORA_SVC_EMAIL_DEFAULT_LANGUAGE	Indicates the default language to format outbound emails and parse inbound emails. The default value is blank. When it's blank, the existing values for the start and end markers are displayed for the past conversations. For details about these markers, see the preceding two rows in this table. You can specify the locale as a value for this profile option. For example: en for English, fr for French, and pt for Portuguese. When you specify the locale, the translated values for the following start and end conversation markers are displayed in the specified language: • SVC_EMAIL_PAST_CONVERSATION_START_MARKER: [##Send your response as a reply to the above mail##] • SVC_EMAIL_PAST_CONVERSATION_END_MARKER: [##End of conversation##]
SVC_EMAIL_PAST_CONVERSATION_MSGTYPES	Indicates the types of messages to include in the email thread. You must specify the codes for the message types, separated by commas. For example: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_SYSTEM_NOTE, ORA_SVC_CUSTOMER_ENTRY, ORA_SVC_FORWARD, ORA_SVC_SYSTEM_RESPONSE. You can't specify the meaning or the display name of the message type. The default value is ORA_SVC_CUSTOMER_ENTRY. **Note:** To add codes for other message types, see the "Search for Lookup Codes of Message Types" section at the end of this topic.
ORA_SVC_EMAIL_PAST_CONVERSATION_SHOW_MSG_TYPES	Indicates whether to include the message type in past conversations. The default value is Y.

Profile Option	Description
	The message type is translated based on the signed-in user's locale. But the default language might be different. Let's say the signed-in agent's locale is Japanese and the default language is Chinese. So while everything gets translated to Chinese, only the message types appear in Japanese. If your customers contact you about this issue, you can set the value to No. The message type is no longer included in past conversations.
ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS	Indicates whether to enable past conversations by default in outbound messages.
ORA_SVC_EMAIL_PAST_CONVERSATION_CHAN_TYPES	Includes messages from only one or more specific channels in past conversations. Set the value to a comma-separated list of those specific channel types that you want.

To configure the profile options for displaying the email thread:

1. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type `Manage Admin`.
4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the **Search: Profile Option** region.
6. In the Profile Option Code field, type `%`.
7. Select **%PAST_CONVERSATION%** from the options displayed.
8. Click **Search**.

   The Search Results: Profile Options region displays the list of profile options related to past conversations.
9. Select the profile options one by one.
10. In the Profile Values region, specify the values in the **Profile Value** column for the **Site** Profile Level as described in the table.
11. Repeat the previous step for each profile option in the search results.
12. Click **Save**.

Search for Lookup Codes of Message Types

Follow these steps to search for the lookup codes of message types that you want to add in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option. You can use the same steps to search for the lookup codes of message types available in the Compose menu in the Messages sub tab of an SR.

1. Sign in as an administrator.
2. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
3. Click **Search** from the list of displayed tasks.
4. Search for and select **Manage Standard Lookups**.
5. In the Manage Standard Lookups page, in the **Lookup Type** field, type `ORA_SVC_MESSAGE_TYPE_CD`.
6. Click **Search**.

7. From the **Lookup Code** column in the ORA_SVC_MESSAGE_TYPE_CD: Lookup Codes region of the page, copy the lookup codes that you want to specify in the SVC_EMAIL_PAST_CONVERSATION_MSG_TYPES profile option.

> **Note:**
> - The lookup codes ORA_SVC_CHAT_TRANSCRIPT and ORA_SVC_WRAP_UP aren't applicable to emails.
> - If you disable any of the following lookup codes, the corresponding message types disappear from the Compose menu on the Messages sub tab of an SR: ORA_SVC_INTERNAL_NOTE, ORA_SVC_RESPONSE, ORA_SVC_CUSTOMER_ENTRY, and ORA_SVC_FORWARD.

How do I change email templates to display the email thread?

When an agent replies to a customer from the Messages tab in an SR, it's good to display the email thread. This way, the customer clearly understands the context.

For this to happen, you must insert the #PastConversation# tag into the email templates for SRs. This tag indicates the place within the email layout where you want to insert the previous messages from the email thread.

When the #PastConversation# tag is detected, the email-sending process automatically inserts the following details of previous messages from the SR:

- Type of message
- Sender
- To/Cc
- Received date and time of the message for customer entries
- Sent date and time of the message for agent responses
- Creation date and time for other messages
- Message content

When agents view an email, the email thread is included in the preview. This helps them to verify the flow and make changes as required, so the message is clearly understood.

To change an email template to display the email thread:

1. Sign in to the application as an administrator.
2. Navigate to Application Composer.
3. In the **Application** field, select **CRM Cloud** from the drop-down list.
4. Click **Email Templates** from the Common Setup region or the Overview page.
5. From the **Object** drop-down list in the Email Templates page, select **Service Request** .
6. From the **Active** drop-down list, select **Yes**.
7. Click **Search**.
8. From the list of templates displayed, select the template that you want to change.
9. Click **Edit**.
10. Navigate to the Email Body region of the email template.
11. Insert the #PastConversation# tag at the place within the email body where you want the email thread to be displayed.
12. Click **Save and Close**.

Related Topics

- How do I display email thread of past conversations?
- How do I configure profile options to display an email thread?
- How do I define email templates?

