Siebel

Email Administration Guide

March 2021



Siebel
Email Administration Guide

March 2021

Part Number: F12703-03

Copyright © 2021, Oracle and/or its affiliates.

Authors: Siebel Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display in any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or “commercial computer software documentation” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government’s use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

The business names used in this documentation are fictitious, and are not intended to identify any real companies currently or previously in existence.

Contents

Preface i

1 What's New in This Release 1

What's New in Siebel Email Administration Guide, Siebel CRM 21.3 Update 1
What's New in Siebel Email Administration Guide, Siebel CRM 20.1 Update 1
What's New in Siebel Email Administration Guide, Siebel CRM 19.1 Update 1

2 Overview of Siebel Email Response 3

Overview of Siebel Email Response 3
About Inbound and Outbound Communications 3
Fundamentals of Using Siebel Email Response 4
Features for Siebel Email Response 5
Methods for Deploying Siebel Email Response 10
Siebel Email Response and Siebel CRM Applications 12
Architecture for Siebel Email Response 12

3 Planning Deployment for Siebel Email Response 19

Planning Deployment for Siebel Email Response 19
About Deployment Planning for Siebel Email Response 19
Business Analysis for Deployment of Siebel Email Response 19
Setup Information for Siebel Email Response 21
Requirements for Setting Up Siebel Email Response 23
About Implementing Routing and Queueing Processes 24
Comparison of Routing and Queueing Methods 25

4 Global Deployment of Siebel Email Response 27

Global Deployment of Siebel Email Response 27
Smart Character Set for Siebel Email Response 27
Enabling Smart Character Set 28
About Global Deployments for Siebel Email Response 29

Planning Global Deployments for Siebel Email Response 30
Setting Up Global Deployments for Siebel Email Response 30

5 Configuring Communications Drivers and Profiles for Email 33

Configuring Communications Drivers and Profiles for Email 33
About Setting Up Parameters for Communications Drivers 33
Communications Drivers Provided with Siebel CRM 34
Process of Setting Up Communications Driver Profiles 36
Upgrading to 64-bit JRE Support for the Siebel IMAP and POP3 Drivers 41
Process of Setting Up Response Groups 44
How Communications Drivers Process Email Messages 48

6 Configuring User Interface Elements 59

Configuring User Interface Elements 59
Configuring Recipient Groups for Requests and Advanced Templates 59
About Recipient Groups 60
Predefined Recipient Groups 60
Configuring Substitution Fields for Recipient Groups 63
Configuring Additional Recipient Groups and Recipient Sources Applets 64
Configuring Recipients for Send Commands 67
Configuring Default Templates for Send Email Command 70
Configuring the Retry Interval for Outbound Email 70
Configuring Invalid Characters or Symbols in Email Attachment Names 71
Process of Authenticating Sender Email Addresses 72

7 Configuring Communications Templates 77

Configuring Communications Templates 77
About Communications Templates 77
Substitution Fields in Templates 79
Visibility and Access for Templates 80
About Catalogs and Categories for Siebel Email Response 81
Creating Simple Templates 83
Creating Advanced Templates 84
Editing and Formatting Controls for Text in Templates 86
Specifying Template Items for Advanced Templates 88
Modifying Files for Template Items 89

Copying or Deleting Templates and Template Items 89
Using Substitution Fields in Templates for Siebel Email Response 90
Creating a Catalog and Categories 92
Using Access Groups to Filter Objects 94
Process of Setting Up HTML Wrapper Templates 95
Fields for Templates 97
Fields for Template Items 103

8 Administering Siebel Communications Server for Siebel Email Response 109
Administering Siebel Communication Server for Siebel Email Response 109
Siebel Server Requirements for Siebel Communications Server 109
About Setting Up Siebel Communications Server for Siebel Email Response 111
About Starting Server Components 112
Administering Communications Inbound Receiver 114
Events and Communications Inbound Receiver 117
Administering Communications Inbound Processor 123
Administering Communications Outbound Manager 123
Starting Server Components 126

9 Defining Outbound Communication Requests 129
Defining Outbound Communication Requests 129
About Outbound Communication Requests 129
Creating and Submitting Outbound Communication Requests 130
Fields for Outbound Communication Requests 133
Restarting an Aborted Communications Outbound Manager Component 135
Monitoring Outbound Communication Requests 135

10 Managing Workflows for Siebel Email Response 139
Managing Workflows for Siebel Email Response 139
About Processing Email with Siebel Workflow 139
About Process Properties for Siebel Email Response 141
About Modifying Process Properties for Siebel Email Response 141
Preconfigured Workflow Processes for Siebel Email Response 143
eMail Response - Process Message Workflow 144
eMail Response - Process Service Request Workflow 151
eMail Response - Response Workflow 156

eMail Response - Client Send Email Workflow 157
Configuring Email Response to Capture Emails Sent with External Email Clients 157
Managing Workflow Processes and Subprocesses 162
Running the Process Simulator 165
Process of Modifying Workflow Processes 168

11 Managing Email, Fax and Other Communications Products 175
Managing Email, Fax, and Other Communications Products 175
Managing Integrations with Email and Fax Servers 175
Integrating with Fax Products 177
Configuring Fax Integration Elements in Siebel Tools 177
Settings for Internet SMTP/IMAP Server Driver 178
Settings for Internet SMTP/POP3 Server Driver 179
Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver 179
Configuring Client-Side Integration for Send Email Command 192
Process of Configuring Third-Party Email Integrations 193
Modem-Based TAP Paging Driver 203
FTP Driver 205

12 Using Communications Operations 209
Using Communications Operations 209
About Email Messages for Siebel Email Response 209
About Status Field Changes for Email Messages 209
Process of Managing Email Messages for Siebel Email Response 212
Specifying Preferences for Outbound Communications 218
Preference Settings for Outbound Communications 218
Preferences for Email Response Category 220
Preferences for Advanced Features Category 221
Creating Communications Profiles for Personal Use 222
Using Send Commands to Send Messages 223
Creating Activities for Send Commands 236
Specifying Settings for Mobile Devices 237

13 Using Wireless Messaging 241
Using Wireless Messaging 241
About Wireless Messaging 241

Configuring Wireless Messaging 241
Administering Mobile Devices 243

14 Troubleshooting Siebel Email Response 247

Troubleshooting Siebel Email Response 247
About Troubleshooting Siebel Email Response 247
Troubleshooting Siebel Email Response Issues 247
About Investigating and Reporting Processing Abnormalities 250
Process of Troubleshooting Siebel Email Response 250
Resolving Issues for Nonreal-Time Processing 250
Resubmitting Failed Email 251
Synchronizing Batch Components 251
Diagnosing Errors for Communications Inbound Receiver 252
Finding Last Encountered Error in Communications Inbound Receiver 252
Resolving Issues for Response Groups 253
Tagging Inbound Email Messages as Faxes 254

15 Business Service Methods for Siebel Email Response 257

Business Service Methods for Siebel Email Response 257
Siebel Email Response and Business Services 257
Inbound Email Manager Business Service 257
Inbound Email Database Operations Business Service 261
Outbound Communications Manager Business Service 264

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an email to: *oracle_fusion_applications_help_ww_grp@oracle.com*.

1 What's New in This Release

What's New in Siebel Email Administration Guide, Siebel CRM 21.3 Update

The following information lists the changes described in this version of the documentation to support this release of the software.

Topic	Description
Upgrading to 64-bit JRE Support for the Siebel IMAP and POP3 Drivers	New topic. This topic describes the steps to upgrade from 32–bit to 64–bit JRE support for the Siebel IMAP and POP3 drivers, a required step as of Siebel CRM 21.3 Update in order to use these drivers.

What's New in Siebel Email Administration Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What's New in Siebel Email Administration Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview of Siebel Email Response

Overview of Siebel Email Response

This chapter provides an overview description of Oracle's Siebel Email Response. It includes the following topics:

- *About Inbound and Outbound Communications*
- *Fundamentals of Using Siebel Email Response*
- *Features for Siebel Email Response*
- *Methods for Deploying Siebel Email Response*
- *Siebel Email Response and Siebel CRM Applications*
- *Architecture for Siebel Email Response*

About Inbound and Outbound Communications

> **Note:** The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals Guide* .

The following kinds of communications are supported for Siebel application users:

- **Inbound communications.** Supports integrating with third-party email servers and processing inbound email (when using Siebel Email Response).
- **Outbound communications.** Supports integrating with a variety of third-party communications products, such as email servers, to send outbound communications. Outbound communications include the following activities:
  - Supports the Send Email, Send Fax, and Send Wireless Message commands for Siebel application users. (The Send Page command uses Page Manager, not Siebel Communications Server.)
  - Supports agents sending email replies for Siebel Email Response.
  - Supports users sending communications content to designated recipients using outbound communication requests. You can manually create and submit communication requests through a user interface described in this guide. Siebel Workflow and business services can also create and submit communications requests. Several Siebel modules invoke business service methods through workflows to send outbound communications.

You can create custom drivers for third-party products using the Adaptive Communications API.

> **Note:** Your Siebel implementation might not include all the features described in this guide. The software modules that you purchase determine the available features.

Fundamentals of Using Siebel Email Response

Siebel Email Response enables organizations to manage and respond to a high volume of incoming email. You can use Siebel Email Response with other Siebel CRM products.

Siebel Email Response and Siebel Communications Server are installed with the Siebel Server and work together to receive email and send responses. Siebel Communications Server supports and integrates communications channels that are used to communicate with customers. The following components for Siebel Communications Server handle email traffic to and from Siebel Email Response:

- **Communications Inbound Receiver.** Communications Inbound Receiver pulls email from the email server, converts the email into event data, and creates a server request for the Server Request Broker component.
- **Communications Inbound Processor.** Communications Inbound Processor receives the events from Communications Inbound Receiver and processes them using workflows.
- **Communications Outbound Manager.** Communications Outbound Manager manages outbound communications with customers. Siebel Email Response uses the Communications Outbound Manager server component to send responses.

In addition to handling email traffic, Siebel Communications Server can support a multichannel toolbar. This toolbar includes buttons that agents use to access different communications channels, such as voice and email. Products such as Siebel CTI and Siebel Email Response might use the communications toolbar to enable agents to initiate outgoing communications and accept incoming communications using supported communications channels. For information about the communications toolbar, see *Siebel CTI Administration Guide* .

> **Note:** The *Siebel Bookshelf* is available on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel Email Response performs the following tasks:

- Monitors one or more mailboxes on your email application.
- Parses an inbound email message for various fields, such as Sender, Message Body, and the message attributes for further processing.
- Creates an activity record in the Siebel database for each inbound email and stores the content of the email in fields within the new record.
- Sends an acknowledgment message to let the sender know that the email is received.
- Routes an inbound email message to an agent by using parameters such as agent skills, when integrated with Siebel Workflow and Siebel Assignment Manager or a custom routing and queueing solution.
- Enables an agent to compose and send a response message using templates configured for your company needs. Templates save agents time and give them preapproved responses to send to customers.
- Includes a spell check feature to improve the accuracy of messages.
- Accesses customer data and history in one customer information database.
- Provides global support for companies that receive email messages from customers around the world with the following features:
    - Support for many different international languages. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.

- Unicode support. Organizations can deploy Siebel Email Response around the globe without needing separate databases and Siebel Enterprises.

Features for Siebel Email Response

This topic presents an overview of the following Siebel Email Response features:

- *Server Components for Siebel Email Response*
- *Timestamp Fields*
- *Cryptographic Protocols and Communications Drivers*
- *Structured and Unstructured Email Processing*
- *Service-Level Agreements*
- *Siebel Workflow and Routing and Queueing Methods*
- *Spell Check*
- *Multiple Organizations and Siebel Email Response*
- *Contact Identification by Email Address*
- *Smart Character Set*

Server Components for Siebel Email Response

You use the Communications Inbound Receiver component to receive inbound email messages and the Communications Inbound Processor component to use business logic to process email messages. These components process all inbound email messages (Web-structured and unstructured). You use the Communications Outbound Manager component to send responses to messages. For more information about the Siebel Email Response architecture, see *Architecture for Siebel Email Response*.

This architecture provides for better performance and greater scalability. Siebel Email Response can run continuously (24 hours a day, 7 days a week) with no manual restart when you change profiles and response groups. Depending on your business needs, you can run Siebel Email Response in real-time mode, with only the Communications Inbound Receiver component processing email, or in nonreal-time mode, with both Communications Inbound Receiver and Communications Inbound Processor processing email, using multiple instances of the server components on different Siebel Servers.

Cleanup Utility for Siebel File System

Communications Inbound Receiver and Communications Inbound Processor use the Siebel File System for temporary storage and to hold copies of any attached files. To clean up any orphan files (files with no corresponding record in the Siebel database) in the file attachment directory, you can use a command-line utility, sfscleanup.exe. However, to avoid accidentally removing any files that Communications Inbound Receiver creates, make sure that you do *not* use the /g option when using this utility. For information about using the sfscleanup.exe utility to clean up Siebel File System, and for a list of sfscleanup.exe parameters, see *Siebel System Administration Guide* .

Timestamp Fields

Siebel Email Response Analytics enables you to create multiple timestamps for an email message as it moves through the different stages of processing. The timestamp fields are initially recorded at various points in the workflow and then written to the S_EM_RESP_TM table using the *Update Analytics Record* method in the Inbound Email Database Operations business service. The following table shows the timestamp fields.

Timestamp Field	Description
Received	The time that Siebel Email Response receives an email.
Processing	The time that Siebel Email Response begins processing an email.
Created	The time that Siebel Email Response creates an activity for an email.
Server Send	The time that Siebel Email Response sends an auto-acknowledgement or an auto-response for an email.
Reply	The time that an agent responds to an email.
Agent Send	The time that an agent sends out a response email.
Assigned	The time that an event is assigned (through Assignment Manager or a custom routing and queueing solution) to an agent.

Cryptographic Protocols and Communications Drivers

Siebel Email Response enables the Internet SMTP/POP3 Server driver or the Internet SMTP/IMAP Server driver to work with email servers that you enable for a connection using cryptographic protocols. Cryptographic protocols include Secure Sockets Layer (SSL) and Transport Layer Security (TLS). A connection that employs one of these protocols provides secure transmission of data between the Siebel Server and the email server. For information about how to enable this connection, see *Enabling Cryptographic Protocols for Communications Drivers*.

For explicit SSL security, the client must issue a specific command to the server to establish the SSL link. If you configure your email drivers to use TLS, then Siebel Email Response uses explicit SSL for the following:

- SMTP (Simple Mail Transport Protocol)
- POP3 (Post Office Protocol)
- IMAP (Internet Message Access Protocol)

If you configure your email drivers to use SSL instead of TLS, then implicit SSL is used instead. For implicit SSL security, security is automatically enabled when the client connects to the server.

Structured and Unstructured Email Processing

Siebel Email Response can process two types of the most common messages sent to many organizations, structured and unstructured. This topic describes how Siebel Email Response handles each type of message and the advantages and disadvantages of each type of message.

Structured Email Processing

Siebel Email Response uses the eMail Response - Process Service Request workflow to process structured (keyword-based or Web-form) messages. You can use keywords (such as Help, Query, Status, Submit, and Update) when processing and creating service requests for keyword-based email.

To use structured email processing, provide your customers with email templates or with Web forms (Web-based forms on your Web sites).

> **Note:** You can create Web forms with the Web development product that you use to maintain your current Web site. Siebel Business Applications do not include a Web-form product. However, organizations using Siebel Self Service can configure Web pages, views, and applets to meet many business needs. For more information, see Siebel eService Administration Guide.

Examples of incoming structured (keyword-based or Web-form) messages include:

- New service requests
- Status requests for pending service requests
- Updates for existing service requests
- Searches for specific service requests

Structured email messages are processed using the eMail Response - Process Service Request workflow process. This workflow process creates service request records in the Siebel database that you can view on the Communications screen.

Keyword-Based Email Processing

For keyword-based email, the subject headers of incoming email messages need specific keywords to indicate different actions. For example, you can require Help, Status, Query, Submit, and Update keywords in the subject to initiate an action. The keyword enables Siebel Workflow to determine the appropriate process for an email. In keyword-based email messages, customers must understand and use the required format or the data is not parsed correctly.

Web Forms Processing

Web forms enable the customer to communicate the severity of an issue, enable Siebel Email Response to categorize the issue, and provide information that Siebel Assignment Manager can use to notify the appropriate service representatives in your organization. If you use Web forms, then administrators must build and maintain them.

Unstructured Email Processing

Unstructured email (free-form) messages do not need any special subject or structure in the incoming email. They provide for a broad range of communications, such as:

- Requests for general information
- Requests for information about a product or event

- Order requests

Unstructured email messages are processed using the eMail Response - Process Message workflow process. This workflow process creates activity records in the Siebel database that you can view on the Communications screen.

Unstructured email processing is useful when Web forms are not available or when your customers must receive personalized service. However, automating the response process for free-form messages is difficult because customer email frequently does not include all the information necessary to process a message.

Service-Level Agreements

Siebel Email Response can use information from your customer service-level agreements (SLAs) when processing incoming email. For example, if your organization has two levels of support, standard and premier, then your Siebel Email Response administrator can implement the following service functionality:

- Customers with standard agreements can access full online support but do not receive any premier services.
- Customers with premier agreements can send an email message and receive an immediate auto-acknowledgment giving the date and time that they will receive a response.

Siebel Workflow and Routing and Queueing Methods

You can use Siebel Workflow with routing and queueing products or methods to further automate your email interactions. Routing and queueing applications and methods assign incoming records to employees, positions, and organizations. For information about the routing and queueing methods as well as associated advantages and disadvantages, see *Comparison of Routing and Queueing Methods*. For more information about Siebel Email Response routing and queueing requirements, see *About Implementing Routing and Queueing Processes*.

Your company can manage your email processes by using Siebel Workflow with one of the following routing and queueing methods:

- **Manual routing.** A user must manually assign every work item as it is created. This method is the most labor-intensive.
- **Siebel Assignment Manager (optional).** Assignment Manager assigns inbound work items such as opportunities, email, or service requests to agents by using your business rules and agent skills, product expertise, language skills, availability, workload, and other criteria. You can change the rules as your business requirements change.
- **Custom routing and queueing.** You can implement a custom routing and queueing solution, such as a solution using third-party products.

Spell Check

Siebel Email Response uses a spell check feature that is available with Siebel Business Applications. This feature can identify many spelling errors in text communications (including email, service requests, and solutions) before they are sent to customers. The spell check feature is automatically installed and enabled as part of the Siebel Server and Mobile Web Client installation processes.

Note: In Siebel Open UI, the spell check feature is deprecated. If available, then use the spell check functionality enabled in your browser or use a third-party spell check plug-in for your browser.

By default, the spell check feature ignores HTML in outbound email messages. You can change this option and other spell check options (for example, the option to automatically check spelling when an email is sent) in the Spelling view of the User Preferences screen. For more information about setting user preferences, see *Siebel Applications Administration Guide* .

Default Dictionary

The spell check feature uses the dictionary for the default language your system administrator specifies during installation. During installation, dictionary files (lexicons) for the most common international languages are installed. Common dictionary files (two files for each language, with the TLX and CLX extension) are stored in the `[ROOT]\lex` directory during installation. All included language dictionaries are installed regardless of the default language your system administrator selects during installation. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.

In the User Preferences screen, agents can change the default language for the spell check feature. If you assign a default language in user preferences, then the spell check feature uses that default language to check the spelling in replies to inbound email. For more information about user preferences, see *Siebel Applications Administration Guide* .

Personal Dictionary

An agent can add frequently used words to a personal dictionary (custom user dictionary) that is saved on the server so that the agent can access this dictionary from any workstation. This dictionary is stored in the following locations:

- `[FILESERVERROOT]\userpref\[USERNAME&]\[USERNAME_LANGID].tlx`
- `[FILESERVERROOT]\crm\[USERNAME_LANGID].tlx`

Multiple Organizations and Siebel Email Response

In Siebel Email Response, you can associate business entities with a specific organization. This association gives you a way to filter and access records. If your company consists of multiple organizations, then you can look up contacts by organization.

Contact Identification by Email Address

Siebel Email Response enables you to identify one contact with multiple email addresses or multiple contacts that share one email address. The eMail Response - Process Message and eMail Response - Process Service Request workflows support contact verification.

One Contact with Multiple Email Addresses

Many customers have multiple email addresses. For example, customers might work from multiple locations (office, home, and other remote locations). When a customer contacts you, you must be able to identify the customer from the email address. You can add a contact's alternate email addresses in the More Info view of the Contacts screen.

Note: In the Contacts screen, the Do Not Email check box applies to all email addresses in the contact record.

Multiple Contacts That Share One Email Address

When Siebel Email Response receives an email, it searches all contact records for the email address of the sender and compares the email address of the sender to the email address in the Email field. When Siebel Email Response finds a match, it creates an activity record and associates this record with that contact record. If multiple contact records contain the email address of the sender, then Siebel Email Response associates the email with the first contact record found and creates an activity record for that contact.

After Siebel Email Response creates an activity record, the following events occur:

- If routing is enabled, then one inbound email is routed.
- In Siebel Email Response, an auto-acknowledgment response is sent to the email sender. You must set an input argument for the response group to send no acknowledgment.
- The eMail Response - Update Activity Status workflow process updates the activity status for the contact.
- The eMail Response - Client Send Email workflow process updates the response activity status and inbound activity status for the contact.

Smart Character Set

The Smart Character Set feature enables you to receive, process, and reply to an email in the same character set as the inbound email. For information about this feature, see *Smart Character Set for Siebel Email Response*.

Methods for Deploying Siebel Email Response

You can implement Siebel Email Response in the following ways:

- To use only the Siebel Email Response features, another Siebel application such as Siebel Sales, Siebel Marketing, Siebel Service, or Siebel Call Center is required. Instead of configuring both Siebel Email Response and the other Siebel application, you can configure only Siebel Email Response. Using another Siebel application as a foundation for your deployment of Siebel Email Response can solve the immediate challenge of routing and processing a high volume of incoming email and can be an interim step before you implement a larger, more integrated solution.
- The Siebel Email Response add-on module (integrated solution) includes Siebel Email Response features (without Siebel Service functionality). You can add this module to many other Siebel Business Applications, including Siebel Sales, Siebel Marketing, Siebel Service, and Siebel Call Center. For example, if you want only Siebel Marketing and Siebel Email Response, then purchase the Siebel Marketing application and the Siebel Email Response add-on module.

Siebel Email Response is installed during the installation of your purchased Siebel application package and does not require separate installation.

The following topics provide additional information about a Siebel Email Response deployment:

- *Implementation Team*
- *Siebel Email Response in a Global Environment*

Implementation Team

Designate several people to serve as the Siebel Email Response deployment team. These people coordinate the setup and maintenance of the new email application. They use the deployment planning information in this guide. For more information, see *Planning Deployment of Siebel Email Response*.

After the planning process is complete, the administrator sets up Siebel Email Response. For more information, see *Configuring Communications Drivers and Profiles for Email*.

Employees in the following roles might be on your Siebel Email Response implementation team:

- **System administrator.** Responsible for installing, configuring, and maintaining the network, including the email server and the Siebel environment. The system administrator also administers and configures server components.
- **Siebel Email Response administrator.** Responsible for setting up and maintaining Siebel Email Response features, including profiles, drivers, response groups, catalogs, response categories, and templates.
- **Developer.** Responsible for configuring and customizing the Siebel application to meet your business requirements. This configuration and customizing includes view modifications and process automation.
- **Business analyst.** Responsible for:
  - Mapping and developing your business processes in Siebel Business Process Designer.
  - Developing response categories, solutions, and templates for agent use.
- **Agent.** Responsible for providing feedback to the system administrator and business analyst during the development process.

Note: The same employee can have multiple roles.

Siebel Email Response in a Global Environment

Siebel Email Response supports Unicode and filtering templates by using language and locale settings in a single Siebel environment. Whether or not the Siebel database uses Unicode, incoming email content is converted to Unicode. If the Siebel database uses Unicode, then all characters are saved in the Siebel database after the conversion. Any characters that the in-use code set does not support are *not* saved after the conversion. The following table describes the global deployment resources.

Topic About Global Deployment	Resource
Configuring Siebel CRM for multiple languages. For general Unicode information, see the topics about global deployments.	*Siebel Global Deployment Guide* *Siebel Installation Guide*
Setting up global deployment, including the Smart Character Set feature.	*Global Deployment of Siebel Email Response*
Supported languages and Siebel database code pages.	1513102.1 (Article ID) on My Oracle Support.

Topic About Global Deployment	Resource

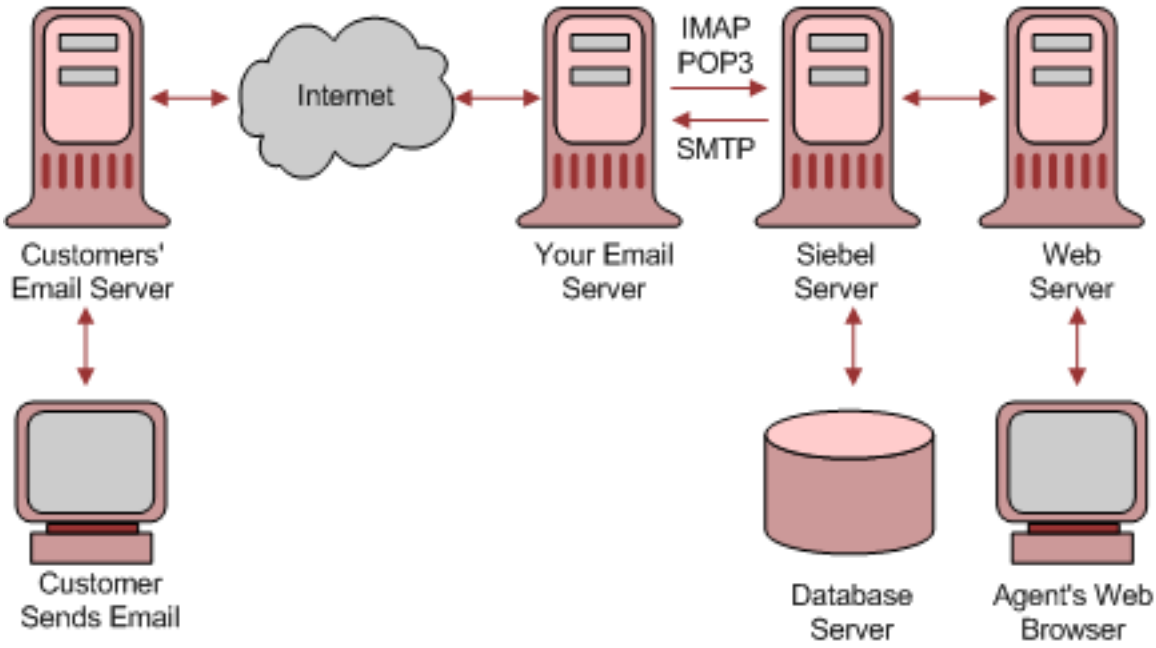
Siebel Email Response and Siebel CRM Applications

You most frequently use Siebel Email Response with the following Siebel CRM applications:

- **Siebel Sales.** Agents can generate opportunities from Siebel Email Response that sales representatives can access.
- **Siebel Marketing.** Companies must be prepared to handle the large quantities of inbound messages that large outbound email campaigns generate. Using the routing rules for the rest of your company, Siebel Email Response processes customer responses to the campaign and outgoing messages that are returned to your company because of incorrect email addresses or overloaded email servers.
- **Siebel Service.** This application schedules service requests, installations, projects, and preventive maintenance activities and dispatches these activities to the right person. When customers send email requesting a service call status or a change request, Siebel Email Response routes the email to the correct field agents, enabling them to respond and adjust their schedules immediately.
- **Siebel Call Center.** This unified, multichannel, desktop application includes voice and email channels. This application includes Siebel Service, Siebel Sales, and optionally Siebel Email Response. You can configure Siebel Call Center to include channel integration so that an agent can use any available channel to communicate with customers. If the customer sends an email, then the agent can reply using Siebel Email Response. If the customer calls on the phone, then the agent can switch to the voice channel to handle the phone call.

Architecture for Siebel Email Response

The Siebel Server and Siebel Email Response process incoming email and handle the replies. The following figure provides a high-level overview of a typical email process, which starts when a customer sends an email and ends when Siebel Server components (either the Communications Inbound Receiver or the Communications Inbound Receiver and the Communications Inbound Processor) process the incoming email and send a reply to the customer.



The following topics provide additional information about Siebel Email Response architecture:

- *Workflows for Siebel Email Response*
- *Processing Incoming Email*

Workflows for Siebel Email Response

The Siebel Email Response workflow begins when a customer sends an email to your company over the Internet using that customer's email software. The email passes through the customer's email server and communicates with your email server using SMTP and POP3 or IMAP. Communications Inbound Receiver uses POP3 or IMAP to retrieve the inbound message.

Supported Email Sender Software and Email Servers

The following guidelines describe the types of email software a sender can use and the types of email servers that your company can use:

- **Sender's email application.** The sender can use any email client and email server that you can currently use on the Internet.
- **Your email server.** The Oracle-provided Internet SMTP/POP3 Server driver and Internet SMTP/IMAP Server driver are tested and certified with some email servers. Although many email servers support the SMTP and POP3 or IMAP communication protocols, it is recommended that you use a supported email server for the following reasons:
  - Oracle personnel certified and tested these servers.
  - Oracle personnel can access these servers to support customer issues.

  Siebel Email Response supports email servers that comply with certain RFC (Request for Comments) standards. For information about these RFC standards, see 477923.1 (Article ID) on My Oracle Support.

For information about support for email applications and email servers, see the Certifications tab on My Oracle Support.

Processing Incoming Email

After a customer sends an email to your company, your email server, which is connected to the Siebel Server, receives the email and passes it to Communications Inbound Receiver. Communications Inbound Receiver resides on the Siebel Server and has a primary role in the Siebel Email Response processes.

Email processing uses workflow processes, which call other Siebel Server components, such as Assignment Manager. Communications Inbound Receiver uses the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver to periodically connect to your email server and check for new email messages. When Communications Inbound Receiver detects a new message, it completes the following tasks:

- Downloads the message and attachments from the email server.
- Parses the elements of the email message (To:, CC:, Subject:, and body content) and places these elements in memory.
- Converts the email data into event data that is saved in the Siebel database (if less than 15 KB) or in the Siebel File System (if greater than 15 KB).
- If you use nonreal-time email processing, creates a server request for the Server Request Broker component to notify Communications Inbound Processor that a new event is created.
- If you use nonreal-time email processing, passes the event data from memory to Communications Inbound Processor.

Note: Communications Inbound Processor can start multiple subprocesses so that multiple instances of a workflow can operate in parallel.

