INBOUND EMAIL CAMPAIGNS

Scripted App and Email Entity
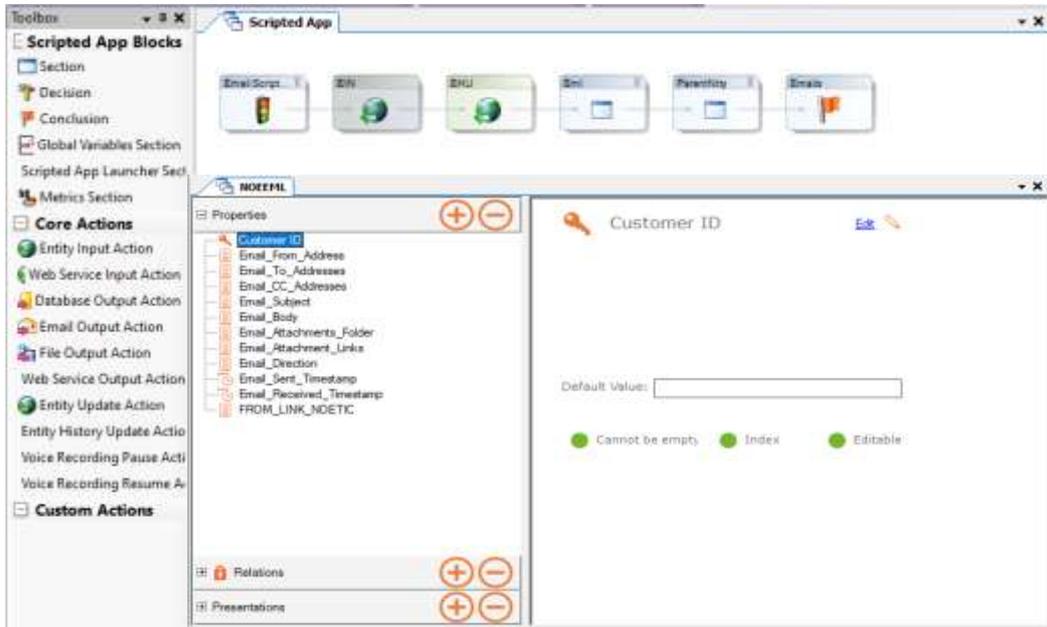
Campaign Manager and Inbound Email List

Synthesys™ Inbound Email Campaigns

Last updated March 2022

Content

INBOUND EMAIL CAMPAIGNS

Introduction

Inbound email campaigns enable agents to handle inbound emails and respond to these in a systematic, campaign based fashion. As part of the inbound email feature, blending between inbound and outbound voice, and inbound email is also available.

The solution is based on a service that "listens" for incoming emails on one or more email servers. Once an email arrives, it uses the existing CRM API to insert the content of the email (linked to any attachments) into an appropriate CRM Entity, and then inserts a respective record into an email list within a campaign.

Email inbound lists are always preview lists (without auto-dial set). List items will be delivered to agents using a scripted app associated with the campaign.

The scripted app displays incoming emails with links to available attachments, together with a history of any other communications (email or otherwise) to and from the customer from whom the email has arrived, if such history exists.

The scripted app will then guide the agent through the process of handling the email, using entity input and entity history update actions to link emails to the correct CRM entity record, if appropriate, and possibly an email output action to reply or forward the email.

Inbound Email campaigns require a special setting, which needs to be activated, to display the Email tab at list level in the Campaign Manager.

Please speak to your Noetica contact, for more information and training.

SYNTHESYS™ INTERACTION STUDIO

Email lists and campaigns reside in their respective workspaces and require two CRM entities, an email child, and a parent customer entity.

The CRM entities, workspaces and scripted apps for inbound email campaigns are created in the Synthesys™ Interaction Studio, ensuring that agents always have the relevant information at hand when processing emails in the Synthesys™ Agent Portal.

The email child entity needs to be of a very particular type and include ten specific entity properties. The associated parent customer entity can be a dedicated entity, or an existing one, as used for the dialler or for inbound CLI screen pops and needs to contain at least one Email type property.

- Log in to the Interaction Studio and synchronize the client machine with the server.
- Go to **File – New – Entity** and start by creating an email child entity.
- The entity prefix needs to be unique and can contain up to six characters.

Email Child Entity

Email Entity Properties

The email child entity (in our example NOEEML) needs to include the nine mandatory Property fields listed below (plus the From_Link_YYY, which will be added automatically later, when creating a relationship between the child and parent entity), and may contain other fields, if necessary.

