



iceMail
User Manual
Server Version 15.x

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Welcome to iceMail

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers**. Contact centers interact with clients over the telephone, through email messages, and over the Internet.

ice is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center.

iceMail is the component of ice that controls email messages. iceMail manages the email traffic on the ice server and allows a user to receive email notifications through iceBar. The user responds to emails using the company's mail client.

The *iceMail User Manual* will help you to understand and manage iceMail.

In discussing how this application works, this manual assumes that you:

- Are familiar with the contents of the *iceAdministrator User Manual*;
- Are familiar with the contents of the *iceBar User Manual*;
- Understand basic telephony terms and concepts, such as queue and contact;
- Have basic navigating skills for standard Windows®-based graphical user interfaces. This includes the ability to right-click & left-click, select options from a right-click menu, resize & minimize windows and navigate & scroll with a mouse pointer.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** are used to bring attention to functions and features that can impact the information viewed.
- Words displayed in **bold** font are defined within the paragraph.
- *Italics* are used to indicate buttons found on the software interface.
- The term "right-click" is used to indicate that the secondary mouse button, which, by default, is the button on the right, should be clicked. This configuration can be changed so that the left mouse button is the secondary button (for personal preference, for example, if the user is left-handed).



iceMail: Getting Started

iceMail is the integrated component of the ice solution that manages email contacts. ice allows for unified queuing so that all contacts can be handled in a similar fashion. For example, a caller or an email can wait in a queue for the first available user. A user that enters the Ready state receives the next contact in the queue.

The following sections describe the major components of iceMail and explain how to understand the iceMail server.

Components of iceMail

iceMail has several components, as described below:

- **iceMail Server** receives inbound email messages, directs them to the workflow, directs them to available users, and manages any responses from the user or the sender. For more information, refer to *Understanding iceMail Server* starting on page 8.
- **iceBar** allows users to control when they receive email messages and when they have finished handling an email message. For more information, refer to the *iceBar User Manual*.
- **iceMonitor** allows administrators and users with the appropriate security settings to monitor email contacts waiting in the queue. For more information, refer to the *iceMonitor User Manual*.
- **iceReporting** allows administrators and users with the appropriate security settings to view reports on email contacts. For more information, refer to the *iceReporting User Manual*.
- **iceJournal** allows administrators and users with the appropriate security settings to search for specific email messages which have been presented to ice, view media transcripts for email contacts, and evaluate email interactions. For more information, refer to the *iceManager User Manual*.

Understanding iceMail Server

iceMail Server: Sometimes this component is referred to as the Email Management Server (EMS).

The following sections describe how inbound and outbound email messages are handled by iceMail Server.

Message from a customer to iceMail

iceMail Server does not receive email messages directly from your clients or customers but instead polls a POP3 or IMAP compatible email account on your company's mail server. By default, iceMail polls the account (i.e checks for new messages) every 20 seconds. A trained technician can modify this setting. iceMail supports secured IMAP and SMTP connections.

