

5.8 Email

Bright Pattern Documentation

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1. REDIRECT [5.3:Contact-center-administrator-guide/ServicesandCampaigns/ServicesandCampaignsOverview](#)

How to Configure Microsoft Email Account Access Using Microsoft Graph

Bright Pattern Contact Center software allows contact centers to use the Microsoft Graph API as a method for authenticating access to different Microsoft-based email services (e.g., Exchange Online, Office 365, Hotmail.com, Live.com, Outlook.com, etc.), from non-Microsoft email hosts.

This section explains how to to configure a [Microsoft Graph](#) email scenario entry.

Prerequisite

The Microsoft Graph API must be enabled for contact centers; ask your service provider for more information.

Procedure

1. Log into the Contact Center Administrator application.
2. If no email service exists, one must be created in section [Services & Campaigns](#).
3. Next, navigate to section [Scenario Entries > Email](#), and then click the **Add new** + button.
4. The POP3 server type displays by default in the Account tab. For the setting *Protocol type*, select *Microsoft Graph*.
5. Click the **Connect account button**. A pop-up window will prompt you to select or enter the desired Microsoft email address credentials. The application can request grant permissions, so you will need to give the required permissions to the application. **Note:** If the tenant is already signed into a Microsoft email account, a session cookie will be detected and credentials will not need to be entered.
6. Upon successful connection to the email account, the address will automatically populate the *Email address* and *Display name* fields. The tenant can click the **Test** button; a "Success" message should display.
7. Next, in the [Services](#) tab, a *Default email service* must be selected.
8. If nothing else needs to be defined, the tenant may click **Apply** at this point.

9. For more information, see the *Contact Center Administrator Guide*, section [Scenario Entries > Email](#).



Required permissions

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.

Configuring High-Importance Email Routing

If your contact center uses email, it is possible to have the system place incoming, high-priority emails at the top of the Agent Desktop application's [Team Queue](#) and the [Personal Queue](#).

This can be accomplished by configuring *queueing priority* settings, which are located in the Contact Center Administrator application, section [Scenario Entries > Email > Services tab](#).

Note: In order for this feature to work, the [Case details](#) filter **must** be set to [SLA Age %](#). The *SLA Age %* filter takes *queueing priority* into account, that is, incoming emails are first sorted by priority and then by the remaining *SLA Age %* within that priority.

Understanding Importance

Microsoft email services and a number of other email messenger applications can set and indicate the importance of a message to a recipient. In order to do this, a numeric value ranging from 1 (high) to 5 (low) is sent as an [X-Priority header](#) in the email.

When Bright Pattern Contact Center (BPCC) software receives emails with this header, it places them in order of importance in the *Team Queue* and the *Personal Queue*. BPCC uses numeric values configured in the *Email > Services tab*, which range from 5 (high) to 1 (low), to determine the queue order.

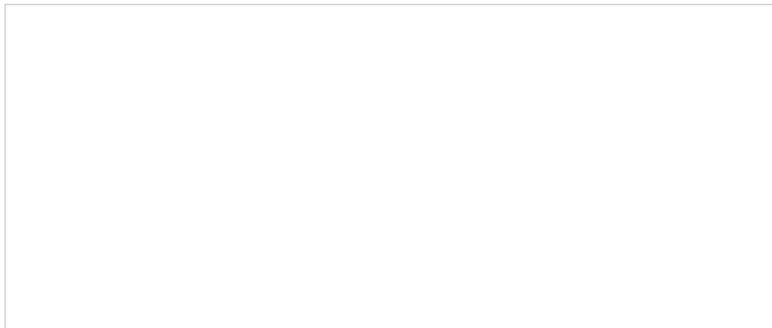
When you are defining queueing priority in the Contact Center Administrator application, **use BPC importance only!** The following table will help you convert X-Priority numeric importance to Bright Pattern numeric importance.

Importance Conversion Table		
Importance	X-Priority Header	BPC
High	1	5
	2	5
Medium	3	3
	4	1
Low	5	1

Configuration

Default

By default, BPC applies low importance (i.e., 1) to all incoming emails. When the configured importance is the same for every *Queueing priority* setting, emails will appear in the Team queue in the order that they were received (i.e., X-Priority header importance will be ignored).