- Create your email child entity, adding the property fields <u>exactly</u> as specified:

Email_From_Address	Email_Attachments_Folder
Email_To_Addresses	Email_Attachment_Links
Email_CC_Addresses	Email_Direction
Email_Subject	Email_Sent_Timestamp
Email_Body	Email_Received_Timestamp

The next page will show how to configure the email child presentation and search sections.

We will then look at the design of an associated parent customer entity, before returning to the child entity, to create a relationship between the child and parent entities.

Email Entity Presentation

In the **Properties** section of your email child entity, create a new section, and specify how the entity should be displayed at run time.

- Click the **+** tab, add a new section, and give it a logical name.
- Add your display names into column A, i.e., Customer ID and Attachments.
- In column B, pick up the associated Customer ID and Email_Attachment_Links data fields.
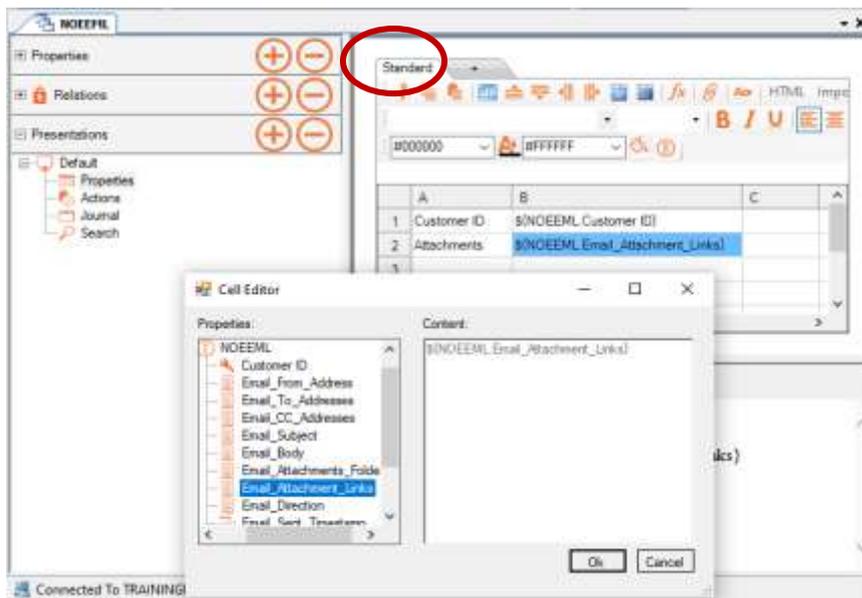
Email Entity Search

In the **Search** section, add the search field to be used at run time, for example:

- Add **ID** as the display name, then pick up the associated **Customer ID** data field.
- **Save** and **Release** the entity table.
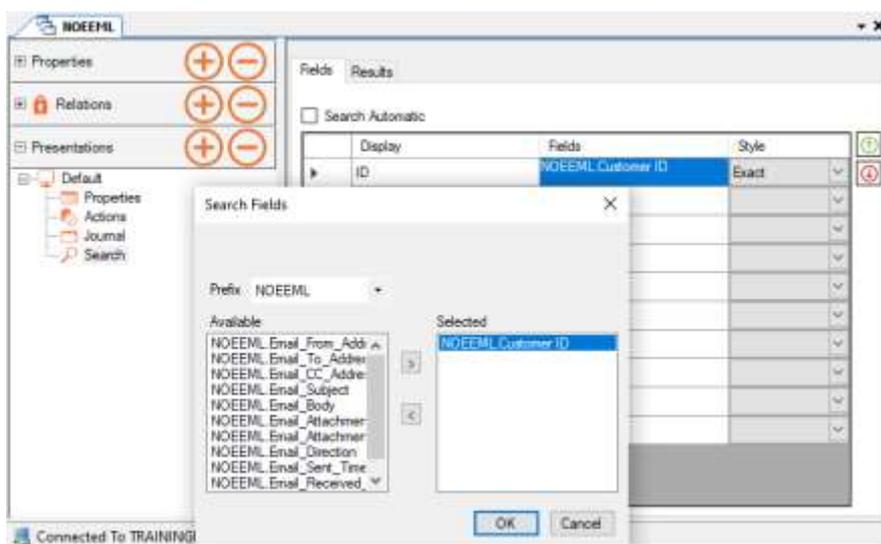
The next step is to configure the related parent customer entity, and to create a link between the email child and parent customer entities.

Parent Customer Entity

The parent customer entity will hold essential customer details. It can be a new dedicated entity, or you can adapt an existing one. As the parent entity is used with an email child entity, it will need to contain at least one Email type property.

Entity Properties

In the **Properties** editor of the parent customer entity (e.g., NOETIC), create or modify your entity table, adding the relevant fields. Acceptable property names can include letters, digits, or underscore.