Configure Email Templates to Control When to Include Past Conversations

When past conversations are enabled by setting the SVC_EMAIL_ENABLE_PAST_CONVERSATIONS profile option to Y, they're included in the SR message. But sometimes, you may not want to include past conversations in the SR message.

If the past conversations are enabled and you have used an email template, you can still control whether to include past conversations in an outbound email message. The ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS profile option lets you decide whether you want to enable past conversations by default in outbound messages. This gives you more flexibility.

Let's consider some examples.

- **Past conversations aren't required:** When an agent is helping your customer to fix an issue, the customer may not require the thread of past conversations in every email related to this issue. So you can set the ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS profile to No and remove the `#PastConversation#` tag from the Customer Response email template. The past conversation isn't included in the email sent to the customer.
- **Past conversations are required:** Let's suppose the agent needs to take the help of another agent to resolve the customer issue. So he must share the whole past conversation thread with the agent who's helping him resolve the issue. In this case, you can set the ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS profile to No and add the `#PastConversation#` tag to the Forward email template.

Note: You can configure this profile option by using the Manage Administrator Profile Values task. For more detailed steps, see Configure Profile Options to Display Email Thread.

To include past conversations only in selected emails of your choice, perform the following steps:

- Set the SVC_EMAIL_ENABLE_PAST_CONVERSATIONS profile option to Yes.
- Set the ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS profile option to No.
- Add the `#PastConversation#` tag in your email templates for messages where you want to include past conversations.

This table explains how the ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS profile option and the `#PastConversation#` tag help you to include or exclude past conversations.

Value of ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS Profile Option	#PastConversation# tag present?	Past Conversations included in outbound message?
Yes	Yes	Included
Yes	No	Included
No	Yes	Included

Value of ORA_SVC_EMAIL_DEFAULT_PAST_CONVERSATIONS_IN_OUTBOUND_MSGS Profile Option	#PastConversation# tag present?	Past Conversations included in outbound message?
No	No	**Not Included**

Include Messages of Only Some Channel Types in Past Conversations

On the SRs, there may be various messages from different channels: your customer may have called, visited a retail store, or sent an email. These all become SR messages, but you may want the past conversations to include messages of only some channel types.

You can select those specific channel types by configuring this profile option.

ORA_SVC_EMAIL_PAST_CONVERSATION_CHAN_TYPES: Includes messages from only one or more specific channels in past conversations. Set the value to a comma-separated list of those specific channel types that you want.

> **Note:** You can configure this profile option by using the Manage Administrator Profile Values task. For more detailed steps, see Configure Profile Options to Display Email Thread.

This table shows a sample range of values for this profile option, along with the result.

Profile option value	Messages from the following channel types are included in the past conversations:
blank	All channel types such as Email, Web, and Chat
ORA_SVC_EMAIL	Email only
ORA_SVC_EMAIL, ORA_SVC_CHAT	Email and Chat only
ORA_SVC_EMAIL, ORA_SVC_WEB	Email and Web only

Send Bulk Emails

Optimize Sending Emails in Bulk

You may sometimes have situations where a major incident occurs, such as the network going down in the West Coast of the US. So a huge number of your customers would report issues triggered by this incident.

The root cause for all these issues would be the same incident. In such cases, you can compose multiple outbound messages or SR messages in bulk mode. You can then send out these bulk messages in batches without affecting the normal email communication with customers. Using groovy scripts or REST APIs, application developers can send outbound emails in bulk.

To optimize sending emails in bulk using groovy scripts:

In Application Composer, create an After Create trigger on the service request Message object and add the following groovy script in the **Edit Script** field:

```
Trigger: Create

if (ChannelTypeCd == "ORA_SVC_EMAIL") {

setAttribute('ProcessingStatusCd', "ORA_SVC_BATCH_READY");

}
```

To optimize sending emails in bulk using REST APIs:

1. Go to Oracle Help Center.
2. Drill down to your apps service area of interest.
3. Go to the APIs and Schema section.
4. Review the REST service definition in the REST API guides available here.

Note: If you're new to Oracle's REST services, you may want to begin with the Quick Start section.

Here are some key pointers:

- If you're using REST APIs to create outbound messages and want to send them out in batch: You must set the value of the `DeliveryTypeCd` attribute to ORA_SVC_BATCH.
- If you're using REST APIs to create outbound SR messages and want to send them out in batch: You must set the value of the `ProcessingStatusCd` attribute to ORA_SVC_BATCH_READY.
- After you create all the outbound messages or SR messages, you can run the Send Outbound Messages scheduled process to send these messages in batch.