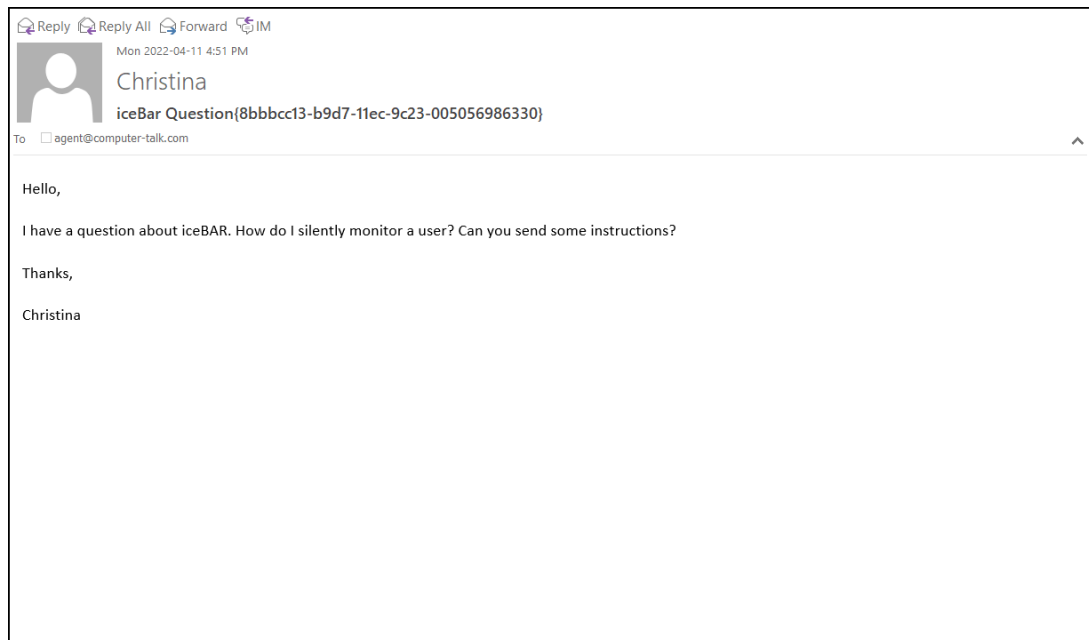
Your company provides the POP3 iceMail Service and emails are then routed to the workflow. Workflow configuration determines exactly what happens next to the email message. For more information on workflow, refer to page 17.

Note: Your company can create new POP3 or IMAP email accounts for ice, but the account information will need to be added to the ice server by a trained technician before ice can start handling the email messages. Changes to workflow may also be required when receiving email messages from new accounts.

Message from iceMail to a user

When a user becomes available while queued email messages are waiting to be handled:

- The user is placed in the Email state and receives notification of the email message through iceBar.
- iceMail sends the queued email message to the user's email address using your company's SMTP message.
- In both cases, if applicable, apply the appropriate Resolution code the interaction once the interaction is complete.



The message a user has received from ice shows the sender's address. The figure shows an email that was sent to agent@computer-talk.com.

Message from a user to iceMail

When a user replies to a message, they do not reply directly to the original sender. Instead, the message goes to a POP3 the iceMail server. This account is referred to as the **internal address** and is only used to receive reply messages from users. The figure below shows that the reply message is going to agent@computer-talk.com.

Pop Out X Discard

Send

To...

agent@computer-talk.com,

Cc...

Subject

RE: iceBar Question{8bbbcc13-b9d7-11ec-9c23-005056986330}

Hello,

You can find the answer to your question in the 'Silent Monitoring' handout attached here for your reference. Let me know if I can be of further assistance.

Best regards,

Agent

From: Christina <customer@abc.com>
Sent: April 11, 2022 4:40 PM
To: Agent <agent@computer-talk.com>
Subject: iceBar Question{8bbbcc13-b9d7-11ec-9c23-005056986330}

Hello,

I have a question about iceBAR. How do I silently monitor a user? Can you send some instructions?

Thanks,

Customer

Only one internal address is provided at the time of the ice implementation.

To respond, complete the following steps:

1. Type a message that is intended for the original sender.
2. Click send. The message is sent to the internal address.
iceMail retrieves the message, processes it, then sends the message to the original sender.
3. If applicable, select the appropriate Resolution code interaction.

Support for Additional Recipients

In ice 13, iceMail has added functionality to support multiple recipients. iceMail allows additional 'to' and 'cc' recipients added by the customer or the agent.

The following four new email properties have been made available in workflow to handle multiple recipients:

- `$Email:LastHandlingAgent`: Represents the last handling agent for a message thread.
- `$Email:OtherHandlingAgents`: Represents all other handling agents in the thread.
- `$Email:InternalCCAddresses`: Contains a comma-delimited list of addresses that were copied on the previous agent reply message on the thread.
- `$Email:ExternalCCAddresses`: Contains a comma-delimited list of addresses that were copied by the customer on the last inbound message to ice.

These variables are populated using the last agent or email address an email was routed to for a given interaction.

