



Cisco E-Mail Manager Overview Guide

Cisco E-Mail Manager Release 5.0(0)

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Introduction

Introduction

Welcome to the *Cisco E-Mail Manager Overview Guide*. This introduction contains the following sections:

Audience

Cisco E-Mail Manager Documentation

Getting Started with E-Mail Manager

Getting Help

Audience

This guide is intended for users who are new to Cisco E-Mail Manager and need a broad overview. This guide does not contain specific instructions for performing tasks in E-Mail Manager and does not cover all functionality.

Cisco E-Mail Manager Documentation

The following documentation is available for E-Mail Manager Release 5.0(0):

Document	Audience	Description	Where to Find
<i>Cisco E-Mail Manager Overview Guide</i>	All E-Mail Manager users.	An overview of E-Mail Manager functionality, capability, and architecture.	Cisco E-Mail Manager CD Help menu in the Administration Desktop Cisco Web site: www.cisco.com
<i>Cisco E-Mail Manager Administration Guide</i>	Administrators and managers working with the Administration Desktop.	Conceptual information about typical administrative and managerial tasks done through the Administration Desktop.	Cisco E-Mail Manager CD Help menu in the Administration Desktop Cisco Web site: www.cisco.com
<i>Cisco E-Mail Manager Agent Guide</i>	Managers who set up agents and determine how they will respond to e-mail messages, as well as those agents.	Conceptual information about typical agent tasks done through the Agent Desktop.	Cisco E-Mail Manager CD Help icon in the Agent Desktop Cisco Web site: www.cisco.com
<i>Cisco E-Mail Manager Installation and Configuration Guide</i>	Those who install and configure E-Mail Manager on the server.	Instructions and requirements for installing and configuring E-Mail Manager on the server.	Cisco E-Mail Manager CD Help menu in the Administration Desktop Cisco Web site: www.cisco.com

<i>Cisco E-Mail Manager Database Guide</i>	Those who maintain the database used by E-Mail Manager, and those who generate reports.	Descriptions of all database tables and columns	<p>Cisco E-Mail Manager CD</p> <p>Help menu in the Administration Desktop</p> <p>Cisco Web site: www.cisco.com</p>
<i>Cisco E-Mail Manager Implementation and Customization Guide</i>	Those who are implementing and customizing E-Mail Manager to fit particular business needs of the customer.	Guidelines on implementing E-Mail Manager to meet your business needs, instructions on customizing the look of the Web interface, and information about extending the capabilities of rules and templates.	<p>Cisco E-Mail Manager CD</p> <p>Help menu in the Administration Desktop</p> <p>Cisco Web site: www.cisco.com</p>
<i>Cisco E-Mail Manager Application Programming Interface Guide</i>	Programmers and developers creating external application to E-Mail Manager that work with agents and messages.	Reference information, instructions, and examples on building applications that communicates with the E-Mail Manager API Server.	<p>Cisco E-Mail Manager CD</p> <p>Help menu in the Administration Desktop</p> <p>Cisco Web site: www.cisco.com</p>
<i>Cisco E-Mail Manager External Data Access Guide</i>	Programmers and developers customizing E-Mail Manager to work with data from an external database.	Information on the External Data Access toolkit, which demonstrates how data from external databases can be used within E-Mail Manager.	<p>Cisco E-Mail Manager CD</p> <p>Help menu in the Administration Desktop</p> <p>Cisco Web site: www.cisco.com</p>
<i>Release Notes for Cisco E-Mail Manager</i>	Those who are administering and managing E-Mail Manager.	Information about the current release, known problems, and documentation updates.	<p>Cisco E-Mail Manager CD</p> <p>Cisco Web site: www.cisco.com</p>

In addition, for all screens in the Agent Desktop and the Administration Desktop, there is online help.

If you are integrating E-Mail Manager with ICM Software, you should also consult the Cisco ICM Software documentation set.

Getting Started with E-Mail Manager

This section contains the following information:

Browser Versions

Browser Settings

Desktop Colors

Logging In to the Agent Desktop

Logging In to the Administration Desktop

For more information about getting started with E-Mail Manager, or if you cannot successfully log in, see your system administrator.

Browser Versions

For complete and current information on what browser version you should use for the E-Mail Manager Web Interface, see the Cisco Intelligent Contact Management Software Release 5.0(0) Bill of Materials (BOM). The ICM BOM is available at: <http://www.cisco.com/univercd/cc/td/doc/product/icm/index.htm>.

Browser Settings

Before using E-Mail Manager, ensure that your browser is set up to:

Always accept cookies.