- Add any fields as required, including at least one Email property field.
- **Save** and **Release** your entity table.

Entity Presentation

In the **Presentations** editor **Properties** section, create a new email presentation, and configure the content and layout of your parent customer entity, for example:

- Add a new presentation called **Emai**l, and add a new section called **Sender**.
- Pick up the data fields with the sender's name and email address, to show these details at run time in the Synthesys^{TM} Agent Portal.
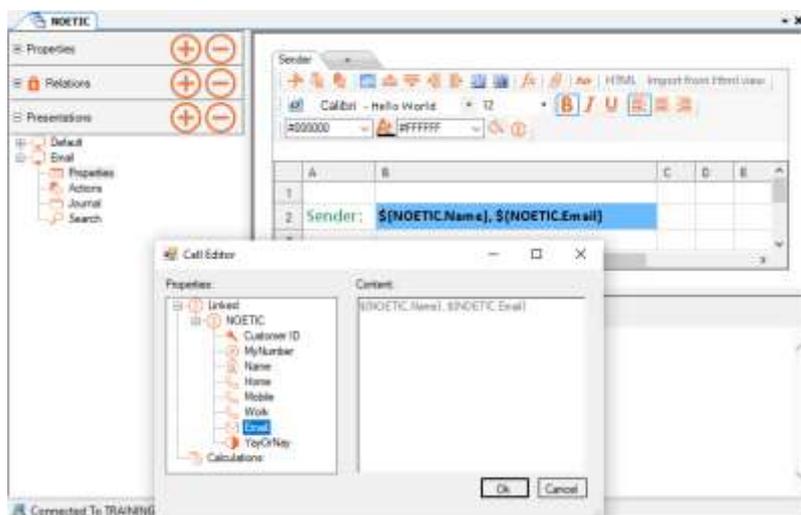
Entity Search

In the **Search** page, add the fields to be used for a customer search at run time, for example:

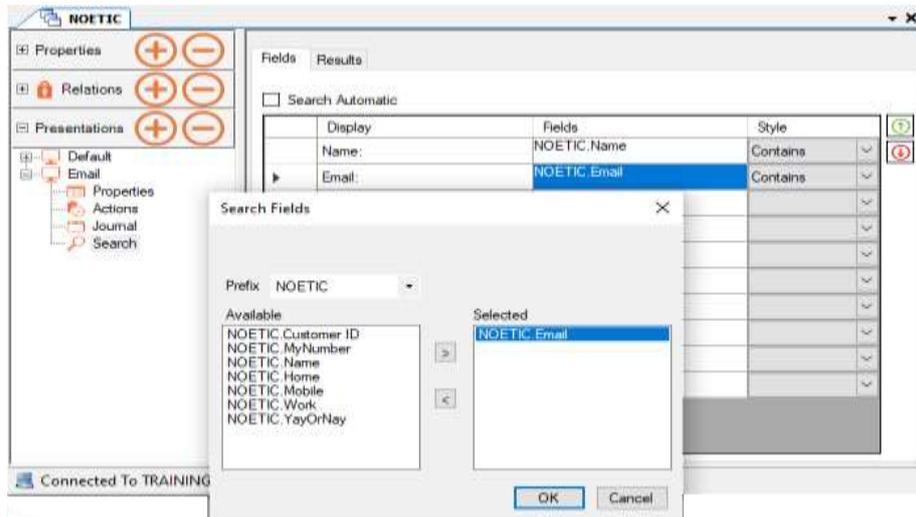- Add a display name and data fields for customer name and email address.
- **Save** and **Release** your entity table.

Entity Relations and Email History Events

Having created the parent customer entity, you can now create a link between the email child and parent customer entity and define the events that should be accessible to agents at run time.

Defining Entity Relations

Relations are defined from the child entity (e.g., NOEEML) to the parent entity (e.g., NOETIC), and will then be available in both entities:

