

Enabling Super-Service with VisNetic MailFlow

A Functional Overview

Introduction – opportunities & challenges

The Internet provides streamlined, cost-effective channels for delivering products and services to customers. As a result, today's customers are progressively more Internet-savvy, and it's increasingly likely that many of them are reaching out to you via email.

When used correctly, email has the capacity to help you deliver quality online service, establish lasting customer relationships, improve customer loyalty and satisfaction, and even reduce service costs.

But this evolution of communications does not come without risks. Effectively managing email is critical to your organization's ongoing ability to service customers. The customer of today is increasingly familiar with your competitors, and is no longer willing to wait for you to get back to them. From the moment an email-based customer inquiry reaches your company, the clock is ticking. You must have the capacity to:

- Answer customer inquiries quickly and efficiently, despite potentially high volumes of email
- Answer customer inquiries accurately, with information relevant to the customer's needs
- Build and sustain lasting relationships with your customers

Traditional email, however, fails to provide a framework for efficient and successful customer interaction. In the traditional model, email communications are dispersed and isolated, and opportunities to manage, facilitate, and standardize customer interactions are practically non-existent.

As you research means of managing the opportunities and problems of email-based customer communications, you will also find that the successful formula differs considerably from a traditional call-center service. There are new concepts and models which, when used properly, can greatly enhance your online customer service capability.

VisNetic MailFlow offers a comprehensive solution to the challenges of modern email-based customer interaction. And it does it all via an intuitive, zero-footprint, browser-based interface. This document describes the features of VisNetic MailFlow, and how it can empower your organization.

Concepts and terminology

It is useful to start our overview of VisNetic MailFlow with a review of the concepts that form its foundation.

In VisNetic MailFlow, a *ticket* represents a logical thread of email correspondence. A ticket will contain one or more email *messages* which follow a common thread of dialog with a customer. For example, a technical support inquiry and any responses to it would be contained within the same ticket, as would further dialog with this customer about this specific issue.

Tickets are contained within *ticketboxes*, which are conceptually similar to a “queue” and are created to house tickets in logical groupings. For example, a “sales” ticketbox may be the primary container for all of a company’s sales-related customer inquiries. Or there might be multiple sales ticketboxes, one for each product being sold.

Tickets reach their intended ticketboxes via *routing rules*. Routing rules define the business logic which routes tickets (and their messages) into the appropriate ticketboxes. In doing so, routing rules provide an important precursor to the processing of inbound customer inquiries.

An *agent* is an individual representative of your company, and a user of VisNetic MailFlow. Agents may or may not be part of a larger *group* of agents.

How email gets into VisNetic MailFlow

VisNetic MailFlow operates independently of, and integrates with, your existing email service. Many companies will use their own established mail server to send and receive customer email. Others will leverage the email services provided by their ISP or hosted provider. In either case, VisNetic MailFlow will interoperate seamlessly with nearly any email server.

The VisNetic MailFlow service engine incorporates a high-capacity mail conduit, which is capable of retrieving email from (and sending email via) any number of mail server accounts. Email messages are stored in the VisNetic MailFlow database, and subsequently processed by the routing engine (more on this below).

VisNetic MailFlow offers tremendous flexibility in its interaction with mail servers, including:

- The ability to define any number of email message sources and destinations
- The ability to simultaneously send & receive email via multiple accounts
- SMTP message delivery authentication (CRAM-MD5, LOGIN, SSL/TLS protocols)
- Ability to leave copies of email messages on the server as they are retrieved
- Configurable send & receive intervals (as well as manual triggers)

- Configurable connection properties, such as port settings, connection timeouts, etc.
- Powerful outbound message spooler with automatic retries, delivery failure notifications, automated bounce processing, etc.
- Maximum inbound and outbound message sizes, enforced at the transport level

Benefit: The retrieval of email messages into the VisNetic MailFlow database provides the basis for its powerful and flexible email processing capabilities.

Routing email messages in VisNetic MailFlow

Once an email message enters the VisNetic MailFlow system (and is subsequently stored in the database), the message gains the attention of the VisNetic MailFlow routing engine.

The routing engine's responsibility is to:

- Associate email messages with existing or newly-created tickets
- Route tickets (and associated email messages) to the appropriate destination (ticketbox) and optionally assign ownership to an agent
- Apply automatic processing, such as auto-reply, copy forwarding, or deletion

Any number of routing rules can be defined within VisNetic MailFlow; they are applied to an inbound message, in order of definition, until a routing rule effectively processes the message. If no routing rule is capable of handling an email message, that message is sent to a pre-defined "unassigned" ticketbox to be processed by an agent at later time.