Compare the document in cache to the document on the network once per session.

Enable JavaScript

Enable Style Sheets

Caution: Internet Explorer must use the Microsoft Virtual Machine for Java Applets. Ensure that the Sun Virtual Machine is not selected in the Advanced Tab of the Internet Options dialog box. (This option may or may not be available, depending on whether the Sun's Virtual Machine was installed and the options selected.)

For specific instructions, see the documentation for your browser.

Desktop Colors

Your desktop computer must be set to display at least 256 colors in order for you to use E-Mail Manager successfully.

Logging In to the Agent Desktop

To log into the Agent Desktop, you can point your browser to server in one of the following ways:

- a. `http://<hostName>/<instanceName>`
- b. `http://<hostName>/<instanceName>/default/cem/index.html`
- c. `http://<hostname>/<instanceName>/uicommander?req=cem.userMaintenance.cemLoginStart`

Note: The instance name part of the URL is case-sensitive and must be entered exactly as the instance was named on the E-Mail Manager server.

You may want to include your user ID in the bookmarked URL, to automatically populate the Login Name field when the Log In page opens. To do this, you must use the URL in option b above, and include the user ID as follows:

`http://<hostName>/<instanceName>/default/cem/index.html?user=userID`

Caution: Do not attempt to run multiple browser sessions on the same desktop with different user IDs or connected to different servers. Unexpected errors may result.

Logging In to the Administration Desktop

To log into the Administration Desktop, point your browser to the name of the server, followed by the port number, as follows:

`http://server-name:port-number`

The default port number for the Administration Desktop is 8088. If your installation has multiple instances, other instances will have different port numbers.

In the Log In screen, enter your Login Name and Password.

If there is another active session with your Login Name, you are prompted to close that session and log in again.

Caution: Do not attempt to run multiple browser sessions on the same desktop with different user IDs or connected to different servers. Unexpected errors may result.

Getting Help

For issues with Cisco E-Mail Manager, your system manager can open a case through the Technical Assistance Center on the Cisco Web site: www.cisco.com. You will need your Contract ID to open a case.

If you have questions, please call us at 800-553-2447, option #3, or send email to tac@cisco.com. From outside of the United States, call 1-408-526-7209.

Cisco E-Mail Manager Overview

Overview

This topic contains the following sections:

- What is Cisco E-Mail Manager?

- Basic Functionality of Cisco E-Mail Manager

What is Cisco E-Mail Manager?

Cisco E-Mail Manager is a comprehensive, enterprise-class solution for managing high volumes of customer inquiries submitted to your company mailboxes or Web site.

Based on customizable business rules, Cisco E-Mail Manager accelerates the response process by automatically directing messages to the right agent or skill group, categorizing and prioritizing messages, suggesting relevant response templates, and, if desired, sending automated replies.

A full-featured, browser-based interface provides your agents with the productivity tools and knowledge resources they need to provide fast, accurate, and personalized responses to your customers.

In addition, through integration with existing CRM applications and other contact-center technologies, Cisco E-Mail Manager can help you further enhance and personalize your communications with customers.

Basic Functionality of Cisco E-Mail Manager

Basic functionality of Cisco E-Mail Manager consists of:

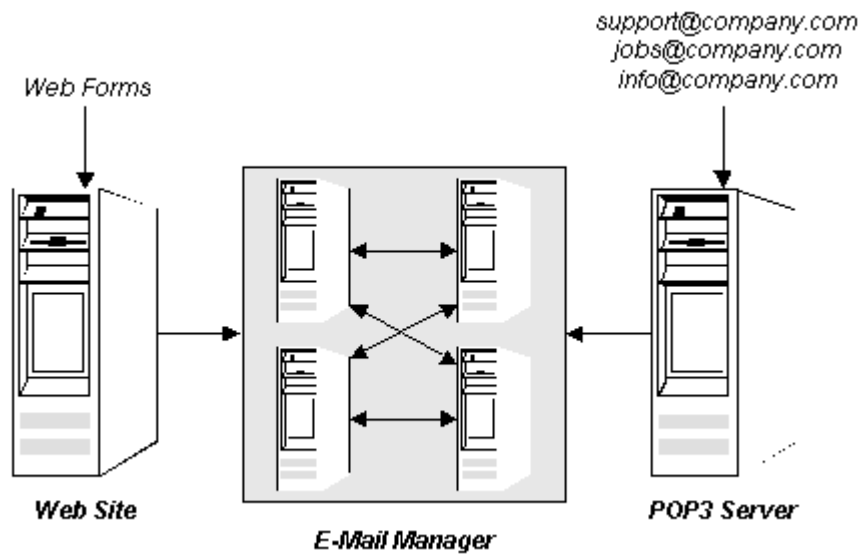
- Taking in Messages from Multiple Sources