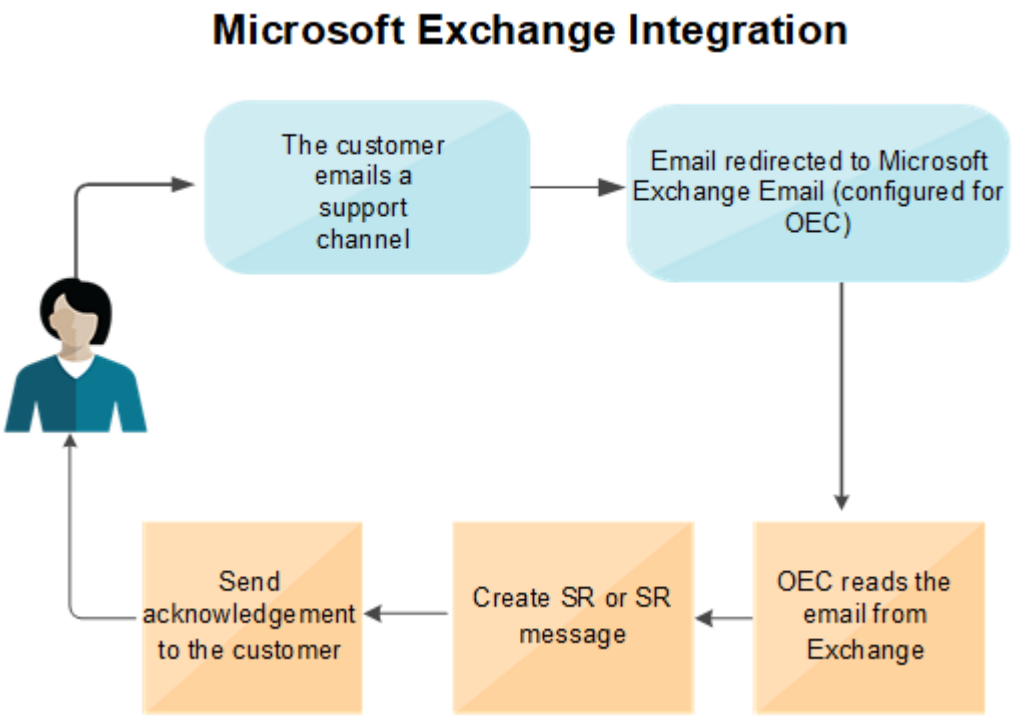
Integrate with Microsoft Exchange Server

Overview of the Integration

Integrating with Microsoft Exchange Server allows you to streamline your service email delivery giving more options and fewer potential failure points.

Create one redirect rule to one of your support mailboxes which is then monitored by Oracle Engagement Cloud (OEC) and the Microsoft Exchange API.

The following graphic shows a high level overview of the integration:



Note: These procedures require certain set up tasks be done in Microsoft Exchange Server. For information on this, you must consult the Microsoft documentation.

Register an App in Microsoft Azure

You begin the integration by creating and registering an app in Microsoft Azure.

When you set up this app you grant all the required permissions to read emails from support mailboxes. After the registration process, the client ID and secret that you created for the app are securely stored in Oracle Platform Security Services (OPSS).

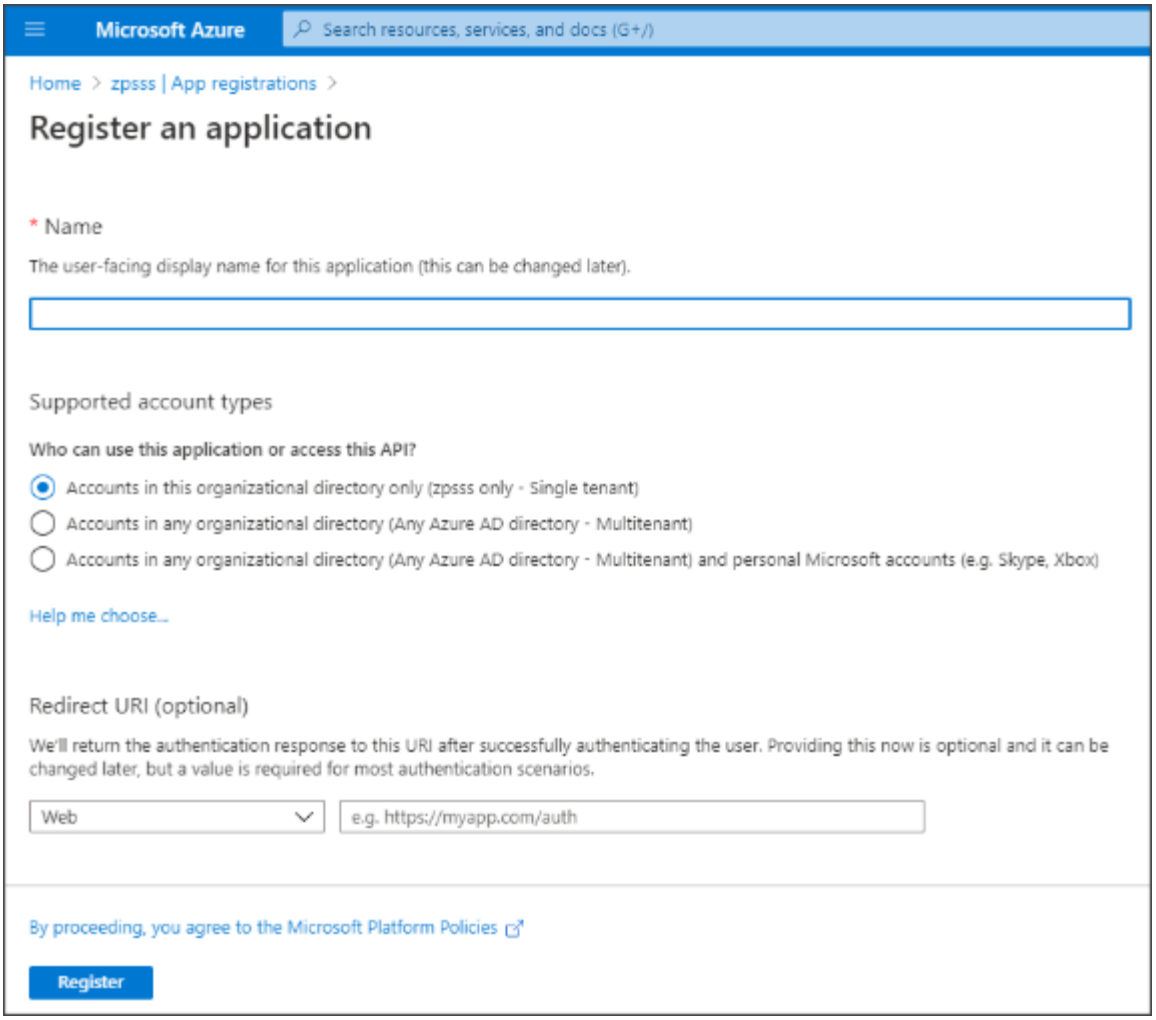
You must have administrator access to Microsoft Azure and Exchange portals.