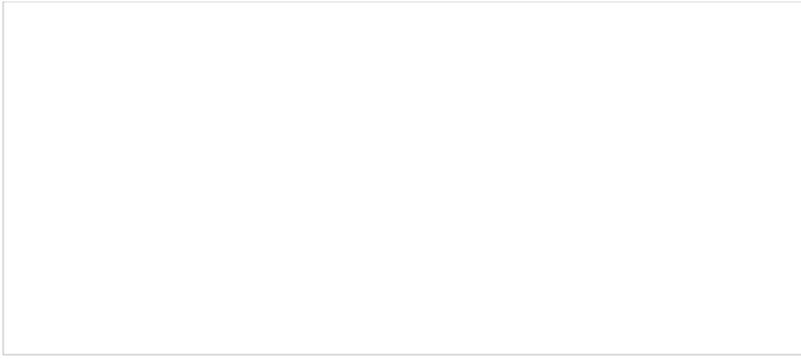


The default system configuration

High-Importance and Low-Importance Emails

If you wish to prioritize emails marked with high importance, and deprioritize emails with marked with low importance, do the following:

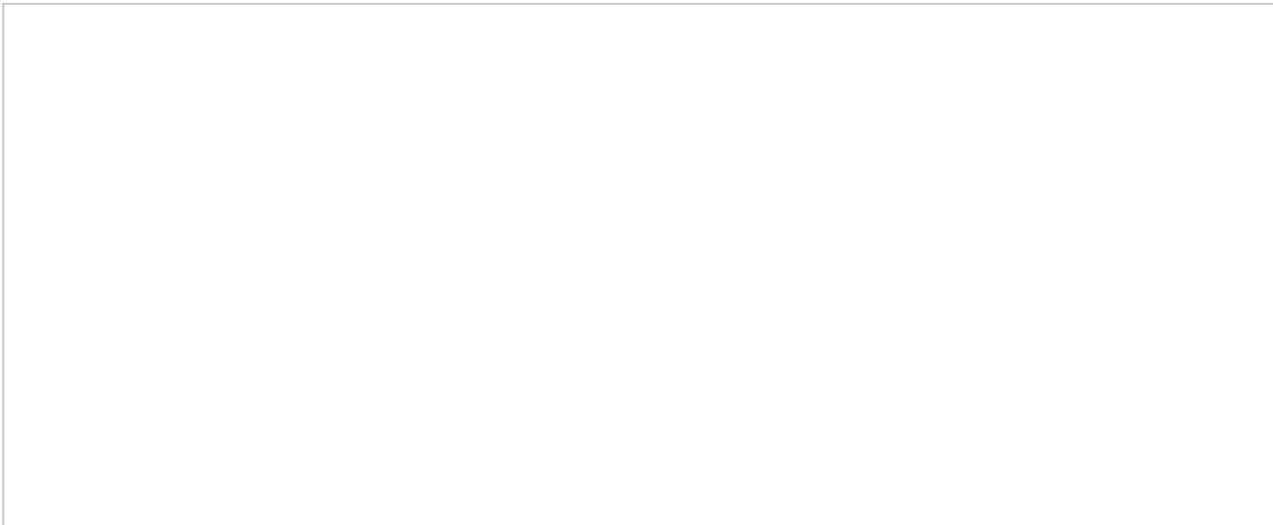
- Change the *Default* column for *first email* and *subsequent email* to **3** (i.e., **normal**).
- Change the *3* (*normal*) column for *first email* and *subsequent email* to **3** (i.e., **normal**).
- Change the *1* (*high*) column for *first email* and *subsequent email* to **5** (i.e., **BPC high**).
- Change the *5* (*low*) column for *first email* and *subsequent email* to **1** (i.e., **BPC low**).



Prioritize high-importance email and deprioritize low-importance emails

With this configuration, all incoming emails (i.e., first and subsequent emails) sent to your contact center's email service with high importance will appear at the top of a queue. Emails sent with normal importance will be displayed after the high-importance emails. Emails sent with low importance will appear at the bottom of the queue.