Routing rules have powerful text-matching capabilities which can route messages according to their "To" and "From" email addresses, as well as email message text, such as the message body, subject, headers, or a combination thereof.

Benefit: Routing rules empower your company with the ability to proactively route email messages to specific agents & ticketboxes. In this way, routing rules can help insure the timely handling of inbound correspondence by the appropriate personnel.

Tickets and email messages

The concept of tickets within VisNetic MailFlow reflects the natural course of customer interactions, in which *threads of email correspondence* comprise the experience customers have with your organization.

Company representatives (or agents) must be able to track customer correspondence in order to provide customers the kind of service they expect and demand. This is especially true when a customer has the potential to communicate with multiple agents within your organization.

VisNetic MailFlow solves this problem by organizing messages into logical tickets. Each ticket contains one or messages concerning a specific incident or dialogue with a customer. At any point, a history of communications with any user is available to any agent.

Further, VisNetic MailFlow tickets have a range of other useful features and properties, such as:

- Ticket status, which indicates whether the ticket is open, closed, on hold, etc.
- Ticket priorities, adjustable by inbound message priorities or set by routing rules
- Instant access to critical contact information, as well as communications history
- Ticket notes for private, internal use
- Powerful, integrated ticket search technology
- Flexible sorting and filtering mechanisms
- An integrated “trash can”, which acts as a safety net for deleted tickets
- Ticket escalation; agents can “escalate” a ticket to a designated supervisor as needed

In addition, the messages that tickets contain are, in and of themselves, a robust construct within VisNetic MailFlow, allowing for:

- Inbound and outbound message attachments, with an ability to process nearly any attachment protocol
- Robust usability, similar to today’s best email client software
- Excellent flexibility; messages can easily be moved from one ticket to another
- Integrated spell-checking, to help ensure quality communications
- Much more...

Benefit: Tickets allow for improved accuracy and efficiency in customer relations, without losing the power and ease-of-use of traditional email.

Handling tickets in ticketboxes

The VisNetic MailFlow ticketbox is a powerful construct, providing the basic storage mechanism for tickets and their associated messages. Your agents will have the task of handling the tickets contained within various ticketboxes.

Any number of public ticketboxes can be created to organize the flow of email into your organization. Examples of public ticketboxes include “sales”, “info”, “support”, etc.

From within public ticketboxes, any agent with proper permissions can assume ownership of tickets or answer messages directly (without taking ownership). Agents can also be assigned ownership of tickets directly by routing rules, including “round-robin” distribution. Tickets owned by a specific agent will be accessible via the agent’s “My Tickets” shortcut.

Ticketboxes also have a number of other very useful features, such as:

- Headers and footers can be automatically added to outbound messages
- Auto Ticket Actions, perform time-based activities on tickets
- Ticketboxes can send alerts to designated agents when contained messages reach a certain age
- The ability to send auto-replies, either immediately or based upon ticket backlog
- Require that agents use the “get oldest” feature, which effectively forces agents to answer oldest tickets first
- Send low and high watermark alerts, which can notify key personnel to minimum and/or maximum open ticket conditions

Another way that VisNetic MailFlow improves agent ticket-handling accuracy and efficiency is through the powerful *Standard Response Library*. This feature allows your agents to develop a categorized collection of effective responses to user inquiries, which can be inserted into outbound messages at any time. Each agent’s most frequently used standard responses are tracked automatically.

Benefit: *Combined with VisNetic MailFlow’s powerful routing rule architecture, ticketboxes organize the flow of email into your organization. The Standard Response Library directly increases the efficiency and effectiveness of agent responses to customer inquiries.*

The role of agents, groups, and security

VisNetic MailFlow uses the concept of “agents” and “groups” to define the individual representatives of your organization and any groups of which they are members. Typically, a unique agent is created for each organizational representative.

Each VisNetic MailFlow agent has a unique set of preferences that they can customize, including:

- The current display theme, which provides the “look and feel” of the user interface
- Creation of arbitrary number of agent signatures (used in email messages), and designation of a default signature
- Define default signatures for each ticketbox
- Which public ticketboxes are accessible to the agent via “My Shortcuts”
- Which other agent views are accessible via “My Shortcuts”; this allows managers or supervisors to review the activity of other agents

Agents are automatically assigned to the “everyone” group when created, which provides them with a basic set of access rights within the system. Additional groups can be created, to which agents are assigned as members. Access rights can then be applied to entire groups, rather than specific agents, to ease administrative overhead.

Access rights can be customized to provide specific users and groups with a specific level of access to various system elements, such as ticketboxes.