Here's how you register the app:

1. Sign in to Microsoft Azure as an administrator.
2. In the explorer list, navigate to **Azure Active Directory > App Registrations**.
3. Click **+ New registration**.

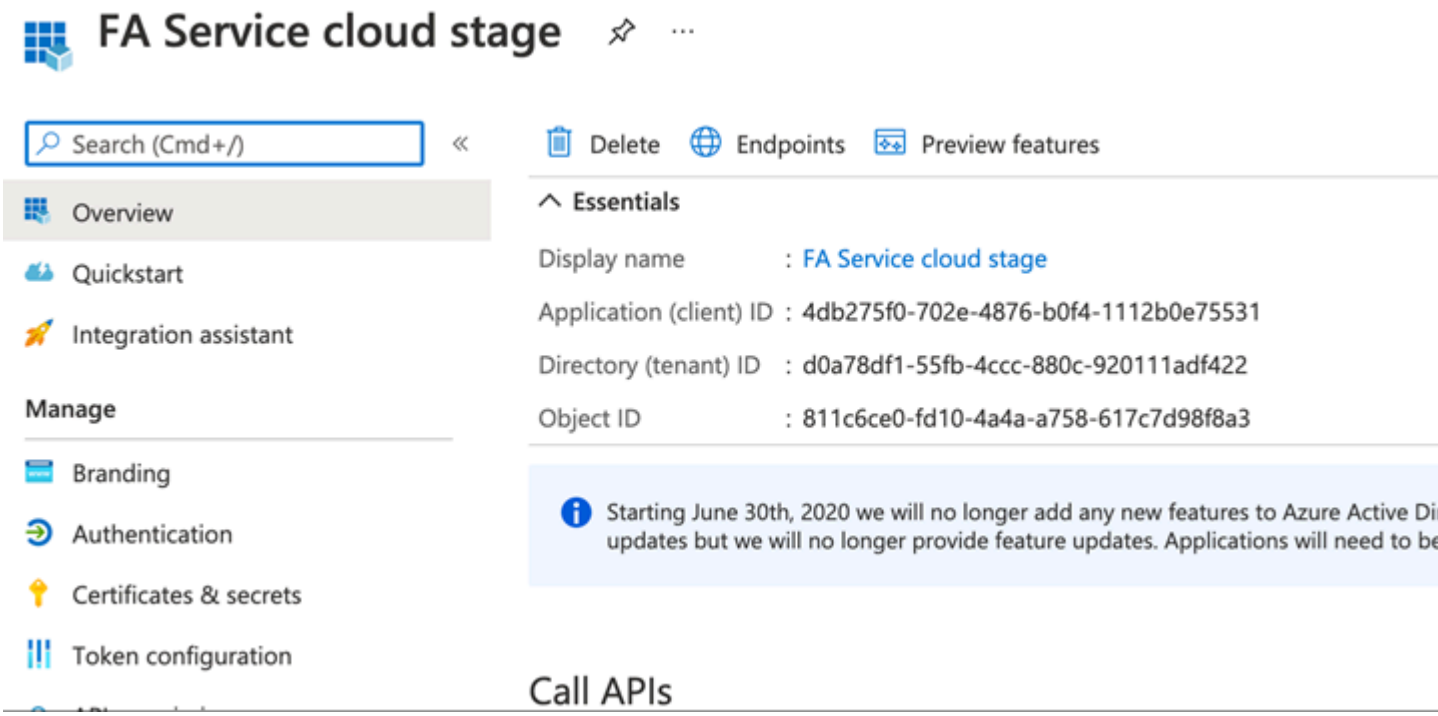
4. In the **Register an application** screen, enter a name for the app, and then select **Single tenant**.

   Note: In future releases, multitenant support will be available, but not currently.