- In the email child entity, right click on the locked 🔒 Relations icon and select **Check out**.
- Press the ⊕ button at the top right of the **Relations** dialog, and select the **Parent Entity** (e.g., NOETIC), to create the association between child and parent entity.
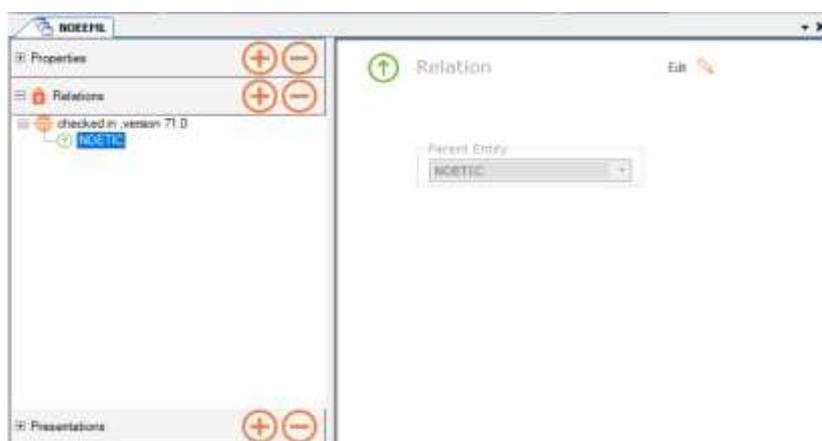
Save and **Release** the entity table, and then return to the parent customer entity to configure the parent entity Journal.

Configuring Parent Entity Journal

Configuring the **Journal** page of a parent entity will allow you to display selected email history events in both the parent customer and email child entities.

The Journal is configured in the Presentations dialog of the entity.

- Go to the **Journal** page of the parent customer entity (e, g., NOETIC).
- Click the **+** and create a new **Email History** tab.
- Add any columns, as required, to subsequently display history events from the email child entity (e.g., Direction, Time Stamps, Subject, Email text).

To add the email child entity and associated data fields to the Email History

- Click into the **Type** column, select **Entity** in the **Choose Journal Type** dialog**,** and pick up the **prefix** of the **email child entity** (e, g., NOEEML).
- Next, fill the relevant column rows with the matching data from the email child entity. To do this, left double click into each column row in turn, and select the relevant data field from the **Linked Properties** section in in the Cell Editor.
- **Save** and **Release** the entity table.

Before exiting the entity designer, ensure that Relations is checked in, displaying a logged 🔒 Relations icon.

The next step is to create a workspace for the inbound email campaign, and to design your scripted app, enabling agents to deal with incoming emails in the Synthesys™ Agent Portal.

Assigning Child Entity to Workspace

The workspace associated with an inbound email campaign needs to be linked to the relevant email child entity.

- In the Interaction Studio, go to **File/ New/ Scripted App.**
- Create a new workspace and allocate the child entity prefix (e.g., NOEEML).
- Click Next> and create a new scripted app for the inbound email campaign.

Scripted App for Email Handling

The scripted app used to process incoming emails will need to include a Customer ID parameter, an Entity Input and Entity History Update action, and a Ntty control, to allow for information to be passed between the email child and parent customer entities.

- Add a CustomerID parameter in the Scripted App Properties (traffic light) section, before adding and configuring the entity input action.

Entity Input Action

The **Entity Input Action** allows access to all or selected CRM Entity details, for use within a scripted app in calculations, the dashboard and/ or to enable branching.

- Drop an Entity Input Action into your scripted app and give it a logical name.
- In the Settings page, select When passed through and tick the Re-Evaluate box.

- In the **Entity Info** page, link the *Entity Prefix* to the **email child** (NOEEML) entity.
- Using the calculation ƒx icon, fill the **Customer_ID** field with the CustomerID parameter.

Next, you need to add and configure the entity history update action.

Entity History Update Action

The **Entity History Update Action** allows for information to be passed from the email child entity, back to the parent customer entity and history table.

- Drop an [Entity History Update Action] into your scripted app, after the *Entity Input Action*.
- In the **Settings** page, select When passed through and tick the Re-Evaluate box.
- In the **Entity Info** page, link the *Entity Prefix* to the **parent customer entity** (e.g., NOETIC).
- Using the calculation f_x icon, fill the **Entity ID** field with the From_Link_NOETIC, from the Input Action Results folder.
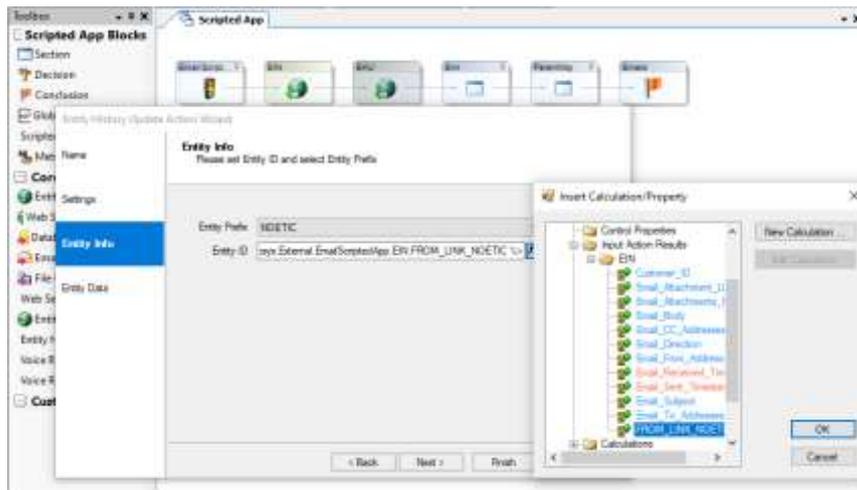
- Next, go to the **Entity Data** page of the Entity History Update Action.
- In the **EventID** field, select the email **child entity prefix** (e.g., NOEEML).
- Use the calculations f_x icon to link the Event Text field to the **CustomerID** parameter.
- To fill the **Event Data** field, use the calculations f_x icon and create the following calculation:
  Function EventDataNOEML() As String