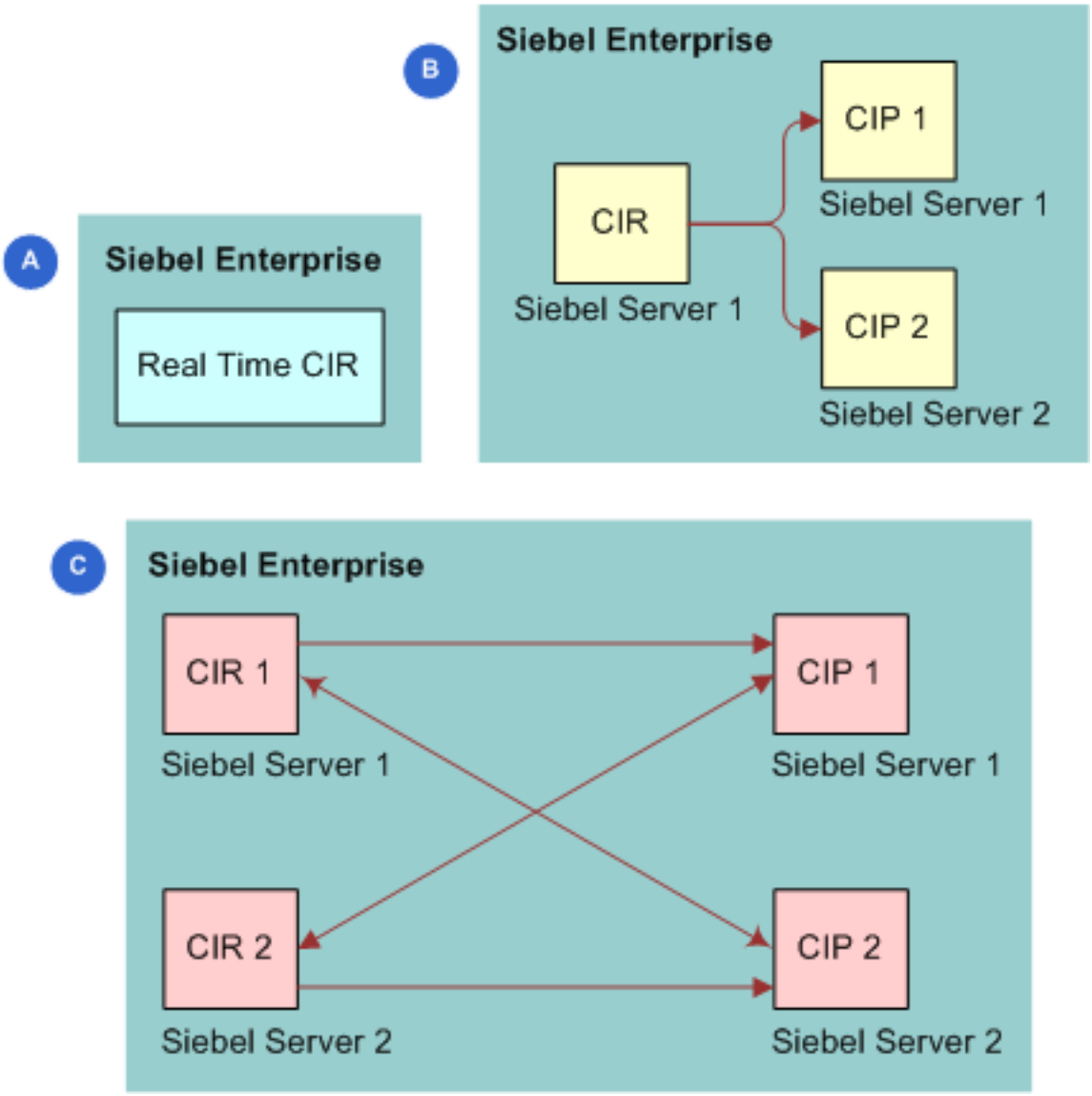
Real-Time and Nonreal-Time Processing

Depending on your business requirements, you can process email in one of the following ways:

- Real-Time Processing.
- Nonreal-Time Processing.

The following figure provides examples of different configurations for Communications Inbound Receiver and Communications Inbound Processor in your Siebel Enterprise, as follows:

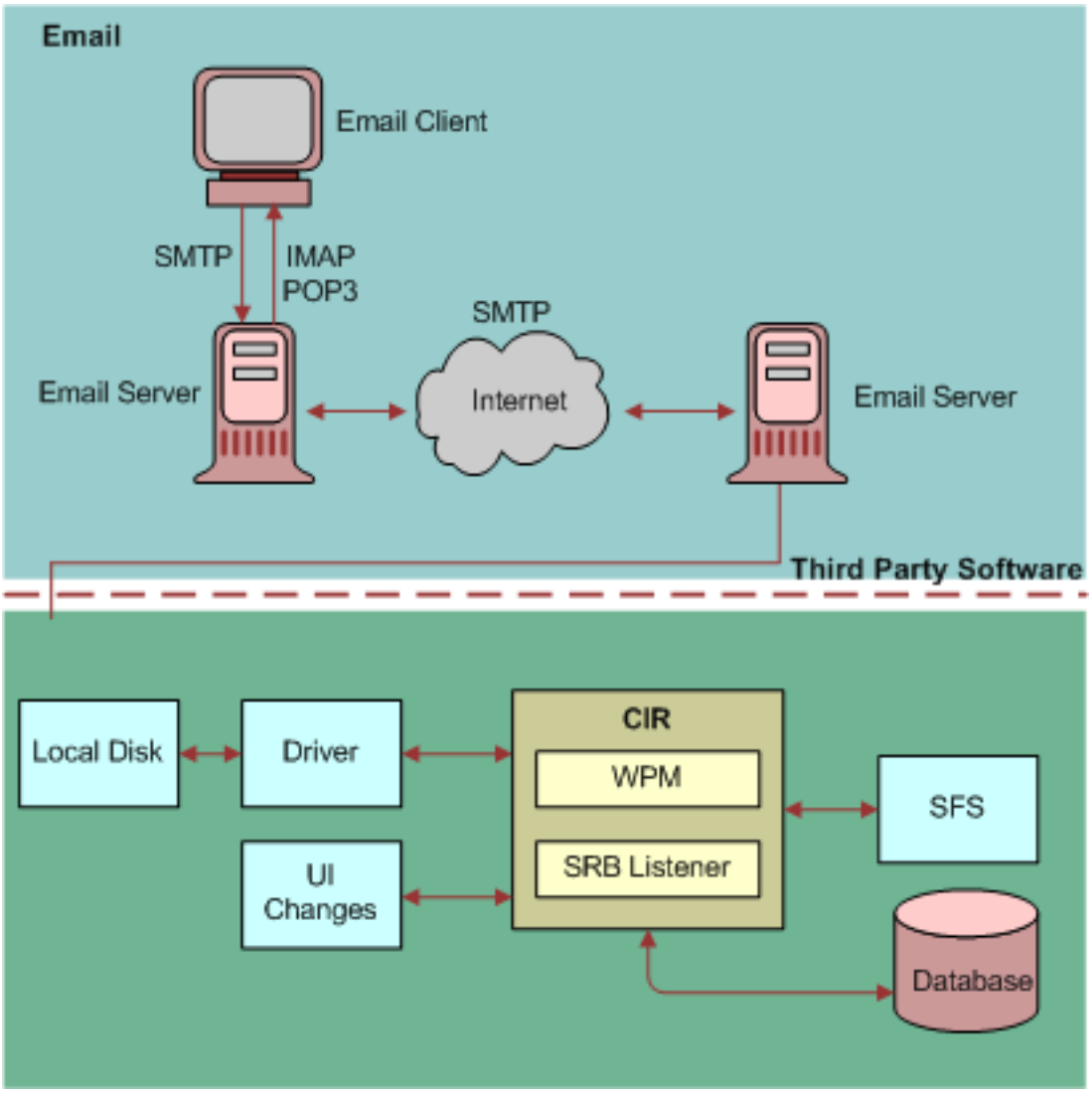
- **Configuration A.** Shows real-time processing for Communications Inbound Receiver on one Siebel Server.
- **Configuration B.** Shows Communications Inbound Receiver on one Siebel Server and Communications Inbound Processor divided between two Siebel Servers.
- **Configuration C.** Shows Communications Inbound Receiver and Communications Inbound Processor on two Siebel Servers.



Real-Time Processing

Real-time email processing uses only one server component, the Communications Inbound Receiver. Communications Inbound Receiver both receives and processes inbound messages. Communications Inbound Processor is not used in real-time processing. This type of processing is best for businesses with a low volume of email customers or businesses that primarily use phone events because these events *always* use real-time processing.

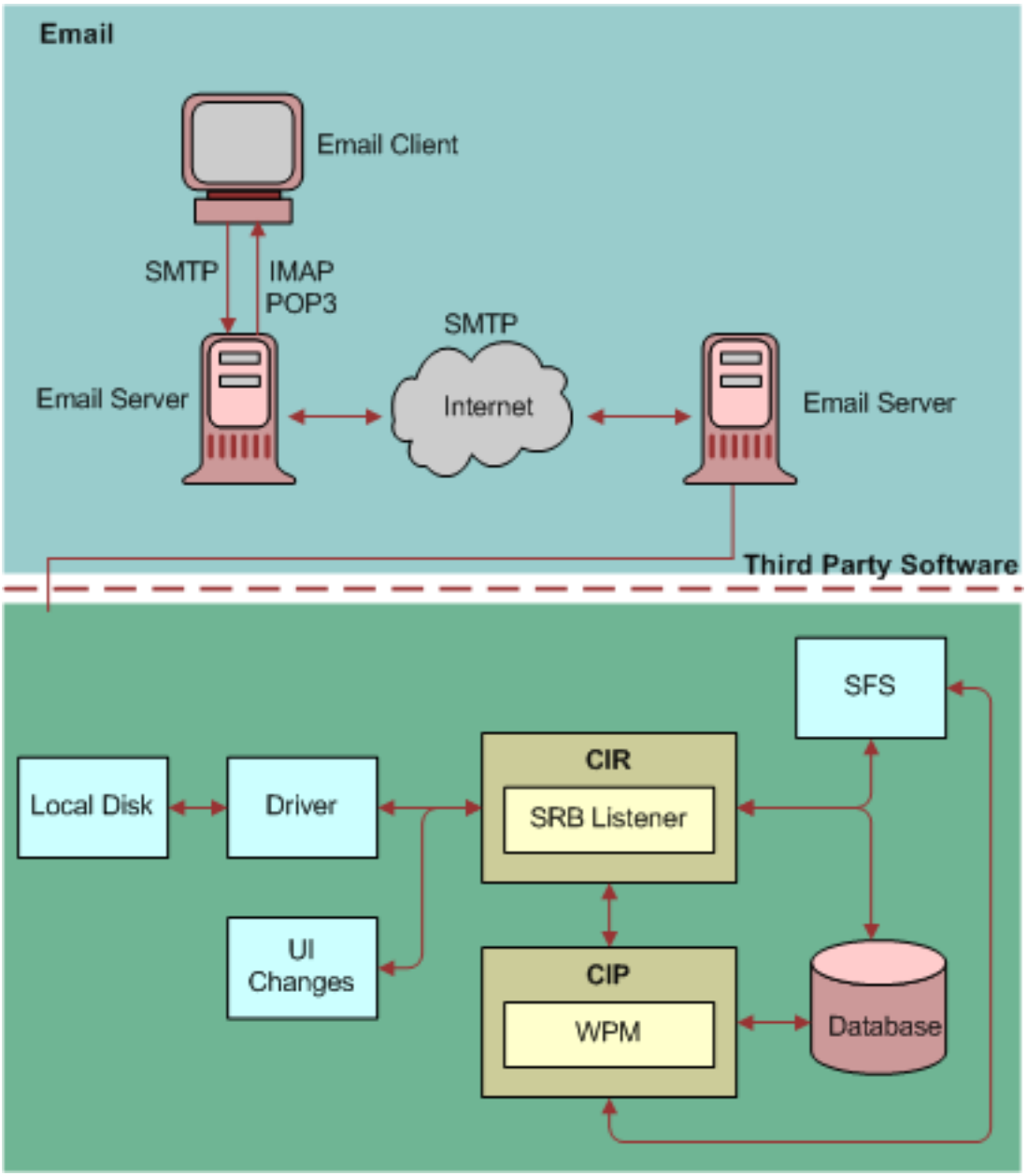
The following figure describes the architecture for real-time email processing. This figure shows that Communications Inbound Receiver (CIR) pulls email from the email server. CIR includes the Workflow Process Manager (WPM) and Server Request Broker (SRB), and CIR communicates with the Siebel File System (SFS) and with other entities, such as the driver and the user interface (UI). For information about how to enable real-time email processing, see *Enabling Real-Time Email Processing*. For more information about processing email in real time, see *Events and Communications Inbound Receiver*.



Nonreal-Time Processing

Nonreal-time email processing has two server components, the Communications Inbound Receiver and the Communications Inbound Processor, running as separate server components. This type of processing enables you to have multiple instances of Communications Inbound Receiver and Communications Inbound Processor on different Siebel Servers, providing a distributed architecture that is more scalable and reliable.

The following figure describes the architecture for nonreal-time email processing. This figure shows that Communications Inbound Receiver (CIR) pulls email from the email server. CIR includes Server Request Broker (SRB), and Communications Inbound Processor (CIP) includes the Workflow Process Manager (WPM). CIR and CIP communicate with each other, with the Siebel File System (SFS), and with other entities, such as the driver and the user interface (UI). For information about how to enable nonreal-time email processing, see *Enabling Nonreal-Time Email Processing*.



Siebel Workflow and Processing Incoming Email

Communications Inbound Processor uses the Workflow Process Manager, part of Siebel Workflow, to process an email message in several different ways, depending on the workflow process that you select to handle that type of message. Siebel Email Response includes several preconfigured workflow processes that provide email processing features. For more information, see *Managing Workflows for Siebel Email Response*.

You can set up the Workflow Process Manager to perform the following tasks:

- Determine the commit time (the time by which you must reply to the message) by using the customer's service-level agreement.
- Send the message to Assignment Manager for routing or to a custom routing and queueing solution.
- Write a record to your Siebel database if the message is routed to an agent for response.

- When integrated with routing and queueing software, route incoming email to an agent by using defined parameters such as agent skills. The selected routing and queueing processes route and queue messages to the agent with the skills that are necessary to respond to the message.

About Returning Replies to Customers

The agent reviews the message using the Siebel client and composes and sends a reply using templates that users configure for your company's needs. When the agent sends the reply, the Communications Outbound Manager server component sends the reply through your email server using the SMTP communication protocol. Your email server then sends the email over the Internet to the customer's email server, and the customer's email server delivers the email to the customer's mailbox. The figure in *Architecture for Siebel Email Response* illustrates this process.

3 Planning Deployment for Siebel Email Response

Planning Deployment for Siebel Email Response

This chapter covers planning a Siebel Email Response deployment. It includes the following topics:

- *About Deployment Planning for Siebel Email Response*
- *Business Analysis for Deployment of Siebel Email Response*
- *Setup Information for Siebel Email Response*
- *Requirements for Setting Up Siebel Email Response*
- *About Implementing Routing and Queueing Processes*
- *Comparison of Routing and Queueing Methods*

About Deployment Planning for Siebel Email Response

This chapter provides tools and resources to help you implement Siebel Email Response. Setting up Siebel Email Response for your business is easier if you:

- Use the provided planning tools.
- Follow the recommendations, unless your business needs dictate otherwise.

This chapter includes guidelines for business analysis and setup planning. Content in each topic tells you what to do and why to do it, and it provides suggestions for obtaining more information. Your answers to questions in each topic consist of the data that you use to set up Siebel Email Response after installation.

Business Analysis for Deployment of Siebel Email Response

Before you set up Siebel Email Response, analyze your company's email business needs. Often customers deploy Siebel Email Response to meet the needs of one group in an organization. After additional research, you might identify other groups that can benefit from the capabilities of Siebel Email Response. To analyze your company's business needs, answer the following questions:

- Which groups in your organization have the largest email volume?
  Groups with the largest email volume benefit most from using Siebel Email Response. Analyze all groups in your organization to determine which groups can benefit from using Siebel Email Response. Email server administrators in your organization can help you to identify the email addresses that are most heavily used.
- What email addresses will you use for Siebel Email Response?

Develop a list of current and new email addresses that you want to use for all groups using Siebel Email Response. Specify the email addresses that you must create to receive incoming email. Your email server administrator can tell you the email addresses that your company currently uses.

Designate each email address to receive unstructured (free-form) or structured (keyword-based or Web-form) email.

- Does your organization use structured (Web-form) or unstructured (free-form) email messages?

  If your company uses many structured email messages, then you might want to use Siebel Self Service. This product can automate many of the processes that Web forms solve. For example, use Siebel Self Service to automate service request submissions or status updates.

  - **Web forms.** An example of a Web form is an order status form. Compile a list of Web forms that you might use. If you currently use Web forms, then gather examples with your standard responses.

    A Web form saves time because no human interaction is necessary to respond to the initial email. However, you need special skills and time to set up and maintain Web forms with associated responses. You cannot use Web forms in every situation, but they are useful to handle high-volume communications that require standard responses.
  - **Free-form messages.** Examples of free-form messages are a free-form email for a customer's order status and a free-form email for help with a product that the customer purchased.

    Agents must respond to each free-form email.

  When you set up your workflow processes, decide which workflow you want to use to process incoming messages, eMail Response - Process Message or eMail Response - Process Service Request.

- What are the most frequently asked questions that you receive at each corporate email address?

  Gather examples of the most common questions (and associated responses) and estimate how many of these questions you receive. You can modify templates, so concentrate on determining the most frequently asked questions you receive at present.

  One of the most valuable features of any email response product is the ability to store templates that agents can use to respond to common questions.

  You can identify questions that templates can answer by asking customer service agents for a list of the most commonly asked questions and the appropriate response for each question. Another source of templates is FAQ (Frequently Asked Questions) documents that you develop for your customers.

- What solution documents do you currently use?

  A solution document can be any document you prepare for customers that provides a fix or a recommended approach to an issue. For information about when to use solution documents (called FAQs in Siebel Self Service), when to use reply templates, and how solutions and templates compare to free-form replies, see *Solutions and Templates Decision Table*.

  Gather copies or make a list of these electronic documents and the network location of them. Specify new documents that you need and existing documents that you can convert to electronic documents.

- What categories do you want to associate with templates and solutions?

  Sort the templates and solutions into types of email questions (categories) and assign a category to each solution and template. During Siebel Email Response setup, you associate solutions and templates with categories so that agents can insert solutions and templates into the body of Siebel Email Response replies.

> **Note:** Associate with a category only the templates that you intend use as body templates.

- Who will be responsible for template maintenance and developing maintenance procedures?

  Develop a process and specify a responsible person. Develop procedures for maintaining templates, for notifying agents that new or changed templates are available, and for using templates.

  You must review templates for needed changes if your business changes. For example, when you launch a new product or discontinue a product, you might want to review your templates for needed updates. Also, for example, you can add the URL of a new Web site to the signature line of an email template.
- Do you want to automatically acknowledge receipt of incoming email?

  An auto-acknowledgment message sets reasonable customer expectations for a response and reduces the chance that customers send follow-up email or communicate through other channels.

  Obtain a copy of any existing auto-acknowledgment message. An auto-acknowledgment message thanks the customer for the inquiry and tells the customer the time needed to respond.
- How do groups currently route email messages? Why do you use the current routing approach?

  Determine how each of your target email response groups (such as, Sales and Call Center) currently routes an incoming email message to the agent best suited to handle the message. In most organizations, agents select email messages from a list of messages that are sent to an address. How do you manage incoming email queues and why?
- Which routing and queueing method meets your needs for email response?

  When using Siebel Email Response, you can choose from several methods to route email messages to the correct agent. For information about different routing and queueing methods, see *Comparison of Routing and Queueing Methods*.

  The method that you use is based on the way that your business needs to route incoming email. For example, if you must notify agents immediately after routing a message, then you need a custom routing and queueing solution.

  If CTI software is set up for your contact center, then you can use third-party routing and queueing technologies to make multiple media channels available to your agents. In this scenario, customer service representatives might handle telephone calls, but when they are not busy with telephone calls, they are assigned email messages.
- What are your language support needs?

  Determine the languages in which you customers send email, the languages in which you reply to email, and if you have templates in multiple languages. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.
- Do you need to set up multiple organizations for your company?

Setup Information for Siebel Email Response

You gather setup information for Siebel Email Response by answering the following questions:

- Has your system administrator installed and configured a working Siebel Business Applications environment?

You must have a working Siebel Business Applications environment. For more information, see *Siebel Installation Guide* .

- Has your Communications Server administrator installed and configured your email server?

  Your email server must be installed and configured.

- What communications drivers and profiles will you use for Siebel Email Response?

  > **Note:** Use the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver for connecting to all supported email servers.

  Create communications profile names that correspond to all the mailboxes that you monitor, for example, customersupport@example.com and sales@example.com.

  The values that you assign to driver parameters apply to every profile that uses that driver unless you add a profile parameter override value to the profile. Profile parameter overrides enable you to uniquely identify each profile.

- What profile parameter overrides and values do you need to establish for each profile (email address) that you assign to the communications driver?

  A profile parameter override is a setting that overrides the values on the driver that the profile uses. Note the following guidelines about profile parameter overrides:

  - If you do not supply a profile parameter override, then the default parameter value on the driver is used. Some required parameters, such as POP3 Account Name and IMAP Account Name, do not have a default value. You must provide values for all required parameters.
  - If you supply a profile parameter override, then the override value is used instead of the parameter value on the driver.

  Each profile has parameter overrides that are necessary to connect to the email server account. For example, a common parameter override is From Address. The From Address parameter is passed to the SMTP server as the address that shows in the From field in an email reply. Values that you assign uniquely identify each profile. You add profile parameter overrides during Siebel Email Response setup procedures.

- Which email profiles (mailboxes) will receive Web-form messages and which will receive free-form messages?

  Separate your email profiles into two groups, one group to receive Web-form messages (such as, service requests) and one group to receive free-form messages.

  For each of these two groups of email profiles, separate the profiles into groups with the same types of email behavior (input arguments). You associate each of these profiles with a single response group.

  These groups are the response groups and associated profiles that you create. For more information, see *Process of Setting Up Communications Driver Profiles* and *Process of Setting Up Response Groups*.

  Choose the following values for each group:

  - **Name.** Select a meaningful name for each response group.
  - **Administrator email address.** Select the email address to which you want to direct unprocessed email (email that cannot be processed due to a database error, a routing error, and so on) that is sent to the profiles in each response group.

    - **Description.** Describe the types of email behavior that each response group controls. This information prepares you to set up input arguments for each response group.

- What email behaviors (input arguments) do you need for each profile type?
  Input arguments provide information to a business service so it can process incoming email. Because input arguments control the way that email is handled, all profiles in a response group must have the same input arguments.
  Using the response group description, assign the input arguments to each group of email profiles. For information about available input arguments, see *Business Service Methods for Siebel Email Response*.
- Do you need to modify the workflows included with Siebel Email Response?
  If you want to modify the predefined workflows, then you must activate them in the Administration - Business Process screen before starting Siebel Server and receiving incoming email. For more information about predefined workflows, see *About Processing Email with Siebel Workflow*. For information about creating and modifying workflows, see *Siebel Business Process Framework: Workflow Guide* .

  > **CAUTION:** If you modify a workflow, then the modification is not upgraded when you upgrade Siebel Email Response. You must re-create all modifications in the prebuilt workflows.

- Which routing and queueing method will you use to route incoming email to agents?
  By default, email messages are recorded in your Siebel database as activities or service requests.
  Identify the routing and queueing methods that you want to use, such as manual assignment, Siebel Assignment Manager, or custom routing and queueing. For information about the advantages and disadvantages of each method, see *Comparison of Routing and Queueing Methods*. For information about creating routing and queueing rules, see *Siebel Assignment Manager Administration Guide* .
- Do you want to process email using real-time processing or nonreal-time processing?
  Depending on your business requirements, you can set up Siebel Email Response for real-time or nonreal-time processing. For more information, see *Real-Time and Nonreal-Time Processing*.
- Have you enabled your email server for Secure Sockets Layer (SSL) or Transport Layer Security (TLS)?
  Siebel Email Response enables communications drivers to work with email servers that you enable for SSL or TLS. For more information, see *Cryptographic Protocols and Communications Drivers*.

Requirements for Setting Up Siebel Email Response

This topic describes the tasks to complete before you set up Siebel Email Response. For information about the supported email servers, see the Certifications tab on My Oracle Support.

Before you set up Siebel Email Response, confirm that the following tasks are completed:

- **Siebel CRM software is installed.** The system administrator must install and configure a working Siebel environment before setting up Siebel Email Response. For more information, see *Siebel Installation Guide* .
    - During Siebel CRM installation and subsequent configuration using Siebel Management Console, the following items are installed and configured:
        - Siebel Gateway

        - Siebel Server
        - Siebel Database Configuration Utilities
        - Siebel Enterprise Application Integration (The use of this item depends on the nature of your custom integration. You can use this item if you implement a custom routing and queueing solution.)
        - Siebel Application Interface
    - After Siebel Server installation and configuration, the following components are enabled:

        - Communications Management (includes the Communications Inbound Receiver, the Communications Inbound Processor, and the Communications Outbound Manager)
        - Siebel Call Center (includes Siebel Email Response and Siebel Service)

      Component groups can also be enabled after the Siebel Server installation.
    - After Siebel Server installation and configuration, the spell check feature is installed.

      The spell check feature is automatically installed and enabled as part of the Siebel Server and Mobile Web Client installation and configuration. Spell check dictionaries are installed in several languages. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.
- **A third-party routing and queueing solution is installed (optional).** If you want to use a third-party queueing solution, then install and configure it using the vendor documentation.
- **The email server is installed, configured, and tested.** For installation and configuration information, see the installation instructions that you receive with your email server. For information about supported email servers, see the Certifications tab on My Oracle Support.
- **Basic tests are performed.** Before you set up Siebel Email Response, perform the following tests:

    - Verify network connectivity by establishing the presence of the email server from the Siebel Server.
    - Test the email server, and make sure that the email server is properly set up by verifying that you can communicate to and from each email account that you create. For each email account, you can use any email client to:

        - Set up test accounts.
        - Send email from each test account to itself.
        - Send email from each test account to an account outside of your company.

  Your network administrator can help identify the person in your organization who performs each of the tasks in this topic.

About Implementing Routing and Queueing Processes

Siebel Email Response workflows record incoming email messages in your Siebel database, except for messages identified as junk email. The eMail Response - Process Message workflow creates an activity record and the eMail Response - Process Service Request workflow creates a service request record.

The Process Message and Process Service Request workflows can use the routing and queueing features in Siebel Assignment Manager to further automate your email interactions. Routing and queueing choices include Siebel Assignment Manager and custom routing and queueing solutions. For information about determining the routing and queueing method to implement, see *Business Analysis for Deployment of Siebel Email Response*.

Siebel Assignment Manager can assign ownership of email activities and service requests. Your organization can use the preconfigured routing and queueing rules that Siebel Email Response provides, revise these preconfigured rules, or create new rules. Before you start Siebel Email Response and process your incoming email messages, you must activate the Siebel Email Response workflows, make changes to the routing and queueing method that you choose to implement, and start the server tasks that are associated with that routing and queueing method.

You can route email using one of the following methods:

- **Manual assignment.** A user who is dedicated to the routing process manually assigns each incoming email to an agent as it arrives, or agents select a message from a message queue.
- **Siebel Assignment Manager.** Use Siebel Assignment Manager to create new assignment rules that route email to an agent who has the appropriate skills. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

  Use Assignment Manager to assign email messages by setting the Enable Assignment Manager process property in the Email Response - Process Message workflow:

  - If you set the process property to True, then Assignment Manager assigns email messages for all response groups.
  - If you set the process property to True for a response group, then Assignment Manager assigns email messages for that response group.

  > **Note:** When you create or update assignment rules, you must stop the Communications Inbound Receiver component to suspend the processing of new inbound email. After you stop this component, you can create or update the assignment rules, release the assignment rules, and then restart this component.

  After enabling Assignment Manager, complete the following tasks:
  - Verify that you assigned each employee in your Siebel database the appropriate skills to respond to incoming email. For example, you might assign each employee an email recipient address and define competencies, expertise level, and exception hours.
  - Set up the service regions and associate each employee with a service region.
  - Create new assignment rules, assign criteria, define employees, and release the rules.
  - Activate Assignment Manager.
  - Test your Assignment Manager setup.
- **Custom routing and queueing solution.** You can use a custom routing and queueing solution, such as a third-party product. Consult the documentation for that product for implementation instructions.

Comparison of Routing and Queueing Methods

The following table shows the advantages and disadvantages of each routing and queueing method.

Routing Method or Product	Advantages	Disadvantages
Manual routing	• Simple.	• Slow. A user must manually assign each email to an agent.

Routing Method or Product	Advantages	Disadvantages
		• A user must be dedicated to the routing process.
Custom routing and queueing	• Meets precise business requirements. • Can accommodate more complex business processes and hierarchies. • Other possible advantages vary according to the specific solution.	• Takes time to design and program. • Other possible disadvantages vary according to the specific solution.
Siebel Assignment Manager	• Skills-based routing. • Workload-based routing. • Rule maintenance in graphical user interface. No programming is required.	• No real-time notification using the communications toolbar. • No blending of inbound communications in different channels.

4 Global Deployment of Siebel Email Response

Global Deployment of Siebel Email Response

This chapter covers setting up and configuring Siebel Email Response for a multilingual, Unicode database, or non-Unicode database deployment. It includes the following topics:

- *Smart Character Set for Siebel Email Response*
- *Enabling Smart Character Set*
- *About Global Deployments for Siebel Email Response*
- *Planning Global Deployments for Siebel Email Response*
- *Setting Up Global Deployments for Siebel Email Response*

Smart Character Set for Siebel Email Response

Siebel Email Response uses the Smart Character Set feature to support global installations by receiving, displaying, and replying to all email messages with no character corruption. This feature works with both double-byte and single-byte character sets (with and without HTML) and applies to the email message body, MIME attachments, and the Subject line of the email.

The Smart Character Set feature saves the incoming character set so that it can be used later when replying to the email sender. For example, if a customer sends an email in Japanese (for example, using the ISO-2022-JP character set), then this information is saved and used when replying to the email.

By implementing Smart Character Set, all incoming messages from Microsoft Outlook and outgoing messages sent to Web-based email clients (such as Yahoo! and Hotmail) appear properly. For information about supported email clients, see the Certifications tab on My Oracle Support.

Although you can set the character set on a driver, if you are not sure the character set you specify is compatible to your Reply Email, then the SMART CHAR SET VALIDATION feature can guarantee that you always reply email in a compatible character set. For example, if the character set from incoming email and driver profile both are unable to represent the characters you input in the Reply Email, then the UTF-8 character set will be used. However the SMART CHAR SET VALIDATION will have lower efficiency comparing to the SMART CHAR SET as it always does validation for each reply email.

The default Response Email Encoding parameter is UTF-8. In replying emails, the character set will always use UTF-8 as default. The character set from inbound email and driver profile will be ignored.

You can configure Response Email Encoding to use SMART CHAR SET or SMART CHAR SET VALIDATION. In this case when an agent replies to this message, the character set is retrieved from the activity record, so the reply uses the same character set. If, however, the character set of the inbound email message cannot be determined, then the character set for the value of the Charset parameter for the driver profile is used.