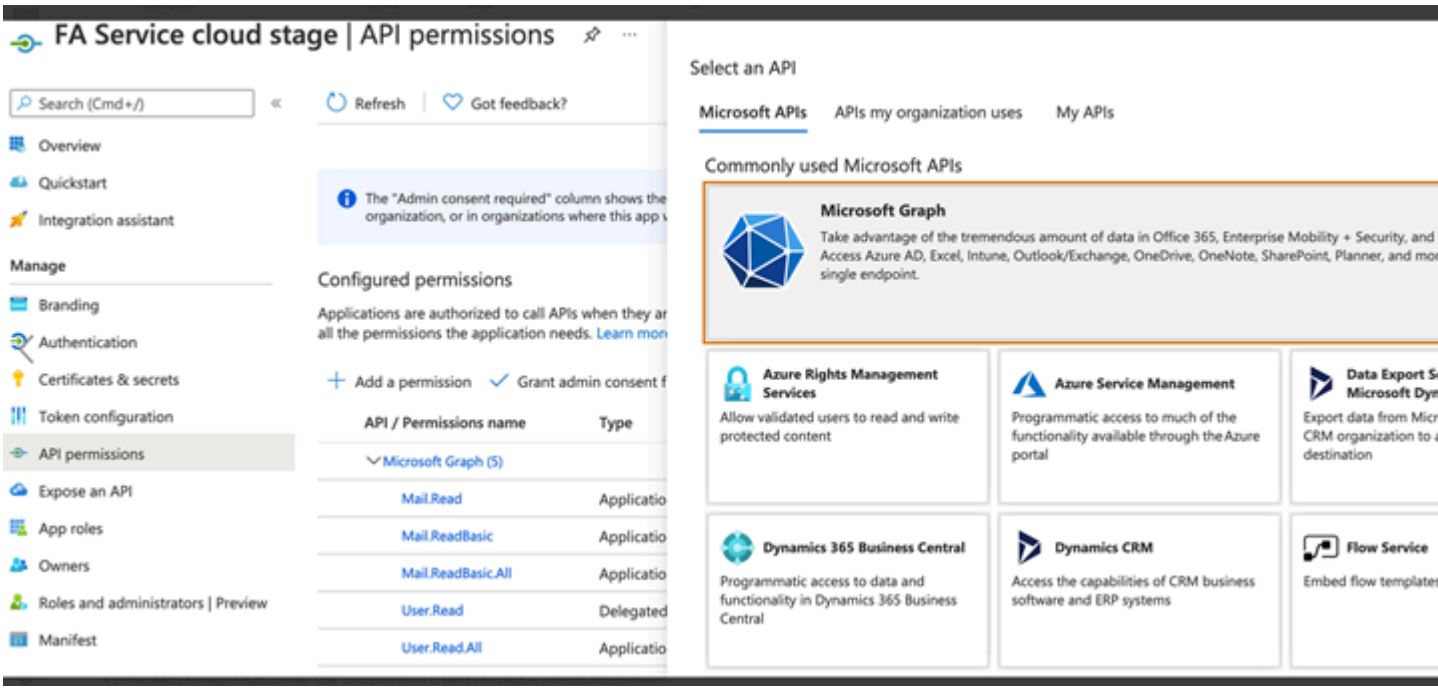


5. When you're finished, click **Register**.

6. On the Stage screen, copy and retain the **Application (client) ID, and Tenant ID** for later use.



7. In the explorer, click **Certificates & secrets**.
8. Create a new client secret and select **Never** as the expiration option, then copy the client secret for later use.
9. In the explorer, click **API permissions**.
10. Click **Add a permission**, then select **Microsoft Graph**.



11. On the **Request API Permissions** screen, select **Application Permissions**.
12. In the **Select Permissions** field enter **User** and then scroll down and select **User.Read.All.**

13. Grant the following API permissions:
    - Mail.Read
    - Mail.ReadBasic
    - Mail.ReadBasic.All
    - User.Read
    - User.Read.All
    - Mail.ReadWrite
14. Now, click **Grant admin consent required** and select **Yes** for each of the permissions you just added.

    The app has now been given permission to read emails.

Limit Access of Mailboxes Using REST API

To provide access to a selected list of outlook mailboxes using the MS Graph API, you now must configure a connection to connect to Microsoft Exchange online PowerShell.

Use the following steps to connect to the PowerShell using docker, then perform the steps to limit the mailbox access.

1. Execute the following commands to install the dependencies to connect to exchange online:
    - --Install-Module -Name PSWSMan (If prompted, accept PSGallery as the source for the cmdlets.)
    - --Install-WSMan (If prompted, accept PSGallery as the source for the cmdlets).
    - --Install-Module -Name ExchangeOnlineManagement
    - --Import-Module ExchangeOnlineManagement
    - **Note:** If you don't have access to the PowerShell tool, run the following PowerShell docker image:
      ```
      docker run -it mcr.microsoft.com/powershell
      ```
2. Execute the following command to connect to Exchange Online: `Connect-ExchangeOnline -Device`

   The output will have a URL with an authentication code, which must be opened in a browser.
3. From the browser, authenticate by logging in to the account.
4. Create a new mail-enabled security group consisting of the mailboxes that should be allowed to access: *https://docs.microsoft.com/en-us/exchange/recipients-in-exchange-online/manage-mail-enabled-security-groups*
5. Execute the following command with the required tenantId and the security group email address:
   ```
   New-ApplicationAccessPolicy -AppId <client_Id> -PolicyScopeGroupId <security_group_email_id> -
   AccessRight RestrictAccess -Description "<description"
   ```

