

5.3 Email

Bright Pattern Documentation

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Salesforce.com Integration

Integration with Salesforce.com (SFDC) customer relationship management applications provides the integrated Agent Desktop, single sign-on, access to CRM data from scenarios, screen pop, activity history, and click-to-dial functions.

You can also create calling lists using contact records imported from SFDC and export the corresponding campaign results directly to SFDC. You can define more than one Salesforce.com integration account.

For detailed integration instructions, including specification of the Salesforce.com integration account properties, see [Salesforce.com Integration Guide](#).

Email Tab

The *Email tab* includes settings specific to email services.

To view and edit these settings, select the **Email** tab of the desired email service.



Email tab

Email Service Settings

Email tab settings are described as follows.

Acknowledgment

Acknowledgment is the message that will be sent as an immediate response to inbound emails associated with this service. Normally this is done to acknowledge receipt of the request and advise the sender about the estimated reply time.

Acknowledgment is not considered a reply and will not affect any metrics related to this service. Acknowledgment is only sent for the initial email in an [email thread](#).

Acknowledgments must initially be prepared as articles in the [Knowledge Base](#).

To select an article that will be used as an acknowledgment for the given service, click the link, enter some article keywords in the search field, and choose the language. A list of matching articles will be displayed in the list below. Select the desired article; it will be displayed in the preview field.

Note that in the current product version, acknowledgment can be defined in one language only.

Distribution method

Distribution method is the method of email delivery to the Agent Desktop.

With the **pull** method, all incoming emails remain in the service queue and will be visible to the agents of the teams associated with this service (see the description of the Assignments tab). The agents will be expected to select emails manually for processing from this queue.

With the **push** method, incoming emails are delivered directly to the Agent Desktop in the same manner as calls and chats. The agents will be able to either accept incoming email for immediate processing or move it to *My Queue* for processing at a later time. For information about agents' availability to process email interactions, see section [Omni-Channel Routing](#).

Note that the order in which incoming emails are delivered to agents (for the push method) or appear in the service queue (for the pull method) is determined first by priority and then by the shortest remaining time to breach the configured service level (see the description of the *Service Level* settings below). For more information about email priority, see section [Scenario Entries - Email](#).

Enable personal routing

Enable personal routing indicates whether personal email routing is enabled for this service.

If enabled, the system will attempt to deliver any email identified as part of an existing [email thread](#) to the agent who composed the previous reply within that thread.

Personal routing timeout

If personal routing is enabled (see *Enable personal routing* above), this timeout specifies for how long the system will wait for the agent who composed the previous reply to become available before switching to the regular distribution method involving all qualified agents.

This timeout is essential for the *push* method only. For the *pull* method, such emails will be immediately delivered to the agent's *My Queue*.

Return emails to general queue after

Return emails to general queue after specifies how long the system will wait (from the moment the email is placed in an agent's *My Queue*) before returning this email to the general service queue.

If the option to *return emails to general queue if SLA is breached* is selected (see below), such messages will be returned back to the general queue, even when they are put in the agent's *My queue* after the SLA is breached.

Return emails to general queue if SLA is breached

This setting indicates whether emails that have breached service level while in *My Queues* will be returned to the general service queue. See the description of the following *Service Level* settings.

Service level, Replied emails

This setting specifies the percentage of emails associated with this service that are expected to be replied within the specified service level threshold (see below) relative to all replied emails.

Service level, Within threshold

Service level, Within threshold sets the service level threshold for this service. A service level threshold is the amount of time in which emails associated with this service are expected to get a reply. The reply time is measured from the moment the email is placed in the service queue to the moment when the first reply is sent. *Acknowledgement* (see above) is not considered a reply. Note that the Service Level will be reset when an email is moved from one service queue to another.

The email service level threshold can be specified either in hours or in days and in either case excludes the time that is outside of the [hours of operation specified for the given service](#)

Screenpop URL

Screenpop URL is the URL of the web page that will be displayed by the Agent Desktop application when the agent receives an email associated with the given service (e.g., [Salesforce.com synchronization](#)). A query string can be added to supply variables for the screen pop.

The following variables are supported:

- *\$(item.from)* – sender's email address
- *\$(item.to)* – emails address in the *To:* field
- *\$(item.subject)* – content of email subject

The *Screenpop URL* parameter is optional.

Purpose

The Bright Pattern Contact Center *Salesforce.com Integration Guide* provides detailed instructions for setting up your Bright Pattern Contact Center solution to function in an integrated manner with your Salesforce applications.

Integration embeds the Agent Desktop communications widget into your Salesforce applications and provides single sign-on functionality, Salesforce data-driven interaction routing, screen pop, activity history, and click-to-call functions.

Note that throughout this guide, configuration instructions and tutorials are given for Salesforce Classic, Lightning, and Service Cloud views, where applicable.

1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/IntegrationAccounts](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CaseandContactManagement/CustomFields](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/Appendices/Glossary](#)