Smart Character Set and F9 Send Email

For F9 Send Email, Smart Character Set completes the following tasks:

1. Checks the driver parameter to determine the correct character set.
2. Sends the email in the UTF-8 character set if the driver parameter that specifies the character set has no value.

Note: F9 Send Email is sent in the UTF-8 character set unless you specify a character set when setting the profile.

Smart Character Set and Siebel Email Response

For Siebel Email Response, Smart Character Set completes the following tasks:

1. Uses the message header of the inbound email to determine the correct character set (for example, Content - Type:text/plain;charset=iso-8859-1).
2. Checks the driver parameter to determine the correct character set if no customer record exists.
3. Sends the email in the UTF-8 character set if no driver parameter exists.

Enabling Smart Character Set

The following activities automatically use the same character set as the inbound email:

- Auto Response
- Auto Acknowledgement
- Server Request Reply

Note: The MIME_CHAR_SET field in the S_EVT_MAIL table stores the incoming or outgoing character set.

When you manually enable the Smart Character Set feature, you define the character set for all outbound email using the profile.

To enable Smart Character Set

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select Internet SMTP/POP3 Server or Internet SMTP/IMAP Server.
3. Click the Driver Parameters view tab.
4. In the Charset parameter, enter a value.

   For information about supported character sets, see 1513102.1 (Article ID) on My Oracle Support.

About Global Deployments for Siebel Email Response

If you want to use Siebel Email Response for global responses, then you must configure it accordingly. Siebel Email Response setup and configuration steps are the same for each deployment type. For more information, see *Siebel Global Deployment Guide* .

In a global deployment of Siebel Email Response, you must set up an email account (profile) and a response group for each language that your organization supports.

For example, if your organization supports French and German, then set up two profiles and response groups. You might name the French profile and response group fra_support@example.com and the German profile and response group deu_support@example.com. Customers send messages to the address that processes their preferred language.

In a Unicode deployment, the Siebel database is Unicode, and customers can send email messages in different languages such as Japanese, Chinese, English, German, and so on. However, you still must set up a profile for each language.

In a global environment, Siebel Email Response performs the following tasks:

- Monitors the response groups that you set up for each language that your organization supports.
- Creates an activity record in the Siebel database that stores the content of the email along with the language of the email message. The original email message is also stored as an attachment to the record.
- Sends an acknowledgement message using the original language of the message. For example, if a user sends a message in French, then an acknowledgement message is sent to the user in French.
- Routes an inbound email message to the agent who can best handle the message. The routing is based on assignment rules you define using Assignment Manager or based on criteria that a custom routing and queueing solution uses. For example, a French message is routed to an agent with a French language skill. For more information, see *Siebel Assignment Manager Administration Guide* .
- Enables an agent to compose and send messages using templates in a preferred language.

  Agents review messages using a Siebel client and compose and send response messages using response templates. The list of available templates consists of all templates in all languages. Templates are filtered by the language and locale values that the agent sets in the User Preferences screen.

  If the agent does not specify these user preference fields, then filtering is based on the language and locale of the object manager to which the agent is connected. For example, if the agent's browser is connected to the French object manager, then the templates are filtered by using the French language.

  > **Note:** You translate templates and solutions into the supported languages that your organization selects during the deployment planning stage of your Siebel Email Response implementation.

- Checks spelling for the most common international languages. For more information, see *Spell Check*.

Planning Global Deployments for Siebel Email Response

Before deploying Siebel Email Response in a global environment, analyze your organization's requirements by answering the following questions:

- Do any groups in your organization receive messages in languages other than English? If so, do you have an email address set up to receive international messages? How do you handle international messages?
- What code page does your Siebel Server support? How many languages does your organization plan to support?

  If your organization supports three languages (French, German, and Italian), then you must create one profile for each language. You also must create one response group for each language and add the appropriate profile to the response group. Each response group supports one language-specific profile. For example, to support French, the response group named fra_support@example.com supports the profile named fra_support@example.com.
- Which routing method will you use to route incoming email to agents?

  For example, you can route activities using Assignment Manager and the language of the message.
- What communications templates will you use in Siebel Email Response replies?

  If your organization plans to support multiple languages and decides to add new templates, then you must translate the template text to the languages that you plan to support. For more information, see *Templates for Global Deployments*.

Setting Up Global Deployments for Siebel Email Response

Customers can deploy Siebel Email Response in a single environment using different languages if the languages are in the same code page. Agents that use templates for daily replies to inbound messages can filter templates by using the language and locale setting in user preferences.

Requirements for Setting Up Global Deployments

Before you set up global deployment for Siebel Email Response, complete the following tasks:

- If your organization plans to support multiple languages, then install the language packs for each of the supported languages. The language pack installs the Siebel Email Response templates in a specific language. For information about language pack installation, see the *Siebel Installation Guide* .
- If you plan to use Siebel Assignment Manager to assign activities by using language, then enable the Assignment Management component group. For more information, see *Siebel Assignment Manager Administration Guide* .

Language Packs and Communications Templates

When you install the seed data for required languages into the Siebel database, the communications templates (containing the correct values for language and locale) associated with Siebel Email Response are installed. You can create additional templates to meet your business requirements. For more information, see *Templates for Global Deployments*.

Email Accounts for Supported Languages

Set up an email account for each language that you plan to support.

In your email server, create one response group for each language. Each of these response groups handles messages in different languages. If your installation supports French and German messages, then set up two response groups (for example, fra_support@example.com and deu_support@example.com). For French messages, users must send their messages to fra_support@example.com. For German messages, users must send their messages to deu_support@example.com.

Response Groups for Global Deployments

To be able to reply to email messages in more than one language, you must create a response group for each language and associate a profile with the response group. For example, if you plan to receive French messages, then create a response group named FRA Response Group and associate the profile fra_support@example.com with the response group. For information about how to create profiles, see *Process of Setting Up Communications Driver Profiles*. For information about how to create response groups, see *Process of Setting Up Response Groups*.

Each response group monitors a language response group. Create one response group for each language. For example, Communications Inbound Receiver for French monitors the profiles that are associated with FRA Response Group.

For each response group, you must pass the MsgDefaultLanguageCode input argument, which contains the default language of the email message, to the following workflows:

- eMail Response - Process Message
- eMail Response - Process Service Request

MsgDefaultLanguageCode is an argument in the workflow process. It specifies the language that the workflow process uses to set the language of a created activity record. For example, when a user sends an email to fra_support@example.com, an activity record is created with a language of FRA. Assignment Manager can assign the activity to the agent who handles French email by using the activity language. For information about the input parameters to configure for response groups, see *Adding Input Arguments to Response Groups*.

Templates for Global Deployments

When creating templates for a global deployment, follow the convention of naming the templates in English and including the language and locale to help maintain consistency. Oracle uses this naming convention for translating the

standard templates the Siebel Email Response uses into the languages that Oracle supports. It is recommended that you follow the same naming convention.

Additionally, if you create templates, then you must add logic to the workflow so that the workflow process can call the templates and so that Siebel Workflow is able to detect the language of the templates. For information about creating templates, see *Creating Simple Templates* and *Creating Advanced Templates*.

Language Support for Global Deployments

Consider the following guidelines in a Siebel Email Response global deployment:

- Internet Email Addresses (delivery addresses) must contain ASCII characters. They cannot contain any non-ASCII characters.

  Extended Internet Email Addresses can contain a display name in addition to a delivery address. The display name can contain non-ASCII characters if these characters are encoded according to MIME standards to enable them to be transformed into ASCII characters. If these non-ASCII characters in the display name can be transformed into ASCII characters, then the message can be transmitted.
- One response group can handle only one language. If you support multiple languages, then you must set up a response group for each language.
- Siebel Email Response does not perform language detection. If an email message is sent to the wrong response group, then the language of the activity record is the default language that you specify in the input argument of the response group. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.
- Messages that are in languages that are not in the Windows code page 1252 or code page 8859-1 appear as characters that cannot be displayed.

  When you work with a monolingual or multilingual deployment and a non-Unicode database deployment, you might receive messages in languages that the environment does not support. All new deployments must use Unicode.

  Because the subject and body cannot be converted, they appear as characters that cannot be displayed. Siebel Email Response does not process this email or create activities, and sends the email as an attachment in email format to the administrator for review (if you set up the administrator email profile).
- The most widely-used character sets, including 1252 / Latin-1, Shift-JIS, ISO-2022-JP (mail JIS), EUC-JP, and UTF-8, are valid for Communications Inbound Receiver and Communications Inbound Processor.
- When Siebel Email Response replies to email messages, the prefix strings are in English and not in the various supported languages. For a list of the languages supported by Siebel CRM, see 1513102.1 (Article ID) on My Oracle Support.

5 Configuring Communications Drivers and Profiles for Email

Configuring Communications Drivers and Profiles for Email

This chapter provides information about configuring communications drivers and profiles. It includes the following topics:

- *About Setting Up Parameters for Communications Drivers*
- *Communications Drivers Provided with Siebel CRM*
- *Process of Setting Up Communications Driver Profiles*
- *Upgrading to 64-bit JRE Support for the Siebel IMAP and POP3 Drivers*
- *Process of Setting Up Response Groups*
- *How Communications Drivers Process Email Messages*

About Setting Up Parameters for Communications Drivers

Siebel Email Response uses the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver to send and receive email messages. These drivers have several parameters that define their default behavior. Organizations might have multiple mailboxes to monitor such as customersupport@example.com, sales@example.com, and marketing@example.com. These mailboxes can share common parameters. For example, these mailboxes might have the same SMTP server parameter and POP3 or IMAP server parameter (mail.example.com). For more information, see *How Communications Drivers Process Email Messages*.

Administrators can set default driver parameters for the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver, instead of setting these values for each profile that they create. If, however, the administrator has another mailbox (such as support-japan@example.com) that is on a different SMTP server and POP3 or IMAP server (such as japan.example.com), then the administrator must create profile parameter overrides for the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver only for the support-japan@example.com profile.

The most common driver parameters that an administrator might change are parameters that are relatively consistent for most of an organization's mailboxes, such as those for the SMTP server and POP3 or IMAP server, or parameters that you change occasionally for all profiles. For example, if an administrator is troubleshooting the communications setup and wants to enable debug logging, then the administrator changes the LogDebug parameter to True.

The administrator can set up a backup SMTP server, and define a parameter specifying the host name or IP address of the computer on which the backup SMTP server is running, as appropriate for your network configuration. This parameter is used when you implement a failover strategy for your SMTP server that handles outbound email or fax communications.

Note: Make sure that you use a supported communications driver. For more information about specific requirements, see the Certifications tab on My Oracle Support.

Communications Drivers Provided with Siebel CRM

Some communications drivers provided with Siebel CRM include:

- **Internet SMTP/IMAP Server.** Supports Internet mail servers that support the SMTP protocol for outbound email, fax, or wireless messages or the IMAP protocol for inbound email (for Siebel Email Response). This driver supports both plain-text and HTML email. For more information, see *Email Servers That Oracle Validates*, and *Managing Integrations with Email and Fax Servers*.
- **Internet SMTP/POP3 Server.** Supports Internet mail servers that support the SMTP protocol for outbound email, fax, or wireless messages or the POP3 protocol for inbound email (for Siebel Email Response). This driver supports both plain-text and HTML email. For more information, see *Email Servers That Oracle Validates*, and *Managing Integrations with Email and Fax Servers*.
- **Modem-based TAP Paging.** For Siebel Paging, supports paging over a modem using the Telocator Alphanumeric Paging (TAP) protocol for outbound communication requests. (The Send Page command does not use this driver.) For more information, see *Modem-Based TAP Paging Driver*.
- **Note:** Siebel Paging is included with all base applications of the Siebel Business Applications.
- **FTP.** Supports File Transfer Protocol (FTP). Siebel Marketing uses this driver to send contact lists to vendors who are contracted to execute campaigns. For more information, see *FTP Driver*.

For information about files and database records for communications drivers and about developing new drivers, see *Siebel CTI Administration Guide* .

Email Servers That Oracle Validates

The Internet SMTP/IMAP Server and Internet SMTP/POP3 Server drivers are provided with Siebel Business Applications and are validated to work with several third-party email servers. For more information about support for third-party email servers and related products, see the Certifications tab on My Oracle Support and see the third-party vendor documentation. For information about using the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server driver to integrate Siebel Communications Server with email servers, see *Managing Integrations with Email and Fax Servers*.

The Internet SMTP/IMAP Server and Internet SMTP/POP3 Server drivers are compliant with the following RFC standards:

- 1894: delivery status notification
- 1939: POP3 (Internet SMTP/POP3 Server driver only)
- 2045 - 2049: MIME
- 2821: SMTP
- 2822: text message syntax
- 3207: SMTP session encryption using SSL

Note: Configure your email servers appropriately to work with Siebel applications. For example, for security reasons, your SMTP server might restrict from which originating computers outbound email messages can be relayed. In this scenario, you must configure the SMTP server to allow message relay from the Siebel Server computers running the Outbound Communications Manager server component.

About Profiles for Communications Drivers

You initially configure a communications driver by setting default parameter values for the driver in the Communications Drivers and Profiles view.

You can make a communications driver available to serve a particular purpose by creating one or more profiles that reference the driver. For each profile, you can specify parameter values to override the parameters of the referenced driver or to provide values that not specified.

Administrators can specify in the Communications Drivers and Profiles view the Siebel responsibilities and organizations that can see the profiles that users specify in some of the contexts of use. For more information, see *Contexts of Use for Communications Driver Profiles*.

Profile visibility applies to the Send Email window (in the Siebel native email client) and Send Fax window, to email reply features for Siebel Email Response, and to outbound communication requests. Users can see only those profiles that are associated with both their responsibilities and their organizations, or the profiles they create themselves.

If your company includes multiple organizations, then administrators can associate each profile with a responsibility and an organization. For example, Siebel Email Response might use this association to find the contact for an inbound email message.

Contexts of Use for Communications Driver Profiles

Administrators or (in limited contexts) users can create communications driver profiles. They can specify communications driver profiles for use by administrators and users in many communications-related contexts in the Siebel application.

Administrator Contexts for Using Profiles

Administrators specify profiles in the following contexts:

- When defining response groups for inbound communications to support Siebel Email Response.
- When configuring mobile devices associated with employees, contacts, or others. This configuration supports wireless messaging. These profiles are associated with device addresses for each mobile device for each person.

User Contexts for Using Profiles

In general, users specify profiles in the following contexts:

- When specifying a default email or fax profile in the Outbound Communications view of the User Preferences screen. The profile specifies the message sender.
- To specify the sender when sending outbound communications using the Send Email command (for the native Siebel email client) or the Send Fax command.

- When configuring mobile devices associated with the user. This configuration supports wireless messaging. Profiles are associated with device addresses for each mobile device for the user.

Specialized users specify profiles in the following contexts:

- When defining communications templates for use with outbound communication requests.
- When defining contact lists for vendor campaign execution in Siebel Marketing.

If the capability is provided to them, then users can create profiles for their own use by using the My Profiles view in the Communications screen. User-defined profiles support particular features, such as the Send Email or Send Fax command, for which the users can directly specify the profile to use.

In any of the user contexts, an user can see only the profiles that meet one of the following conditions:

- The responsibility associated with the profile is one of the user's responsibilities *and* the organization associated with the profile includes the user's current position.
- The user created the profile.

Process of Setting Up Communications Driver Profiles

For Siebel Email Response, communications driver profiles map to individual accounts or mailboxes on a server. For example, customersupport@example.com or info@example.com are valid accounts to which you can map a profile.

Because you can use the same driver for many different profiles, you must create a unique profile to differentiate each of your email server accounts. For example, customersupport@example.com and info@example.com must have separate profiles. Although you can use any name, it is recommended that you use the email address as the profile name to make each profile easier to identify.

You can determine the email profiles that are available in the From drop-down list on an email reply by associating profiles with responsibilities. For example, you might want your support representatives to send replies only from customersupport@example.com and your marketing representatives to send replies only from info@example.com. Create a responsibility for each group and associate each profile and agent with the appropriate responsibility.

> **Note:** A specific email address can be associated with only one communications profile and a profile can only be associated with one response group.

Each profile has parameter overrides that assign unique behaviors to it. A common parameter override is Mail Password. This topic provides basic information for creating a communications driver profile.

To set up a communications driver profile, perform the following tasks:

1. *Creating Communications Driver Profiles*
2. *Assigning Parameter Overrides to Communications Driver Profiles*
3. *Enabling Cryptographic Protocols for Communications Drivers*
4. *Submitting Changes for Communications Driver Profiles*

Repeat these tasks for each Siebel Email Response mailbox.

> **CAUTION:** Do not delete a profile from the Profiles list because Communications Outbound Manager might be using it to send a message, and email messages might be lost. Delete a profile only from the response group.

Creating Communications Driver Profiles

You first create a communications driver profile. After you create the profile, you assign overrides to the profile. For more information, see *Assigning Parameter Overrides to Communications Driver Profiles*.

To create this profile, you use the information that you gather during the planning process. For more information, see *Setup Information for Siebel Email Response*.

This task is a step in *Process of Setting Up Communications Driver Profiles*.

To create a communications driver profile

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select Internet SMTP/POP3 Server or Internet SMTP/IMAP Server.
3. In the Profiles list, create a new record, and complete the necessary fields.

   The fields are described in the following table.

Field	Description
Name	Type the name of the profile (the mailbox that you want to monitor). It is recommended that you use the email address of the profile name.
Organization	Select an organization to associate with the profile. o If your company has only one organization, then do not change the default value. o If your company has multiple organizations, then click the select button and select the appropriate organization in the Pick Organization dialog box. When an email sender has contact records that exist in multiple organizations, Siebel Email Response can use the organization ID on the receiving profile to look up the sender. You must add an input argument named Lookup Sender By Organization to the response group and set the value to True. This value also determines the profile that shows in the drop-down list.
Responsibilities	Select the responsibilities for this profile in the Responsibilities dialog box. Responsibilities determine the email profiles that show in the From drop-down list on an email reply. Only the email profiles that are associated with these responsibilities show for users whose personal profiles contain the same responsibilities. The profile is visible to a user in the profile's context of use. For example, in Siebel Email Response and in the Send Email and Send Fax commands, the profile is visible if it meets one of the visibility criteria. For more information about the visibility criteria, see *Contexts of Use for Communications Driver Profiles*.

Assigning Parameter Overrides to Communications Driver Profiles

You assign parameter overrides to the profile. To assign these overrides, you use the information that you gather during the planning process. For more information, see *Setup Information for Siebel Email Response*.

Some driver parameters have no default value. If a parameter is required, then you must assign the value as a profile parameter override when you create the profile.

If you use the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server driver in an environment that supports multiple email servers, then you must create different profiles for this driver. Each profile includes a different value for the SMTP Server parameter, which identifies the name of the server.

This task is a step in *Process of Setting Up Communications Driver Profiles*.

To assign parameter overrides to a communications driver profile

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select Internet SMTP/POP3 Server or Internet SMTP/IMAP Server.
3. Click the Profiles view tab, and select the appropriate profile.
4. In the Profile Parameter Overrides list, create a new record, and add the necessary parameter override fields:
   a. In the Name drop-down list, select the name of the driver parameter for which you want to change the value.

      If you cannot see the entire name in the drop-down list, then move your cursor over it to make the full name appear. For descriptions of driver parameters, see *Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver*.
   b. Complete the Value field.

Enabling Cryptographic Protocols for Communications Drivers

Cryptographic protocols include SSL (Secure Sockets Layer) or TLS (Transport Layer Security). To configure cryptographic protocols for communications drivers and for communication between servers, complete the following procedures:

- *Enabling SSL or TLS Connection for Communications Drivers*
- *Setting Server Parameters for SSL or TLS*

Note: An encryption level below 128 bits is not supported in Siebel CRM. For more information about encryption, see *Siebel Security Guide* .

This task is a step in *Process of Setting Up Communications Driver Profiles*.

Enabling SSL or TLS Connection for Communications Drivers

The procedure in this topic describes how to enable SSL or TLS connection for communications drivers. In this procedure, you define parameters that relate to the communications drivers.

When you define the parameters, including SMTP Account Name and SMTP Account Password, an attempt is made to execute the AUTH LOGIN command at the start of the SMTP session. If the AUTH LOGIN command fails, then the session is terminated, a log file error message is generated, and the message is not sent. This occurrence is not a permanent fatal error for the driver, so the existing retry logic for Communications Outbound Manager applies, and another attempt is made to send the message at a later date.

To enable SSL or TLS connection for communications drivers

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select Internet SMTP/POP3 Server or Internet SMTP/IMAP Server.
3. Click the Driver Parameters view tab, and complete the fields in the following table.

Field	Description
Enable SSL for IMAP	If you select Internet SMTP/IMAP Server in Step 2 , then type a value of True to enable SSL.
Enable SSL for POP3	If you select Internet SMTP/POP3 Server in Step 2, then type a value of True to enable SSL.
Enable SSL for SMTP	Type a value of True to enable SSL.
Enable TLS for IMAP	If you select Internet SMTP/IMAP Server in Step 2, then type a value of True to enable TLS.
Enable TLS for POP3	If you select Internet SMTP/POP3 Server in Step 2, then type a value of True to enable TLS.
Enable TLS for SMTP	Type a value of True to enable TLS.
IMAP Server Port	If you select Internet SMTP/IMAP Server in Step 2, then change the IMAP port to 993 for secure SSL or TLS connections. Change the IMAP port to 143 (or your email server port for IMAP) for nonsecure connections. Nonsecure connections are not recommended. The email server uses its self-signed preconfigured certificates. The default value for this port is 143.
POP3 Server Port	If you select Internet SMTP/POP3 Server in Step 2, then change the POP3 port to 995 for secure SSL or TLS connections. Change the POP3 port to 110 (or your email server port for POP3) for nonsecure connections. Nonsecure connections are not recommended. The email server uses its self-signed preconfigured certificates. The default value for this port is 110.
SMTP Account Name	Type the value for the SMTP account name.
SMTP Account Password	Type the value for the SMTP account password.
SMTP Backup Account Name	Type the account name for the backup SMTP interface that requires user authentication.
SMTP Backup Account Password	Type the account password for the backup SMTP interface that requires user authentication.
SMTP Server Port	Change the SMTP port to 465 for secure SSL or TLS connections. Change the SMTP port to 25 (or your email server port for SMTP) for nonsecure connections. Nonsecure connections are not recommended. The email server uses its self-signed preconfigured certificates. The default value for this port is 25.

Setting Server Parameters for SSL or TLS

To ensure secure transactions between the Siebel Server and the email server, it is highly recommended that you set the SSL (Secure Sockets Layer) or TLS (Transport Layer Security) server parameters in the procedure in this topic. This procedure describes how to set these server parameters to enable cryptographic authentication. After completing this procedure, restart the Siebel server to implement the parameter changes. For more information about the parameters for SSL and TLS, see the *Siebel Installation Guide* and the topics in *Siebel Security Guide* about configuring encryption for Siebel Enterprise or Siebel Server.

To set the SSL or TLS server parameters

1. Navigate to the Administration - Server Configuration screen, then the Servers view.
2. In the Servers list, select the Siebel Server.
3. Click the Parameters view tab.
4. Set the SSL or TLS parameters in the following table.

Parameter	Description
CA certificate file name	Type the URL to the Cryptographic Authentication (CA) certificate file. You must set this value to enable CA of email messages. An example of this URL is `d:\siebel\admin\cacertfile.pem`.
Certificate file name	Type the URL to the certificate file.
Peer Authentication	Type a value of True. This parameter enables Cryptographic Authentication. **Note:** To enable authentication, you *must* at a minimum set the CACertFileName and PeerAuth parameters.
Private key file name	Type the URL to the key file.
Private key file password	Type the password of the key file.
Validate peer certificate	Type a value of False. This parameter enables authentication of the certification files.

Submitting Changes for Communications Driver Profiles

You submit any profile changes. When you submit profile changes, you *unload* the profile and profile configuration settings from all response groups that are loaded with the profile. You also load the profile in all of the response groups that you configure with the profile.

Submit profile changes in the following situations:

- If you change only the parameters (or the underlying driver parameters) on a communications driver profile that at least one response group currently loads.

- **Note:** If you attempt to submit profile changes for a communications driver profile that a response group does not load, then your action has no effect.

- If you remove a profile from a response group and you want only the profile to unload without unloading and reloading all of the other profiles. Remove the profile from the response group and then submit profile changes so that the response group unloads the profile.
- If you want to move a communications driver profile between response groups. You must remove the profile from one response group and submit the change, and then add the same profile to another response group and submit the change. By submitting profile changes, you cause the communications driver profile to stop executing in one response group (the response group that you move the communications driver profile *from*) and start executing in the other response group (the response group that you move the communications driver profile *to*).

This task is a step in *Process of Setting Up Communications Driver Profiles*.

To submit changes for communications driver profiles

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select Internet SMTP/POP3 Server or Internet SMTP/IMAP Server.
3. Click the Profiles view tab.
4. In the Profiles Menu drop-down list, select Submit Profile Changes.

Upgrading to 64-bit JRE Support for the Siebel IMAP and POP3 Drivers

The Internet SMTP/IMAP Server and Internet SMTP/POP3 Server email drivers previously ran on the 32-bit JRE. However, Oracle no longer supports the 32-bit JRE on certain platforms, such as Solaris. As of Siebel CRM 21.3 Update, to continue to use either of these email drivers for Siebel Email Response, you must upgrade to the latest 64-bit JRE. The functionality of these drivers remains the same. The upgrade includes the following modules:

- **Email driver.** Loaded by the Siebel Communication Inbound Manager (CommInboundMgr) component and uses HTTP to access the email servlet.
- **Email servlet.** Hosted by the Apache Tomcat server (on the Siebel Server), which leverages the JavaMail IMAP implementation.

To upgrade to 64–bit JRE, perform the necessary steps in the following tasks, in the order shown:

1. *Obtaining and Importing the Certificate*
2. *Configuring the 64-bit JRE Using the Siebel CRM Application*
3. *Viewing Deployment Files and Configuring Log files*

Obtaining and Importing the Certificate

Before you can configure the email drivers to support the 64-bit JRE, you must obtain a suitable certificate and import it into your Siebel truststore.

To obtain and import the certificate

1. Obtain the public certificate from Microsoft Exchange Server.

2. To import the certificate into your Siebel truststore, run a command like the following from the `Java_Home/bin` directory:

```
keytool -import -alias outlook.com -file outlook.cer -keystore YourSiebelTruststore.jks
```

Configuring the 64-bit JRE Using the Siebel CRM Application

The next step in configuring the 64-bit JRE to configure the driver and profile parameters using the Siebel application.

To configure the 64-bit JRE

1. In the Siebel CRM application, go to Administration - Communications, and then to Communications Drivers and Profiles.
2. Select the Internet SMTP/IMAP Server driver and configure a profile, as required for your deployment:
   a. Add the Mail Servlet URL parameter to the Internet SMTP/IMAP Server driver.
   b. Select a profile you are using for the Internet SMTP/IMAP Server driver.
   c. In Profile Parameter Overrides, configure the value of the Mail Servlet URL parameter.

      Specify a URL in the following format, directed to the Tomcat server of the Siebel Server: http://hostname:port/siebel/mail, where the URL contains the following elements:
      - hostname is the hostname of your Tomcat server on the Siebel Server.
      - port is defined in `SIEBEL_ROOT\applicationcontainer_internal\conf\server.xml`, similar to the following:

        ```
        <connector port="9012" protocol="HTTP/1.1" connectionTimeout="20000" redirectport="4630" />
        ```

      - mail is defined in `SIEBEL_ROOT\applicationcontainer_internal\webapps\siebel\WEB-INF\web.xml`, as follows:

        ```
        <servlet-name>mail</servlet-name>
        ```

3. Select the Internet SMTP/POP3 Server driver and configure a profile, as required for your deployment:
   a. Add the following parameters to the Internet SMTP/POP3 Server driver:
      - Mail Servlet URL
      - Enable Java for POP3
   b. Select a profile you are using for the Internet SMTP/POP3 Server driver.
   c. In Profile Parameter Overrides, configure values for the parameters you added, to enable the server to access the jssecacerts file:
      - **Mail Servlet URL.** Specify the value as described in Step 2 for the Internet SMTP/IMAP Server driver.
      - **Enable Java for POP3.** Specify the value of TRUE.

Viewing Deployment Files and Configuring Log files

On upgrading your Siebel email drivers to use the 64-bit JRE, the following associated deployment and log files are created in the Siebel Server installation.

Deployment Files

The following files are installed on the Tomcat server for the Siebel Server, in the following location: `SIEBEL_ROOT\applicationcontainer_internal\webapps\siebel\WEB-INF\lib`.

- mailservlet.jar
- JavaMail (jakarta.mail.jar)

Log Files

You can view the following log files for any errors in upgrading:

- **IMAPSMTP.log.** This file is generated by the C++ IMAP driver in the Siebel Server `log` directory.
- **POP3SMTP.log.** This file is generated by the C++ POP3 driver in the Siebel Server `log` directory.
- **mail.log.** This file is generated by the email servlet in the Tomcat server's `log` directory. You can configure this log file in the file `SIEBEL_ROOT\applicationcontainer_internal\webapps\siebel\WEB-INF\log4j2-siebel.xml`.

Configuring the mail.log File

The email servlet creates the log4j2-siebel.xml file, which manages the mail.log file. You can configure this file for two purposes:

- **Set the log file size.** You can use the default log file size or set the file size value such that when the log file reaches the defined value, a new log file is generated.
- **Set the log level.** Set what you want the log file to display for the email servlet. The following log levels are supported: ERROR (default), ALL, OFF, DEBUG, TRACE, INFO, and WARN. For example:

```
<RollingFile name="MAIL" fileName="${sys:catalina.base}/logs/mail.log"
 filePattern="${sys:catalina.base}/logs/mail-%d{MM-dd-yyyy}-%i.log">
                        <PatternLayout>
                                    <pattern>[%-5level] %d{yyyy-MM-dd HH:mm:ss.SSS} [%t] %c{1} - %msg
%n</pattern>
                        </PatternLayout>
                        <Policies>
                                    <SizeBasedTriggeringPolicy size="10 MB"/>
                        </Policies>
            </RollingFile>

   <logger name="MAIL" level="ERROR" additivity="false">
      <AppenderRef ref="MAIL"/>
   </logger>
```

Process of Setting Up Response Groups

A response group includes input arguments that define the behaviors for one or more profiles. Communications Inbound Receiver processes each item by using the input arguments in the response group. When Communications Inbound Receiver starts, it searches for all active response groups and starts them. Because Siebel Workflow manages Siebel Email Response functionality, response groups use the Workflow Process Manager business service and the RunProcess method for Siebel Email Response work items as defaults.

You begin the process of setting up a response group by creating the response group. Then, you assign input arguments that tell Communications Inbound Receiver how to monitor incoming email for all profiles in the response group. Input arguments enable you to define auto-acknowledgment messages, error messages, and business component fields. Each response group method has different input argument settings.

Note: You cannot change the method name of a response group after you generate input arguments.