- Processing and Routing Messages

- Replying to Messages

Taking in Messages from Multiple Sources

You can configure E-Mail Manager to process messages from multiple sources, including e-mail addresses and Web forms, as shown below:

**Notes:**

This figure implies that the E-Mail Manager system is comprised of a specific number of computers. The actual number of computers used is flexible and depends on your load and configuration needs. For more information on possible configurations, see the *Cisco E-Mail Manager Installation and Configuration Guide*.

You can have Web Forms sent directly into E-Mail Manager, or to a POP3 Server first, then to E-Mail Manager.

By having all asynchronous contacts processed by one system, you can ensure consistent and efficient processing of customer inquiries.

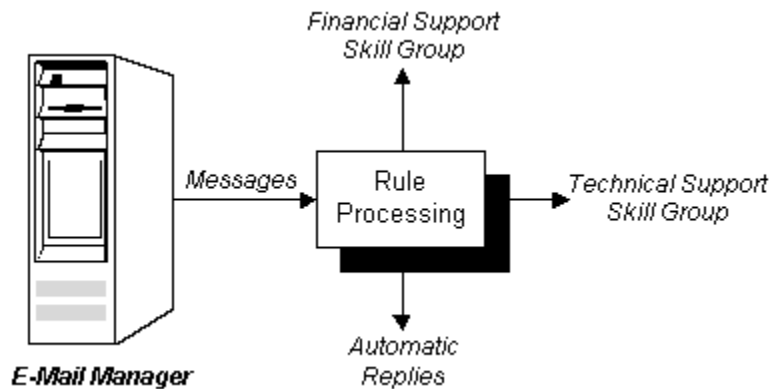
Processing and Routing Messages

After E-Mail Manager takes in e-mail messages and Web site forms, the rules that you define process the messages. Rules can test the content of messages and the time they arrived, and based on the results of those tests, do any combination of the following actions, as well as other actions described in the *Cisco E-Mail Manager Administration Guide*:

- Send pre-defined automatic responses

- Categorize the messages for reporting purposes

- Route messages to the agent or skill group best able to respond, with suggested responses.



Replying to Messages

The rules route messages to the appropriate agents and skill groups, and can suggest appropriate responses. Agents then work with messages assigned to them, as well as those assigned to skill groups in which they are members.

Managers can configure agents so that they must select messages to respond to in particular ways:

- Through pick mode, in which agents are free to select and respond to messages in any order.

- Through pull mode, in which agents select to open most important messages first (in terms of priority setting and age).

- Through push mode, in which the next most important message opens automatically in the agent's browser.

After an agent has a message opened, the agent can:

- Compose and send a reply.

- Use a pre-defined reply called a template, which may have been suggested by the rules.

- Reassign or escalate to another agent or skill group with more expertise in the message's subject.

There are many more options and intricacies in the way managers can set up agents and how agents can handle messages. For more information, see the *Cisco E-Mail Manager Agent Guide* and the *Cisco E-Mail Manager Administration Guide*.

Cisco E-Mail Manager Architecture

Cisco E-Mail Manager Architecture

This topic contains the following sections:

- Cisco E-Mail Manager Components

- Integration with ICM Software

Cisco E-Mail Manager Components

Cisco E-Mail Manager is comprised of three top-level components:

- CEM Server

- UI Server

- WebView Report Server

This section also contains a Component View.

For more information on E-Mail Manager components and the different ways they can fit together, see the *Cisco E-Mail Manager Installation and Configuration Guide*.

CEM Server

The CEM Server consists of the following sub-components:

- RSERVER, which processes incoming messages and serves the Administration Desktop.

- TSERVER, which controls database transactions.

- InBasket, which pulls messages from POP3 Mailboxes.

- LAMBDA, (Load Adaptive Message-Base Data Archiving), which moves older messages to the LAMBDA database.

- CIR (Cisco Independent Reporting), which replicates appropriate data to the CIR database for reporting purposes.

- SpellCheck, which provides spell-check capabilities for responses and templates in the Agent Desktop.

UI Server

The UI Server serves the Agent Desktop. The UI Server also receives commands and sends responses to external applications using the E-Mail Manager API.

For more information on the API, see the *Cisco E-Mail Manager Application Programming Interface Guide*.

