# GENESYS™

# Web Services and Applications Configuration Guide

## Email Interactions

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# Email Interactions

## Contents

Workspace enables agents to handle email interactions, including the following functionality:

- Reply to inbound emails (with or without the original text)
- Create new outbound emails
- Check the spelling of an outbound email
- Apply a signature to an outbound email
- Store emails in a workbin
- Transfer an email to an internal target
- Set a disposition code
- Mark the interaction as Done
- View and copy links to non-embedded images in inbound and outbound email interactions
- View and insert Standard Responses
- Paste content from browsers and other applications that display HTML
- Paste images from browsers and other applications that display HTML

Workspace enables the following Email interaction capabilities:

- Decline an interaction
- Release an interaction
- Move an interaction to a Workbin
- Reply to an interaction
- Reply All to an interaction
- Add Attachments to an interaction
- Send an interaction
- Save an interaction
- Delete an interaction

The following are mandatory options for correct email interaction handling:

- privilege.email.can-use — Mandatory to use the email channel. When the value of this option is set to `true`, the agent is permitted to use the Email channel.
- email.default-queue — Specifies the default queue for email interactions.
- email.outbound-queue — Specifies the default queue for email interactions.
- workbin.email.draft — Specifies the name of the Workbin to be used to store draft emails
- workbin.email.in-progress — Specifies the workbin to be used to store emails which are in the `In Progress` state.

You can also use the following options for email interaction handling:

- email.from-addresses — Specifies a character string that specifies the name of the Business Attribute which contains the Attribute Values that are used as available addresses. You can set a default value by using the flag from the Business Attribute value. These come from the addresses of email interactions. This option can be overridden by a routing strategy.

- interaction.disposition.is-mandatory — Specifies whether it is mandatory for the agent to set a disposition code before Marking Done an interaction. This option can be overridden by a routing strategy.

- interaction.disposition.is-read-only-on-idle — Prevents changes to the disposition code after the interaction has been released. This option can be overridden by a routing strategy.

- interaction.disposition.key-name — The key that is used to populate attached data or a user event when a disposition code is submitted to the back-end system, such as T-Server, Interaction Server, and Contact Server. This option can be overridden by a routing strategy.

- interaction.disposition.use-attached-data — Enables the adding of attached data from the interaction in UserEvent. This option can be overridden by a routing strategy.

- interaction.disposition.value-business-attribute — A character string that specifies the name of the Business Attribute that contains the Attribute Values that are used as an enumerated value for a disposition code. This option can be overridden by a routing strategy.

You can use the following options to control the default and available fonts for outgoing email interactions:

- editor.fonts — the list of available fonts in the font menu.

- editor.font-sizes — the list of available font sizes in the font size menu.

- editor.default-font — the default font for all new or reply outgoing email interactions.

- editor.default-font-size — the default font size for all new or reply outgoing email interactions.

## Signatures

Workspace Agent Desktop enables you to assign default signature templates to outbound email interactions. Email signatures allow the insertion of tagged-data fields with data that is related to the agent, such as name, job title, department, phone number, email address, and so on. Refer to "Using UCS Data in Standard Responses: System Variables" in the "Genesys Knowledge Management: Basics" chapter of the eServices User's Guide for more information about the tagged data field. Signatures also support linked image(s) and hyperlinks.

Use the email.signature configuration option in the **[interaction-workspace]** section to specify the type and location of the signature template that Workspace should add to outbound emails.

Use the email.signature.line-<n> configuration option in the **[interaction-workspace]** section to specify the path and name of the signature file or the location of the Response in the Standard Response Library that is to be used as the default signature.

> ### Tip
> This option can be overridden by a routing strategy based on the attached data of the

> interaction.

# Forwarding Inbound Email

Workspace enables agents to forward active and closed inbound email interactions to an external resource by selecting a valid email address in Team Communicator, either by manually entering the address or by selecting it from a searched Contact or a Corporate or Personal Favorite. Email Forward supports both **To** and **CC** (carbon copy) addressing and multiple recipient targets. Agents can also add additional information about the forwarded interaction in a dedicated text box.

Two types of forwarding are supported:

1. Inline forwarding (quoted)

2. Forwarding as an attachment (if supported by the email server)

Depending on the Business Process that you are using, the agent who has forwarded an email interaction to an external resource can still retain the ownership of the interaction and be responsible for closing the interaction.

## Business Processes

A set of key-value pairs that include the destination email address and other information is added to the inbound email before it is placed in the Forward queue so that they can be used in a Business Process:

Inline Forwarding

- `IW_OriginalAgentEmployeeId` — The Empoyee Id of the agent.

- `OriginalAgentUserName` — The UserName of the agent.

Refer to eServices email workflow samples for more information about forwarding email interactions to external resources.

Forward as an Attachment

- `IW_OriginalAgentEmployeeId` — The Empoyee Id of the agent.

- `IW_TransferrerUserName` — The UserName of the agent.

- `IW_EmailNotepad` — The current notepad text of the email view.

- `IW_ExternalAgentAddress` — The **To** email address destination. If the value of the email.forward.enable-multiple-to-addresses option is set to `true`, the value of `IW_ExternalAgentAddress` is a comma separated list of **To** addresses. This list has to be parsed in the Business Process. For each extracted address, the Business Process has to do the following:

   1. Assign the extracted address to a variable.

2. Use this variable in the Forward Email block.

- `IW_ExternalAgentCcAddress` — The **CC** email address destination. This is added only if the value of the email.forward.enable-cc-addresses option is set to `true` (Enable the CC address field where agents can specify one or several CC addresses). The value is a comma separated list of **CC** addresses. With this list, the Business Process has to do the following:

  1. Assign the list to a variable.

  2. Use this variable in the Forward Email block.

- `IW_ExternalAgentInstructions` — The text provided by the agent who is forwarding the email interaction. This is added only if the value of the email.forward.enable-instructions option is set to `true` (Enable the forward instructions field). This value can be used as a Field Code in the Standard Response that is contained in the Forward Email block to give forward instructions to an external resource.

Refer to eServices email workflow samples for more information about forwarding email interactions to external resources.

## Privileges

The following privilege controls the use of the forwarding feature:

- privilege.email.can-forward — Allows forwarding of an email as an attachment.
- privilege.email.can-inline-forward — Allows forwarding of an email as an inline (quoted) email.
     If both privileges are granted, the **Forward** button becomes a split button, and the following menu options are availalbe:

  - Forward (Inline forwarding)

  - Forward as an Attachment

- privilege.contact.can-inline-forward.email.from-history — Allows forwarding of a closed email interaction as an inline email from the History.

## Configuration Options

Use the following configuration options in the **[interaction-workspace]** section to configure the forwarding features:

### Forwarding as an Attachment Specific Configuration Options

- email.forward.enable-instructions — Enable the forward information field. Information entered into this field is included in the email containing the attachment.
- email.forward-queue — Specifies the Interaction Queue in which the inbound email is placed when an agent forwards it to an external resource.
- email.forward.enable-cc-addresses — Enable agents to specify more than one target in the **CC** address field.
- email.forward.enable-multiple-to-addresses — Enable agents to specify more than one target in the **To** address field.

## Inline Forwarding Specific Configuration Options

- email.inline-forward-queue — Specifies the Interaction Queue in which the inbound email is placed when an agent forwards it as an inline email.

- email.inline-forward-prefix — Specifies the in-line forward prefix that is added to subject of the inbound email.

- email.inline-forward-header — Specifies the header information that is added inline to the forwarded email interaction.