After making any changes to a response group or profile, you must submit the response group changes so that these changes take effect. Then you associate the response group with profiles (email addresses). The input arguments that you assign to the response group control the processing of all email that is sent to these profiles.

CAUTION: Do not associate a profile with more than one active response group. Messages might be lost if you associate a profile with more than one active response group.

To set up response groups, perform the following tasks:

1. *Creating Response Groups*
2. *Adding Input Arguments to Response Groups*
3. *Associating Profiles with Response Groups*
4. *Submitting Changes for Response Groups*
5. *Starting Response Groups*

CAUTION: Do *not* delete a response group from the Profiles list. Communications Outbound Manager might be using it to send a message, and email messages might be lost. Delete a response group only from the response group.

Creating Response Groups

First, create a response group.

This task is a step in *Process of Setting Up Response Groups*.

To create a response group

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Groups form, create a new record.
3. Using information you gather during the planning process, complete the necessary response group fields in the following table.

Field	Description
Name	Type the name of the response group.
Service Name	Do not change the default value of Workflow Process Manager.
Method Name	Do not change the default value of RunProcess.
Administrator Email Address	Type the email address to which a notification is sent when server errors occur.
Description	Type notes about this response group. You can describe the behaviors that apply to all profiles in this response group.

Adding Input Arguments to Response Groups

Next, add input arguments to the response group. To add input arguments, you use the information that you gather during the planning process. For more information, see *Setup Information for Siebel Email Response*.

The following table shows the input arguments for response groups.

Input Argument	Type	Description
ProcessName	None	The name of the workflow process that processes Siebel Email Response inbound messages (for example, Email Response - Process Message). This input argument is required. Change the value to Email Response - Process Service Request for keyword-based response groups.
ProcessInstanceId	String	The unique ID of this instance of the process.
RowId	String	The unique ID of the response group in the Siebel database.
Catalog Name	String	The name of a catalog to use.
Disable Send Acknowledgement	True or False	A value to indicate if an acknowledgement message is sent. The default value is False. If you change this input argument to True, then no acknowledgement message is sent.
Enable Assignment Manager	True or False	A value to indicate if Assignment Manager is disabled. The default value is False.

Input Argument	Type	Description
Enable Lookup Sender By Organization	True or False	A value to indicate if sender lookup by organization is enabled. The default value is False.
Enable Test Mode	True or False	A value to indicate of test mode is enabled. The default value is False.
MsgDefaultLanguageCode	None	The assumed language for email messages sent to mailboxes that the response group monitors.
RealTime	True or False	The default value is True. This value enables processing of email messages in real time.

This task is a step in *Process of Setting Up Response Groups*.

To add input arguments to a response group

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Group list, select the response group for which you want to make changes.
3. Click the Input Arguments view tab.
4. In the Input Arguments list, click Generate Defaults.

   Default input arguments appear on the Input Arguments list.

   Default input arguments are based on the business service method. For information about the Siebel Email Response process properties that are used as input arguments, see *About Modifying Process Properties for Siebel Email Response*.
5. Select the eMail Response - Process Message workflow, and add the Catalog Name input argument:

   a. In the Input Argument list, create a new record.
   b. In the Name field, enter Catalog Name.
   c. In the Value field, enter the catalog name.

   For information about creating this catalog and its categories, see *Setting Up a Catalog for Siebel Email Response*.
6. Add other new input arguments:

   a. Create a new record.
   b. Enter the name and value of the input argument.

   You must enter the exact name of the input argument. For information about the names of the input arguments, see *Business Service Methods for Siebel Email Response*.
7. To delete an input argument record, click Delete.

Associating Profiles with Response Groups

Next, associate the profiles with the response group. To associate the profiles with the response group, you use the profiles that you gather during the planning process. For more information, see *Setup Information for Siebel Email Response*.

This task is a step in *Process of Setting Up Response Groups*.

To associate profiles with a response group

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Group list, select the response group for which you want to make changes.
3. Click the Profiles view tab.
4. In the Profiles list, create a new record.

   The Add Communication Profiles dialog box appears, listing existing profiles.
5. In the Add Communication Profiles dialog box, select the profiles.

   Only created profiles appear on the list. For information about adding more profiles, see *Creating Communications Driver Profiles*.
6. Click the drop-down arrow to view and select additional profiles.
7. Click OK to associate the selected profiles with the response group.

   The profiles appear in the Profiles list.

Submitting Changes for Response Groups

Most of the changes that you can make to a response group do not automatically take effect. For a change to take effect, you must click Submit Response Group Changes in the Response Groups menu drop-down list. Deleting a response group automatically takes effect.

The types of changes that you can make are:

- Adding or deleting a profile
- Changing an input argument
- Changing a workflow

Note: The Submit Response Group menu item does not work on the Siebel Mobile Web Client.

If you make changes to the response group input parameters, then add a profile to the response group, or remove a profile from the response group, you must submit the response group changes for the changes to take effect.

This task is a step in *Process of Setting Up Response Groups*.

To submit changes for response groups

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Group list, select the response group for which you want to make changes.

3. In the Response Group form, verify that the Server field value is the Siebel Server name and the Startup field value is Active.
4. In the Response Groups menu drop-down list, select Submit Response Group Changes.

Starting Response Groups

You can automatically or manually start a response group. After you start a response group, the response group is in effect and its input arguments can control email processing.

When Communications Inbound Receiver starts, it looks at the *Startup and Server* field to determine if a response group must be started. When the Startup field for a response group changes from *blank* to *Active*, Communications Inbound Receiver picks up the change, and the response group is automatically started.

Each response group has one component task. For two or more response groups, two or more component tasks are automatically started. Communications Inbound Receiver can start multiple component tasks, one task for each response group. Each task has multiple subtasks, representing a workflow thread that can process inbound messages.

This task is a step in *Process of Setting Up Response Groups*.

To manually start a response group

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Group list, select the response group that you want to start.
3. In the Response Group form, verify that the Server field value is the Siebel Server name and the Startup field value is Active.
4. In the Response Groups menu drop-down list, select Submit Response Group Changes.

How Communications Drivers Process Email Messages

This topic contains some information about email directories and driver parameters as well as an overview of how the communications drivers process email messages.

This topic contains the following information:

- *Email Directories and Driver Parameters*
- *Output Parameter Values for Communications Drivers*
- *Overview of the Processing Flow of Inbound Email Messages*
- *Attachments Created When Inbound Email Is Received*
- *Attachments Created When Outbound Email Is Sent*

Email Directories and Driver Parameters

When the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver starts, it creates the following directories:

- Failed
- Incoming

- Loopback
- Processed
- Sent

By default, these directories are placed in the bin subdirectory of the Siebel Server installation directory if they do not exist. If you do not want to store messages in the bin subdirectory, then you can specify a different location by changing the values for the communications driver parameters. To change the locations where messages are stored, navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view. In the Driver Parameters list, choose one of the following parameters for the directory location that you want to change, and enter a directory path in the Default Value column:

- Failed Email Directory
- Incoming Email Directory
- Loopback Email Directory
- Processed Email Directory
- Sent Email Directory

The following parameters control processing of incoming and outgoing messages:

- Delete Processed Messages
- Save Sent Messages
- Return Attachments
- Process If Loopback Detected

You can change processing for these email messages by changing the default value of a driver parameter. For more information about the parameters in this topic, see *Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver*.

Output Parameter Values for Communications Drivers

During email processing, the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver passes output parameter values to the Communications Inbound Receiver and Communications Inbound Processor server components. From these server components, these values are passed to the Siebel Email Response workflows in the form of properties for the EventFields property set. The following table provides a list of the output parameter values and a description of how you can modify email handling behavior by accessing these values in the EventFields property set.

Parameter Name	Description
Attachments	The number of nonsupplemental attachments that are found. The default value is 0.
CcList	The value of the *CC:* header field. This parameter must be semicolon delimited if it includes multiple recipients.
DsnAction	This parameter uses the *RFC1894* protocol. For more information, see: http://www.faqs.org/rfcs/rfc1894.html.

Parameter Name	Description
DsnContent	This parameter uses the *RFC1894* protocol. For more information, see: http://www.faqs.org/rfcs/rfc1894.html.
DsnFinalRecipient	This parameter uses the *RFC1894* protocol. For more information, see: http://www.faqs.org/rfcs/rfc1894.html.
DsnOriginalEnvelopeId	This parameter uses the *RFC1894* protocol. For more information, see: http://www.faqs.org/rfcs/rfc1894.html.
DsnStatus	This parameter uses the *RFC1894* protocol. For more information, see: http://www.faqs.org/rfcs/rfc1894.html.
FileCharset%d	The character set of the attachment file.
FileIsInline%d	If an incoming *attachment* file does not have an associated name, then the attachment file is considered *inline*. The user interface displays the attachment in the rich edit control and not in the attachment pane.
FileIsSupplemental%d	If the incoming *attachment file* is a supplemental file that the driver creates, such as the original message.txt file, then this parameter is True. Otherwise this parameter is False.
FileName%d	The name of the *attachment* file. You can specify this parameter in the MIME type or as synthesized by using the type and subtype of the attachment.
FilePath%d	The physical location of the attachment file on the local hard disk. If the response group that loads the driver does not process email in real time, then this parameter is the location of the file on the Siebel File System.
FileSubtype%d	The MIME subtype of the attachment file.
FileType%d	The MIME type of the attachment file.
HasAttach	This parameter is True if the number of attachments is greater than or equal to 1.
HTMLBody	This parameter is set if the incoming email text is HTML only or is multipart or alternative with HTML.
In-Reply-To	The value of the *In-Reply-To:* header field. This parameter uses the *RFC2822* protocol. For more information, see: http://www.faqs.org/rfcs/rfc2822.html.
IsDeliveryStatusNotification	If the incoming email is a delivery status notification as specified by the *RFC1894* protocol, then this parameter is True. Otherwise, this parameter is False. For more information, see:

Parameter Name	Description
	http://www.faqs.org/rfcs/rfc1894.html.
Keywords	The value of the *Keywords:* header field. This parameter uses the *RFC2822* protocol. For more information, see: http://www.faqs.org/rfcs/rfc2822.html.
LocalFileToGlobal%d	This parameter facilitates moving generated local files to the Siebel File System. For more information, see *About Moving Generated Local Files to Siebel File System*.
LoopbackCandidate	This parameter facilitates moving generated local files to the Siebel File System. For more information, see *About Moving Generated Local Files to Siebel File System*.
Message-ID	The value of the Message-ID: header field. This value is also used as the DriverTrackingID for the Siebel Communications API. For more information, see: http://www.faqs.org/rfcs/rfc2822.html.
MsgClass	This parameter is obsolete.
OrigMsgFile	If the response group that loads the driver does not process email in *real time*, then this parameter is the location on file on the Siebel File System. The incoming MIME type is saved in this local file.
Prefix	For a forwarded message, this parameter is *Fwd* or *Fw*. For a message that is in reply to another message, this parameter is *Re*. Otherwise, this parameter is empty.
Priority	This parameter is a number from *1* to *5* with *1* designating the highest priority and *5* designating the lowest priority. The default value is 3. This parameter is extracted from the *X-Priority* or the *X-MSMail-Priority* if available.
Received	The date that the email is retrieved from the POP3 or IMAP server.
ReceiverAddress	The email address that is extracted from the *From Address* communications profile input parameter. For example, the ReceiverAddress for *Example Support <support@example.com>* is *support@example.com*.
ReceiverName	The *proper name* that is extracted from the *From Address* communications profile input parameter. If there is no *proper name*, then this parameter is set to the ReceiverAddress parameter. For example, the ReceiverName for *Example Support <support@example.com>* is *Example Support.*
References	The value of the *References:* header field. This parameter uses the *RFC2822* protocol. For more information, see: http://www.faqs.org/rfcs/rfc2822.html.
SenderAddress	The email address that is extracted from the *From:* header field. For example, the SenderAddress for *John Smith <John@Smith.net>* is *john@smith.net.*
SenderAddrType	This parameter is always empty. The workflows do not use this parameter.

Parameter Name	Description
SenderName	The *proper name* that is extracted from the *From:* header field. If there is no proper name, then this parameter is set to the SenderAddress parameter. For example, the SenderName for *John Smith <John@Smith.net>* is *John Smith.*
SenderReplyNames	If the *Reply-To:* header field has a value, then this parameter is that value delimited by semicolons rather than commas. If *Reply-To:* has no value, then this parameter is the same value as the SenderAddress parameter.
Sent	The date from the *Date:* header field.
SiebelChannelProfile	Media Manager generates this parameter.
SiebelChannelType	Media Manager generates this parameter.
SiebelChannelTypeString	Media Manager generates this parameter.
SiebelDriverNotifyWhenDone	Media Manager generates this parameter.
SiebelWorkItemID	Media Manager generates this parameter.
Subject	The value of the *Subject:* header field.
Temp%d	If this parameter is True, then the person who accesses the file must assume ownership of the disk-based file, and in most cases the workflow that processes the incoming message must delete the file after it is stored in the Siebel File System.
text/html charset	The *IANA character set* of the HTMLBody parameter. This parameter is the value of the *charset* parameter of the *Content-Type:* header field.
text/plain charset	The *IANA character set* of the TextNote parameter. This parameter is the value of the *charset* parameter of the *Content-Type:* header field.
TextNote	The text/plain message body text of the incoming message.
ToList	The value of the *To:* header field. This parameter must be semicolon delimited if it includes multiple recipients.

About Moving Generated Local Files to Siebel File System

This topic describes how to direct Communications Inbound Receiver to move driver-generated local files to the Siebel File System. The processing of driver events can occur on a remote Communications Inbound Processor server only if you set the *RealTime input parameter for the* response group to False and nonreal-time processing applies.

To enable workflows executing on a remote Communications Inbound Processor server to access driver-generated local files, Communications Inbound Receiver monitors EventFields with the following code:

```
LocalFileToGlobalXXX=tag|FiletoRep
 lace
```

where:

XXX must start at *0* and increase contiguously.

FiletoReplace is the file that is moved to the Siebel File System.

This code is the key to a tag-value pair with *FiletoReplace* replaced with the actual Siebel File System file name that is generated when the file is moved to the Siebel File System.

For example, the driver generates the following EventFields:

```
LocalFileToGlobal0=OriginalMsgFile|C:\OriginalMsgFile.txt

OriginalMsgFile=C:\OriginalMsgFile.txt
```

In this example, the local file `C:\OriginalMsgFile.txt` is moved to the Siebel File System. If this file receives the name *ABCDEFG* on the Siebel File System, then the EventFields is modified as follows *before* submitted to the workflow for processing:

```
OriginalMsgFile=ABCDEFG
```

Overview of the Processing Flow of Inbound Email Messages

When the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver starts, it creates required directories, such as a directory for incoming email. The driver also creates a thread that polls the POP3 or IMAP server. The PollingInterval driver parameter controls the frequency with which the driver checks the POP3 or IMAP server for messages.

If messages exist for the POP3 server, then the driver retrieves and processes them one at a time, up to a maximum for each session equal to the value in the POP3 Batch Size driver parameter. If the current session with the POP3 server terminates abnormally, then all messages previously retrieved, processed, and deleted during the current session are restored, retrieved, and processed again the next time that the driver connects to the POP3 server. The smaller the value of the driver parameter, the fewer duplicate messages are created and processed if a restart occurs.

Messages in a session are processed as shown in the following steps:

1. A retrieve command downloads and saves a message to the directory for incoming email.

   For the POP3 server, the retrieve command is POP3 RETR. The name of the temporary file for the message is POP3_*A_B_C_D_E_F*.tmp. For more information about the files that the processing flow creates, see *Attachments Created When Inbound Email Is Received*.
2. A delete command deletes the message from the POP3 or IMAP server.

   For the POP3 server, the delete command is POP3 DELE. If the delete command fails, then the message that is stored in the directory for incoming email is erased because it is retrieved again in the next POP3 or IMAP session.

> **Note:** Do not set up other email clients to access the mailboxes that Siebel Email Response monitors because the email driver deletes the messages from the POP3 or IMAP server when Siebel Email Response processes them. These deleted messages are not visible to another client.

3. The disk-based message is parsed. The parsing produces the following files in the directory for incoming email:
   a. OriginalMessageText_*A_B_C_D_E_F_G*.txt.
   b. Any attachments parsed from message are given unique names as follows: ATT_*A_B_C_D_E_F_G*.dat.
   c. Any remaining text or HTML fragments are converted to attachments and are given unique names as follows: ATT_*A_B_C_D_E_F_G*.dat.

   > **CAUTION:** Any errors that occur in the workflows can place the ATT_A_B_C_D_E_F_G.dat files in the directory for incoming email. If this placement occurs when the Communications Inbound Receiver is not running, then the workflow that the Communications Inbound Receiver invokes fails to process a message event.

   To determine if you can delete an ATT_A_B_C_D_E_F_G.dat file in the directory for incoming email, stop the Communications Inbound Receiver, and then look at the contents of all the queued Communications Inbound Receiver events in all response groups to make sure that the ATT_A_B_C_D_E_F_G.dat files are no longer referenced.
4. If an error occurs when the message is parsed, then the following events occur:
   a. The temporary file is moved to the directory for failed email and any created attachments are deleted.
   b. The POP3 or IMAP session is immediately terminated with a quit command so that the error message is permanently deleted from the server.
5. If the Loopback Detection Interval parameter value is greater than zero, and the message sender is currently blocked, then the following events occur:
   - If the Process If Loopback Detected parameter value is False, then the message is moved to the directory for loopback email.
   - If the Process If Loopback Detected parameter value is True, then the driver's Loopback Candidate flag is set to True, and the message continues processing.
6. If the message is not moved to the directory for loopback email or flagged as a loopback candidate, then the temporary file is processed as follows:
   - If the Delete Processed Messages parameter value is True, then the temporary file is deleted.
   - If the Delete Processed Messages parameter value is False, then the temporary file is moved to the directory for processed email.
7. The primary message text, header information (subject, to, cc, date, and so on), Loopback Candidate flag, and references to the attachments are passed to the driver's creator (usually Communications Inbound Receiver).
8. The Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver does not delete the OriginalMessageText file and all the attachments. The workflow that the Communications Inbound Receiver invokes deletes all the attachments.

Attachments Created When Inbound Email Is Received

The Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver creates several different files as a result of processing inbound and outbound email messages. Some of these files are temporary, and some can be permanent depending on the profile parameters. All numbers in the file names are in Hexadecimal format.

Siebel Email Response generates internal attachments when it receives plain text or HTML email. These internally generated attachments appear in addition to any external attachments that the email sender associates with the email. No internally generated attachment is sent with a Reply, Reply to All, or Forward message.

SMTP_A_B_C_D_E_F.tmp

When the driver is used to send a message, it creates one file with the naming convention SMTP_*A_B_C_D_E_F*.tmp where:

- *A* is the process ID of the application that loads the driver.
- *B* is the Siebel Communications API handle of the driver.
- *C* is the Siebel Communications API handle of the service.
- *D* is the time when the service is created.
- *E* is the number of messages that this service sends.
- *F* is the number of milliseconds that elapsed since the application was started.

This file is the encoded MIME message that is sent to the SMTP server for delivery. This file is created under the `bin/sent` directory unless you specify the Sent Email Directory profile parameter. This file is deleted after the message is sent from the disk to the SMTP server unless the Save Sent Msg profile parameter is set to True.

POP3_A_B_C_D_E_F.tmp

When the driver is used to retrieve a message from a POP3 server, it creates a file to store the incoming message with the naming convention POP3_*A_B_C_D_E_F*.tmp where:

- *A* is the process ID of the application that loads the driver.
- *B* is the Siebel Communications API handle of the driver.
- *C* is the Siebel Communications API handle of the service.
- *D* is the time when the service that received the message is created.
- *E* is the number of messages that are received during the current POP3 session.
- *F* is the number of milliseconds that elapsed since the application was started.

This file is the MIME message that is retrieved from the POP3 server. This file stores the incoming message and is always created in the `bin/incoming` directory unless you specify the Incoming Email Directory profile parameter. If the Delete Processed Messages profile parameter is False, then these messages are moved to the `bin/processed` directory after they are processed, otherwise they are deleted.

After a MIME message is downloaded to the `bin/incoming` directory, it is parsed and the results are usually passed to the Communications Inbound Receiver. This file is not reprocessed when the Communications Inbound Receiver is restarted. Therefore, if an application failure occurs, then one or more of these files might be placed in the `bin/incoming` directory. You can delete these files without consequence. The messages that the POP3_*A_B_C_D_E_F*.tmp files represent are re-retrieved and not lost.

ATT_A_B_C_D_E_F_G.dat

When the driver is used to retrieve a message, it creates a file to store attachments that are parsed from the incoming message with the naming convention ATT_*A_B_C_D_E_F_G*.dat where:

- *A* is the process ID of the application that loads the driver.
- *B* is the Siebel Communications API handle of the driver.

- *C* is the Siebel Communications API handle of the service.
- *D* is the time when the service that received the message is created.
- *E* is the number of messages that are received during the current POP3 or IMAP session.
- *F* is the number of attachments that are found so far in the message.
- *G* is the number of milliseconds that elapsed since the application was started.

When the message is parsed, all non-inline message parts and textual parts of the message are used to create the attachment files in the `bin/incoming` directory.

Another special instance of this type of file is created when an embedded message is found in the message that is parsed. Embedded messages cause the creation of one of the following two types of files:

- A file with the internal name of EmbeddedMsgX.xml that contains the embedded message header and all plain text parts of the mail. The purpose of this file is the same as the purpose of the OriginalMessageText_*A_B_C_D_E_F*.txt file.
- A file with the internal name EmbeddedMsgX.eml that contains the MIME message of the embedded message. You can open this file with Microsoft Outlook Express. This file is created only if the Parse Embedded Messages profile parameter is explicitly set to False, and the EmbeddedMsgX.xml file is not created.

OriginalMessageText_A_B_C_D_E_F_G.txt

When the driver is used to retrieve a message, it creates a file to store the header and textual data from the incoming message with the naming convention OriginalMessageText_*A_B_C_D_E_F*.txt where:

- *A* is the process ID of the application that loads the driver.
- *B* is the Siebel Communications API handle of the driver.
- *C* is the Siebel Communications API handle of the service.
- *D* is the time when the service that received the message is created.
- *E* is the number of messages that are received during the current POP3 or IMAP session.
- *F* is the number of attachments that are found so far in the message.
- *G* is the number of milliseconds that elapsed since the application was started.

The OriginalMessageText file contains the MIME format of the message that the Internet SMTP/POP3 Server driver or Internet SMTP/IMAP Server driver receives. The original message header and all text/plain message parts that are not inside an embedded message part and not marked as *inline* are written to a file in the UTF-8 character set.

The Siebel Email Response workflows delete the ATT and OriginalMessageText files. If ATT or OriginalMessageText files exist in the `bin/incoming` directory, then the Communications Inbound Receiver process terminated abnormally or the email events that created these files are not yet processed. Do not manually delete these temporary files until you verify that none of the email events under the `bin/queued` directory reference the temporary files.

Current_A_B.ids and Previous_A_B.ids

To avoid retrieving duplicate messages when a POP3 or IMAP session is abnormally terminated, the unique message-ids associated with each processed message are stored (to keep track of previously retrieved messages) in two files with the naming conventions Current_*A_B*.ids and Previous_*A_B*.ids where:

- *A* is the POP3 or IMAP server name.
- *B* is the POP3 or IMAP account name.

The Current index file stores all the message IDs that are passed to the Communications Inbound Receiver for workflow processing in the current POP3 or IMAP session. If the session terminates abnormally, then the quit command is not

executed and the delete commands for the current session are not executed. To avoid re-retrieving the messages from the previous session, the driver checks for a Current index file on startup, and if this file exists, then it is appended to the Previous index file. Before a message is retrieved from the POP3 or IMAP server, the Previous index file is checked to see whether that message is already processed.

You can delete these files, but if a POP3 or IMAP session terminates abnormally and you delete these files, then messages with a POP3 Batch Size less 1 might be duplicated. These files never are large because they are erased each time a POP3 or IMAP session terminates normally. In addition, they are never larger than a certain number of bytes (POP3 Batch Size multiplied by 128).

POP3SMTP_A_B_C_D_E.log or IMAPSMTP_A_B_C_D_E.log

Each service instance can also create a log file if you set the LogDebug profile parameter to True. The error logging level determines the amount of tracing data in this log file. This log file is always created in the same directory as all the other Siebel log files. The naming convention of this file is POP3SMTP_*A_B_C_D_E*.log or IMAPSMTP_*A_B_C_D_E*.log where:

- *A* is the process ID of the application that loads the driver.
- *B* is the Siebel Communications API handle of the driver.
- *C* is the Siebel Communications API handle of the service.
- *D* is the time when the service that received the message is created.
- *E* is the number of milliseconds that elapsed since the application was started.

Attachments Created When Outbound Email Is Sent

When sending an outbound email message, an internally generated attachment is created for an outbound email message with a size greater than 16 KB (about 15,000 characters). This internally generated attachment is named SiebelLongEmailBody and is stored with the email activity record in the Siebel application but is not sent with the outbound message.

The following table describes the formats for this attachment. Regardless of its size, the attachment contains the entire email in the body of the message without any internally generated attachments. This attachment is created so that any message greater than 16 KB can be stored in the Siebel File System. A Siebel database maximum of 15,000 characters exists for any email. Additionally, this attachment is sent to the email recipient in the body of a single email message. Users can see the entire text of the email in the Outgoing Message form.

You can generate a SiebelLongEmailBody attachment file for an outbound email message with a size less than 16 KB by setting the Save Email Body as Attachment user property for the Comm Outbound Email business component to True.

Default Message Format	Attachment Created for Email Greater than 16 KB
HTML	SiebelLongEmailBody.htm
Plain Text	SiebelLongEmailBody.txt

Note: You set the Default Message Format in the Outbound Communications view of the User Preferences screen.

6 Configuring User Interface Elements

Configuring User Interface Elements

This chapter provides information about configuring user interface elements for communications features. It includes the following topics:

- *Configuring Recipient Groups for Requests and Advanced Templates*
- *Configuring Recipients for Send Commands*
- *Configuring Default Templates for Send Email Command*
- *Configuring the Retry Interval for Outbound Email*
- *Configuring Invalid Characters or Symbols in Email Attachment Names*
- *Process of Authenticating Sender Email Addresses*

Configuring Recipient Groups for Requests and Advanced Templates

This topic describes configuring recipient groups for outbound communication requests and advanced templates. It contains the following information:

- *About Recipient Groups*
- *Predefined Recipient Groups*
- *Configuring Substitution Fields for Recipient Groups*
- *Configuring Additional Recipient Groups and Recipient Sources Applets*

A *recipient group* is a group of people that you want to send communications to. Generally, you do not need to configure new recipient groups unless existing recipient groups do not meet your needs. Note the following information about recipient groups:

- For outbound communication requests, recipient groups determine the actual recipients of communications. For example, for the Opportunity Contacts recipient group, recipients include the contacts associated with one or more opportunities.
- For communications templates, which requests and other communications features use, recipient groups determine the Siebel objects that the template is associated with as follows:
  - For advanced templates used for outbound communication requests, substitution fields for templates come from Siebel objects. For example, for the Opportunity Contacts recipient group, substitution fields come from the Opportunity and Contact business components.
  - For simple templates used for email replies in Siebel Email Response and for the Send commands in the File menu, substitution fields come from a specified business object. No configuration is necessary other than for the template itself. For more information, see *Configuring Recipients for Send Commands*.

Outbound communication requests use advanced templates to send email, fax, or wireless messages in an automated fashion. Communication requests can support high-volume processing and output. For more information about

working with recipient groups when creating advanced templates and requests, see *Configuring Communications Templates* and *Defining Outbound Communication Requests*.

A user can create and submit outbound communication requests, and Siebel Workflow or other modules can automatically create and submit outbound communications requests by invoking the methods of the Outbound Communications Manager business service. For more information about Siebel Workflow, see *Siebel Business Process Framework: Workflow Guide* . For more information about using business services with Siebel Communications Server, see *Business Service Methods for Siebel Email Response*.

About Recipient Groups

This topic describes concepts to help you to use or configure recipient groups used with advanced templates and outbound communication requests. For more information about working with business objects, business components, links, and other elements mentioned in this topic, see *Configuring Siebel Business Applications* and *Siebel Developer's Reference* .

Each recipient group specifies a source business object, called the *recipient source*, such as Opportunity, Account, Action, Internal Division, and so on. The recipient group also specifies a recipient group business component, which must be a direct child of the primary business component for the recipient source business object.

The actual recipients for a communication request come from the recipient group business component, such as Contact, Employee, and so on. The link between the primary and child business components defines these recipients. Note the following examples:

- A recipient group might be based on a recipient source that specifies one or more accounts and the contacts of these accounts (Account Contacts).
- A recipient group might be based on a recipient source that specifies one or more opportunities and the sales-team members of these opportunities (Opportunity Sales Team Members).
- A recipient group might be based on a recipient source that directly specifies one or more employees (Employees).

Note: Make sure that you select Link Specification for the Primary Contact ID field in the parent business component.

Recipient groups directly determine actual recipients only for outbound communication requests. For advanced communications templates, they determine the fields that are available for substitution data from the Siebel application when the template is sent to each specific recipient for the request.

Note: If you create a new recipient group using a custom business component, and select the Create Activity check box for an advanced template that uses the recipient group, then you must create a System Activity object on the custom business component to specify the fields to log with activity logging. For more information about the description of the Create Activity check box, see *Fields for Templates*.

Predefined Recipient Groups

Several predefined recipient groups, and their underlying business objects and business components, are provided with Siebel Business Applications. If the predefined recipient groups do not meet all your business needs, then you

can configure the Siebel application to extend or modify the available recipient groups. For more information, see *Configuring Additional Recipient Groups and Recipient Sources Applets*.

The following table lists predefined recipient groups that users or administrators can select in the Recipient Group drop-down list in the end-user and administrator views for working with outbound communication requests, or in the end-user and administrator views for working with communications templates in the Advanced form. You can also specify these recipient groups in workflow processes that you create using Siebel Workflow.

(In the Simple form of the templates views, the Object drop-down list displays business objects for which a primary business component is defined. These entries are not the same as the recipient groups described in this topic.)

Note: The Recipient Group drop-down list (for requests or for advanced templates) contains the most up-to-date list of recipient groups for the standard Siebel applications. Your Siebel products might not contain all of the recipient groups in the following table.

Most of the recipient groups in the Recipient Group drop-down list apply to both requests and advanced templates, but some recipient groups apply only to templates. Recipient groups not applicable to requests display a star icon.

The following table shows each recipient group along with the name of the source business object and recipient business component. For COMM_RECIP_SRC type in the List of Values view of the Administration - Data screen, the Parent LIC column corresponds to the source business object, and the Language-Independent Code column corresponds to the recipient business component. For more information about these elements, see *About Recipient Groups*.