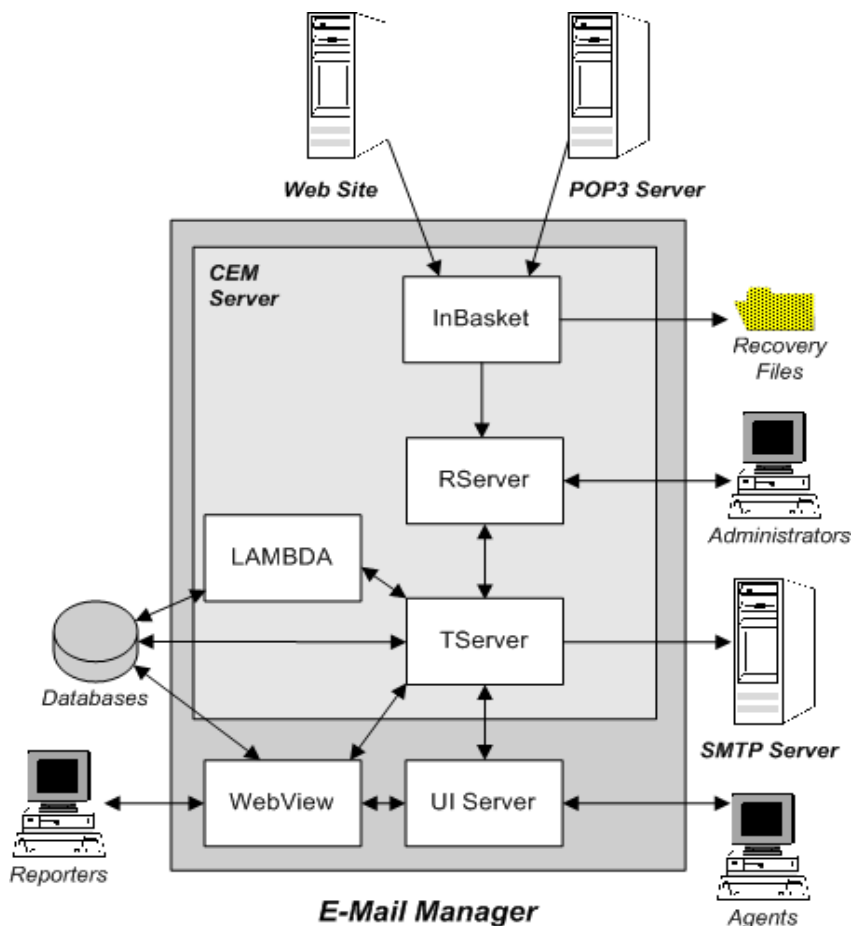
WebView Report Server

The WebView Report Server is used to generate historical reports from the CIR database using WebView. You access WebView through the Agent Desktop.

For more information, see the WebView Online help.

Component View

The following figure shows how the E-Mail Manager components fit together:



Integration with ICM Software

Cisco E-Mail Manager must be integrated with ICM software. In such an integration environment, ICM software can route e-mail messages, as well as telephone calls (and, if used, Web Collaboration sessions), to agents that are common across the different applications. Through this integration, your contact center can achieve more efficient routing and enhance agent productivity. Furthermore, because agents are common across the different applications, you can monitor and report on agent activity across multiple channels.

For a high-level overview of integrating E-Mail Manager with ICM software, see the *Multichannel Software Implementation Map* and the *Multichannel Software Overview*.

Examples of Cisco E-Mail Manager Use

Examples of Cisco E-Mail Manager Use

This topic contains the following sections:

- Overview

- What is an Instance?

- An Enterprise with One Instance

- An Enterprise with Multiple Instances in a Matrix

- Application Service Provider with Multiple Stand-alone Instances

Overview

Cisco E-Mail Manager has a flexible architecture that allows both small and large enterprises to configure and use the application to best suit their e-mail message processing needs.

The E-Mail Manager architecture is also ideal for service providers who set up and manage the application for multiple customers.

The primary way the E-Mail Manager architecture achieves this flexibility is through the use of *instances*. The rest of this topic shows how different customers can use instances differently to suit their needs.

For more information on instances, see the *Cisco E-Mail Manager Installation and Configuration Guide*.

What is an Instance?

An instance is a partition of E-Mail Manager that uses its own databases, has its own configuration, and processes e-mail messages separately. Data in one instance is not accessible to other instances. One E-Mail Manager installation can support multiple instances.