Consider the following example:

A customer sends an email to the contact center agent@computer-talk.com and CC's their colleague colleague@business.com.

The variables will be set as follows:

- \$Email:LastHandlingAgent=
- \$Email:OtherHandlingAgents=
- \$Email:InternalCCAddresses=
- \$Email:ExternalCCAddresses= colleague@business.com

This email is routed to Agent 1001 who transfers the contact to Agent 1002. Agent 1001 replies to the customer. The customer performs a Reply All and the email arrives back at the contact center.

The variables will be set as follows:

- \$Email:LastHandlingAgent=1002:a2@ct.com
- \$Email:OtherHandlingAgents=
- \$Email:InternalCCAddresses=
- \$Email:ExternalCCAddresses= colleague@business.com

Note: The variables are not impacted when an agent replies to an email. Although Agent 1001 replied to the customer, they are not the last handling agent.

This email is then routed to Agent 1003, and Agent 1003 CC's a subject matter expert sme@ext.com. The customer replies again but drops their colleague from the thread.

The variables will be set as follows:

- \$Email:LastHandlingAgent=1003:a3@ct.com
- \$Email:OtherHandlingAgents=1002:a2@ct.com
- \$Email:InternalCCAddresses=sme@ext.com
- \$Email:ExternalCCAddresses=

The last handling agent on any given interaction will be tracked, and previous agents that the email was routed to on a given interaction will not be included in the \$Email:OtherHandlingAgents.

Note: The iceManager settings *Keep Additional Emails (Internal)* and *Keep Additional Emails (External)* must both be enabled. If these settings are both disabled, email handling for additional CC recipients will follow the behaviour of earlier versions of ice.

If you are using a version of ice prior to ice 13, or if the iceManager settings *Keep Additional Emails (Internal)* and *Keep Additional Emails (External)* are disabled, users will experience the following:

For an agent adding an internal recipient in the CC field:

1. The customer sends an email to ITsupport@icemail.com.
2. The message the agent receives from ice will show the sender's address.
3. The agent replies to the email using the Reply-To address of ITsupport@icemail.com, and adds finance@icemail.com to the CC field.
 - a. The customer receives the agent's reply from ITsupport@icemail.com and will see finance@icemail.com in the CC field.
 - b. The finance@icemail.com user receives the agent's reply directly. In the From field, they will see the agent's email address and will see that the agent replied to ITsupport@icemail.com. Unless the customer's email address is somewhere in the body of the email, finance@icemail.com will not know the customer's email address.
4. The customer replies to the agent's reply. The email will go to ITsupport@icemail.com and a copy will go to finance@icemail.com directly.
 - a. The agent will see the customer email address in the From field. The reply-to field will be ITsupport@icemail.com, and will see the additional recipient address in CC.
 - b. The finance@icemail.com user receives the customer's reply directly. The From field is agent's email address, and will see that the customer replied to ITsupport@icemail.com.

For a customer adding an internal recipient (another recipient at @customer.com) in the CC field:

1. The customer sends an email to ITsupport@icemail.com and adds finance@cutomer.com to the CC field. This finance@cutomer.com address is not managed by iceMail.
2. The agent will see the customer's email address in the From field. The reply-to field will be ITsupport@icemail.com and the agent will see the additional recipient address in the CC field.
3. The agent replies and uses the reply-to field of ITsupport@icemail.com.
 - a. The email exchange server sends a copy of the email to iceMail in the To field and sends another copy directly to the CC recipient.
 - b. The CC recipient sees that the email was sent to iceMail with finance@customer.com in the CC. They can see that the email came directly from the agent and not iceMail.
 - c. iceMail receives the email and sends the agent's reply to the customer.
 - d. The customer receives the agent's reply from iceMail and will see the finance@icemail.com address in the CC.