Recipient Group (Display Value)	Source Business Object (Parent LIC)	Recipient Business Component (Language-Independent Code)
Account Contacts	Account	Contact
Account Team Members	Account	Position
Activity Contact	Action	Comm Contact
Activity Contacts	Action	Contact(All)
Activity Owner	Action	Employee (MM)
Campaign Contacts/Prospects	Campaign	Campaign Recipient
Campaign Team Members	Campaign	Campaign Position
Contacts	Contact	Contact
Division Positions	Internal Division	Position
Email Activity Receiver*	Comm Outbound Email	Comm Outbound Email
Email Activity Sender	Action	Action

Recipient Group (Display Value)	Source Business Object (Parent LIC)	Recipient Business Component (Language-Independent Code)
Employees	Employee	Employee
Expense Approver	Expense	Expense Report Approver
Expense Owner	Expense	Expense Report Owner
List Contacts/Prospects	List Mgmt	List Mgmt List Member
Messaging Activity*	Messaging	Messaging Activity
Messaging Activity Assignee	Action	Messaging Activity Assignee
Messaging Assignee*	Messaging	Messaging Assignee
Messaging Contacts*	Messaging	Messaging
Opportunity Contacts	Opportunity	Contact
Opportunity Key Contact	Opportunity	Opportunity Key Contact
Opportunity Sales Team Members	Opportunity	Position
Order Contact	Order Entry	Comm Contact
Order Contact (Purchasing Mgr)	Order Entry	Contact (Purchasing Manager)
Order Sales Team Members	Order Entry	Position
Project Team Members	Project	PS Project Team
Prospect Partner	Channel Partner	Prospect Partner
Quote Contact	Quote	Comm Contact
Quote Sales Rep	Quote	Position
Service Request Contact	Service Request	Comm Contact
Service Request Owner	Service Request	Comm Employee

Recipient Group (Display Value)	Source Business Object (Parent LIC)	Recipient Business Component (Language-Independent Code)
Time Sheet Approver	Time Sheet	TS Approver
Time Sheet Owner	Time Sheet	TS Owner
eEvent Attendee	eEvents Event Attendee	eEvents Event Attendee

Configuring Substitution Fields for Recipient Groups

For the business components in a recipient group, all business component fields are generally listed as available substitutions. (System fields, hidden fields, and fields that have a dot in the name are not listed.) Fields are listed from both the recipient group business component and recipient source business component, if the fields are different.

Note the following examples:

- For the Contacts recipient group, the available substitution fields are from the Contact business component in the form [Field Name].
- For the Account Contacts recipient group, the available substitution fields are from both the Contact business component in the form [Field Name] and the Account business component in the form [Account.Field Name].

Although it is usually unnecessary, you can use Siebel Tools to explicitly specify the substitution fields to list for any business component.

To configure a substitution field for a recipient group

1. Start Siebel Tools, then select the business component on which the recipient group is based.
2. In the Object Explorer, select Business Component User Prop.

   The Business Component User Properties applet appears.
3. Select Edit, then New Record.
4. Enter details for the new record as shown in the following table.

In this field	Enter
Name	Substitution Field # Replace # with the next number in the list of substitution fields. For example, if the name of the last created substitution field is Substitution Field 17, then the name of the new field is Substitution Field 18.
Value	The name of the business component field.

5. Step off the record to save your changes.

Note: If you add one or more Substitution Field user properties, then only those business component fields that the user properties identify are listed as available substitution fields in the All Templates or My Templates view. No other fields are listed for the business component. For more information about specifying user properties, see *Configuring Siebel Business Applications* and *Siebel Developer's Reference* .

For the Account Contacts recipient group, any Substitution Field user properties defined on the Accounts or the Contacts business component affect the substitution fields for only that business component.

Configuring Additional Recipient Groups and Recipient Sources Applets

If the Recipient Group drop-down list does not contain the values you need, then complete the procedures in this topic. This topic describes how to configure your Siebel application to add or modify recipient groups or to modify user interface features for specifying recipients for outbound communication requests. For more information, see *About Recipient Groups*, *Predefined Recipient Groups*, and *Configuring Substitution Fields for Recipient Groups*.

If the predefined recipient groups do not serve all your needs, then you must configure the List of Values for the Recipient Group drop-down list to add values you need or remove values you do not need. For more information, see *Configuring the List of Values for Recipient Groups*.

If you want to add any items to the List of Values, then you must also configure the Recipient Sources applet to display records associated with the business objects and business components from which you want to specify recipients. The Recipient Sources applet is named Comm Source List Applet in Siebel Tools. For more information, see *Configuring Recipient Sources Applets*.

Configure the Recipient Sources applet for the following views:

- Outbound Request Overview view of the Administration - Communications screen. The view name in Siebel Tools is Comm Request Source Recipient Admin View.
- My Outbound Request Overview view of the Communications screen. The view name in Siebel Tools is Comm Request Source Recipient Personal View.

If you want to only remove a value from the List of Values, then you do not need to configure the applet in Siebel Tools.

Note: If you customize a recipient group to include child business component fields, then the user properties of the business component must exist in the child business component and not in the parent business component.

Configuring the List of Values for Recipient Groups

This topic describes how to configure the List of Values for the Recipient Group drop-down list. For more information about configuring Lists of Values, see *Siebel Applications Administration Guide* .

To configure the List of Values for the Recipient Group drop-down list

1. Navigate to the Administration - Data screen, then the List of Values view.
2. Optionally, complete the following steps to create a new List of Values item of the COMM_RECIP_SRC type, if one does not already exist that specifies the business object that serves as the recipient source for the recipient group you require:

a. Locate a record of the COMM_RECIP_SRC type for which the Parent LIC (Language-Independent Code) field contains no value.
b. Copy the record.
c. Set the Display Value and the Language-Independent Code fields for the new record to the business object name that represents the recipient source (for example, Campaign, Account, and so on).

3. Locate a record of the COMM_RECIP_SRC type for which the field Parent LIC is contains a value.
4. Copy the record.
5. Specify values for the new record as follows:

a. Set the Parent LIC field to the business object name that represents the recipient source, such as one you specified in Step 2.
b. Set the Display Value field to any appropriate value.
c. Set the Language-Independent Code field to the business component specified as the recipient group business component.

Configuring Recipient Sources Applets

This topic describes how to configure the Recipient Sources applet and associated applets. For more information about configuring applets, see *Configuring Siebel Business Applications* and *Siebel Developer's Reference* .

To configure Recipient Sources applets

1. Start Siebel Tools.

   If the Comm Source *bus_obj_name* List Applet applet is defined, where *bus_obj_name* is the name of the business object that serves as the recipient source, then you do not need to create the applet in Step 2 and Step 3.
2. As necessary, create a new applet, or copy and modify an existing applet.

   For example, you can copy the Comm Source List Applet applet, which appears as the Recipient Sources applet.
3. Provide a name for the new applet in the form Comm Source *bus_obj_name* List Applet, where *bus_obj_name* is the name of the business object that serves as the recipient source.

   > **Note:** You must specify the Comm Source bus_obj_name List Applet for recipient groups for communication requests. The recipient groups listed for communication requests are only those recipient groups for which applets with this naming convention are defined. For recipient groups to use only for communications templates, this naming convention is not required.

   The class of the new applet must be CSSFrameListCommSrc.
4. Specify the business component associated with your new applet. If you copied Comm Source List Applet or another existing applet, then you must also modify the business component that your new applet is associated with.
5. Add the new applet to the Applet Toggle list for the Comm Source List Applet.

   When a user selects the corresponding value from the Recipient Group drop-down list, as configured in the previous procedure, the Recipient Sources applet automatically functions like the new applet you define in this procedure. You define the recipient source business object using a label that appears on the far side of the applet header area.

6. Create a new association applet for the new recipient source, or use an existing association applet, and set it into the new list applet.

   An association applet is the applet that appears in a dialog box when you add a new record in a fixed applet that allows association. For example, an association applet might be for associating an account with a communication request. Every list applet has an Assoc Applet property that you can set to an association applet.
7. Create a link between the Comm Request business component and the new recipient source business component, and use S_COMM_REQ_SRC as the intersection table.

   For examples, refer to the existing links defined for the Comm Request business object.
8. Add the new recipient source business component to the Comm Request business object, and specify the link from Step 7.
9. For outbound communication requests for email, fax, or page, define the following user properties on the business component to use as the recipient group:

   - **Recipient First Name Field.** The business component field containing the recipient's first name.
   - **Recipient Last Name Field.** The business component field containing the recipient's last name.
   - **Recipient Preferred Medium Field.** The business component field containing the recipient's communications channel preference.

     If the Only Send Preference setting is specified for a communication request, then a communications template is sent to a recipient if the template channel type corresponds to the value in the field that this user property indicates. For more information about the Only Send Preference, see *Fields for Outbound Communication Requests*.

     If you do not set this user property, then the preference is retrieved from the Preferred Communications field if the business component includes such a field.
   - **Recipient Email Address Field.** The business component field containing the recipient's email address data.

     For example, in the Contact business component, your application might use the Email Address field for email address data. In this scenario, Recipient Email Address Field must specify the Email Address field. (This field is specified by default.)
   - **Recipient Fax Address Field.** The business component field containing the recipient's fax address data.

     For example, in the Contact business component, your application might use the Fax Phone # field for fax address data. However, the Recipient Fax Address Field must specify the Fax Address field. (This field is specified by default.) Fax Address is a calculated field that prepares fax addressing data obtained from the Fax Phone # field for use with your fax server.

     The formatting for fax-related fields depends on your fax server requirements. By default, the calculated field value for the Fax Address field contains fax formatting that applies to OpenText RightFax and specifies the email account that the fax server monitors. You must modify all such field values as appropriate for your specific fax integration. For more information, see *Integrating with Fax Products* and *Configuring Fax Integration Elements in Siebel Tools*.
   - **Recipient Fax Address Prefix.** An optional prefix string for the recipient's fax address.
   - **Recipient Fax Address Suffix.** An optional suffix string for the recipient's fax address.
   - **Recipient Pager Address Field.** The business component field containing the recipient's pager address data. For more information about this field, see the Recipient Pager Address Field in the Employee business component for the correct pager address format.

For outbound communication requests that use wireless messaging, the listed user properties are not used. Each recipient's mobile device address data is obtained from the Mobile Device Address business component using the recipient's ID stored in the S_PARTY table. System administrators enter mobile device address data in the Mobile Devices view of the Administration - Communications screen, and users enter mobile devise address data in the Mobile screen. For more information about wireless messaging, *Using Wireless Messaging*

Configuring Recipients for Send Commands

This topic describes how to specify user properties to configure generic recipients for messages that users send using the Send Email, Send Fax, and Send Wireless Message commands.

The Send Wireless Message command uses generic recipients, but it does not use the user properties for nonjoined generic recipients. The Send Page command does not use generic recipients, and the user properties do not apply. For information about using the Send commands, see *Using Send Commands to Send Messages*.

About Generic Recipients

A generic recipient is associated with a business component and identifies a potential recipient related to a specific record. Generic recipients include the following types:

- **Nonjoined generic recipients.** With nonjoined generic recipients, addressing information is obtained directly from fields in the current business component. For more information, see *Configuring Nonjoined Generic Recipients*.

  For example, the Contact business component uses the nonjoined generic recipient type. If a contact record is selected when the user invokes the Send Email command, then the Send Email window appears, preaddressed to the selected recipient. Recipient data comes directly from the contact record.

  The Send Wireless Message command does not use the user properties for nonjoined generic recipients. The mobile address data for the wireless messaging recipient is obtained from the Mobile Device Address business component by using the recipient's ID stored in the S_PARTY table.

  Administrators enter mobile device data in the Mobile Devices view of the Administration - Communications screen, and users enter mobile device data in the Mobile screen. Mobile device data can be captured automatically. For more information about wireless messaging, see *Using Wireless Messaging*.
- **Joined generic recipients.** With joined generic recipients, addressing information is obtained from fields in another business component that is joined to the current business component. For more information, see *Configuring Joined Generic Recipients*.

  For example, the Service Request business component uses the joined generic recipient type. If a service request record is selected when the user invokes the Send Email command, then the Recipient field allows the user to select Service Request Owner or Service Request Contact as the email recipient. (The user can also select None and specify the recipient.) After the user selects the recipient (and other settings), the Send Email window appears, preaddressed to the appropriate recipient.

  For Service Request Owner, recipient data comes from an employee record. For Service Request Contact, recipient data comes from a contact record. In each case, recipient data comes from a record that is joined to the service request record.

For Send Wireless Message, mobile device address data is obtained without using the user properties for nonjoined generic recipients. However, the user properties for joined generic recipients user are used.

User Interface Context for the Recipient Field

The user interface context for the Recipient field is as follows for the Send Email, Send Fax, and Send Wireless Message commands:

- For Send Email using the native Siebel email client, or for Send Fax and Send Wireless Message, the Recipient field is part of the Pick Recipient dialog box.

  If invoking the Send command does not require the user to select from this field, such as when the current business component uses nonjoined generic recipients for Send Email or Send Fax, or any time the user invokes Send Wireless Message, then the Pick Recipient dialog box does not appear. The Send Email, Send Fax, or Send Wireless Message window appears.
- For Send Email using Lotus Notes or Microsoft Outlook, the Recipient field is part of the Recipient or Template dialog box.

  If invoking the Send Email command does not require the user to select from this field, such as when the current business component uses nonjoined generic recipients for Send Email, then the Recipient or Template dialog box appears without the Recipient field. After the user selects a template, the Lotus Notes or Microsoft Outlook email window appears.

Configuring Nonjoined Generic Recipients

To configure nonjoined generic recipients for a business component, specify values for the following business component user properties:

- **Recipient Email Address Field.** The business component field from which email address data is obtained for the Send Email command.

  For example, in the Contact business component, your application might use the Email Address field for email address data. In this scenario, Recipient Email Address Field must specify the Email Address field. (This field is specified by default.)
- **Recipient Fax Address Field.** The business component field from which fax address data is obtained for the Send Fax command.

  For example, in the Contact business component, your application might use the Fax Phone # field for fax address data. However, Recipient Fax Address Field must specify the Fax Address field. (This field is specified by default.) Fax Address is a calculated field that prepares fax addressing data obtained from the Fax Phone # field for use with your fax server.

  The formatting for fax-related fields depends on your fax server requirements. By default, the calculated field value for the Fax Address field contains fax formatting that applies to OpenText RightFax and specifies the email account that the fax server monitors. You must modify all such field values as appropriate for your specific fax integration. For more information, see *Integrating with Fax Products* and *Configuring Fax Integration Elements in Siebel Tools*.

Additional Requirement for Nonjoined Generic Recipients

When you configure nonjoined generic recipients, the business component must belong to the Messaging Recipient business object. (The Contact and Employee business components already belong to this business object.)

Configuring Joined Generic Recipients

To configure joined generic recipients for a business component, specify values for the following business component user property:

- **Recipient Id Field N (where N is an integer).** A comma-delimited list of three required values, and an optional fourth value, that points to records in the joined business component. The Send Email, Send Fax, and Send Wireless Message commands use this user property.

  For example, the Service Request Contact joined generic recipient type is defined for the Service Request business component using the *Contact Id, Contact, Service Request Contact* value. The value for this user property includes the following elements:

  - The foreign key field in the parent business component that points to records in the joined business component. In this example, this field is Contact Id, a field in the Service Request business component that corresponds to the Id field in the Contact business component.
  - The joined business component. In this example, the joined business component is Contact.
  - The text of the label to appear for this generic recipient in the Recipient field. In this example, this text is Service Request Contact.
  - An optional fourth element that identifies the primary key field in the target business component to join to. By default, the field name is assumed to be Id. Include this element in the user property value if the field name is other than Id. (In this example, this element is unnecessary because the Contact business component uses the Id field.)

You can specify multiple joined generic recipients for a business component. That is, you can define the Recipient Id Field 1 user property to specify one joined generic recipient (such as Service Request Contact), Recipient Id Field 2 to specify another recipient (such as Service Request Owner), and so on. The order of the integers in the user property names determines the order in which the joined generic recipients are listed in the Recipient field.

Additional Requirements for Joined Generic Recipients

When you configure joined generic recipients, also consider the following requirements:

- For Send Email and Send Fax, the user properties of the nonjoined type must be set in the joined business component, such as in the Contact business component, joined from the Service Request business component. For information about the user properties of the nonjoined type, see *Configuring Nonjoined Generic Recipients*.
- The joined business component, such as Contact, must belong to the Messaging Recipient business object. (The Contact and Employee business components already belong to this business object.)
- If a business component has user properties defined to specify both nonjoined and joined generic recipients, then the joined recipients take precedence.
- If any user property definitions of Recipient Id Field *N* are specified as inactive in Siebel Tools, then all such definitions with higher numbers are also inactive.

Configuring Default Templates for Send Email Command

This topic describes how to configure a default communications template for an applet. You use this communications template with the Send Email command (F9 shortcut). A default template is preselected and populates the message area when the Send Email command is invoked. The default template is based on the current (active) applet at the time the command is invoked. For more information about communications templates, see *Configuring Communications Templates*.

To specify that a specific email template is the default for a given applet, specify the template name as the value for the Mail Template applet property for the applet. You do this in Siebel Tools. For more information about using Siebel Tools, see *Using Siebel Tools* , *Configuring Siebel Business Applications* , and *Siebel Developer's Reference* .

For example, by default, the email template Service Request Assignment is associated in this manner with the applet Service Request List Applet and with other applets that display service request records in the Service screen.

When the Mail Template applet property is set for an applet, and the repository changes are compiled and distributed, users do not need to explicitly select the template from the Body drop-down list when they use the Send Email command and this applet is active.

Setting a default template for the Send Email command overrides template visibility by channel. For example, if a template is specified as the default email template for Change Request applets, then this same template is also the default template for these applets for the fax and wireless message channels (using the Send Fax and Send Wireless Message commands).

Configuring the Retry Interval for Outbound Email

When users send an outgoing email, sometimes the processing does not complete because, for example, the recipient address on the email is invalid. An attempt is made to send the email again at an interval (in minutes) that you can designate. The default value for this retry interval is 15 minutes, but you can change this default value.

To configure the retry interval for outbound email

1. In Siebel Tools Object Explorer, select the Business Component object.
2. In the Business Components list, select the Comm Outbound Email business component, and check out the project.
3. Select the Send Retry Interval user property for this business component.
4. Change the value for this user property.
5. Check in the project.
6. Deploy the changes to the Siebel runtime repository.

Configuring Invalid Characters or Symbols in Email Attachment Names

By default, if the file name for an email attachment contains a designated invalid character, then the character is replaced with an underscore (_). Although you cannot delete the default invalid characters, you can add additional invalid characters to these default invalid characters. You can also change the default replacement character from the underscore to another valid character or symbol.

The default invalid characters and symbols follow:

Symbol	Description
\	Backslash
/	Slash (forward)
:	Colon
*	Asterisk
?	Question mark
"	Quotation mark
<	Less than symbol
>	Greater than symbol
|	Vertical bar
\t	Tab character

To configure the invalid characters or symbols in email attachment names

1. In Siebel Tools Object Explorer, select the Business Service object.
2. In the Business Service list, select the Inbound E-mail Manager business service, and check out the project.
3. Select the InvalidAttachmentFileNameCharacters user property for this business service, and add additional characters or symbols to the existing invalid characters or symbols.

   If this user property does not exist, then you can create it. Define the invalid characters or symbols in hexadecimal format, and separate each character or symbol with a semicolon.
4. Select the InvalidFilenameReplacementChar user property for this business service, and change the existing replacement character (the underscore) to another valid character or symbol.
5. Check in the project.
6. Deploy the changes to the Siebel runtime repository.

Process of Authenticating Sender Email Addresses

To authenticate a sender's email address, perform the following tasks:

- *Authenticating Sender Email Addresses Using Employee Email Addresses*
- *Authenticating Sender Email Addresses Using Alternate Email Addresses*
- *Recapturing the Account ID*

The eMail Response - Process Service Request workflow process authenticates inbound email sender addresses during the Lookup Sender step. For more information, see *eMail Response - Process Service Request Workflow*.

Note: Many customers can deploy Siebel Email Response without further customizing. For customers with more complex needs, this topic contains information that they can use to customize eMail Response - Process Service Request workflow.

CAUTION: Changes to one step in a workflow process can affect other steps later in the process. Therefore, be careful when customizing any workflow, and test all customized workflow processes thoroughly before implementing them in a production environment.

Authenticating Sender Email Addresses Using Employee Email Addresses

When authenticating a sender's email address using the employee email address, returning the Account Id value is not useful. Therefore, you might want to change the Value Fields argument to Id to return the row ID of the employee who has access. You might decide to use the value in the workflow to set the Owner Id field of the service request record. Before changing any workflow, make sure that you are familiar with the procedures and guidelines for changing workflows. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Perform the following procedures to customize the workflow to authenticate the sender's email address:

- *Changing the Lookup Sender Step to Capture Employee Email Addresses*
- *Changing Related Workflows and Subprocesses*

This task is a step in *Process of Authenticating Sender Email Addresses*.

Changing the Lookup Sender Step to Capture Employee Email Addresses

If employees must be authenticated using email, then you can modify the Lookup Sender step input arguments by setting the Business Object field to Employee, the Business Component field to Employee, and the Query field to EMail Addr (the field in the Employee business component that stores the email address).

To change the Lookup Sender step to find the employee email address

1. In the Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Process Service Request*.
3. In the Workflow Processes list, select *eMail Response - Process Service Request* and then click Revise.
   The status of the workflow process changes to *In Progress*.

4. In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click the Lookup Sender step and choose Show Input Arguments.
6. In the Input Argument list, make the changes in the following table.

Input Argument	Type	Value
Business Object	Literal	Employee
Business Component	Literal	Employee
Email Address	Process Property	Email Addr
Query	Literal	Email Addr
Value	Literal	Id

7. Right-click the Lookup Sender step and choose Show Output Arguments.
8. In the Output Arguments list, delete Account Id.

   Note: For information about recapturing the Account Id, see *Recapturing the Account ID*.
9. Right-click the Lookup Sender step and choose Show Process Properties.
10. In the WF Process Props list, add a new process property named Employee ID and change the value in the Data Type field to String.
11. Right-click the Lookup Sender step and choose Show Output Arguments.
12. In the Output Arguments list, modify the Contact Id output argument by changing the Property Name field to Employee Id instead of Contact Id.
13. In the History Toolbar, click Back to return to Siebel Tools.
14. In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Validate.
15. In the Workflow Processes list, right-click *eMail Response - Process Service Request* and click Deploy.

Changing Related Workflows and Subprocesses

After you change the Lookup Sender step, you must also change other steps in the eMail Response - Process Service Request workflow and any of its subprocesses that use the Employee ID process property value. Make sure that you set the appropriate fields in the service request or activity records so that they use the row ID of the employee record that the Lookup Sender step finds.

For the outbound acknowledgement email, the preconfigured workflow uses an email template for which the contact ID is assigned to the service request record. In this example, you modify the Lookup Sender step of the workflow to assign the employee ID. To prevent the acknowledgement step in the eMail Response - SR Submit workflow process from failing, change the acknowledgement to use a template that uses the Service Request Owner recipient group or assign the contact ID to the service request record.

The procedure in this topic provides an example of how to set up an employee ID in a subprocess workflow.

To set up an employee ID in a subprocess workflow

1. Add a process property named Employee ID to *eMail Response - SR Submit*.
2. Add an input argument named Employee ID to the Submit Subprocess step of *eMail Response - Process Service Request* and set the process property to Employee ID.
3. Add an input argument named Field: Owned By ID to the Create Service Request step of *eMail Response - SR Submit* and set the process property to Employee ID.

> **Note:** The employee who submits the email is the owner of the new service request record.

Authenticating Sender Email Addresses Using Alternate Email Addresses

You might want to store more than one email address for each contact in the Siebel database. You can use the Alternate Email Address field in the Contact business component. This field has multiple values, and the data is stored in the Address field of the Communication Address business component.

The following procedures describe how to change standard workflow processes so that they check the Alternate Email Address field to authenticate the sender of inbound email:

- *Using Siebel Webtools to Create New Business Objects*
- *Changing the Lookup Sender Step to Capture Alternate Email Addresses*

This task is a step in *Process of Authenticating Sender Email Addresses*.

Using Siebel Webtools to Create New Business Objects

Because the Alternate Email Address field in the Contact business component is a multivalue field, you can use Siebel Webtools to determine the destination business component and the destination field that stores the data. To find the destination business component, check the multivalue link for the field. The destination field is defined as a field parameter. In this example, the Alternate Email Address field in the Contact business component uses the data in the Address field of the Communication Address business component. These values are used to define the input arguments in the Lookup Sender step.

Before you can use the Communication Address business component in the workflow, you must define it as part of a business object in the repository. Because Communication Address is not defined as part of a business object in preconfigured workflows, you must create a new business object in Siebel Tools. For more information about creating business objects, see *Using Siebel Tools* .

To use Siebel Webtools to create a new business object

1. In Siebel Webtools Object Explorer, select the Business Object.
2. Create a new business object named Communication Address.
3. Add the Contact and the Communication Address business object components to the new business object.
4. Set the link parameter on the Communication Address business object component to Contact/Communication Address.
5. Navigate back to the new business object, and set the primary business component to Contact.
6. Deploy the changes to the Siebel runtime repository.

Changing the Lookup Sender Step to Capture Alternate Email Addresses

After you redeploy the changes to the Siebel runtime repository and restart the Siebel Server, perform the following steps to change the Lookup Sender step.

To change the Lookup Sender step to find the alternate email address

1. In the Siebel Webtools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Process Service Request*.
3. In the Workflow Processes list, select *eMail Response - Process Service Request* and then click Revise.

   The status of the workflow process changes to *In Progress*.
4. In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Edit Workflow Process.

   The Business Designer appears.
5. Right-click the Lookup Sender step and choose Show Input Arguments.
6. In the Input Arguments list, make the changes in the following table.

Input Argument	Type	Value
Business Object	Literal	Communication Address
Business Component	Literal	Communication Address
Email Address	Process Property	Address
Query	Literal	Address
Value	Literal	Person Id (the foreign key that stores the row ID of the contact)

7. Right-click the Lookup Sender step and choose Show Output Arguments.
8. In the Output Arguments list, make the following changes:
   a. Delete Account Id.

      Note: For information about recapturing the Account Id, see *Recapturing the Account ID*.

   b. Change the argument from Object Id to Person Id.

Recapturing the Account ID

When you delete the Account Id output argument, *eMail Response - Process Service Request* no longer captures the account ID for the contact. You can use the Contact Id process property to obtain the account ID using the procedure in this topic. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Note: This procedure is optional.

This task is a step in *Process of Authenticating Sender Email Addresses*.

To recapture the account ID

1. Create a new business service step in the workflow process named Find Contact Account.

   Set the business service to Inbound Email Siebel Operation and the method to FindRecord.
2. Connect the Lookup Sender to the Find Contact Account step instead of the Get Subject Keyword step.
3. Connect the Find Contact Account step to the Get Subject Keyword step.
4. In the Find Contact Account step, create the input arguments in the following table.

Input Argument	Type	Value
Business Object	Literal	Contact
Business Component	Literal	Contact
Query Fields	Literal	Id
Value Fields	Literal	Account Id
Object ID	Process Property	Contact Id

5. Create an output argument named Account Id and set its value to Account Id.

7 Configuring Communications Templates

Configuring Communications Templates

This chapter provides information about configuring and managing communications templates. It includes the following topics:

- *About Communications Templates*
- *About Catalogs and Categories for Siebel Email Response*
- *Creating Simple Templates*
- *Creating Advanced Templates*
- *Editing and Formatting Controls for Text in Templates*
- *Specifying Template Items for Advanced Templates*
- *Modifying Files for Template Items*
- *Copying or Deleting Templates and Template Items*
- *Using Substitution Fields in Templates for Siebel Email Response*
- *Creating a Catalog and Categories*
- *Using Access Groups to Filter Objects*
- *Process of Setting Up HTML Wrapper Templates*
- *Fields for Templates*
- *Fields for Template Items*

About Communications Templates

Communications templates are sent to outbound communications recipients in various scenarios. The following features use each of the two types of templates:

- Replies to inbound messages in Siebel Email Response use simple templates. For more information, see *Creating Simple Templates*.
- The Send Email, Send Fax, Send Wireless Message, and Send Page commands use simple templates. For more information, see *Creating Simple Templates*.
- Outbound communication requests use advanced templates. Only advanced templates support template items. For more information, see *Creating Advanced Templates* and *Specifying Template Items for Advanced Templates*.

> **Note:** Usually your Siebel database contains the same repository data as the Siebel Runtime Repository. However, if you create templates on a local database, such as on a Mobile Web Client, then the templates are available in the drop-down list only when you access the local database.

Templates provide both structure and content for outbound messages. Content can include both explicitly specified text and Siebel field values substituted into the outbound message. Field data can be substituted for all supported Siebel

data types. In an end-user context of using the Send commands or replying to inbound messages, the user can also specify additional content.

For outbound communication requests, which can include multiple templates for each request, each template is associated with a communications profile that determines how the template message is delivered. For more information about outbound communication requests, see *Defining Outbound Communication Requests*.

A set of templates supporting different communication channels is provided with Siebel CRM. You can use these templates or adapted them for use with the Send Email command or Siebel Email Response, outbound communication requests, Siebel Workflow, and so on. For information about configuring a list of values for a custom channel type, see *Siebel CTI Administration Guide* .

Note: Either administrators or advanced users can perform the procedures described in this chapter.

This topic contains the following information:

- *Content and Formatting for Templates*
- *Substitution Fields in Templates*
- *Visibility and Access for Templates*

Content and Formatting for Templates

Templates can include any of the following content:

- A single block of template text in the Text field.
- One or more template items providing component parts for the template. A template item can be based on a Siebel literature item or a text file.
- A combination of template text and template items.

Note: Template users can work with literature items or files only if the Siebel File System is properly configured.

For email or fax messages, you can specify that the content of a template item appears in the body of a message or as an attachment. Both plain-text and HTML content are supported for email or fax templates, but fax templates have some limitations. Standard HTML tagging options can support text formatting, images, hyperlinks, tables, and so on.

HTML Formatting

For email or fax templates, you can define HTML in the template text or, for advanced templates, in template items. (Only advanced templates support template items. Advanced templates are sent using outbound communication requests.)

You can format template text as HTML by using the controls in the Text field. When you save the template, formatting of text in this field is preserved only if you select the HTML Template check box for the template.

For advanced templates, select the HTML Template check box to specify that HTML text from template items for the message body is sent as HTML. If the HTML Template check box is not selected, then the text is converted to plain text before the message is sent.

If the default message format (in the Send Email group in the Outbound Communications view of the User Preferences screen) is set to HTML, then HTML formatting is enabled for the Send Email and Send Fax windows. Only HTML templates appear in the Body drop-down list.

Similarly, if the default message format setting for Siebel Email Response is set to HTML (also in the Outbound Communications view of the User Preferences screen), then HTML formatting is enabled for email replies in the Outbound Messages form of the Communications screen. Only HTML templates appear in the Body drop-down list.

Related Topics

Visibility and Access for Templates

Preference Settings for Outbound Communications

Editing and Formatting Controls for Text in Templates

Editing and Formatting Controls for Send Email and Send Fax Commands

Defining Outbound Communication Requests

Using HTML Email

Substitution Fields in Templates

Field values from Siebel database records can be substituted into the structure of the template for each recipient of a communication that uses the template. Field substitution can apply to text entered directly into the template, to text in the subject line, and to literature items and files.