In a small enterprise environment, one instance may be used. That instance may monitor multiple e-mail addresses and use rules to route messages to the appropriate department and employees.

A larger enterprise environment may configure multiple instances, each to serve a particular business function. For example, each of the following might be separate instances:

- Customer Support Instance - to process messages from customers with questions, with agents who work in the Customer Support department.

- Jobs Instance - to process inquiries about employment, monitored by Human Resources employees.

Public Relations Instance - to process inquiries about the company and financial information, monitored by Marketing employees.

In an Application Service Provider (ASP) environment, an instance typically serves one ASP customer. The ASP can run multiple instances for each of their customers. Because data in an instance is not accessible to users on another instance, security is maintained.

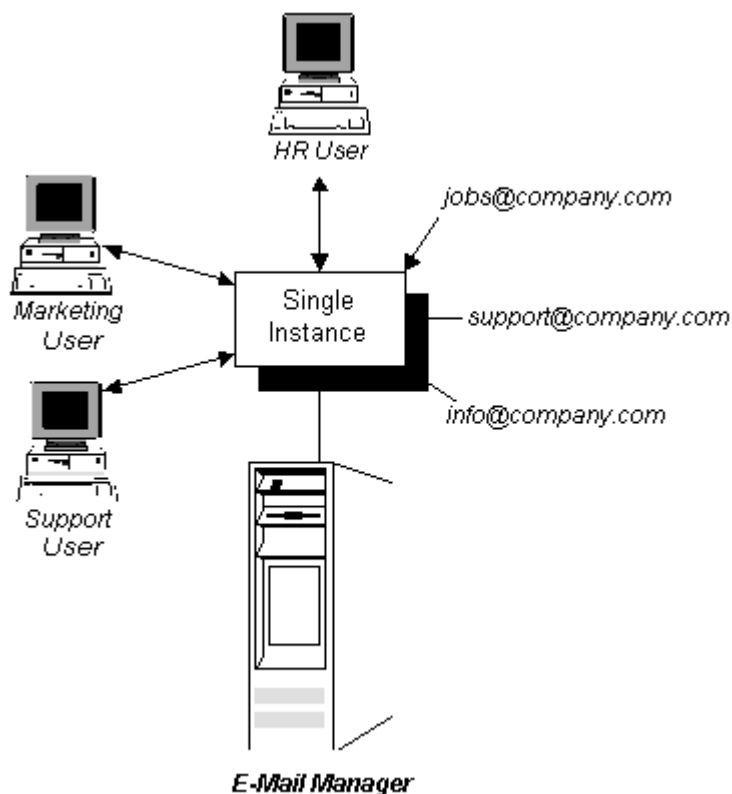
The rest of this topic briefly describes how E-Mail Manager can serve different environments.

Note: The configurations shown below are examples only and do not imply specific requirements; your environment and business needs may require a different configuration.

An Enterprise with One Instance

A small enterprise may choose to have one instance that serves all users in all departments, and that monitors all general e-mail addresses. The rules would route messages in the instance to the appropriate department or user.

Such an example is shown below:

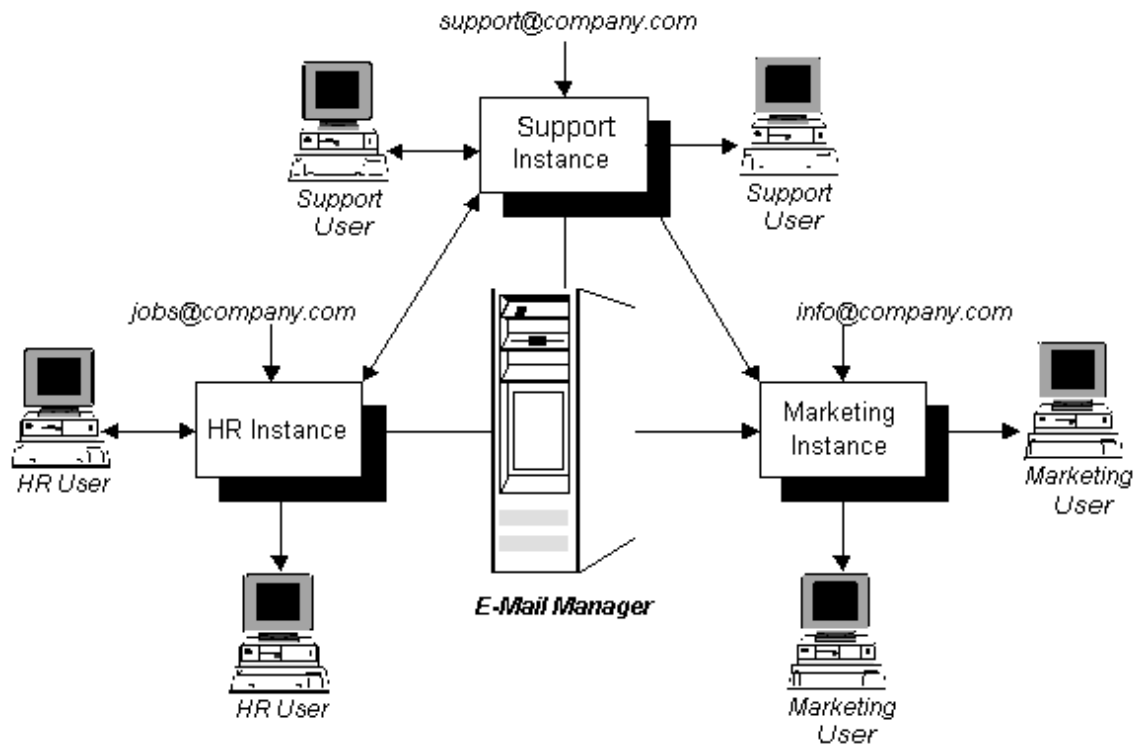


An Enterprise with Multiple Instances in a Matrix

A larger enterprise environment may set up multiple instances in a matrix.

A matrix is a set of instances that can exchange messages through rules. For more information on matrices, see the *Cisco E-Mail Manager Installation and Configuration Guide*.

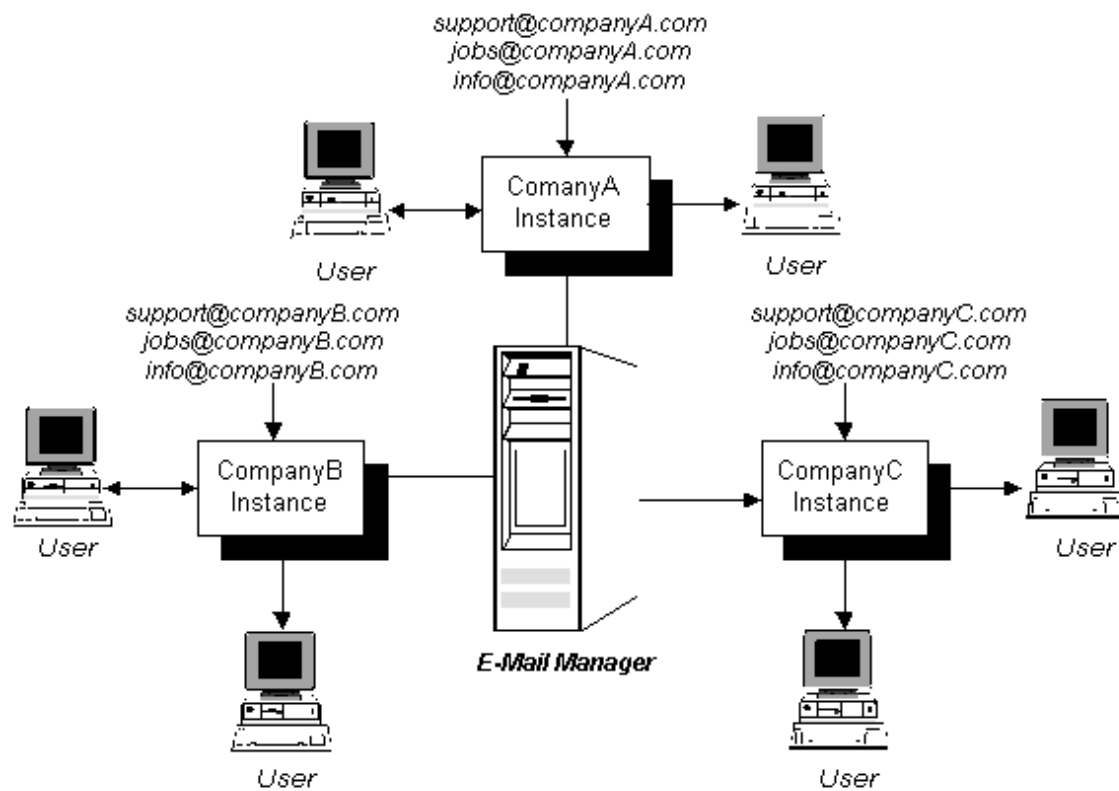
In the example below, each instance processes messages sent to a particular e-mail address. However, because the instances are configured in a matrix, the rules at one instance can transfer messages to other instances. This can be useful in a large enterprise, where customer messages are not always sent to the best e-mail address:



Application Service Provider with Multiple Stand-alone Instances

An application service provider (ASP) may set up multiple instances. Typically, an ASP would not configure multiple instances in a matrix, as each instance serves one customer, and that customer's data remains separate and private from all others.