     EventDataNOEML = "<Entity Prefix=""NOEEML"" Id="" & EmailScriptedApp.CustomerID & "" />"

  End Function
- Click Ok, to add the calculation to the EventData field.
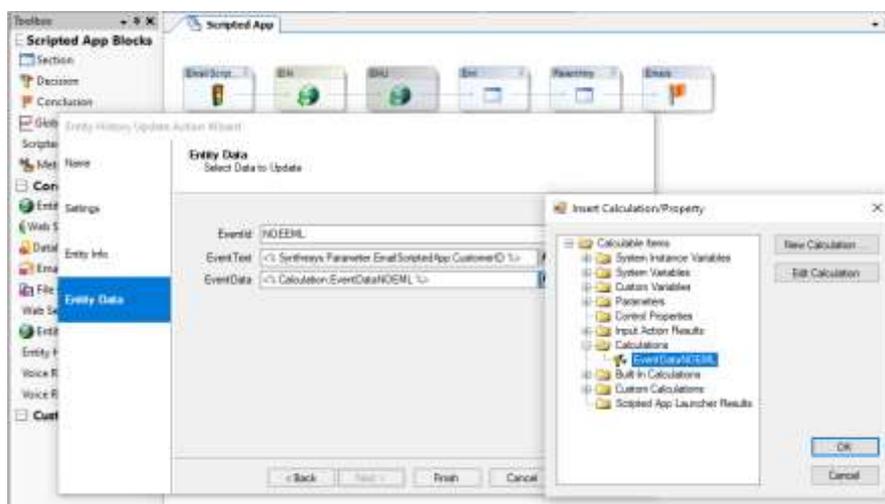
- Click F**inish** to display the Entity History Update Action in the scripted app design area.

Email Details Section

Adding a new email details section to the scripted app will enable you to pick up any relevant information associated with an incoming email and display the details to agents at run time.

The section should be placed after the entity input and history update actions, as it typically will be the first section visible to agents as they handle emails in the Synthesys^{TM} Agent Portal.

The email details section could, for example, contain the subject and body of the email, a link to available attachments, and details regarding the sender of the email.

- Drop a new email section after the entity history update action.
- Use Prompt controls, to pick up the relevant email data fields from the Input Action Results folder, via the calculations f_x icon in the Value page of the prompt control.
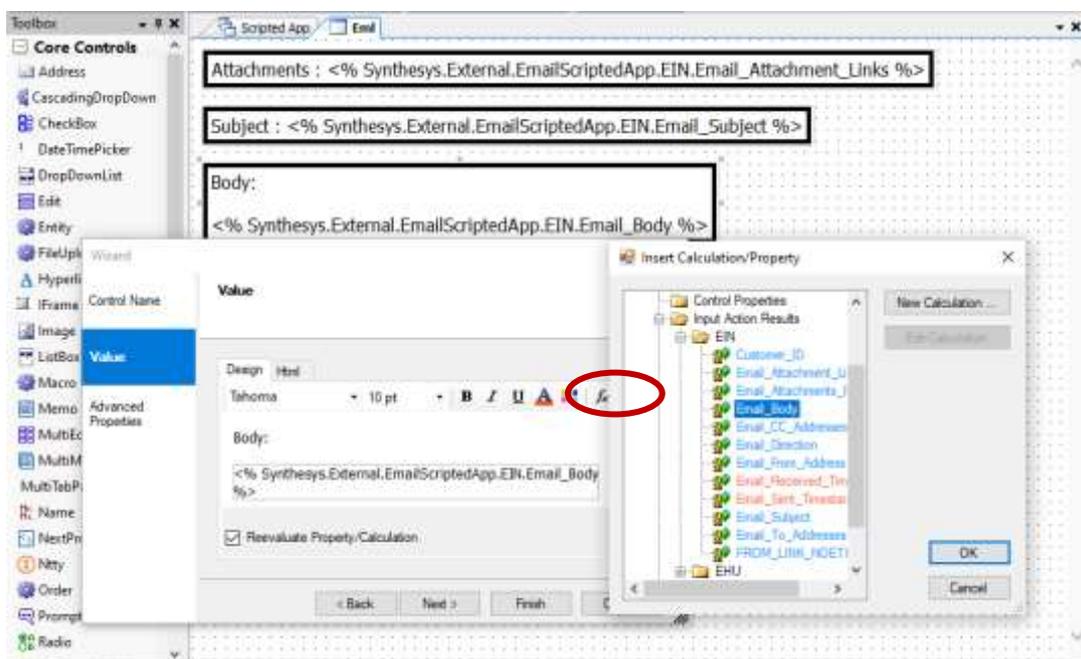
Depending on your requirements, the scripted app can be extended further.