Available fields for substitution correspond to the fields that apply to the recipient group or business object for the template as follows:

- For simple templates, which you use with Siebel Email Response replies or Send commands, you can specify a business object that has a primary business component, for example, Account.
- For advanced templates, which you use with outbound communication requests, you can specify a predefined recipient group that corresponds to one of the recipient groups you can specify for requests, for example, Account Team Members.

You can insert fields from the Account business component into template text (for simple or advanced templates) or into template items (for only advanced templates).

For a template item, you can use advanced field substitution, where you specify an iteration child business component from which to substitute field values for a template item. Each template item repeats, in iterative fashion, for every applicable child record.

For example, assume that the recipient group is Account Team Members and the Iteration Child Business Component field for the template item is Opportunity. In the outgoing message, the content of the template item is repeated once for each opportunity (child business component) that is associated with the account (parent business component).

Field substitution is supported in plain-text or HTML templates or in template items. (Template items that specify files in other formats, such as RTF or Microsoft Word, do not support field substitution.)

In an HTML template or a template item, for example, you can specify a row containing substitution fields in a single-row HTML table to align field data. If you specify an iteration child business component, then the tables repeat, and you can align field data from multiple records.

Field substitution functions correctly for an outbound communication request if the request specifies the same recipient group that the template specifies. If the recipient groups are different, then the field names (with enclosing

brackets) might appear in each message as literal character strings without substitution. Substitution still occurs for fields that are applicable to the recipient group of the request.

Siebel Repository Requirement for Using Substitution Fields

The Siebel repository applicable to where you create templates must be consistent with the repository applicable to where you use the templates. Otherwise, field substitution behavior might not occur as expected.

For example, if you use the Siebel Mobile Web Client (connected to a local database), then create templates only if the applicable business objects and business components (and substitution fields) in that environment are consistent with those in the enterprise repository.

Visibility and Access for Templates

You can create templates for only your personal use, or you can make them publicly available to all users of the applicable communications features.

> **Note:** In general, advanced users who have administrator privilege must create, modify, and review templates for group. Such users work with templates in the All Templates view of the Administration - Communications screen.

Depending on the context of use, the templates that appear to a user, such as in the Body drop-down list, depends on the following factors:

- The setting of the Public check box for the template. A user cannot access templates for which the Public check box is not selected. Templates the user creates in the My Templates view of the Communications screen are not subject to this limitation.
- The specified channel (such as email or fax, or wireless message) for the template. A user can access only the templates that are applicable to the feature. For example, only email templates are available for Send Email and other email features.
- The specified template type, such as Greeting, Body, or Closing. For the Send commands, a user can access the Body template type in the Body drop-down list. For email replies, a user can access each template type in a different drop-down list. (The template type does not apply to communication requests.)
- The specified language and locale for the template. For the Send Email, Send Fax, and Send Wireless Message commands, a user can access only the templates for which the language and locale correspond to the outbound communications preferences of the user. If these user preferences have no values, then the language and locale for the Application Object Manager apply (as for all Siebel client types).

  For the Send Email command and for email replies, the user can specify overrides for the language and locale settings to access a different set of templates.

  In a global deployment, you create some templates in specific languages and locales. Because you can see only templates that you create for the language and locale setting, you create each template that you want to use for another language and locale in that language and locale.
- For simple templates used with the Send commands, the specified object (such as Account) for the template. A user can access only templates for which the specified business object corresponds to the business component (such as Account) for the current applet when the user selects the Send command. A user can also access templates with no specified object.

- For templates used with the Send Email or Send Fax commands, or with email replies, the setting of the HTML Template check box for the template. In the Outbound Communications view of the User Preferences screen, users can specify a default message format of either Plain Text or HTML. They specify this user preference setting separately for Send Email and Send Fax and for Siebel Email Response. Note the following information about this preference setting:
  - If the preference setting is HTML, then the user can access only the templates for which HTML Template is selected.
  - If the preference setting is Plain Text, then the user can access only the templates for which HTML Template is not selected.
- Access groups that are used to filter objects. For more information, see *Using Access Groups to Filter Objects*.

About Catalogs and Categories for Siebel Email Response

The templates that appear to an agent depend on the agent's Outbound Communications user preference settings and how the templates are filtered. For more information about setting user preferences, see *Siebel Applications Administration Guide* .

Templates are filtered using catalogs and categories. A catalog is the name that you give to a group of categories. For information about creating catalogs and categories, see *Creating a Catalog and Categories*.

You can define one or more catalogs for use with Siebel Email Response as follows:

- You need only one catalog if everyone in your organization can share the same categories.
- You need multiple catalogs if users in your organization cannot use some categories.

A company might have two groups that share one catalog and a third group that has its own catalog.

You must define a catalog as a response group input argument. A catalog contains categories that you can associate with templates and solutions. During the planning process, you gather and categorize templates and solutions.

You associate templates and solutions that contain answers to similar questions with a single category. When agents use categories, they do not need to review all templates and solutions to find the information that they want to send to a customer. They can use Search Center to look through the templates and solutions that are grouped in the appropriate categories. To use Search Center for this purpose, the you must index categories. For more information, see *Siebel Search Administration Guide* .

About Solutions

You can use Solutions and Templates objects as templates in Siebel Email Response. For information about determining when to use solutions, when to use templates, and how each compares to a free-form reply, see *Solutions and Templates Decision Table*.

Solutions appear to customers over the Web through Siebel Self Service and to employees through products such as Siebel Call Center. You use solutions for answers to questions that customer communications channels share. For information about creating and storing solutions, see *Siebel Applications Administration Guide* .

You might discover that you answer some questions in email and service requests many times. Storing responses to frequently asked questions enables you to reuse the answers without performing duplicate research.

Siebel Email Response uses solutions as a type of template that does not have substitution fields. Solutions contain information and instructions for customers that departments or channels share. When you maintain information in one place, maintenance is minimized and customers receive the most current information.

An agent can import solutions into the body of a Siebel Email Response reply when you associate the solutions with a category. An agent can use solutions when responding to telephone, email, and service requests.

> **Note:** If Siebel Email Response and Siebel Self Service share your solutions, and if your solutions contain URLs or other HTML tags, then enable HTML formatting for Siebel Email Response. You enable HTML formatting in the Outbound Communications view of the User Preferences screen. For more information about enabling HTML formatting for Siebel Email Response, see *Siebel Applications Administration Guide* .

Solutions and Templates Decision Table

The following table helps you to determine when to use solution documents (called FAQs in Siebel Self Service), when to use reply templates, and how solutions and templates compare to a free-form reply.

Free-Form Reply	Template	Solution
Personalized.	Less personal than free-form.	Less personal than free-form.
Time-consuming.	Faster than free-form.	Faster than free-form.
More error-prone.	Legal and other departments can verify and approve content before using.	Legal and other departments can verify and approve content before using.
Does not use substitution fields.	You can select identified fields from an incoming email and insert them in predefined places in your template. You can include multilevel substitution fields using the Advanced Template form, such as links to service requests, orders, and opportunities.	Does not use substitution fields.
A onetime effort that you cannot share with other customers unless you re-create the email.	You can send to any customer by selecting the template in Siebel Email Response.	You can share the same solution files in different channels. You update solutions only once, and then all users can access the most current information. An agent can insert the contents of a solution file into the body of an email message (in Siebel Email Response), use solutions to reply to a customer request in a telephone call (in Siebel Call Center), and publish solutions on a service Web site (in Siebel Self Service).
You can attach files to an email.	You can attach a file to an email that contains a template. However, Siebel Email Response does not support adding attachments to templates.	You can attach a file to an email that contains a solution. However, Siebel Email Response does not support

Free-Form Reply	Template	Solution
		automatically adding attachments from solutions.

Creating Simple Templates

Simple templates apply to replies in Siebel Email Response. You also use simple templates for the Send Email, Send Fax, or Send Page, or Send Wireless Message commands. You access these commands from the File application-level menu, from the communications toolbar, or by using keyboard shortcuts. For information about the fields for the Templates list and the Simple form, see *Fields for Templates*.

You can complete the procedure this topic to create a simple template. You can also create a simple template by saving a message as a template. For more information, see *Saving Messages as Templates*.

To create a simple template

1. Navigate to the Communications screen, then the My Templates view.
   Administrators and other advanced users can navigate to the All Templates view of the Communications screen.
2. In the Templates list, complete the following steps:
   a. Add a new record. (Alternatively, you can add the record in the Simple form.)
   b. Specify the name of the template for the new record.
   c. Specify the channel type, such as Email, Fax, Pager, or Wireless Message.
   d. Specify the language and locale that is applicable to the template.
   e. Optionally, provide a short description for the template.
3. In the Simple form, complete the following steps:
   a. Specify the name of the template if you did not already do so in the Templates list.
   b. Specify the channel type for the template if you did not already do so in the Templates list.
   c. Specify the template type, such as Greeting, Body, or Closing:
      - When replying to an inbound email message using Siebel Email Response, users can select templates with each type to insert into the reply.
      - When using the Send Email, Send Fax, or Send Page, or Send Wireless Message command, users can select templates with a Body template type to insert into the message.
   d. Specify the language and locale for the template if you did not already do so in the Templates list.
   e. For an email or fax template, specify whether this template is an HTML template or a plain-text template.
      For a simple template, this setting determines if the template appears in the Body drop-down list. Templates appear in the list only when they correspond to the user preference setting for Default Message Format. For more information, see *Visibility and Access for Templates*.
   f. For a template that is intended for public use, select the Public check box when the template is ready for publicly availability.
   g. Optionally, specify for Pick Available Substitutions the appropriate business object (Object) for the recipient group of the template:

- The primary business component of the business object that you specify determines the substitution fields that are available for the template text. The available business components serve as the primary business component for a business object. For more information, see *Substitution Fields in Templates*.
- For the Send commands, the recipient group helps determine when users can specify the template. For more information, see *Visibility and Access for Templates*.

The actual recipients are determined when the using the template.

h. Specify a subject line for the template, as applicable for the channel type.

The subject line is overridden by any subject line the user specifies when using the template, for example, when sending an email message in the Send Email window, or when replying to an email message in Siebel Email Response.

i. Enter the template text.

As appropriate, copy and paste fields from the list of available field substitutions. Include the brackets around the field names. The Text field allows you to use editing and formatting controls. For an HTML email or fax template, formatting you apply is preserved. For a plain-text template, formatting is eliminated when you save the template. For more information, see *Editing and Formatting Controls for Text in Templates*.

The Available Substitutions list is populated with field names. For more information, see *Fields for Templates* (for the Simple form).

4. Test the template to verify that it functions as required and that field substitution behavior works correctly.

To test a template, send it in the intended usage context, for example, by using the applicable Send command, or by specifying a test reply for Siebel Email Response. Perform this test before you make a template publicly available.

Creating Advanced Templates

You specify advanced templates for outbound communication requests. You can manually specify advanced temples, or a module like Siebel Workflow that can invoke business service methods can specify them. For information about the fields for the Templates list and the Advanced form, see *Fields for Templates*.

Advanced templates have the following characteristics that simple templates do not have:

- You can associate a delivery profile with an advanced template.
- You specify a recipient group for an advanced template. (You specify a business object is for a simple template.)
- You can specify to create activities for requests that use the advanced template.
- You can specify to include a bookmark URL for the recipient source record.
- You can create template items for advanced template. For more information, see *Specifying Template Items for Advanced Templates*.
- **Note:** For an advanced template, a communications profile you specify as the delivery profile must already exist before you can specify it for the template. For more information about creating profiles, see *Process of Setting Up Communications Driver Profiles*.

To create an advanced template

1. Navigate to the Communications screen, then the My Templates view.

   Administrators and other advanced users can navigate to the All Templates view of the Communications screen.
2. In the Templates list, complete the following steps:

   a. Add a new record. (Alternatively, you can add the record in the Advanced form.)
   b. Specify the name of the template for the new record.
   c. Specify the channel type, such as Email, Fax, Pager, or Wireless Message.
   d. Specify the language and locale that is applicable to the template.
   e. Optionally, provide a short description for the template.
3. Click the Advanced view tab.
4. In the Advanced form, complete the following steps:

   a. Specify the name of the template if you did not already do so in the Templates list.
   b. Specify the channel type for the template if you did not already do so in the Templates list.
   c. Specify the delivery profile for the template.
   d. Specify the language and locale for the template if you did not already do so in the Templates list.
   e. For an email or fax template, specify whether this template is an HTML template or a plain-text template.

      > **Note:** The HTML Template setting affects the text you enter in the Text field. It does not affect template items.

   f. For a template that is intended for public use, select the Public check box when the template is ready for public availability.
   g. For an email template, specify whether to include a Siebel bookmark with the message.
   h. Select the Create Activity check box if you want to set activity logging for any outbound communication request that specifies this template.
   i. Optionally, specify the recipient group, which determines the kind of recipients that the template is sent to.

      The recipient group you specify determines only the substitution fields that are available for the template text. The actual recipients are determined when using the template for a communication request.
   j. Specify a subject line for the template, as applicable for the channel type.
   k. Optionally, enter the template text.

      As appropriate, copy and paste fields from the list of available substitution fields. Include the brackets around the field names. The Text field allows you to use editing and formatting controls. For an HTML email or fax template, formatting you apply is preserved. For a plain-text template, formatting is eliminated when you save the template. For more information, see *Editing and Formatting Controls for Text in Templates*.

      The Available Fields list is populated with field names. For more information, see *Fields for Templates* (for the Advanced form).

      A template that includes template items does not have to include template text.
5. Optionally, add template items to the template.

A template that does not include template text must generally include one or more template items to provide content. You can combine template text and template items in the same template. The template text appears in the message body before the content for the specified template items. For more information, see *Specifying Template Items for Advanced Templates*.

6. Test the template to verify that it functions as required and that field substitution behavior works correctly.

   To test a template, send it in the intended usage context, for example, by creating and submitting an outbound communication request. Perform this test before you make a template publicly available.

Editing and Formatting Controls for Text in Templates

For email or fax templates, you can edit and format template text by using controls in an editing bar that appears when you click in the Text field in the Simple form or Advanced form.

> **Note:** HTML formatting does not apply to templates for channels other than email or fax, even if the HTML Template check box is selected. Any formatting is eliminated when you use such a template.

You can use the editing controls, such as controls for clipboard operations, without applying HTML formatting.

For an HTML email or fax template, formatting you apply in the Text field is preserved when you save the template. For a plain-text template, such formatting is eliminated when you save the template.

> **Note:** If you change the setting of the HTML Template check box, then the change is not apparent until you step off the record to display another template record and then reselect the record. If you clear this check box, then the HTML formatting controls are still available, and formatted text is not immediately converted to plain text. However, when you save the template, any formatting you applied is removed.

Managing Line Breaks for HTML and Plain-Text Templates

The following behavior regarding line breaks applies to *both* plain-text and HTML templates:

- Pressing ENTER creates a new paragraph.
- Pressing SHIFT+ENTER creates a new line.

Managing Links and HTML Elements from Other Sources

For email messages, you can directly enter URL or mailto links, and they are automatically converted to links if the template is saved as HTML. (This behavior might not apply to email sent using third-party email clients.) Examples of these links follow:

- www.example.com
- http://www.example.com
- ftp://ftp.example.gov
- mailto:user@example.com

You might select graphics or other tag-based elements that appear on Web pages, such as horizontal rules or tables, by dragging the mouse pointer. In some cases, you can copy and paste such elements into the template text.

> **Note:** You cannot add content other than text or HTML tag elements directly to the template text. For example, you cannot copy and paste graphics or other files into the template text. (For advanced templates, you can specify graphics by using template items.)

Editing and Formatting Options

This topic lists the editing and formatting options for template text in the order in which they appear from left to right in the user interface. The following editing and formatting options are available:

- **Find or Replace.** Click the arrow to display the Find controls before the editing bar or to hide these controls. When the Find controls appear before the editing bar, click the arrow on the left to toggle between the Find controls and the Find and Replace controls. Enter text to find, or enter replacement text, and then click Go. Find operations are not case-sensitive.
- **Cut.** Click to cut selected text to the clipboard.
- **Copy.** Click to copy selected text to the clipboard.
- **Paste.** Click to paste text from the clipboard into the template text. Depending on the source, the text you paste might include HTML formatting.
- **Font.** Select a font from a drop-down list to apply to selected text. Available fonts include Arial (the default), Verdana, Times New Roman, and Courier.
- **Size.** Select a font size from a drop-down list to apply to selected text. Point sizes include 8 (the default), 10, 12, 14, 18, 24, and 36.
- **Font Color.** Click the arrow to display font colors before the editing bar, and then click to select a color to apply to selected text.
- **Bold.** Click to apply bold formatting to selected text or to remove bold formatting.
- **Italic.** Click to apply italic formatting to selected text or to remove italic formatting.
- **Underline.** Click to apply underlining to selected text or to remove underlining.
- **Ordered List.** Click to apply numbering to selected text or to remove numbering. Apply numbering to make the text an ordered list.
- **Unordered List.** Click to apply bullets to selected text or to remove bullets. Apply bullets to make the text an unordered list. Bullets appear differently at different levels of indenting.
- **Indent.** Click to increase indenting for selected paragraphs.
- **Outdent.** Click to decrease indenting for selected paragraphs.
- **Left Align.** Click to left-align selected paragraphs.
- **Center Align.** Click to center selected paragraphs.
- **Right Align.** Click to right-align selected paragraphs.

Specifying Template Items for Advanced Templates

You can specify template items to construct templates in modular fashion by using literature items or files. Also, you can use template items to use advanced field substitution (iteration child business component), to specify content for both the message body and attachments, and to specify plain text or HTML versions of the message body (for email only).

You can combine template text and template items in the same advanced template. A template that does not include template text must include at least one template item. If you include template text, then this text appears in the message body before any content for template items.

You must select either a literature item *or* a file to include for the template item.

Select the HTML Template check box for a template to specify that HTML text from template items for the message body is sent as HTML. If the HTML Template check box is not selected, then the text is converted to plain text before the message is sent. For more information about template item fields, see *Fields for Template Items*.

To specify template items for an advanced template

1. Navigate to the Communications screen, then the My Templates view.

   Administrators and other advanced users can navigate to the All Templates view of the Communications screen.
2. In the Templates list, select the advanced template for which you want to add template items.
3. For an HTML template, verify that the HTML Template check box is selected.
4. Click the Template Items view tab.
5. In the Template Items list, add a new record for each template item.
   - To add a file, perform one of the following actions:
     - Click New File (recommended), and choose a file from the Choose File dialog box. Go to Step 6, then go to Step 9.
     - Click New (or choose New Record from the menu). Go to Step 6, then go to Step 7.
   - To add a literature item, click New (or choose New Record from the menu). Go to Step 6, then go to Step 8.
6. Specify a sequence integer number for the template item.

   The default value is the lowest positive integer that is not assigned to an existing template item.
7. To finish adding the file (begun in Step 5), complete the following steps:
   a. Click the select button for the Attachment Name field.
   b. In the Add Attachment dialog box, click Browse, specify a file from the operating system, then click Add. Go to Step 9.
8. To finish adding the literature item (begun in Step 5), complete the following steps:
   a. Click the select button for the Literature Name field.
   b. In the Pick Literature dialog box, specify a literature item, then click OK.
9. To designate a template item as an attachment to an email or fax message, specify a label in the Attachment Label field.
10. In the Template Item form, complete the following steps:

a. Optionally, specify an iteration child business component from which you can specify substitution fields.

   For more information, see *Fields for Template Items*.

b. Select the Substitute Values check box if you want to use field substitution for the file or literature item you specified for the template item in previous steps.

   The Available Fields list is populated with field names.

c. Select the Message Body check box, as appropriate:

   - For an email or fax template, select the Message Body check box to include the template item content in the message body. Otherwise, the template item content is an attachment to the email or fax message.
   - For a wireless message or page template, select the Message Body check box to include the template item in the message body. For a wireless message template, template item content that you do not specify for the message body is ignored. For a page template, the message fails if you do not specify any template item for the message body. (Template items must be plain-text files or literature items.)

Modifying Files for Template Items

You can modify a file you add to a template item.

To modify a file for a template item if the original operating system file still exists

1. Open the file in the operating system environment.
2. Modify the file, and save it to the operating system.
3. Delete the template item record to which you added the file.
4. Create a new template item record, and add the modified version of the file.

Nonexistent Original Operating Systems

If the original operating system file does not exist, then complete the procedure in this topic.

To modify a file for a template item if the original operating system file does not exist

1. Open the file from the template item record by clicking the hyperlink in the Attachment Name field.
2. Modify the file, and save it to the operating system.
3. Delete the template item record to which you added the file.
4. Create a new template item record and add the modified version of the file.

Copying or Deleting Templates and Template Items

You can copy or delete a template, copy a template item in a template, or delete a template item from a template.

Copying Templates and Template Items

When you copy a template, you must specify a new name for the new template. As appropriate, you can modify existing settings such as the delivery profile, specify different template text, or add template items. No template items are automatically associated with the new template.

When you copy a template item in a template, the copy is identical to the template item that you copy, except that its sequence number is one higher than the highest sequence number for all the other template items. As appropriate, you can modify existing settings. For example, you can specify a different file or literature item, change whether the content in the template item appears in the message body, or change the value-substitution settings.

> **Note:** Copying a communications template created for use with one channel type and modifying the template for use with another channel type might not always work as intended.

Deleting Templates and Template Items

When you delete a template, its template items are also deleted. However, the files or literature items for the template items are not deleted from the Siebel File System. When you delete a template item, the file or literature item for the template item is not deleted from the Siebel File System.

Each user can delete any template that the user created, or delete template items from such a template. A Siebel administrator can delete any template or template item.

Using Substitution Fields in Templates for Siebel Email Response

Templates can include substitution fields that obtain data directly from your Siebel database, such as a customer name or a service request status. You insert a substitution field by selecting it in the Available Substitutions list, copying the substitution, and pasting it into the Template Text field where you want the value to appear. In a template, you can use substitution fields from only one recipient group.

Setting Up Workflow to Use Substitution Fields

Templates in Siebel Email Response can include substitution fields from any business component that has a correctly configured relationship to the Comm Outbound Email business component. Business components with this relationship include Account, Campaign, Contact, Opportunity, and Service Request.

Before you attempt to set up templates that include substitution fields other than a default active business component, you must modify the eMail Response - Response workflow.

To set up a workflow to use substitution fields

1. In the Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Response Workflow*.
3. In the Workflow Processes list, select *eMail Response - Response Workflow*, and click Revise.

4. In the Workflow Processes list, right-click *eMail Response - Response Workflow* and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click the Get Response Text business service step and choose Show Input Arguments.
6. In the Input Arguments list, add the input arguments in the following table.

Input Argument	Type	Value	Property Name
ActivityBusComp	Literal	Action	None
ActivityBusObj	Literal	Action	None
SourceId	Process Property	None	Object Id

7. Right-click the Expand Template Text business service step and choose Show Input Arguments.
8. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Value	Property Name
Expand Template	Literal	Y	None

9. In the History Toolbar, click Back to return to Siebel Tools.
10. In the Workflow Processes list, right-click *eMail Response - Response Workflow* and choose Validate.
11. In the Workflow Processes list, select *eMail Response - Response Workflow* and click Deploy.

Note: Use Siebel Tools to enable additional business components for template substitutions. For more information, see *Using Siebel Tools* .

Setting Up Additional Business Components for Substitution Fields

Recipient groups are based on business objects. When you create a template, you associate it with a recipient group. Siebel Email Response checks the recipient group that you assign to the template to determine the associated business object. For example, the Service Request Contact recipient group is based on the Service Request business object, and the Opportunity Sales Team recipient group is based on the Opportunity business object. You can use fields from any business component within the related business object as substitution fields in a template.

Siebel Email Response looks at the user properties defined on the Comm Outbound Email business component for a record that describes the relationship between the Comm Outbound Email business component and the target business object. Any business object that has a primary business component can be chosen. In the following table, the user property record shows that the Comm Outbound Email business component is related to the Account business object, using the Account Id field from the Comm Outbound Email business component as the foreign key:

BusComp User Prop	Value
Source Id Field: Account	Account Id

In the following procedure, you will configure the Order Entry business object that will be used for substitution fields. The Order Entry business object has a primary business component, Order Entry - Orders.

To set up other business objects for substitution fields

1. In Siebel Webtools, extend the Comm Outbound Email business component to expose a custom field that stores the Order Id.
2. Add a new user property to the Comm Outbound Email business component as follows:

BusComp User Prop	Value
Source Id Field: Order Entry	Order Id

In this example, Order Entry is the name of the business object, and Order Id is the name of the foreign key between Comm Outbound Email business component and the Order - Order Entry business component.

Creating a Catalog and Categories

Complete the following procedures to create a catalog and categories:

- *Setting Up a Catalog for Siebel Email Response*
- *Setting Up Categories for Siebel Email Response*

Setting Up a Catalog for Siebel Email Response

You must set up a catalog for Siebel Email Response so that agents can use templates and solutions in replies to customers.

To create a catalog for the eMail Response - Process Message workflow

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalogs list, create a new record.
3. In the Name field, enter the catalog name you want to use.

> **Note:** Catalog names must be unique.

The new catalog appears in the Catalogs list.

Setting Up Categories for Siebel Email Response

After creating the catalog, you must set up categories for Siebel Email Response. To set up categories, complete the procedures in this topic.

When setting up categories, first create the categories in a catalog.

To create a category in a catalog

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalogs list, select the appropriate catalog, and click the link in the Name field.
3. In the Categories list, create a new record, and complete the fields as appropriate.

   Some fields are described in the following table.

Field	Description
Name	Type the name of the category. Enter the name that you assign to your templates and solutions during the planning process. Enter a name that clearly describes the templates to associate with the category.
Display Name	Type the category name as you want it to appear to the agents.
Effective Start Date Effective End Date	Select the dates that determine when the category is in effect.

Associating Templates with Categories

Next, associate a template with a category. You can associate a template with more than one category. You identify these templates during the planning process. For more information, see *Business Analysis for Deployment of Siebel Email Response*.

To associate a template with a category

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalogs list, select the appropriate catalog, and click the link in the Name field.
3. Select the category with which you want to associate a template.
4. In the Categories form, click the drop-down arrow to find the Response Template view.
5. In the Response Templates list, create a new record.
6. In the Add Templates dialog box, scroll to find and select one or more templates that you want to associate with the category.
7. Click OK.

   The Response Templates list shows the templates that you select to associate with the category.

Associating Solutions with Categories

Next, associate a solution with a category. You identify these solutions during the planning process. For more information, see *Business Analysis for Deployment of Siebel Email Response*.

To associate a solution with a category

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalogs list, select the appropriate catalog, and click the link in the Name field.
3. Select the category with which you want to associate a solution.
4. In the Categories form, click the drop-down arrow to find the Solutions view.
5. In the Solution list, create a new record.
6. In the Add Solutions dialog box, scroll to find and select one or more solutions that you want to associate with the category.
7. Click OK.

   The Solutions list shows the solutions that you select to associate with the category.

Repeat these three procedures for each category that you create during the planning process.

Note: To delete a record from the list of associated templates or solutions, select the record, and click Delete.

Using Access Groups to Filter Objects

Access groups enable you to restrict visibility to various objects. By adding an access group to catalogs, you can filter objects by using the user's access group, division, or organization. Using access groups, you can also filter catalogs and corresponding response templates and solutions. For more information about access groups, divisions, and organizations, see *Siebel Security Guide* .

To assign an access group to a catalog

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalogs list, select the appropriate catalog, and click the link in the Name field.
3. Click the Access Groups view tab, and create a new record.
4. In the Add Access dialog box, select the groups that need visibility to this catalog and click OK.

   Note: You can create new access groups in the Access Group screen.

5. Click the Private Flag field.

Assigning Access Groups to Categories

By adding an access group to categories, you can filter objects by using the user's access group, division, or organization. Using access groups, you can also filter categories and corresponding response templates and solutions.

To assign an access group to a category

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.

2. In the Catalogs list, select the appropriate catalog, and click the link in the Name field.
3. Select an existing category or create a record and complete the fields.
4. Click the Access Groups view tab, and create a new record.
5. In the Access Group dialog box, select the groups that need visibility to this category and click OK.

Note: You can create new access groups in the Access Group screen.

Process of Setting Up HTML Wrapper Templates

You can set up a special template containing HTML features that serves as a wrapper around outbound email messages, even when Siebel communications features do not directly support HTML. A wrapper template can contain links to your Web site, marketing messages, and so on. Agents do not need to change the way in which they reply to incoming messages through Siebel Email Response. When an agent clicks Send, the email is embedded in the wrapper template and sent to the message recipient. Auto-acknowledgment messages and messages that users send using Send Email (F9) do not use wrapper templates.

To set up a wrapper template for use with Siebel Email Response replies, perform the following tasks:

1. *Creating Wrapper Templates*
2. *Creating Advanced Templates for Wrapper Templates*
3. *Modifying the eMail Response - Client Send Email Workflow*

Creating Wrapper Templates

First, use any HTML editor to create a wrapper template.

This task is a step in *Process of Setting Up HTML Wrapper Templates*.

To create an HTML wrapper template

1. Using any HTML editor, create an HTML template.
2. Make sure that the template contains the substitution value of [Email Body] where you want your email body to appear.

Creating Advanced Templates for Wrapper Templates

Next, create an advanced template.

This task is a step in *Process of Setting Up HTML Wrapper Templates*.

To create an advanced template for a wrapper template

1. Navigate to the Administration - Communications screen, then the All Templates view.
2. In the Templates list, select a template.
3. Click the Advanced view tab.
4. In the Templates form, select Email Activity Receiver in the Recipient Group field.
5. Click the Template Items view tab.

6. In the Template Item form, select the Substitute Values and Message Body check boxes.
7. Add the wrapper template and associated graphics files to items in the Template Items view.

Modifying the eMail Response - Client Send Email Workflow

After creating the HTML wrapper template and your communications template, modify the eMail Response - Client Send Email workflow.

> **Note:** In addition to completing the procedure in this topic, you must complete an additional step for advanced templates. Change the SendMessage method to the CreateRequest method for the Outbound Communications Manager business service in the Send Response step of the eMail Response - Client Send Email workflow process. All processing that depends on this workflow uses the wrapper template.

This task is a step in *Process of Setting Up HTML Wrapper Templates*.

To modify the Client Send Email workflow

1. In the Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Client Send Email*.
3. In the Workflow Processes list, select *eMail Response - Client Send Email* and click Revise.
4. In the Workflow Processes list, right-click *eMail Response - Client Send Email*, and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click the Send Response business service and choose Show Input Arguments.
6. In the Input Arguments list, add the input arguments in the following table.

Input Argument	Type	Other Columns
Comm Template Name List	Literal	Value: [Siebel template name that contains your HTML template (without the HTML file extension)]
Recipient Business Component	Literal	Value: Comm Outbound Email
Source Business Object	Literal	Value: Comm Outbound Email
Comm Profile Override	Business Component	Business Component Name: Comm Outbound Email Business Component Field: Email Sender Name
Source Id List	Process Property	Property Name: Object Id Property Data Type: String

7. In the History Toolbar, click Back to return to Siebel Tools.
8. In the Workflow Processes list, select *eMail Response - Client Send Email* and choose Validate.
9. In the Workflow Processes list, select *eMail Response - Client Send Email* and click Deploy.