A built-in group, called “Administrators”, provides member agents with full access to administrative functions within the VisNetic MailFlow system. Administrators can create and delete users & groups, routing rules, ticketboxes, etc.

Other VisNetic MailFlow security-related features include:

- IP address access restrictions, which can prevent agents from logging into the system from unauthorized locations
- Use of HTTPS (secure HTTP protocol) can be enforced, providing an extra level of security at the protocol level
- Session locking, which prevents an agent from logging in from more than one IP address
- Active session listing, which allows administrators to view agents with active connections (and their IP addresses)

Through administrative settings, an agent can also be required to use the “get oldest” button in any public ticketbox (this feature can also be engaged on a per-ticketbox basis). This helps to ensure that agents aren’t selectively picking tickets from public ticketboxes based upon their contents.

***Benefit:** Agents, groups, and security work together to provide a flexible and secure working environment within VisNetic MailFlow, without sacrificing ease-of-use.*

The power of contact management

With VisNetic MailFlow, Deerfield Communications continues their philosophy of placing the highest value on the customer relationship. With each new customer correspondence, you have the opportunity to establish and extend customer loyalty and satisfaction.

Each email message that’s received by VisNetic MailFlow is associated with a contact; if a message cannot be correlated to an existing contact, a new contact record will be automatically created. This results in a centralized and highly integrated store of contact information within the system.

Contact records in VisNetic MailFlow are representative of your customers, each with their own unique characteristics. Each contact record in VisNetic MailFlow is defined by a combination of default and custom data fields (including private notes) that can be updated or merged at any time.

Contact records can also be “owned” by a specific agent, in which case all correspondence relating to the contact is (optionally) routed automatically to the owning agent.

VisNetic MailFlow also allows for powerful contact searching via a flexible range of criteria, helping you locate specific customer records whenever you may need them. Contacts can also be easily located during email message composition.

***Benefit:** Extend the effectiveness of your business representatives by putting customer profile information at their fingertips.*

Reporting, logging, and alerting

VisNetic MailFlow strives to provide empowering information to agents, supervisors, and administrators through its robust reporting, logging, and alerting facilities. While managers seek to analyze the flow of business correspondence and increase accountability, system administrators require the means to expedite troubleshooting efforts and receive notification of important events.

VisNetic MailFlow supports a range of built-in reports that can provide valuable insight into the operational aspects of the system. Built-in report types include:

- Daily inbound and outbound email trend analysis
- Average number of messages per ticket, reported by day, week, month, or year
- History reports, which provide insights into the flow of email by ticketbox, agent, ticket category, or contact
- Open ticket reporting

Reports can either be viewed directly on-screen, or exported for analysis within third-party applications such as Microsoft Excel.

VisNetic MailFlow also provides highly configurable and integrated logging facilities, allowing administrators the ability to fine-tune the type of information logged, as well as the level of detail.

An integrated log viewer allows administrators to review captured log information, which can be filtered by log entry type and severity, as well as start time.

For system events which may require more immediate attention, VisNetic MailFlow provides powerful alerting functionality. Alerts can be configured by system administrators to provide notification of important events, including:

- Low and high ticketbox watermarks
- Ticket age
- Product registration
- Low disk space
- Inbound and outbound message delivery
- General critical errors

Notifications can either be sent via internal means or to an external email address. Alert recipients can be designated as either agents or groups defined within the system. Internal alerts are made available via an “alerts” shortcut, where they can be viewed and eventually cleared.

***Benefit:** Analyze trends, extend business intelligence, and increase accountability through the built-in reporting facilities of VisNetic MailFlow. Improve response times to important events and expedite troubleshooting processes with the alerting and logging features.*

Powerful web-based architecture

VisNetic MailFlow leverages the ubiquity of the Microsoft Internet Explorer, Google Chrome, and Apple Safari web browsers to provide a responsive, zero-footprint client interface to the system. Usability is advanced, yet intuitive and familiar, maximizing the productivity of new and experienced agents alike.

VisNetic MailFlow interoperates with Microsoft Internet Information Server (IIS) providing a stable and robust foundation upon which VisNetic MailFlow builds its powerful presentation layer.

Compatible database platforms include Microsoft SQL Server, Microsoft SQL Express, and MSDE (the Microsoft Data Engine). While the SQL Server provides a very scalable alternative and is in widespread use, the SQL Express or MSDE provides a free alternative for smaller organizations and can be easily upsized to SQL Server later if warranted.

***Benefit:** Enable agents with an effective email management framework, regardless of their physical location. Minimize deployment expense with a zero-footprint, web-native client interface.*

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