As a reminder, in order for this feature to work, the [Case details](#) filter **must** be set to [SLA Age %](#).

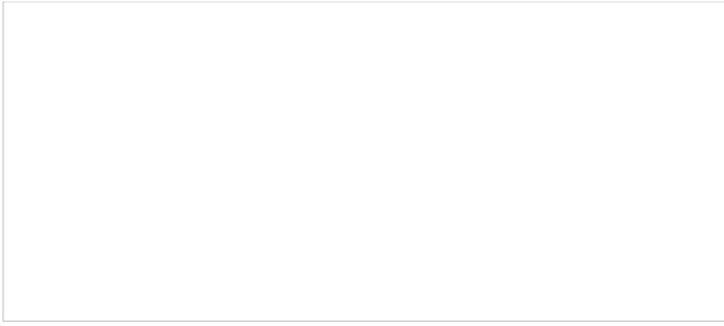


High-importance emails displayed at the top of the *Team Queue*

Higher Importance for Subsequent Emails

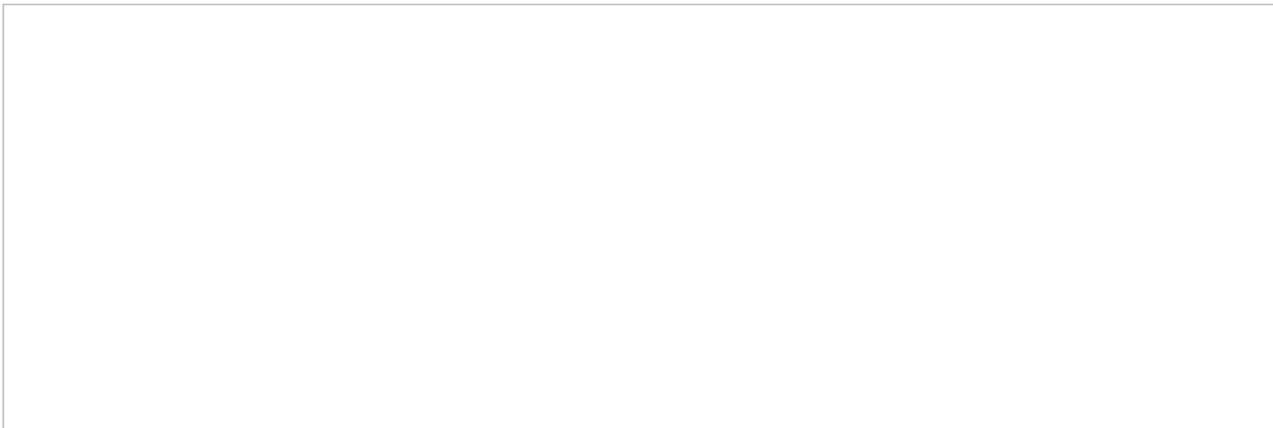
If your contact center wishes to give high-importance to subsequent emails but not first emails, do the following:

- Change all columns in the *first email* row to **3 (i.e., normal)**
- Change all columns in the *subsequent email* row to **5 (i.e., BPC high)**.



Prioritize subsequent (i.e., follow-up) emails

Because we set priority to normal (i.e., 3) for all first incoming emails, the Agent Desktop *Team Queue* will display all first emails in the order of [SLA Age %](#); this includes emails marked with high importance.



Emails displayed by *SLA Age %*

After an agent has replied to a first email, if the customer chooses to send a follow-up message (i.e. a subsequent email), emails with replies will always sit at the top of either the *Team Queue* or the *Personal Queue*. You may verify this information by checking the email's timestamp.



Subsequent emails assigned to a higher priority than first emails display at the top of the queue

1. REDIRECT [5.3:Agent-guide/Work/CasesEmail/CasesEmailandThreads](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/LanguageSkills](#)
1. REDIRECT [5.3:Contact-center-administrator-guide/CallCenterConfiguration/IntegrationAccounts](#)

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](#).

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- *\$(item.from)* – sender's email address
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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](#)