You could, for example add a section with a Memo control, to allow agents to enter a reply. If a reply is being sent via an Email Output Action, you can use the Entity Update Action to create a record in the relevant CRM entity with details of the reply sent. This could then also be linked to the parent record using a History Update Action.

The next page of this document will describe how the Ntty control is set up to allow agents to access to customer records, including details of associated emails and communications.

Configuring Ntty control

To enable agents to view a customer's record, together with a history of associated emails and other communications to and from the customer, if these exist, configure the Ntty control as follows:

- In the *General Properties* dialog of the Ntty control, pick up the **parent entity prefix** (e.g., NOETIC) and **presentation,** and tick *Main Entity for This Scripted App.*
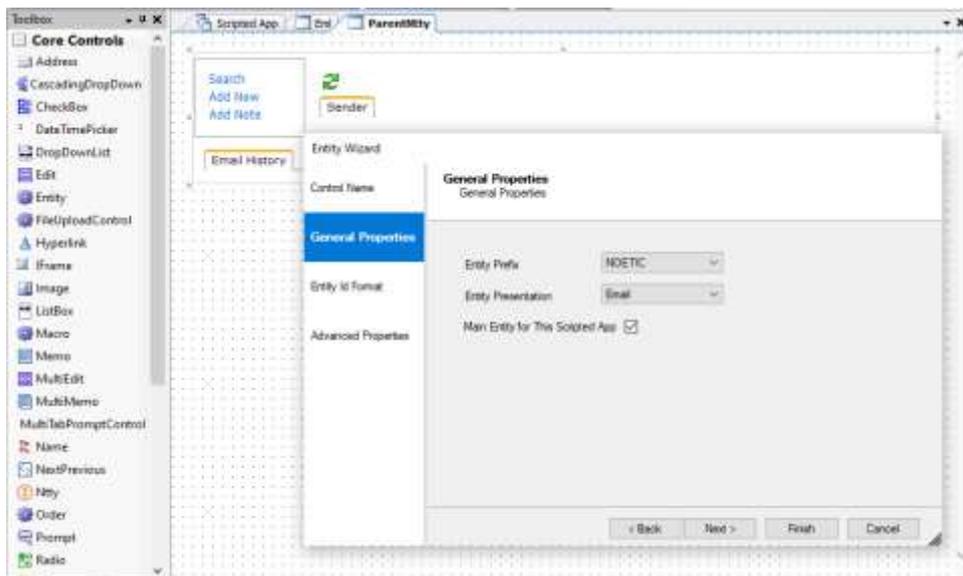
- In the *Advanced Properties* dialog of the Ntty control, go to the **General** section, and fill the **EntityID** field with the From_Link_NOETIC, from Input Action Results folder.
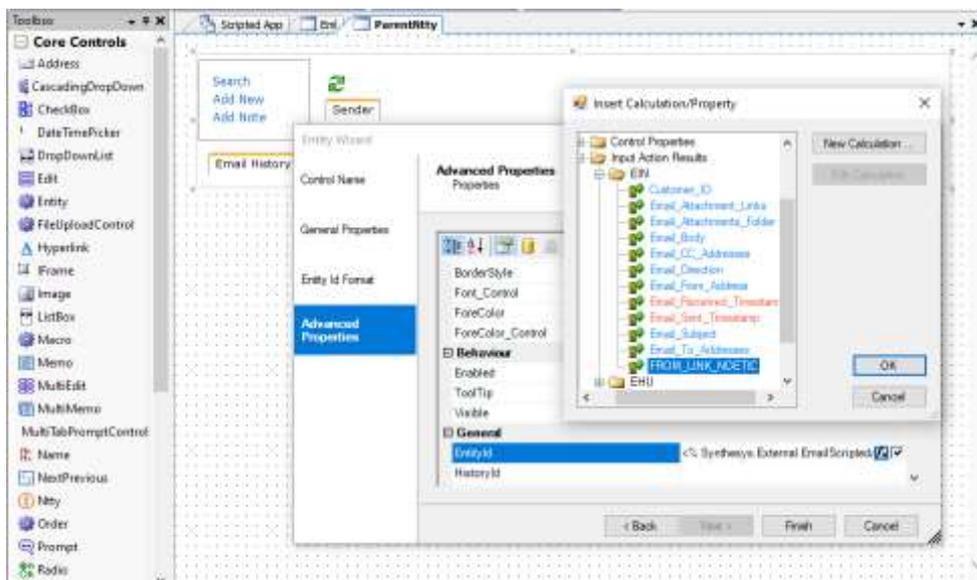
- Save and **Publish** the scripted app.