   For example: `New-ApplicationAccessPolicy -AppId d2abe981-a2f3-44f7-af10-acd1c30e61d4 -PolicyScopeGroupId testdistributionlist@4development11395.onmicrosoft.com -AccessRight RestrictAccess -Description "Restrict this app to members of distribution group Test group."`
6. Use following command to verify that the app has permission to access the given mailbox:`Test-ApplicationAccessPolicy -Identity <email_address> -AppId <client_Id>`

   For example: `Test-ApplicationAccessPolicy -Identity service_test11@4development11395.onmicrosoft.com-AppId d2abe981-a2f3-44f7-af10-acd1c30e61d4`

   The process can take up to an hour to reflect in the REST APIs. Once the change is reflected, an error message similar to the following will be shown, when trying to access a mailbox that is not permitted:

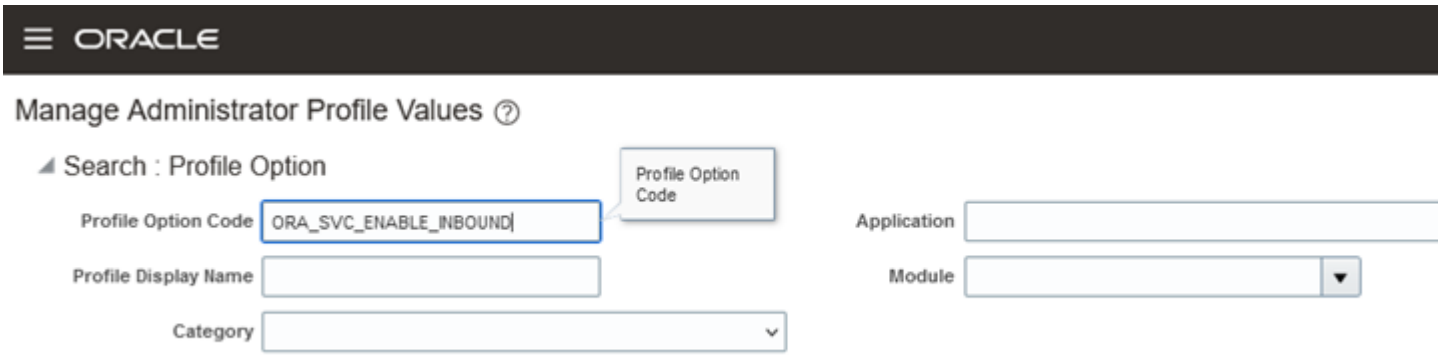
```
"body": {
 "error": {
 "code": "ErrorAccessDenied",
 "message": "Access to OData is disabled."
 }
}
```

Now you add these configurations to your Fusion application.

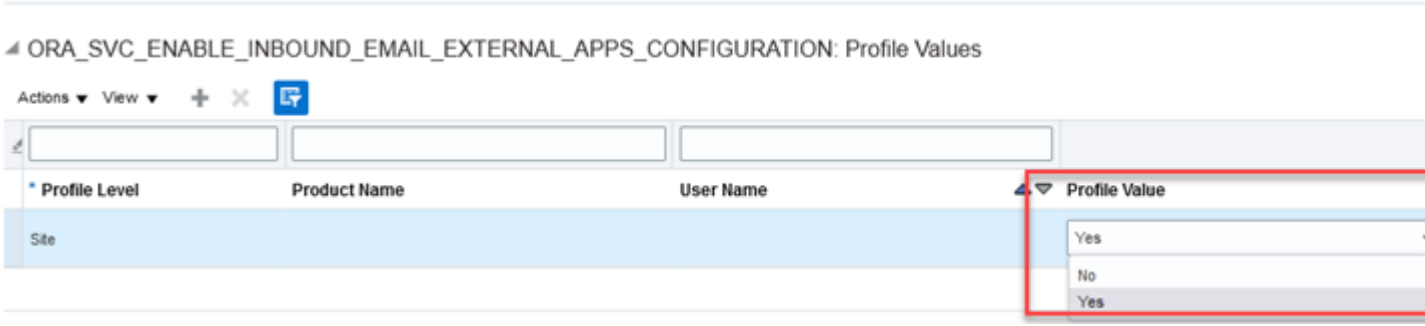
Configure Fusion Email

Now you can configure Fusion email.

1. Sign in to Fusion Service as an administrator.
2. From Setup and Maintenance, click the **Tasks** icon, and click the **Search** link.
3. In the search field, enter **Manage Administrator Profile Values**, and then select it.
4. In the Profile Option Code field, enter ORA_SVC_ENABLE_INBOUND_EMAIL_EXTERNAL_APPS_CONFIGURATION and click **Search**.