Fields for Templates

This topic contains descriptions for the fields in the My Templates or All Templates view. You specify these fields when you create templates. The fields are organized according to where you specify them. For information about the fields for template items, see *Fields for Template Items*.

This topic contains the following information:

- *Fields for the Templates List*
- *Fields for the Simple Form*
- *Fields for the Advanced Form*

Fields for the Templates List

The following fields are available in the Templates list:

- **Name (required).** Specify a unique name for the template.
- **Channel Type (required).** Select from a drop-down list the type of communication channel for the template. Predefined values include Email, Fax, Pager, and Wireless Message.

  For templates to use with outbound communication requests, the channel type can help determine how to deliver a template, such as for fax messages.

  The Default Preference setting you can specify when creating requests (for use with the Only Send Preference check box) generally corresponds to the Channel Type setting for the included templates.

  For the Send commands and for email replies in Siebel Email Response, the channel type also determines if the template appears in the Body drop-down list. For more information, see *Visibility and Access for Templates*.
- **Status.** Select the status of the template. Select Draft or Active. Only templates with a status of Active are available for selection in the Body field of the outgoing message form.
- **Language (required).** Specify the language for the template. This setting filters the templates that are available for use. The field value defaults to the current language in effect for the user's session. For more information, see *Visibility and Access for Templates* and *Preference Settings for Outbound Communications*.
- **Locale (required).** Specify the locale for the template. This setting filters the templates that are available for use. The field value defaults to the current locale in effect for the user's session. For more information, see *Visibility and Access for Templates* and *Preference Settings for Outbound Communications*.
- **Description.** Enter a brief description of the template.

Fields for the Simple Form

This topic describes the template fields you specify in the Simple form. These fields are for simple templates.

Template Properties

The following fields are grouped under Template Properties:

- **Name (required).** For more information, see *Fields for the Templates List*.
- **Channel Type (required).** For more information, see *Fields for the Templates List*.
- **Template Type.** Specify the type of template. This option helps users choose templates with the appropriate function. Default values include Greeting, Body, and Closing. Consider the following points when you specify a template type:
  - A reply message for Siebel Email Response can use all of these template types. Greeting and closing templates are generic in Siebel Email Response. You do not associate them with a category.
  - The Send commands use templates with the Body template type. You associate body templates with a category.
- **Language (required).** For more information, see *Fields for the Templates List*.
- **Locale (required).** For more information, see *Fields for the Templates List*.
- **HTML Template.** Select this option to specify that an email or fax template is an HTML template. Do not select this check box if the template is plain text. If this check box is not selected, then any formatting you apply in the Text field is eliminated when you save the template.

  If the HTML Template check box is not selected, then the text is converted to plain text before the message is sent. For information about HTML formatting in the Text field, see *Editing and Formatting Controls for Text in Templates*.

  This setting and the outbound communications user preference setting for default message format (for Send Email or Send Fax, or for email replies for Siebel Email Response) determine if the template is available for usage. For more information, see *Visibility and Access for Templates* and *Preference Settings for Outbound Communications*.
- **Public.** Select this option to make this template available for all users to specify when using the template, such as when using the Send commands or when sending email replies. Do not select this check box to make the template available only to the current user and to administrators.

Pick Available Substitutions

The following fields are grouped under Pick Available Substitutions:

- **Object.** Select from a drop-down list the type of recipient group (object) for the template. The recipient groups you can choose correspond to business objects for which a primary business component is specified, such as Account, Opportunity, Contact, and so on.

  The object you specify for the template is optional and is used to obtain values for the Available Substitutions list.

  The recipient group you specify determines only the substitution fields that are available for the template text. The actual recipients are determined when using the template, such as when using the Send commands or when sending email replies.
- **Available Substitutions.** Displays the business component fields that are valid for substitution. You can copy and paste such fields into the Text field for the template.

  The fields available for substitution are from the primary business component of the business object in the Object field.

All substitution fields must be enclosed in brackets ([ ]) in the template text.

For example, available substitution fields for Contact include [Contact.Last Name], while fields for Account include [Account.Name].

> **Note:** For an HTML template, make sure that the enclosing brackets and text of any substitution field text do not include any tagging changes. For example, do not change from bold to regular text in the enclosing brackets of a substitution field. Doing so might prevent proper data substitution.

If your template must contain a literal bracket character ([or]), then insert a backslash character (\) before the bracket to *escape* the bracket character so that the character is correctly interpreted.

> **Note:** If a substitution field is not enclosed in brackets, or if you enclose the substitution field some other notation, such as percentage characters (%), then Communications Outbound Manager cannot perform substitution for the field.

Compose Template

The following fields are grouped under Compose Template:

- **Subject.** Enter text for a subject line for the template.

  Text in the Subject field can also include substitutions from the Available Substitutions list. The value in the Object field determines the available substitutions. Note the following points about the text in this field:

  - For a new email message (and not for a reply), the text from this field is used in the Subject line of the message.
  - For a reply message in Siebel Email Response, the subject-line text is derived from the subject line of the original inbound email message.
  - For a fax, the text from this field appears on the cover page of the faxed message.

  > **Note:** If you use OpenText RightFax with the Unicode patch, then the subject text appears on the fax cover page only for ENU (U.S. English) software. For all other languages, the subject text appears on a second page of the faxed message. For more information, see *Integrating with Fax Products*.

  - For a page or wireless message, the text from this field is not used.

- **Text.** Specify text for the template. As appropriate, you can copy and paste fields from the available substitutions.

  All template text appears at the start of the message body. For information about editing and formatting in this field, see *Editing and Formatting Controls for Text in Templates*.

Fields for the Advanced Form

This topic describes the template fields you specify in the Advanced form. These fields are for advanced templates.

Template Properties

The following fields are grouped under Template Properties:

- **Name (required).** For more information, see *Fields for the Templates List*.
- **Channel Type (required).** For more information, see *Fields for the Templates List*.
- **Delivery Profile.** Select the communications profile to use to deliver the template to recipients. The profile must support the specified channel type.

  You must specify the delivery profile for any template that is sent using an outbound communication request, except for templates for the Wireless Message channel, for which specification is optional.

  For templates with the Wireless Message channel type that you use for outbound communication requests, note the following points:

  - If a template has a profile, then, (for each recipient) Communications Outbound Manager identifies the highest priority mobile device that has a corresponding profile and sends the message to the associated address using that profile. If there is no match, then no message is sent to that recipient.
  - If a template does *not* have a profile, then, (for each recipient) Communications Outbound Manager identifies the highest priority mobile device and that device's highest priority address and uses the associated profile to send the message to that device. For more information, see *Process of Setting Up Communications Driver Profiles*.
- **Language (required).** For more information, see *Fields for the Templates List*.
- **Locale (required).** For more information, see *Fields for the Templates List*.
- **HTML Template.** Select this option to specify that an email or fax template is an HTML template. Do not select this check box if the template is plain text. If this check box is not selected, then any formatting you apply in the Text field is eliminated when you save the template. For information about HTML formatting in the Text field, see *Editing and Formatting Controls for Text in Templates*.
- **Public.** Select this option to make this template available for all users to specify when using the template, such as when sending outbound communication requests. Do not select this check box to make the template available only to the current user and to administrators.

  > **Note:** The Public field is ignored for any template that is sent using an outbound communication request that Siebel Workflow initiates. In this scenario, any defined template can be specified.

- **Attach Bookmark.** Select this option to include a Siebel bookmark in communication requests sent using the template.

  A Siebel bookmark is a URL that links to a specific record in the Siebel application. A bookmark included in an email message allows a user to click the link to navigate directly to this record. If you specify this option, then a bookmark is included in outbound messages sent using this template. The bookmark URL is appended to the message body. The bookmark URL functions as a link whether the template is HTML or plain text.

  For example, if you are sending email to account team members, then a bookmark URL is included in the email and provides access to the account record that is the recipient source for the communication request.

  You can include bookmarks in messages sent using templates of any applicable channel. However, only bookmarks in email messages allow the recipient to click the link to navigate to the target record in the Siebel application.

If the recipient user is running the Siebel application, then the bookmark record can open in the application window or can open in another browser window. If the user is not logged in, then the user is prompted to log in before the user can access the record.

> **Note:** You can manually insert a bookmark in an email message or document by choosing the Create Bookmark command from the applet-level menu.

Before you specify to include bookmarks, note the following requirements:

- The Siebel administrator must specify a value for the WebServer server component parameter for Communications Outbound Manager. To access the bookmarked record, the recipient users must have access to the Web server and Application Object Manager that this parameter specifies. For more information, see *Administering Communications Outbound Manager*.
- For each business component representing a type of record for supported bookmarks, a developer must verify that the Default Bookmark View user property is appropriately defined.

  This user property specifies the Siebel application view in which the bookmark record must open for the user, who is in this scenario the email recipient. The specified view must be an user view that is available to the intended recipients. This user property is already defined for many key business components. For example, for the Account business component, the default bookmark view is Account List View. For more information about configuring user properties for business components, see *Configuring Siebel Business Applications* and *Siebel Developer's Reference* .

- **Create Activity.** Select this option to set activity logging for outbound communication requests that include the template. For more information about activity logging, see *Viewing Activity Records for Outbound Communication Requests*.

  If the Create Activity check box is selected for the template, then one activity is created for each recipient after the message is sent to that recipient. For each activity record, the text from the template Subject field appears in the Description field, and the text from the template message body appears in the Comments field. Sending a message to a large number of recipients generates an equally large number of activity records.

  The user who starts the Siebel Server running Communications Outbound Manager is the owner of each created activity. Typically, the user ID for this user is SADMIN.

  > **Note:** If you create a new recipient group using a custom business component, and select the Create Activity check box for an advanced template that uses the recipient group, then you must create a System Activity object on the custom business component to specify fields to log with activity logging. For more information, see *Configuring Recipient Groups for Requests and Advanced Templates*.

Pick Available Substitutions

The following fields are grouped under Pick Available Substitutions:

- **Recipient Group.** Select the type of recipient group for the template. The recipients might be, for example, all contacts associated with an opportunity. This particular group is identified as Opportunity Contacts.

  The recipient group for the template is optional and is used to obtain values for the Available Fields list.

  The recipient group you specify determines only the field substitutions that are available for the template text. The actual recipient group, and actual recipients, are determined when using the template for a communication request.

The Recipient Group drop-down list displays recipient groups for many major business objects and business components. For predefined values, see *Predefined Recipient Groups*.

You can customize the list of values for the Recipient Group drop-down list to add or remove recipient groups. For more information, see *Configuring Recipient Groups for Requests and Advanced Templates*.

In any greeting or closing templates that are set up as defaults in the Outbound Communications view of the User Preferences screen, only field substitutions from the Action recipient group appear correctly for the recipient group. For more information about setting user preferences, see *Siebel Applications Administration Guide* .

- **Available Fields.** Displays the business component fields that are valid for substitution. You can copy and paste such fields into the Text field for the template.

  The fields available for substitution are from the recipient business component that the Recipient Group (such as Contact, for Account Contacts) specifies, or from the primary business component in the recipient source business object (such as Account, for Account Contacts). The business component name, followed by a period, prefaces the fields for the primary business component.

  All substitution fields must be enclosed in brackets ([ ]) in the template text.

  For example, available substitution fields for Account Contacts include [Last Name], from the Contact business component, and [Account.Name], from the Account business component.

  > **Note:** For an HTML template (with HTML text in the Text field) or an HTML template item, make sure that the enclosing brackets and text of any substitution field text do not include any tagging changes. For example, do not change from bold to regular text in the enclosing brackets of a substitution field. Doing so might prevent proper data substitution.

  If your template must contain a literal bracket character ([or]), then insert a backslash character (\) before the bracket to *escape* the bracket character so that the character is correctly interpreted.

  > **Note:** If a substitution field is not enclosed in brackets, or you enclose the substitution field in some other notation, such as percentage characters (%), then Communications Outbound Manager cannot perform substitution for the field.

Compose Template

The following fields are grouped under Compose Template:

- **Subject.** Enter text for a subject line for the template.

  Text in the Subject field can also include substitutions from the Available Fields list. The recipient group determines the available substitutions. Note the following points about the text in this field.

  - For an email message sent using a communication request, the text from this field is used in the Subject line of the message.
  - For a fax sent using a communication request, the text from this field appears on the cover page of the faxed message.

> **Note:** If you use OpenText RightFax with the Unicode patch, then the subject text appears on the fax cover page only for ENU (U.S. English) software. For all other languages, the subject text appears on a second page of the faxed message. For more information, see *Integrating with Fax Products*.

  - For a page or wireless message, the text from this field is not used.

- **Text.** Specify text for the template. As appropriate, you can copy and paste fields from the available substitutions.
  All template text appears at the start of the message body. For information about editing and formatting in this field, see *Editing and Formatting Controls for Text in Templates*.

Fields for Template Items

This topic describes the fields you can specify for a template item. Template items apply to only advanced templates. The fields are organized according to where you specify them. For information about the fields for templates, see *Fields for Templates*.

This topic contains the following information:

- *Fields for the Template Items List*
- *Fields for the Template Item Form*

Fields for the Template Items List

The following fields are available in the Template Items list:

- **Sequence (required).** A sequence number is automatically assigned the template item. The sequence number is used to assemble the template items for the communication.
  The default sequence value for a new template item is the lowest positive number that is not assigned to an existing template item for the same template. For template items for the message body, messages to deliver to recipients are constructed as follows:
  - All plain-text template items are concatenated in sequence to form the plain-text message body for the email message. (This constructions applies to email, fax, page, and wireless message templates.)
  - All HTML template items are concatenated in sequence to form the HTML message body for the email message. If HTML template text is defined, then the HTML template items for the message body appends this text. (This construction applies to email templates only.)

Only template items that have the Message Body check box selected form the plain-text message body *or* (for email only) the HTML message body.

For an email message, the recipient's email client displays the HTML version of the message body if it can do so; otherwise, the email client displays the plain-text version of the message body. Sending separate plain-text and HTML versions of the same email message body is called MIME multipart or alternative support. (MIME stands for Multipurpose Internet Mail Extension.)

> **Note:** For a fax template, specify HTML template items as attachments *only*. Do not specify HTML template items for the message body. (The text in the Text field can be either HTML or plain text.)

You can change the sequence number for a template item, but you cannot specify a sequence number that another template item uses. Instead, you must shift the numbers to make space for the one you want to modify. For example, if you have sequences 1 and 2, then to swap the numbers you can change 1 to 3, change 2 to 1, and then change 3 to 2.

- **Attachment Label.** Specify a label for a template item to attach to an email or fax message. In this context, an attachment is any template item for which the Message Body check box is not selected.

  For a template item that you add as an attachment to an email or fax message, the Attachment Label field provides an optional string to name the attachment. If you do not specify an attachment label, then the file name and extension are used as the attachment label.

  For an HTML template item that you add as an attachment to an email or fax message, note the following points about the attachment label:

  - The Attachment Label field specifies a string that is used for embedding the template item into the HTML. The string must exactly match a reference in the HTML markup so that the HTML content can provide recipients access to the template item content, such as an embedded picture.

    The email client for an email recipient, or the email server for your fax gateway, matches these strings to correctly locate and display or process each embedded attachment.

    For example, for a *my_picture.jpg* attachment label (without enclosing quotes), the matching HTML reference for the embedded picture file follows:

    ```
    <IMG SRC="my_picture.jpg">
    ```

  - If you do not specify an attachment label, then the attachment is a true attachment to the HTML email or fax message and is not embedded in the HTML message.

  > **Note:** If you specify an attachment label that does not exactly match a reference in the HTML markup, then email clients, or the email server for your fax gateway, might not be able to access the template item. The template item is an embedded attachment for which the HTML markup provides no access.

  For more information, see the description for the Attachment Name field in this topic.

  Embedding pictures or other referenced files in HTML makes an email message larger and makes sending an email message take longer, or makes fax gateway processing take longer for a fax. For an email message, you can also make a file available on the Internet and include its URL in the HTML. In this scenario, do not also add the files as template items. Recipients can view the images only if they are connected to the Internet when they read the email message.

- **Literature Name.** Specify a literature item from the Siebel File System. For information about adding a literature item for a template item, see *Specifying Template Items for Advanced Templates*.

  For a literature item you specify, values are substituted using the business component fields in the Available Fields list if the Substitute Values check box is selected.

  You can specify a template item containing a literature item for the message body for the template, or specify a template item as an attachment.

  You can drill down on the literature item to navigate to another view where you can open the item. For information about adding literature items to the Siebel File System, see *Siebel Applications Administration Guide* .

- **Attachment Name.** Specify the name of an operating system file. The file can be a text file, an HTML file, a graphics file, or another type of file. For information about adding a file for a template item, see *Specifying Template Items for Advanced Templates*.

  After you specify a file, its name (without the file extension) appears in the Attachment Name field. (The file extension appears in the File Type field.)

  You must add any graphics (picture) file for an HTML message as a file and specify the file as an attachment to the message. You cannot specify the file for the message body. You must specify an attachment label for the file. For more information, see the description of the Attachment Label field in this topic.

  For a file you specify, values are substituted using the business component fields in the Available Fields list if the Substitute Values check box is selected.

  You can specify a template item containing a file for the message body for the template, or specify a template item as an attachment.

  > **Note:** When you specify a file for a template item, the file is automatically added to the Siebel File System. Then, the operating system file is not referenced. When you send the file, you send the version in the Siebel File System.

- **File Type.** (read only) Displays the extension of a file you add. The file name, without the extension, appears in the Attachment Name field.
- **File Size.** (read only) Displays the size, in kilobytes, of a file you add.

Fields for the Template Item Form

The following fields are available in the Template Item form.

Template Item Commands

The following fields are grouped under Template Item Commands:

- **Substitute Values.** Select this option to enable value substitution for the template item. For more information, see the descriptions for the Available Fields list and for the Iteration Child Business Component field.
- **Message Body.** Select this option to specify that the template item content is used in the message body of the template message.

  Multiple plain-text or HTML template items marked for the message body are concatenated into a single message body for each of these types, in the sequence that their sequence numbers determines. For more information, see the description for the Sequence field in this chapter.

  > **Note:** For a fax template, specify HTML template items as attachments only. Do not specify HTML template items for the message body.

  If a template item is part of the message body, then it must be either a plain-text or HTML file. Communications Outbound Manager uses the file extension to distinguish if a template item file is in HTML format. Any file with an extension containing *htm* (such as .HTM, .HTML, or .SHTML) is recognized as an HTML file.

  The setting of the HTML Template check box also determines how HTML template items are handled. For more information, see *Fields for Templates*.

You can specify a file or literature item, for which values are substituted using business component fields, for the message body or as an attachment. (When you specify a file or literature item for the message body, files or literature items must be plain-text or HTML files only; other file types are not supported and might produce unacceptable results.)

If Message Body check box is not selected, then the current template item is an attachment to the message, and the template item uses the label you specify in the Attachment Label field.

For templates of the Fax channel type, any template items you do not specify for the message body are subject to the support of the sending fax server. Some fax servers support only certain types of attachments; some fax servers might not support any attachments.

For templates of Wireless Messaging channel type, any template items you do not specify for the message body are ignored.

For templates of e Pager channel type, any template that has one or more template items that you do not specify for the message body is not sent.

Pick Available Substitutions

The following fields are grouped under Pick Available Substitutions:

- **Iteration Child Business Component.** Select the name of a business component from which you want to include record data.

  The available business components you can specify are direct children of the recipient source business object for the Recipient Group.

  > **Note:** In the source business object, any business component that you want to specify in the Iteration Child Business Component field must have a link in which the parent business component is the primary business component on the business object.

  If the Substitute Values check box is selected, and you specify a child business component, then the template item is appended to the message body or attachment once for each record in the child business component, in iterative fashion. Business component field values are substituted for each record.

  A template item can include fields from the child business component for which values are substituted. The Template Item form displays the available substitutions.

  For example, if you target a template to Account Team Members, and you want to include a list of opportunities for the account, then you can choose Opportunity as the iteration child business component for a template item.

  If the file or literature item for the template item includes any of the field names in the Available Fields list, then the values for these fields, for all opportunities that are children of the account, are included in the message body or attachment. In this example, values for opportunity name and expected revenue figures might be substituted.

- **Available Fields.** Displays the business component fields that are valid for substitution. You can use the Available Fields list for reference, or copy and paste such fields into a template file or literature item that you use for the template item.

  The fields in the Available Fields list come from *one* of the following sources:

- The recipient business component for the Recipient Group (such as Contact, for Account Contacts), or the primary business component in the recipient source business object (such as Account, for Account Contacts). The business component name, followed by a period, prefaces the fields for the primary business component. These business component fields appear in the Available Fields list if the Iteration Child Business Component field is empty.
- The business component in the Iteration Child Business Component field that represents a child (such as Account Note) of the recipient source business object (such as Account). The business component name, followed by a period, prefaces the fields for the iteration child business component.

All substitution fields must be enclosed in brackets ([ ]) in the template item file or literature item.

Note the following examples:

- Available substitution fields for the Account recipient group (for a simple template) include [Account.Name], [Account.Last Name], [Account.Location], and so on, from the Account business component, which is the primary business component for the Account business object.
- Available substitution fields for the Account Contacts recipient group (advanced template) include:
  - [Last Name], [City] and so on, from the Contact business component
  - [Account.Name], [Account.Last Name], [Account.Location], and so on, from the Account business component
- Available substitution fields for the Account Note iteration child business component include [Note], [Note Type], and so on, from the Note business component.

Note: For an HTML template (HTML text in the Text field) or an HTML template item, make sure that the enclosing brackets and text of any substitution field text do not include any tagging changes. For example, do not change from bold to regular text in the enclosing brackets of a substitution field. Doing so might prevent proper data substitution.

If your template must contain a literal bracket character ([or]), then insert a backslash character (\) before the bracket to *escape* the bracket character, so that the character is correctly interpreted.

Note: If a substitution field is not enclosed in brackets, or you enclose the substitution field in some other notation, such as percentage characters (%), then Communications Outbound Manager cannot perform substitution for the field.

8 Administering Siebel Communications Server for Siebel Email Response

Administering Siebel Communication Server for Siebel Email Response

This chapter describes how to configure and run the components for Siebel Communications Server. It includes the following topics:

- *Siebel Server Requirements for Siebel Communications Server*
- *About Setting Up Siebel Communications Server for Siebel Email Response*
- *About Starting Server Components*
- *Administering Communications Inbound Receiver*
- *Events and Communications Inbound Receiver*
- *Administering Communications Inbound Processor*
- *Administering Communications Outbound Manager*
- *Starting Server Components*

Siebel Server Requirements for Siebel Communications Server

To use Siebel Communications Server in your enterprise, note the following basic requirements relating to Siebel Server:

- The Siebel Server installation must include the Communications Management (CommMgmt) component group.
- After installation, the Communications Management component group must be enabled.

For information about using Siebel Server load balancing with Siebel Communications Server and about the architecture of Siebel Communications Server, see *Siebel CTI Administration Guide* .

This topic contains the following information:

- *Server Components for Siebel Communications Server*
- *Synchronizing Batch-Mode Server Components*

Server Components for Siebel Communications Server

This guide includes information about the following server components in the Communications Management component group:

- **Communications Inbound Receiver (CommInboundRcvr).** Receives inbound work items and, in some deployments, queues them for Communications Inbound Processor processing. Work items can include email

messages for Siebel Email Response. For more information, see *Administering Communications Inbound Receiver*.

  - For real-time work items, such as email messages for most deployments of Siebel Email Response, Communications Inbound Receiver processes the work items it receives. Communications Inbound Processor is not used.
  - For nonreal-time work items, such as email messages for some high-volume deployments of Siebel Email Response, Communications Inbound Receiver queues the work items it receives for further Communications Inbound Processor processing.

- **Communications Inbound Processor (CommInboundProcessor).** For deployments of Siebel Email Response supporting nonreal-time work items, processes inbound work items that Communications Inbound Receiver queues. For more information, see *Administering Communications Inbound Receiver* and *Administering Communications Inbound Processor*.
- **Communications Outbound Manager (CommOutboundMgr).** Processes outbound communications for email, fax, wireless message, or page channels. This component directly supports communication requests or supports them through Siebel Workflow. This component also supports outbound capabilities for Siebel Email Response and for the Send Email, Send Fax, and Send Wireless Message commands. For more information, see *Administering Communications Outbound Manager*.
- **Page Manager (PageMgr).** Sends pages. The Send Page command uses this component. Some workflow processes in Siebel Workflow also use this component. For more information about setting up and using Page Manager, see *Siebel Business Process Framework: Workflow Guide* .
- **Email Manager (MailMgr).** Sends email. Some workflow processes in Siebel Workflow use this component. For more information about setting up and using Email Manager, see *Siebel Business Process Framework: Workflow Guide* .

Synchronizing Batch-Mode Server Components

Communications Inbound Receiver, Communications Inbound Processor, and Communications Outbound Manager are batch-mode components. You need to synchronize batch-mode server components between the Siebel Gateway and the Siebel database when you perform any of the following actions:

- Create new server components.
- Create new component jobs.
- Modify existing server components.
- Delete server components.
- Enable server components.
- Disable server components.

For more information about synchronizing batch-mode server components, see *Siebel System Administration Guide* .

About Setting Up Siebel Communications Server for Siebel Email Response

Siebel Communications Server supports many communication channels that you use to communicate with customers by using server components such as the Communications Inbound Receiver, the Communications Inbound Processor, and the Communications Outbound Manager.

> **Note:** If you change the number of tasks or threads for a server component, then make sure that the *Maximum Tasks* parameter is greater than or equal to the number of response groups multiplied by the number of threads. A thread is represented by a task and three subtasks.

This topic contains the following information:

- *About Setting Up Siebel Communications Server for Real-Time Email Processing*
- *About Setting Up Siebel Communications Server for Nonreal-Time Email Processing*

About Setting Up Siebel Communications Server for Real-Time Email Processing

When you use real-time email processing, you use only the Communications Inbound Receiver server component to receive and process email. For information about enabling real-time processing, see *Enabling Real-Time Email Processing*.

Communications Inbound Receiver monitors email accounts (email addresses) by using communications driver profiles to check for inbound messages. When Communications Inbound Receiver detects an inbound email, it receives the email message and sends the message through the Workflow Process Manager for processing.

After the email is processed and an activity is created, the message is stored in the Siebel database (if the message is less than 16 KB) or the Siebel File System (if the message is larger than 16 KB). The Server Request Broker component receives inbound requests from some other component. For example, when you submit profile or response group changes, the Server Request Broker component executes these commands.

About Setting Up Siebel Communications Server for Nonreal-Time Email Processing

When you use nonreal-time email processing, Communications Inbound Receiver monitors email accounts (email addresses) by using communications driver profiles to check for inbound messages. For information about enabling nonreal-time processing, see *Enabling Nonreal-Time Email Processing*.

When Communications Inbound Receiver detects an inbound email, it gets the email from the email server, converts the email into event data, and creates a server request for the Server Request Broker component to inform Communications Inbound Processor of the new event. Communications Inbound Processor uses workflows to process and route the event. Communications Outbound Manager uses communications driver profiles to handle outbound communications to customers.

You set up communications drivers and profiles to connect the Siebel Server to your email server.

Communications drivers. Drivers specify the protocol to use to access the email server, and driver parameters control the behavior of each driver. For example, the Internet SMTP/POP3 Server driver logs in to the POP3 server and checks for new email at an interval that you set in the PollingInterval driver parameter.

You can use the same communications driver for different purposes. For example, you can use the same communications driver to perform the following tasks:

- Monitor multiple email accounts (addresses).
- Monitor email addresses for other departments in your organization, such as a marketing outbound campaign.

Although you can use the same communications driver for multiple purposes, make sure that you set up a unique email address and response group for each group and purpose.

> **Note:** Changes that you make to a communications driver's parameters affect everyone who uses that driver. Therefore, it is recommended that the person in your organization who maintains communications drivers makes or approves all changes.

Communications driver profile. A driver profile specifies a specific mailbox for monitoring and rules (profile parameter overrides) for the way the driver behaves while monitoring that mailbox.

Communications drivers and profiles for Siebel Email Response enable Communications Inbound Receiver to monitor mailboxes for inbound messages. Other communications channels, such as voice, use different communications drivers and profile types.

Each communications driver profile for Siebel Email Response processes both incoming and outgoing email. Therefore, you must configure each driver profile for both.

To set up Siebel Communications Server for Siebel Email Response:

- Set up your communications driver parameters to establish defaults for all profiles that use the driver.
- Create a communications driver profile for each email account that Siebel Email Response monitors. This process includes creating profile parameter overrides. For more information, see *Process of Setting Up Communications Driver Profiles*.
- Create at least one response group. This process includes creating input arguments and associating a profile with the response group. For more information, see *Process of Setting Up Response Groups*.

About Starting Server Components

For the Communications Inbound Receiver and the Communications Inbound Processor server components, a single component instance has multiple subtasks that run at the same time as the server component task. The Communications Inbound Receiver and the Communications Inbound Processor server component tasks and subtasks *must* be running before Siebel Email Response can process incoming email. Therefore, you must start all Communications Inbound Receiver and Communications Inbound Processor server component tasks and subtasks. For more information about enabling component groups when you configure the Siebel Server, see the *Siebel Installation Guide* and *Siebel System Administration Guide* .

Before starting any Communications Inbound Receiver or Communications Inbound Process component tasks, note the following guidelines:

- If you try to start the same Communications Inbound Receiver or Communications Inbound Processor component task twice, then the second attempt is rejected. However, the first instance is running as usual. You can always increase the number of subtasks for each component task if you have a high volume of incoming email messages.
- One component task can have multiple associated subtasks, and the subtasks route the email. The component task acts like a controller to coordinate its subtasks.

> **Note:** The preconfigured number of maximum threads is *five*. If you change the number of threads for a server component, then make sure that the *Maximum Tasks* parameter is greater than or equal to the number of response groups multiplied by the number of threads. A thread is represented by a task and three subtasks.

If you change the Siebel Email Response setup after you implement Siebel Email Response, then you must stop and restart the Communications Inbound Receiver and the Communications Inbound Processor server components for your changes to take effect.

For some changes, you must stop and restart these server components only if you want your changes to take effect immediately. For example, for changes to a workflow process take effect, you can submit them without stopping these server components. For information about submitting profile changes, see *Submitting Changes for Communications Driver Profiles*. For information about submitting requests, see *Resubmitting Failed Email*.

Task Failures at the Email Process Level

When a task fails, the following events occur:

- An email message is sent to the email address in the Administrator Email Address field of the response group.
- The administrator checks the log files that are attached to the email and identifies possible causes of the server component task failure.

  If the cause is a workflow step error, then the administrator fixes the workflow.

  If the cause is a profile error, then the administrator verifies that the profile for the response group is valid.
- The administrator manually restarts the server component task.