Next, go to the Campaign Manager, to set up your inbound email lists.

SYNTHESYS^{TM} CAMPAIGN MANAGER

Lists for incoming emails are created and managed in the Synthesys^{TM} Campaign Manager.

> Keep in mind, that the required inbound email settings must have been enabled on your system, and that you need to create the relevant email accounts. Please contact your Noetica representative, for more information and documentation.

Inbound Email Campaigns and Lists

- At workspace level, ensure that the relevant **email child entity** has been allocated.
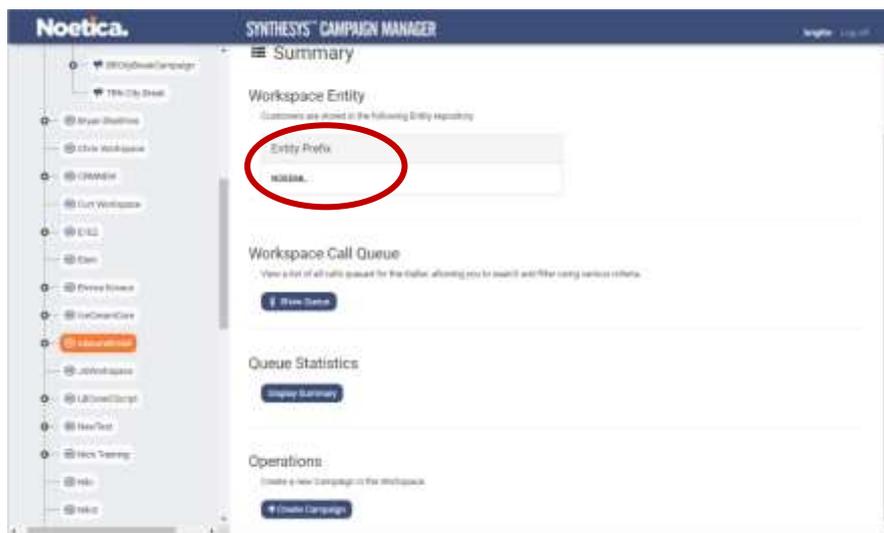
- Create a new Voice campaign and assign the Scripted App to be used with the email.
- Next, add a new Preview list to your inbound email campaign.
- Select the team(s) to be assigned to the Inbound email campaign at scripted app, and campaign or list level, as required.
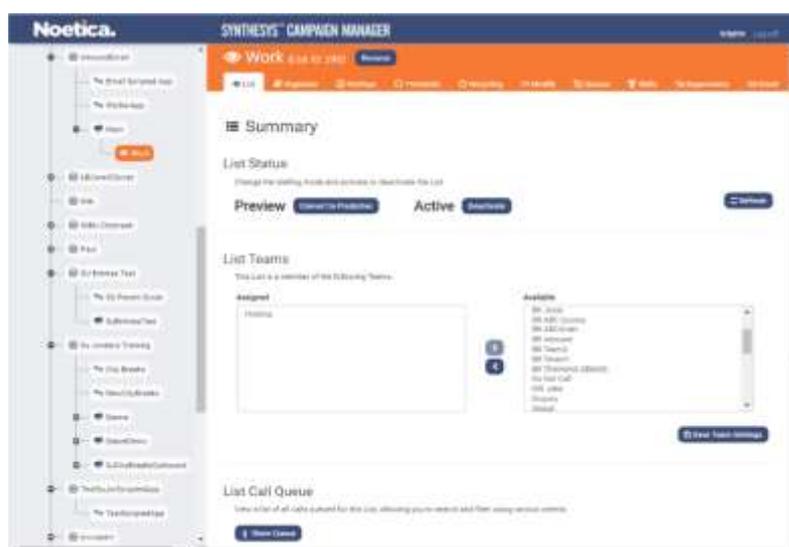
- To pop incoming emails to the agent screen automatically, set **Idle Timeout** in the **Settings** page of the inbound email list.