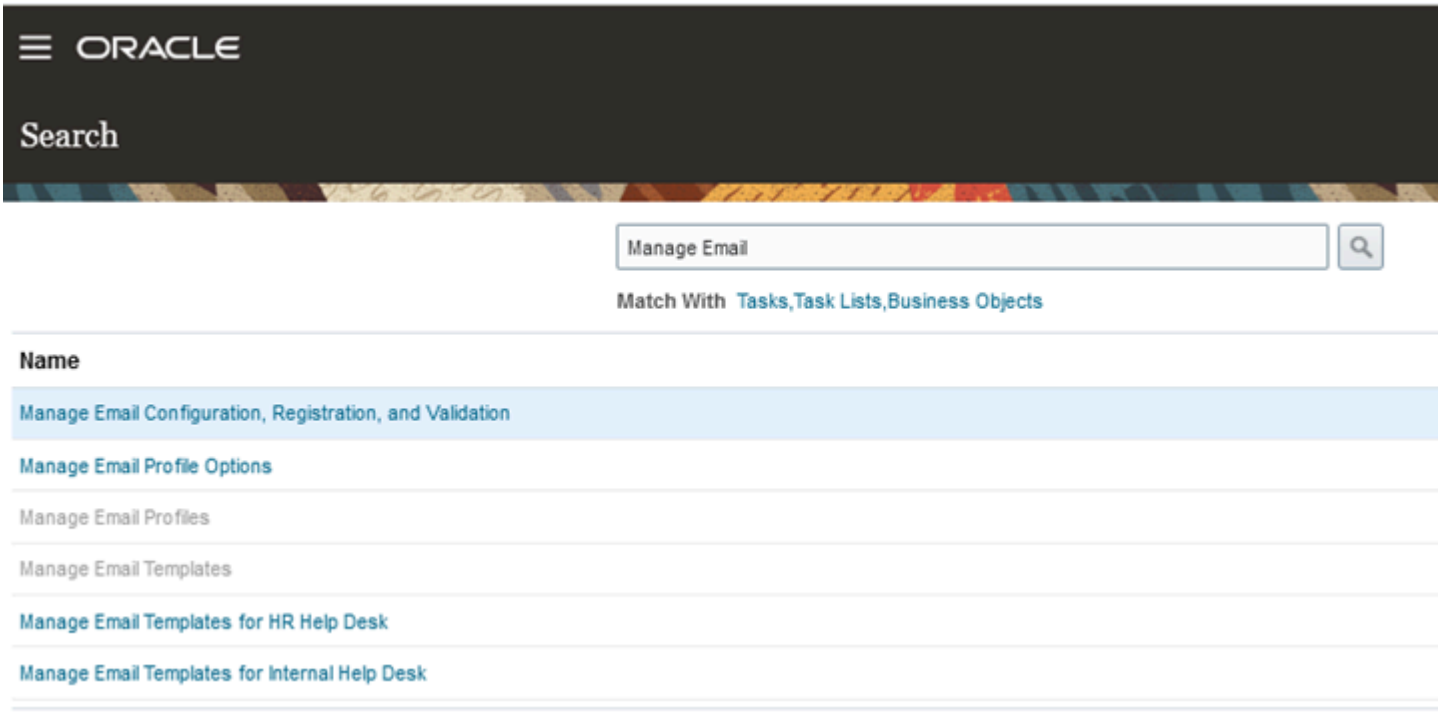


5. In the **Profile Values** list, set the profile value to **Yes**.



6. Click **Save and Close**.

7. In the Search field, enter **Manage Email**.



8. Choose the task **Manage Email Configuration, Registration, and Validation**.
9. Scroll down to the **Configure External Applications** area and enter the values retained from the setup you did in Azure, including Tenant ID, Client ID, Client Secret and so on.

5

10. Enter the email address you want to use.

> **Note:** You can only set up one email address, such as support.examplecompany.com.

11. In the **Activation Date** field, enter the date you want the processes to start.
12. Click **Save**, and then scroll to the top of the page and click **Done**

Set Inbound Email Attachment Size

The default attachment size for inbound email is 15MB. To increase this size you set configure the SVC_INBOUND_EMAIL_MAX_ATTACH_SIZE profile option. Here's how you do it:

1. Sign in to Fusion Service as an administrator.
2. From Setup and Maintenance, click the **Tasks** icon, and click the **Search** link.
3. In the search field, enter **Manage Administrator Profile Values**, and then select it.
4. In the Profile Option Code field, enter SVC_INBOUND_EMAIL_MAX_ATTACH_SIZE and click **Search**
5. In the Profile Values list, for the Site Profile Level increase the **Profile Value** to the MB value you require, then click **Save and Close**.

How do I create a job to read messages?