For a customer adding an external recipient in the CC field:

1. The customer sends an email to ITSupport@icemail.com and adds abc@outlook.com to the CC field.
2. The agent sees the customer's email address in the From field. The reply-to field will be ITsupport@icemail.com and the agent will see the additional external recipient's address in the CC field.
3. The agent replies to ITsupport@icemail.com.
 - a. The email exchange server sends a copy of the email to iceMail in the to field and sends another copy directly to the External CC recipient.
 - b. The External CC recipient will see that it was sent to iceMail with their email in the CC field. They will see that it came directly from the agent's email address and not iceMail.
 - c. iceMail receives the email and sends the agent's reply to the customer.
 - d. The customer receives the agent's reply from iceMail and will see the abc@outlook.com address in the CC field.

Note: It is the same behaviour as an internal CC, but with this scenario, the external CC recipient will see the agent's email address.

The following examples explain the differences when handling additional recipients in ice 13 and show the same three scenarios 1) an agent adding an internal recipient, 2) a customer adding an internal recipient and 3) a customer adding an external recipient with the new support for additional recipients.

For an agent adding an internal recipient in the CC field:

1. The customer sends an email to ITsupport@icemail.com.
2. The agent replies using the Reply-To address ITsupport@icemail.com and adds finance@icemail.com in the CC field.
3. The customer receives the agent's reply from ITsupport@icemail.com and does not see finance@icemail.com in the CC field. The customer also does not see the agent's personal email address.
4. The finance@icemail.com user receives the agent's reply and sees that the agent replied to ITsupport@icemail.com. The From field is the agent's email address. Unless the customer's email address is somewhere in the body of the email, fiannce@icemail.com will not know the customer's email address.
5. The customer replies to the agent's reply which goes to ITsupport@icemail.com
 - a. iceMail populates the Internal CC Addresses with finance@icemail.com which is then available to workflow (the External CC Addresses will be blank). The Last Handling Agent will be populated with the agent ID and email address.
 - b. If Workflow does nothing, then when an agent answers, finance@icemail.com will also receive a copy in addition to a (potentially) new agent.
 - c. Workflow may use the Set Telephony Parameter wf.internalccaddresses to change the CC addresses.

For a customer adding an internal recipient in the CC field:

1. The customer sends an email to ITsupport@icemail.com and adds finance@customer.com to the CC field. finance@customer.com is not managed by iceMail.
2. The agent sees the customer's email address in the From field. The reply-to field will be ITsupport@icemail.com however, the agent does not see the address in the CC field.
3. The agent replies to ITsupport@icemail.com.
 - a. iceMail sends the agent's reply to the customer and adds finance@customer.com to the CC.
 - b. The customer sees finance@customer.com in the CC field.
 - c. The finance@customer.com user receives the same email as the customer. They will see it came from ITsupport@icemail.com, that the email was sent to the end user and that finance@customer.com is in the CC. It will not show the agent's email address.

For a customer adding an External recipient in the CC field:

1. The customer sends an email to ITSupport@icemail.com and adds abc@outlook.com to the CC field.
2. The agent sees the customer's email address in the From field and does not see the additional External recipient address in the CC field.
3. The agent replies to ITSupport@icemail.com.
 - a. iceMail sends the agent's reply to the customer and adds abc@outlook.com to the CC field.
 - b. The customer will see abc@outlook.com in the CC field.
 - c. The abc@outlook.com user receives the same email as the customer. They will see the email came from ITSupport@icemail.com, that it went to the end user, and that they are on the CC. It will not show the agent's email address.

iceMail Re-queuing Contacts

In ice 13, when an ice server restart occurs, previously queued emails will maintain queue time. Ice will attempt to recreate any iceMail contacts on restart that have not been released. These contacts will be re-queued to the queues in which the contact was queued to when the system was brought down and the original contact ID will be used.

If the contact was not handled or queued, it will be sent to workflow as a new contact, but will retain its contact ID.

Email contacts that have been handled by an agent will be treated as though they were released.

iceAdministrator

Workflow

The workflow can be customized to meet the needs of your contact center. Email messages can either be routed to a queue or routed to an individual user.