Inbound Email List Configuration

Details associated with the selected inbound email list are maintained via the **Email** tab in the **Inbound Email** dialog.

If the Email tab is not displayed, the inbound email settings will not have been enabled on your system, and you need to speak to your Noetica contact.

- Select your inbound email list and click the **Email** tab at the top right of the list dialog.
- Enter the **email address** for the inbound email list and select the associated **Mailbox**.
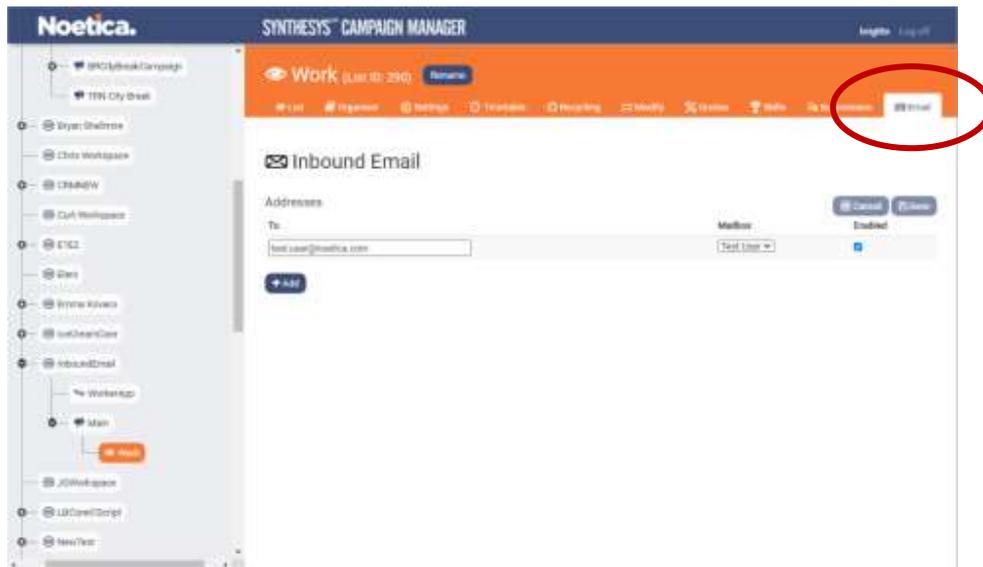
Viewing Inbound Email Lists

Clicking the **Show Queue** button will give you access to the list of email addresses, as and when they are assigned to the inbound email list.
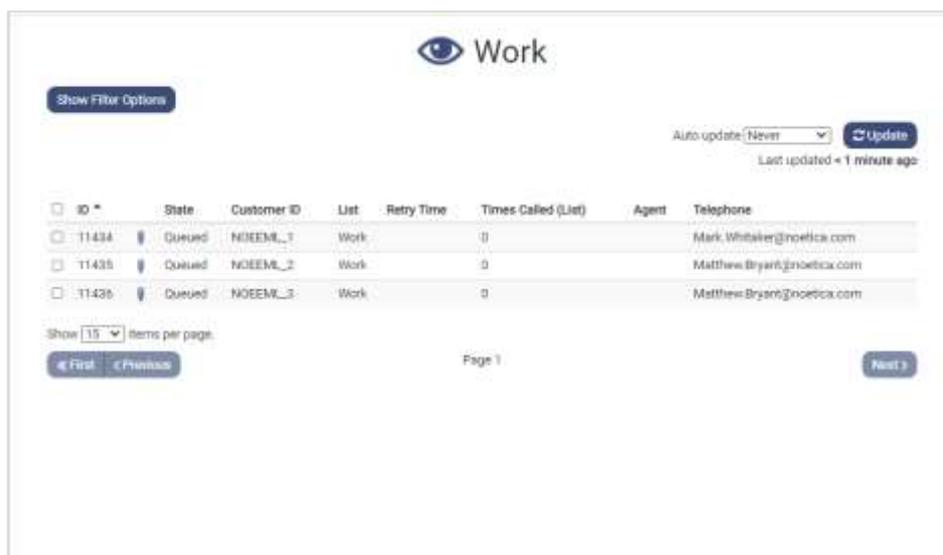
SYNTHESYS™ AGENT PORTAL

Processing Incoming Emails

When dealing with incoming emails in the Synthesys™ Agent Portal, the scripted app should provide agents with all the information necessary, to process the emails.

- The first screen will typically display the **Subject** and **Body** of the email, and a link to **Attachments**, if attachments are available.

- Moving through the scripted app, agents will be able to view current and previous emails associated with the sender in the **Email History** tab of the parent entity.
- The email received most recently, will be displayed at the top of the page.