Such an example is shown below:



Customizing and Extending Cisco E-Mail Manager

Customizing and Extending Cisco E-Mail Manager

You can customize and extend Cisco E-Mail Manager functionality in a wide variety of ways in order to support your business needs. This topic provides an overview of the following ways that you can use these built in capabilities, and provides references for further information:

Application Programming Interface

JavaScript User Interface Customization

User Interface Rebranding

Dynamic Templates

External Data Access

Application Programming Interface

Cisco E-Mail Manager is delivered with a public API that allows third-party applications to access typical agent functionality. Among other things, you can create applications that receive messages from and respond to message through E-Mail Manager.

For more information, see the *Cisco E-Mail Manager Application Programming Interface Guide*.

JavaScript User Interface Customization

Cisco E-Mail Manager is delivered with the infrastructure in place to enable you to easily use JavaScript to customize the Agent Desktop. A typical use of this feature is to create custom menus and commands that enable agents to access other systems directly from E-Mail Manager.

For more information, see the *Cisco E-Mail Manager Implementation and Customization Guide*.

User Interface Rebranding

Cisco E-Mail Manager is delivered with the infrastructure in place to enable you to rebrand the interface to display your own company's information. This feature is particularly useful for Application Service Providers who provide E-Mail Manager service for multiple customers.

For more information, see the *Cisco E-Mail Manager Implementation and Customization Guide*.

Dynamic Templates

A dynamic template is a template that contains variables that allow e-mail responses based on the template to pull data from a message, an external database, or both. Thus, responses based on the dynamic template are automatically customized for specific messages and customers.

For information on customizing E-Mail Manager to use dynamic templates, see the *Cisco E-Mail Manager Implementation and Customization Guide*.

For information on creating and using dynamic templates, see the *Cisco E-Mail Manager Agent Guide*.

External Data Access

External data access refers to the bringing of data in a non-E-Mail Manager database into E-Mail Manager, either for display in the user interface or into rules for additional processing.

You can customize Cisco E-Mail Manager so that it uses such data in a variety of ways.

For more information, see the *Cisco E-Mail Manager External Data Access Guide*.

Glossary & Index

Glossary

A

access privileges: Access privileges define which functions users based on the role are able to perform. You set access privileges when defining a role.

Administration Desktop: The Web application for completing typical administration tasks such as defining rules and maintaining agents and skill groups.

agent: An individual - a customer-contact agent, manager, or administrator - who has a distinct ID with which to log in to E-Mail Manager. Each agent has an associated queue for assigned messages. Agents are specific to the E-Mail Manager instance and cannot be shared across instances.

Agent Desktop: The Web application for completing typical agent and manager tasks such as retrieving and responding to messages, working with templates, and viewing real-time reports.

alias: An e-mail address used for responses that make responses appear as if they came from a different e-mail address.

application programming interface (API): The programming interface that allows third-party applications to access E-Mail Manager functions.

archive: A holding place for messages after agents have completed working with them. Messages in the archive may still reside in the Primary Transaction Database until they have been moved to the LAMBDA database.

assign: The placement of a message in an agent or skill group queue.

attachment: A file that can be stored in E-Mail Manager for use in responses, or a file sent with an incoming message.

autoresponse: A response, using a template that is sent automatically by a rule.

autosuggestion: A template that a rule determines may be an appropriate response to a message. Such templates are not sent automatically; agents view the suggestions and must manually choose to use them.

C

category: A word or phrase that can be associated with a message by an agent (at the Response screen) or by a rule.

CEMWatcher: A tool for monitoring E-Mail Manager from other Windows computers.

Cisco Independent Reporting (CIR) database: The database that stores replicated data for reporting purposes.

Configuration Utility: The application on the E-Mail Manager server used to configure instances.

D

default notification e-mail address: An Internet e-mail address used to alert a user to a message in E-Mail Manager, if specified by rules, and for MailTrack, which is used in distribution rules.

distribution rule: A rule that processes a message at the time the message is assigned to a user's or skill group's queue. A distribution rule executes when a message is assigned to a queue by rules, or by manual reassignment from a different queue. A distribution rule does not execute when an agent claims a message from a group queue.

dynamic template: A template that contains variables that allow e-mail responses based on the template to pull data from a message, an external database, or both. Thus, responses based on the dynamic template are automatically customized for specific messages and customers.