Consider the examples below:

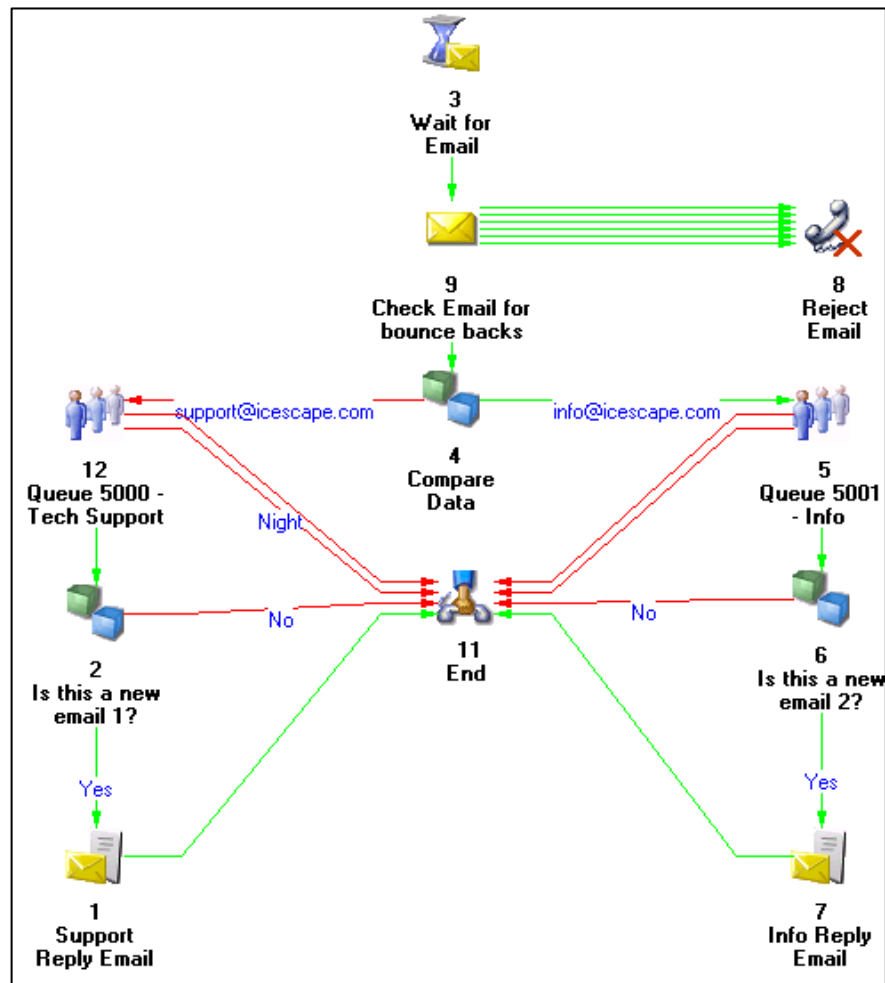
- Messages sent to support@abccompany.com are directed to the Support queue, where the message will be handled by the first available user.
- A reply to an email thread (i.e. a user responded to a message and the customer is sending a reply to the user's message) can be routed to the user that first handled the email message.

Several actions that are specific to email contacts can be used to build workflow, as described below:

- **Wait for Email** – wait for an inbound email message. When the email message is received, it is assigned to an object variable, system variables are initiated, and the email message is routed to the next action. This action is typically the starting point in the workflow for email messages.
- **Compose Reply** – automatically sends a response to the sender of an incoming email message. This feature might be used to send a confirmation email message to the sender (e.g. we have received your message and are processing your request).
- **Check Email** – checks an incoming email message for keywords in the heading or body of the message, a particular sender's email address, or the email address to which the message was sent. Multiple conditions can be added to a table within the action. Email messages can be routed to a distinct workflow path based on a match in the table.

Additional actions which are not specific to email messages can be used when creating a workflow for email messages (e.g. Queue Object, End Workflow Session, etc.). For more information on Workflow Actions, refer to the *iceWorkflow Designer User Manual*.

The figure below shows an example of a workflow that can be created for email messages:



For more information, refer to the *iceWorkflow Designer User Manual*.

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