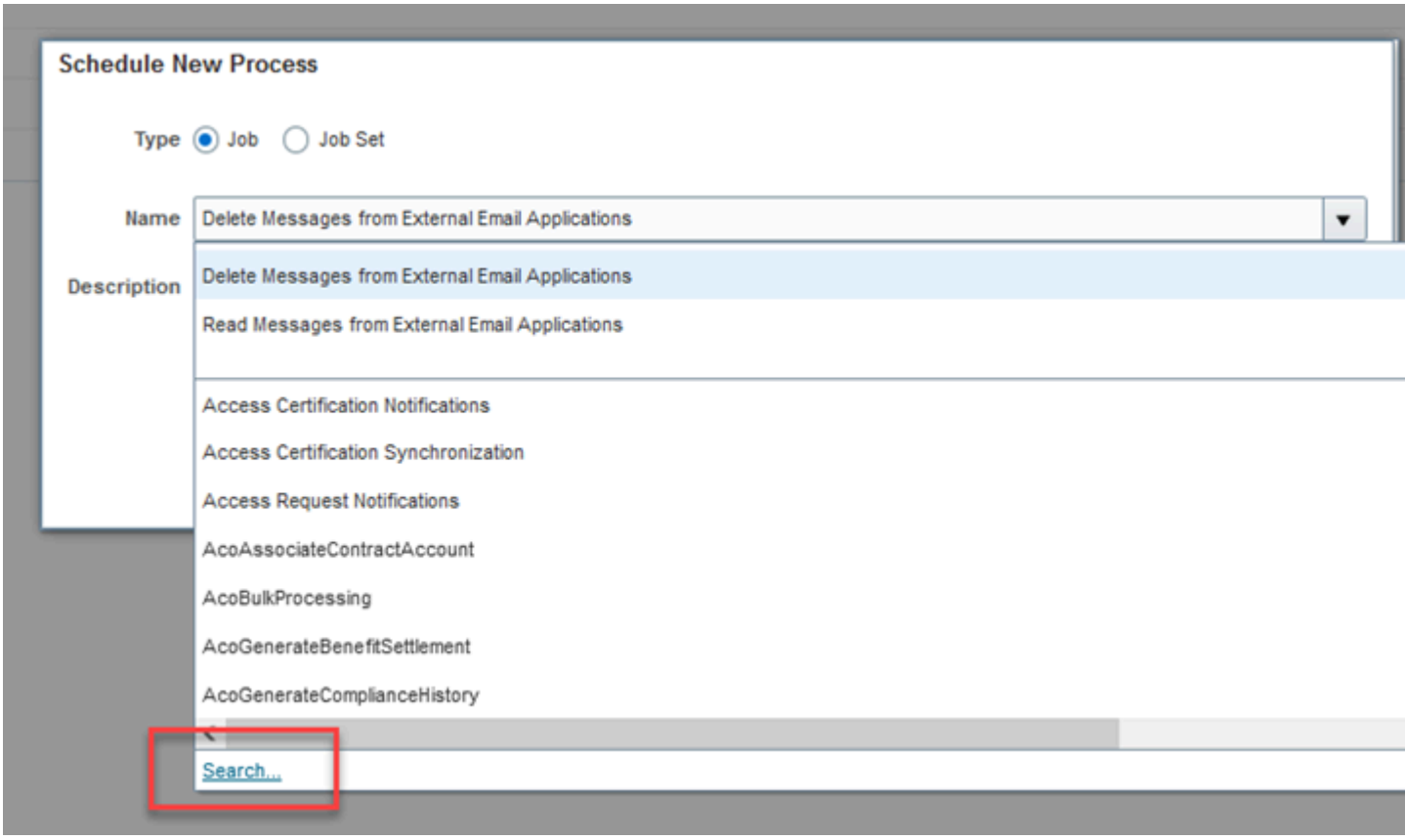
Now, you create an Oracle Enterprise Scheduler (ESS) job to periodically read the email messages from the configured outlook email address.

This process stores all the required details of an email in your database. After reading the required number of emails in a batch, a new event is generated to create an SR or an SR message using the existing SOA composite.

Here's how you create the new job:

1. From the Navigator, select Tools, then **Scheduled Processes**.
2. Click **Schedule New Process**.

3. From the Schedule New Process dialog box, click the drop-down list, and then click the **Search** link.



4. On the Search and Select: Name dialog box, enter any part of **Read Messages from External Email Applications** in the **Name** field, and then click **Search**.
5. From the results, select **Read Messages from External Email Applications** and click **OK**, and then click **OK** again.
6. On Process Details page, click **Advanced**, then in the **Advanced Options** area, select **Using a schedule**, then set a time, such as every 1 minute, every 2 minutes, or whatever time increment suits your needs.
7. When you're finished, click **Submit**.

Create a Job to Delete Messages

Your mailbox serves as staging area, but messages don't need to be retained there. Use this topic to create a job to periodically delete messages.

1. From the Navigator, select Tools, then **Scheduled Processes**.
2. Click **Schedule New Process**.
3. From the Schedule New Process dialog box, click the drop-down list, and then click the **Search** link.
4. On the Search and Select: Name dialog box, enter any part of **Delete Messages from External Email Applications** in the **Name** field, and then click **Search**.
5. From the results, select **Delete Messages from External Email Applications** and click **OK**, and then click **OK** again.

6. On Process Details page, click **Advanced**, then in the **Advanced Options** area, select **Using a schedule**, then set a time, such as every 1 minute, every 2 minutes, or whatever time increment suits your needs.
7. When you're finished, click **Submit**.

How do I schedule deletion of inbound emails that were previously retrieved from Exchange Server?

You can set up a scheduled process to automatically delete inbound emails from the inbox on your Microsoft Exchange server if those emails have already been retrieved and processed. This job increases performance if you're integrated with Microsoft Exchange Server, by removing unnecessary processing.

Here's how you do it:

1. In Setup and Maintenance, do the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Manage Email Configuration, Registration and Validation
2. In the Configure External Applications section, select the **Delete Message** check box.

    This ESS job, **Delete Messages from External Email Applications**, deletes inbound email from the inbox on Exchange Server, and it will now automatically run according to the schedule set by the administrator.