E

escalate: The reassignment of a message while raising its priority one level.

external data access (EDA): The bringing of data in a non-E-Mail Manager database into E-Mail Manager, either for display in the user interface or into rules for additional processing.

I

InBasket: The component of E-Mail Manager that retrieves messages from one or more POP3 Mailboxes and Web forms and sends them to system rules for processing.

instance: An instance is a partition of E-Mail Manager that uses its own databases, has its own configuration, and processes e-mail messages separately. Data in one instance is not accessible to other instances. One E-Mail Manager installation can support multiple instances.

integration: For E-Mail Manager, the use of ICM software for routing messages to agents and for reporting across multiple channels.

J

JavaScript customization: The feature that allows you to use JavaScript to customize the Agent Desktop.

K

keyword: A word or phrase that can be associated with one or more templates.

L

LAMBDA: The acronym for Load Adaptive Message-Base Data Archiving. The E-Mail Manager component that moves older messages to a secondary database for storage.

library: A storage area for templates. Each template is saved in one (and only one) library, based on its content and intended use.

M

mailing list: A group of multiple e-mail addresses (list members) under one list name.

MailTrack: The forwarding of a message, as well as the tracking number, suggested response templates, comments, and other system information associated with the message.

matrix: A set of instances that can exchange messages through rules.

message access privileges: Role settings that determine which messages agents based on the role can work with, and what actions they can perform on messages.

O

opt-out list: A special list of e-mail addresses that is checked before a broadcast message is sent out. Opt-out list e-mail addresses do not receive broadcast messages, even if they are members of personal and public mailing lists.

overdue escalation: The reprocessing of messages after they have waited in a queue for longer than the time period you set.

Overdue rule tree: The rule tree that processes messages that are escalated because they have been in the queue longer than the default or queue-specific Overdue Escalation Time.

overload escalation: The reprocessing of the oldest messages in a queue after that queue contains more messages than the number allowed that you set.

Overload rule tree: The rule tree that processes messages that are escalated because the number of messages in the queue was greater than the default or queue-specific Overload Escalation Threshold.

P

pick mode: The workflow in which agents select messages from their personal queue and from skill group queues in which they are members.

POP3 Mailbox: An account on an e-mail server that E-Mail Manager polls for incoming messages destined for the InBasket.

Primary Transaction Database: The main database used by E-Mail Manager. This database stores such things as messages and agent and skill group settings.

priority: The importance of a message, which can be set automatically by rules or manually by an agent.

pull mode: The workflow in which agents retrieve messages from the Status screen by clicking Get Next for a single queue or for all queues in which the agent is a member.

push mode: The workflow in which agents do not select messages from their queue. Messages from the agent's personal queue, as well as queues in which the agent is a member, are automatically presented for reading and responding to.

Q

queue: A storage space for messages, associated with an agent or skill group.

R

real-time displays: Reports that show the current status of agents and queues.

reassign: The act of moving a message from one queue to another.

rebranding: The feature that allows you customize the interface to display your own company's information.

response: The reply to a message.

role: A collection of settings and access privileges associated with agents. Each agent is based on a role.

round-robin: The even distribution of messages to logged-in members of a skill group.

RServer: The E-Mail Manager component that processes incoming messages and serves the Administration Desktop.

rule: An object that tests a message for certain criteria and performs an action on the message if it meets those criteria. Rules are grouped into rule trees and subroutines.

rule tree: The complete series of rules that process a message.

S

service level management: A collection of several areas of functionality that enable you to manage messages so that you can ensure that: (1) agents in a skill group are working with an equal number of messages. (2) Messages that are not responded to in a set amount of time are escalated and re-processed according to rules you define. (3) Messages in queues with more messages than the number you set are escalated and reprocessed according to rules you define.

skill group: A collection of agents who work with messages assigned to the skill group's own queue.

SMTP Server: The server used by E-Mail Manager to send outgoing messages.

subroutine: A single rule, or a linked series of rules, that is not part of the main rule tree through which messages pass. Subroutines process messages when they are called by other rules.

T

team: A collection of agents grouped for reporting purposes.

template: A predefined response stored in a library for agents' use.

TServer: The E-Mail Manager component that controls database transactions.

W

WebView: The application used for reporting, accessible through the Agent Desktop.

wrap: The state agents go into when they are required to close a case after responding to a message.

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