Main Tasks and Subtasks

Each time you start an instance of Communications Inbound Receiver, Siebel Email Response starts *one* main task and *five* subtasks. The main task is assigned the first (lowest) task number (for example, 1318). The five subtasks are assigned the next numbers in sequence (for example, 1319, 1320, 1321, 1322, and 1323). The main task manages the subtasks and the message queue. The subtasks process inbound messages by pulling the inbound messages from the queue and passing them to the appropriate workflow.

Communications Inbound Processor has only one main task.

Administering Communications Inbound Receiver

The Communications Inbound Receiver server component receives and processes inbound work items, such as email messages. Depending on your deployment, it might queue them for further Communications Inbound Processor processing. The short name for this component is CommInboundRcvr.

This topic contains the following information:

- *Event Processing for Real-Time and Nonreal-Time Processing*
- *Running Communications Inbound Receiver*
- *Configuring Parameters for Communications Inbound Receiver*
- *Activity Attachments Stored for Incoming Messages*

Event Processing for Real-Time and Nonreal-Time Processing

For both real-time processing and nonreal-time processing, inbound email is saved as event data to the local disk in a file with the .EVT file extension. Message content and attachments are also saved to the Siebel File System. For more information, see *Activity Attachments Stored for Incoming Messages*.

How the inbound event is then processed depends on whether you use real-time processing or nonreal-time processing:

- **Real-time processing.** In real-time processing, in which Communications Inbound Receiver performs all event processing, additional files are created on the local disk that represent different states of processing or represent error conditions. For more information about the processing of these files, see *Events and Communications Inbound Receiver*.

  Extensions for these files include the following:

  - **XEVT.** Events that are ready for workflow processing.
  - **ERROR.** Events that generated known errors and that can be retried.
  - **CRASH.** Events that failed for unknown reasons and must not be retried.

- **Nonreal-time processing.** In nonreal-time processing, Communications Inbound Receiver writes event data to the Siebel database (in the S_CM_INBND_EVT table) and to the Siebel File System, and submits a request to Server Request Processor and Server Request Broker. Communications Inbound Processor retrieves this request and processes the event.

  You can track nonreal-time events that are submitted to Communications Inbound Processor using the Communications Inbound Events view of the Administration - Communications screen. You can manually resubmit events that are not fully processed due to transient errors from this view. You cannot track real-time events.

  Valid status for events in the Communications Inbound Events view include:

  - **Queued.** Communications Inbound Receiver submitted the event for Communications Inbound Processor processing.
  - **CIP Processing.** Communications Inbound Processor received the event and is currently processing the event.

- **Error.** Event processing failed due to a known error. You can resubmit the event for processing using the Submit Request command in the applet menu.
- **Fatal.** Event processing failed due to an unknown error and must not be resubmitted.

Running Communications Inbound Receiver

When the Communications Management component group is enabled, the Communications Inbound Receiver component starts automatically. For any computer on which you do not want to run Communications Inbound Receiver, configure the Siebel Server to not start it. Communications Inbound Receiver restarts automatically if the Siebel Server fails and is brought back up.

Communications Inbound Receiver is a batch-mode server component, although it also has characteristics of other component types. It relies on the services of the Server Request Broker and Server Request Processor server components. These components must be running on the Siebel Server for communications to process successfully. As a batch-mode component, Communications Inbound Receiver has requirements. For more information, see *Synchronizing Batch-Mode Server Components*. For more information about configuring, starting, and stopping Siebel Server components, see *Siebel System Administration Guide* .

To provide greater availability and reliability for your deployment of the Communications Inbound Receiver server component, you can update active response groups and individual profiles loaded in active response groups without stopping and restarting the server component as follows:

- Update profiles by using the Submit Profile Changes command for the profile.
- Update response groups (and all profiles in the response group) by using the Submit Response Group Changes command for the response group.

Configuring Parameters for Communications Inbound Receiver

You can specify values for the following parameters for the Communications Inbound Receiver server component:

- **Administrator Email Address (alias AdminEmailAddress).** Specify a value for the Administrator Email Address parameter to provide an administrator email address to send messages to when inbound communications processing errors occur and no such address is defined for the response group.
- **Default Administrator Address (alias DefaultAdminAddress).** Specify a value for the Default Administrator Address parameter to provide an administrator email address to send messages to when server errors, such as a broken database connection, occur.
- **Event Queue Directory (alias EventQueueDirectory).** Specify a value for the Event Queue Directory parameter to provide the name of the directory in which to store queued events. Use this parameter to specify a value to override the default location in the `bin/queued` directory.
- **Maximum Tasks (alias MaxTasks).** Specify a value for the Maximum Tasks parameter to configure the maximum number of tasks for this component. (This parameter is part of the Process Management subsystem.)
- **Note:** Maximum Tasks must always be a value greater than the value of Max Threads.
- **Max Threads (alias MaxThreads).** Specify a value for the Max Threads parameter to configure the maximum number of threads for this component. The value that you specify determines the number of threads that Communications Inbound Receiver can create at the same time to process email. When specifying the value

for MaxThreads, consider the CPU capacity available on the computer that hosts Communications Inbound Receiver.

- **SMTP Server Name (alias SMTPServer).** Specify a value for the SMTP Server Name parameter to provide the name of the SMTP server that is used to send email to the administrator.
- **SMTP Server Port (alias SMTPServerPort).** Specify a value for the SMTP Server Port parameter to provide the port for the SMTP server that is used to send email to the administrator.

Activity Attachments Stored for Incoming Messages

For each inbound email message that Communications Inbound Receiver or Communications Inbound Processor processes, an activity record is created by using the Email - Inbound activity type. The original email content is saved in the form of one or more attachments to this activity record.

The entire original email message content (the entire MIME-encoded message that the POP3 or IMAP server receives) is saved in an attachment file named Original_Msg.txt.

If the original message is more than 16,000 characters long (including any HTML markup), then the full message is saved as another attachment named SiebelLongEmailBody.txt (for plain-text messages) or SiebelLongEmailBody.htm (for HTML messages).

If the original message is less than 16,000 characters long (including any HTML markup), then you can save the SiebelLongEmailBody attachment by setting the Save Email Body as Attachment user property for the Mail Agent Activity business component to TRUE.

Additional files might be created and saved as attachments to the activity, depending on the existence of embedded message content and on the setting of the Parse Embedded Messages parameter for the communications driver. For more information about this parameter, see *Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver*.

Note the following behavior for different settings of the Parse Embedded Messages parameter:

- When Parse Embedded Messages is FALSE, the following behavior applies:

  For each embedded message, a single attachment file is created that contains the entire MIME embedded message. This file is named EmbeddedMsg*partspecifier*.eml, where *partspecifier* represents the file's placement in the original message's structure, for example, EmbeddedMsg01.eml, EmbeddedMsg3.4.eml, and so on. You can open these files using any application that can read an EML file, such as Microsoft Outlook Express.

- When Parse Embedded Messages is TRUE (the default), the following behavior applies:

  - For a plain-text email message, all text components are saved in one or more attachment files. These files are named textplain*partspecifier*.txt, where *partspecifier* represents the file's placement in the original message's structure, for example, textplain01.txt, textplain3.4.txt, and so on.
  - For an HTML email message, all HTML components are saved in one or more attachment files. These files are named texthtml*partspecifier*.htm, where *partspecifier* represents the file's placement in the original message's structure, for example, texthtml01.htm, texthtml3.4.htm, and so on.
  - Any attachments to the original email message are also saved as attachments to the activity record. These files have their original file names.

Events and Communications Inbound Receiver

When Communications Inbound Receiver is started, it loads the communications drivers that its processing response groups require. Each response group can use multiple communications profiles. Each communications profile requires a communications driver. The communications driver retrieves messages and passes them to Communications Inbound Receiver in the proper format.

The communications drivers pass tag-value pairs, which define the content of the incoming messages, to Communications Inbound Receiver. Any attachments that are associated with the incoming message are stored on the email server. References to these attachments are included in the name-value pairs that the communications drivers pass to Communications Inbound Receiver. The workflows that Communications Inbound Receiver invoke delete all file attachments when these attachments are no longer needed.

Communications Inbound Receiver takes the incoming message data and serializes it to a disk-based queue. The disk is used instead of memory for the following reasons:

- **Persistence.** If the computer fails, then the queued events are not lost.
- **Memory.** Storing on disk reduces Communications Inbound Receiver memory requirements.
- **Capacity.** Disk space is essentially unlimited, so the queue size is unbounded.

Events are stored in folders underneath the *queued* directory. The folders are named after the response group that generates the events. Events are in the UTF-8 character set, which translates 16-bit Unicode characters into 8-bit characters. Each event always has a file name prefix of CIR.

If necessary, then you can shut down the Communications Inbound Receiver and the Communications Inbound Processor components. For information about shutting down Siebel Server components, see *Siebel System Administration Guide* .

Related Topics

Event States

State Transitions

Event Processing

Errors Encountered While Processing Events

Logged Event Types and Subtypes

Event States

The disk-based events have special file extensions that represent the event's current state. The following table shows these file extensions and corresponding states.

File Extension	Event State
.evt	An event that is queued and waiting for processing by a work queue thread (normally a workflow).
.xevt	An event is that is currently being processed by a work queue thread. (A workflow is executing.)

File Extension	Event State
.paused	An event that is executing when a transitory error (like a database failure) occurs. An event with this extension is reprocessed every five minutes.
.error	An event that causes a workflow error. An event with this extension is reprocessed every five minutes.
.retry.evt	An event that is queued for a second time because an abnormal termination of Communications Inbound Receiver interrupts the initial processing. The abnormal termination might be related to the processing of this event.
retry.xevt	An event that is queued for a second time and is currently being processed by a work queue thread. (A workflow is executing.)
.crash	An event that is processed by the workflow during two abnormal Communications Inbound Receiver terminations. It is likely that the processing of this event is causing the abnormal termination. You can reprocess this event by changing the .crash file extension to .evt and reloading the response group. To enable the event execution without reloading the response group, rename the event with the .paused extension.
.failed	An event for which a non-transitory error occurs during processing. You can reprocess this event by changing the .failed extension to .evt and reloading the response group. To enable the event execution without reloading the response group, rename the event with the .paused extension.

State Transitions

The following table describes the state transitions for events.

Transition	Reason for Transition
.evt to .xevt	Before a workflow processes a message, an event is renamed with a .xevt extension so that if a failure occurs, on Communications Inbound Receiver restart it is possible to tell which messages were in-process.
.xevt to event deletion	An event is deleted from the disk if a workflow processes the event with no errors.
.paused to .evt	Every five minutes the queue directory is scanned for .paused events. Found events are renamed with the .evt extension and processed again. When Communications Inbound Receiver begins processing a response group, it looks on the disk for any messages with a .paused extension. These events were paused when Communications Inbound Receiver was previously stopped. These events are renamed with the .evt extension, reloaded, and processed again.
.xevt to .paused	An event is paused and renamed with the .paused extension if a transitory error (for example, a database failure) occurs while the event is being processed. Within five minutes, the event is reprocessed.

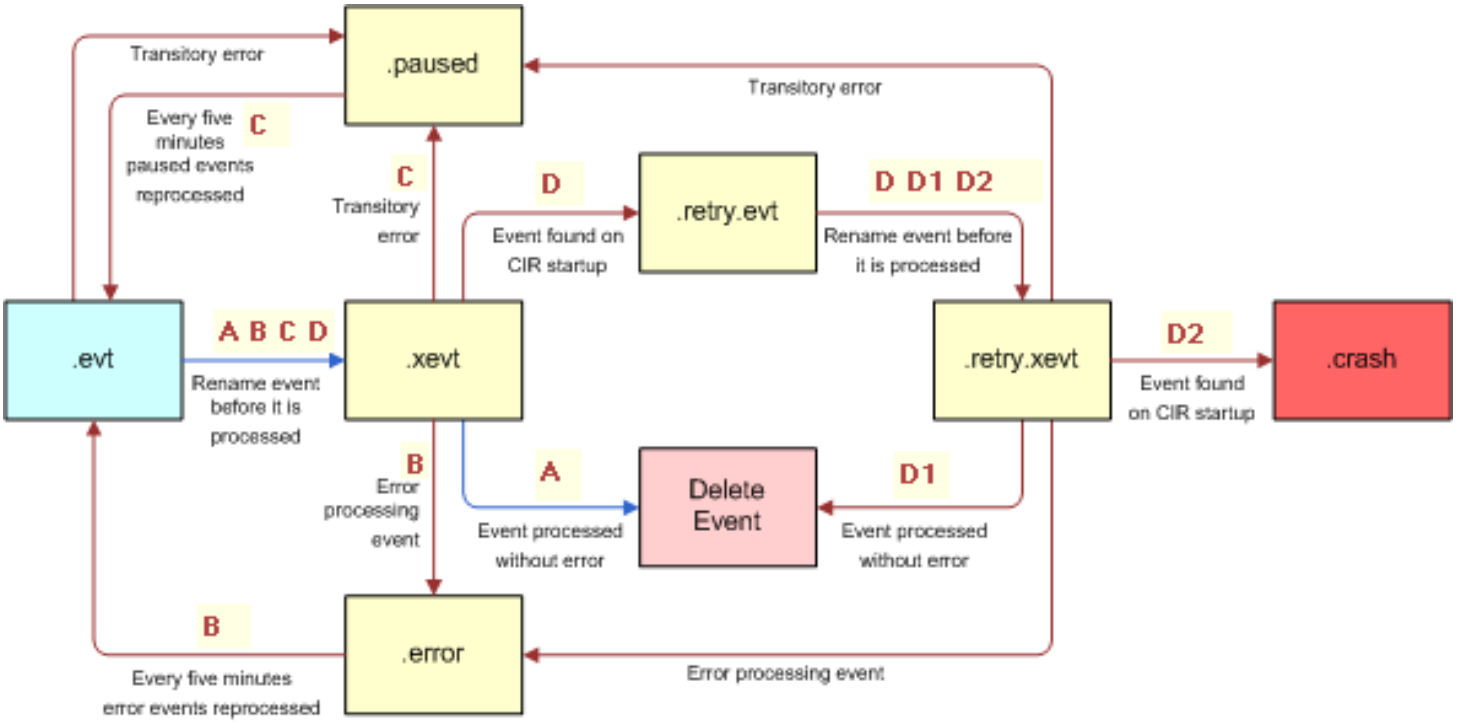
Transition	Reason for Transition
.evt to .paused	An event is paused and renamed with .paused extension if a transitory error occurs before an event can be processed. Within five minutes, another attempt is made to process the event.
.xevt to failed event deletion	If an event cannot be deleted after it is processed, then an error message is logged and an email is sent warning the administrator of the impending reprocessing of an event. When the server restarts, the .xevt event is requeued as a .retry.evt event.
.xevt to .error	An event is given a .error extension if a workflow returns an error while processing the event.
.xevt to .failed	An event is given a .failed extension if a non-transitory error occurs while processing the event.
.xevt to .retry.evt	When Communications Inbound Receiver begins processing a response group, it looks on the disk for any messages with a .xevt extension. These events were in-process when Communications Inbound Receiver failed abnormally so it cannot be determined if they are directly responsible for the failure. To avoid discarding events that do not cause the failure, the events are requeued with a .retry.evt extension. However, if the server fails while processing the .retry.evt event, then it is possible to determine that the message is already party to one failure, which indicates that it might have caused the failure. This determination can help to avoid infinite requeueing of such events.
.retry.evt to .retry.xevt	An event that might have previously caused a failure is renamed with a retry.xevt extension before workflow processing.
.retry.evt to .crash	An event that is party to two abnormal Communications Inbound Receiver failures is renamed with a .crash extension.
retry.xevt to .error	An event that might have previously caused a failure, which then causes a workflow error, is renamed to with an .error extension.

Event Processing

This topic gives one example of how you can use Communications Inbound Receiver events. You can use Communications Inbound Receiver events differently, depending on your business requirements.

Events are stored in a subfolder in the `bin/queued` directory. The subfolder name is based on the response group name. You can override the root directory, `bin/queued`, using the EventQueueDirectory server parameter for Communications Inbound Receiver.

The following figure illustrates event processing. Each of the subtopics in this topic explains one letter notation in this illustration.



Typical Communications Inbound Receiver Events

The following process describes processing of a typical Communications Inbound Receiver event:

1. The driver generates an event for Communications Inbound Receiver.
2. Communications Inbound Receiver creates a .evt file that stores the driver event.
3. Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
4. The workflow executes without any errors and the .xevt file is deleted.

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of A.

Errors During Communications Inbound Receiver Email Processing

The following process describes a processing error during Communications Inbound Receiver email processing:

1. The driver generates an event for Communications Inbound Receiver.
2. Communications Inbound Receiver creates a .evt file that stores the driver event.
3. Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
4. The workflow returns an error that causes the event to be renamed from .xevt to .error.
5. An email is sent to the administrator, and the following error is logged: *Error invoking method %1 on event %2. Event will be reprocessed within %3 seconds*.
6. Within five minutes, the event is renamed from .error to .evt and requeued.

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of B.

Database Failures During Communications Inbound Receiver Processing

The following process describes what happens when a Siebel database fails during Communications Inbound Receiver processing:

1. The driver generates an event for Communications Inbound Receiver.
2. Communications Inbound Receiver creates a .evt file that stores the driver event.
3. Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.

4. The workflow returns an error, and Communications Inbound Receiver determines the Siebel database is down.
5. Communications Inbound Receiver renames the .xevt file to .paused.
6. Within five minutes, the event is renamed from .paused to .evt and requeued.

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of C.

Failure Errors During Communications Inbound Receiver Processing

The following process describes what happens when a failure error occurs during Communications Inbound Receiver processing:

1. The driver generates an event for Communications Inbound Receiver.
2. Communications Inbound Receiver creates a .evt file that stores the driver event.
3. Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
4. A failure occurs during email processing.
5. When Communications Inbound Receiver restarts, the .xevt file is found and renamed to .retry.evt.
6. The following warning message is logged: *Event %s may have caused crash, requeueing event for one retry.*
7. The event is requeued for processing.

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of D.

Typical Processing of an Event that Previously Caused a Failure

The following process describes the typical processing of an event that previously caused a failure:

1. Communications Inbound Receiver renames retry.evt to retry.xevt immediately before workflow execution.
2. The workflow executes without error and retry.xevt is deleted.

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of D1.

Processing of an Event that Caused a Second Failure

The following process describes what happens the second time an event causes a failure:

1. Communications Inbound Receiver renames retry.evt to retry.xevt immediately before workflow execution.
2. A failure occurs during workflow execution.
3. When Communications Inbound Receiver restarts, the retry.xevt file is found and renamed to .crash.
4. An email is sent to the administrator, and the following error message is logged: *Event %s may have caused crash, change .crash extension to .evt to requeue on restart.*

The figure in *Event Processing* illustrates this process in the illustration lines with a notation of D2.

> **Note:** The event is not reprocessed because it is assumed to have caused the failure. To reprocess the event, change the .crash extension to .evt.

Errors Encountered While Processing Events

Any error encountered while processing events never results in the termination of the Communications Inbound Receiver component. All errors are logged and email messages are sent for the following conditions:

- An event deletion failure.
- A workflow error.
- An event that is in-process during two abnormal Communications Inbound Receiver terminations.

- An event that causes two workflow errors.
- An event that causes one workflow error and is in-process during an abnormal Communications Inbound Receiver termination.

Logged Event Types and Subtypes

When incoming messages are logged on the email server, a logged event type and subtype are created for each event. You can filter the quantity and detail of logged messages. The following table describes the logged event types for Siebel Email Response.

Event Type	Description
EMR_Performance	Set to 2 or higher to see performance logging.
EMR_Tracking	Set to 2 or higher to see information that is useful for tracking the flow of driver events.
EMR_Data	Set to 2 or higher to see detail about the actual event data.
EMR_Log	Use for general purpose logging.
LogEvent	Use for logging information about the events.

The following table describes the event subtypes for event types.

Event Subtype	Description
LogDebug (5)	Logs debug information including function entry and exit points.
LogDetail (4)	Logs all information except function entry and exit points.
LogError (1)	Logs all errors.
LogFatal (0)	Logs terminal errors.
LogInfo (3)	Logs information that is helpful for performance issues.
LogWarning (2)	Logs messages that warn of possible issues.

To change the log level, you can enter the following srvrmgr command:

```
change evtloglvl LogEvent=X for comp CommInboundRcvr
```

where: *X* is one of the numbers in parentheses in the previous table.

Administering Communications Inbound Processor

The Communications Inbound Processor server component processes inbound work items, such as email messages, that Communications Inbound Receiver previously received and queued. The short name for this component is CommInboundProcessor.

> **Note:** Communications Inbound Processor is used for nonreal-time event processing, but not for real-time event processing. For more information about real-time processing and nonreal-time processing, see *Processing Incoming Email*.

Running Communications Inbound Processor

When the Communications Management component group is enabled, the Communications Inbound Processor component starts automatically. For any computer on which you do not want to run Communications Inbound Processor, configure the Siebel Server to not start it. Communications Inbound Processor restarts automatically if the Siebel Server fails and is brought back up.

Communications Inbound Processor is a batch-mode server component. It relies on the services of the Server Request Broker and Server Request Processor server components. These components must be running on the Siebel Server for communications to process successfully. As a batch-mode component, Communications Inbound Processor has requirements. For more information, see *Synchronizing Batch-Mode Server Components*. For more information about configuring, starting, and stopping Siebel Server components, see *Siebel System Administration Guide* .

Administering Communications Outbound Manager

This topic describes how to administer the Communications Outbound Manager server component. The alias for this component is CommOutboundMgr.

Communications Outbound Manager processes outbound communications for email, fax, wireless message, or page channels. It supports outbound capabilities for Siebel Email Response and for the Send Email, Send Fax, and Send Wireless Message commands. It also supports communication requests, whether users directly create and submit them, or Siebel Workflow creates and submits them. For more information, see *Defining Outbound Communication Requests*.

For this server component, you can configure a parameter that specifies how Siebel bookmarks are generated, and you can configure a logging parameter. Otherwise, this component uses generic parameters and you do not need to configure it. For more information, see *Configuring Communications Outbound Manager* and *Configuring Shared or Separate Logging*.

This topic contains the following information:

- *Running Communications Outbound Manager*
- *Configuring Communications Outbound Manager*
- *Specifying Siebel Server for Communications Outbound Manager*
- *Specifying Component Name for Outbound Communication Requests*
- *Outbound Communications for Siebel Mobile Web Client*

Running Communications Outbound Manager

When the Communications Management component group is enabled, the Communications Outbound Manager component is started automatically. For any computer on which you do not want to run Communications Outbound Manager, configure the Siebel Server to not start it.

Communications Outbound Manager is a batch-mode server component. It relies on the services of the Server Request Broker and Server Request Processor server components. These components must be running on the Siebel Server for communication requests to dispatch successfully.

> **Note:** If a messaging system server, such as an email server, is restarted, then the Communications Outbound Manager server component that connects to it must also be restarted.

As a batch-mode component, Communications Outbound Manager is subject to requirements. For more information, see *Synchronizing Batch-Mode Server Components*. For more information about configuring, starting, and stopping Siebel Server components, see *Siebel System Administration Guide* .

If Communications Outbound Manager is not synchronized, as appropriate, then users who submit outbound communication requests might receive the following error message:

```
Unable to find definition for component CommOutboundMgr
```

For more information about monitoring communication requests and server requests, see *Monitoring Outbound Communication Requests* and *Monitoring Outbound Communication Requests as Server Requests*.

Configuring Communications Outbound Manager

For Communications Outbound Manager, you can configure a parameter that specifies how Siebel bookmarks are generated, configure a parameter that specifies whether logging must use shared or separate files, and configure logging levels. For more information about configuring logging for server components, see *Siebel System Administration Guide* .

Configuring Siebel Bookmarks

To support the Attach Bookmark setting for advanced communications templates, the Siebel administrator must specify a value for the WebServer server component parameter for Communications Outbound Manager.

This parameter specifies a string that identifies the Web server and Application Object Manager to include in the URL. The URL has the following form:

```
http://web_server/application_object_manager
```

To access the bookmarked record, the recipient users must have access to the specified Web server and Application Object Manager. For more information about using the Attach Bookmark setting for advanced templates, see *Fields for Templates*.

Configuring Shared or Separate Logging

An administrator can review log files for the Communications Outbound Manager component to monitor its performance and to monitor user activities that invoke this component.

Depending on how you configure the Communications Outbound Manager server component, a single log file might be generated for all requests, or a separate log file might be generated for each request (the default). The parameter that modifies this setting is called LogUseSharedFile.

Log files are written to the `log` subdirectory of the Siebel Server installation directory.

Set LogUseSharedFile according to how the server component is generally used as follows:

- For miscellaneous uses, including supporting the Send commands, sending auto-acknowledgement messages and replies for Siebel Email Response, and sending several outbound requests to a small number of recipients, you can set LogUseSharedFile to TRUE to reduce clutter in your `log` directory.
- For high-volume outbound communication requests, however, you can leave this parameter set to FALSE to generate a single log file for each request that you can analyze. LogUseSharedFile is FALSE by default.

The log file names vary according to how you set LogUseSharedFile as follows:

- When a single log file is generated for all requests, the file name is in the form CommOutboundMgr_*xxx*.log, where *xxx* is the ID number for the main Communications Outbound Manager task.
- When a separate log file is generated for each request, the file names are in the form CommOutboundMgr_*xxx*.log, where *xxx* is the ID number for the Communications Outbound Manager task applicable to the specific communication request.

The Outbound Communications Manager business service, run on the Siebel Server, uses the same naming convention to generate log files in the same location.

Configuring Log Levels for Communications Outbound Manager

An administrator can set logging levels for Communications Outbound Manager to specify the degree of detail captured in the logs. Logging levels include:

- **CommSrvrError (level 1).** Lowest level of logging. The most severe errors are logged. Level 1 is the default.
- **CommSrvrWarning (2).** Moderate level of logging. More detail than level 1 is logged. Use this level for production.
- **CommSrvrTrace (3).** Moderately high level of logging. More detail than level 2 is logged.
- **CommSrvrDebug (4).** Highest level of logging. All errors and warnings and other events are logged. Use this level for testing purposes.

To configure log levels for Communications Outbound Manager

1. Navigate to the Administration - Server Configuration screen, then the Servers view.
2. Specify the Siebel Server on which Communications Outbound Manager runs.
3. In the Components list, select the record for the Communications Outbound Manager component.
4. Click the Events tab.
5. Select the record for the CommServer event type.
6. Specify one of the values described in this topic.

Specifying Siebel Server for Communications Outbound Manager

If you have more than one Siebel Server, and you want all outbound communications that are processed using a particular communications driver or profile to use a specific Siebel Server, then you can configure a parameter to specify the server name. You set the value of the Siebel Server driver parameter (generally, using a profile parameter override) to the name of the Siebel Server that is to handle the delivery of the outbound communications.

This parameter supports outbound communications sent (using the Communications Outbound Manager server component) using communications drivers that support outbound communications.

Note: The value of the Siebel Server parameter must exactly match the actual name of the Siebel Server.

As with other driver parameters, you can either specify a default value or provide an override value for a particular communications profile. For more information about the driver parameters, see *Managing Email, Fax, and Other Communications Products*.

Note: If an outbound communication request includes multiple templates, and this parameter value exists for the delivery profile associated with any of the templates, then you cannot specify a different value for this parameter for the profiles of any of the other templates in the same request.

Specifying Component Name for Outbound Communication Requests

When you create an outbound communication request, you can specify the name of the server component that is to process the request.

The default component name is CommOutboundMgr (for Communications Outbound Manager). If you configure new server components that are based on CommOutboundMgr, then you can give them other names. Then, when you create requests, you can provide the applicable component name in the Component Name field for the request.

When Siebel Server load-balancing is in effect, you can create multiple components using the same name. You might create the same name for a subset of your total set of Siebel Servers.

If different Siebel Servers use different Siebel runtime repositories, then you can use this mechanism to make sure that a specified set of Siebel Servers process certain types of requests. For more information about the description for the Component Name field, see *Fields for Outbound Communication Requests*.

Outbound Communications for Siebel Mobile Web Client

Outbound communications sent from Siebel Web Client are processed immediately. When you are connected to the local database and disconnected from the enterprise database, communications sent from Siebel Mobile Web Client are saved until you synchronize. The Communications Outbound Manager server component then processes them for delivery.

Starting Server Components

Depending on your server architecture and business requirements for processing email, start the following server components for Siebel Email Response:

- Communications Inbound Receiver

- Communications Inbound Receiver and Communications Inbound Processor (if you use nonreal-time email processing)
- Communications Outbound Manager

If you make any changes (other than profile or response group changes) to your Siebel Email Response setup after implementation, then you must stop and restart these server components so that your changes take effect. If you make profile or response group changes, then you can submit them without stopping the server components. For more information about enabling component groups when you configure Siebel Server, see the *Siebel Installation Guide* and *Siebel System Administration Guide* .

This topic contains the following procedures:

- *Automatically Restarting Server Components*
- *Enabling Real-Time Email Processing*
- *Enabling Nonreal-Time Email Processing*

Automatically Restarting Server Components

If Communications Inbound Receiver or Communications Inbound Processor fails, then a new process is started automatically for the server component if the AutoRestart component parameter is True. The new process looks through all the response groups in the Siebel database and picks those records in which Startup is Active and Siebel Server is the current Siebel Server name. (The Siebel Server field *cannot* be blank.) Then the new process starts a Communications Inbound Receiver or Communications Inbound Processor component task for each record.

You can access the status page for Communications Inbound Receiver by navigating to:

http:\\hostname:55555

where: hostname is the name of the Siebel Server on which Communications Inbound Receiver is running.

To verify Communications Inbound Receiver or Communications Inbound Processor auto-restart

1. Navigate to the Administration - Server Management screen, then the Servers view.
2. In the servers list, select the appropriate server, and click the Tasks view tab.
3. In the Tasks list, query for the components named Communications Inbound Receiver or Communications Inbound Processor.
4. If the Status field value is not Active, then refresh the view by clicking another view tab and then clicking the Server view tab.

   When the value in the Status field changes to Active, auto-restart is complete.

Enabling Real-Time Email Processing

If you are processing inbound email in real-time mode, then start only Communications Inbound Receiver. Complete the procedure in this topic to enable real-time email processing. For information about real-time email processing, see *Real-Time and Nonreal-Time Processing*.

To enable real-time email processing

1. Navigate to the Administration - Communications screen, then the All Response Groups view.

2. In the Response Groups list, select the response group for which you want to enable real-time processing.
3. Click the Input Arguments view tab.
4. In the Name field, enter the RealTime input argument, and in the Value field enter True.

   This value is the default for this input argument.

Enabling Nonreal-Time Email Processing

If you are processing inbound email in nonreal-time mode, then you start both Communications Inbound Receiver and Communications Inbound Processor. Complete the procedure in this topic to enable nonreal-time email processing. For information about nonreal-time email processing, see *Real-Time and Nonreal-Time Processing*.

To enable nonreal-time email processing

1. Navigate to the Administration - Communications screen, then the All Response Groups view.
2. In the Response Groups list, select the response group for which you want to enable nonreal-time processing.
3. Click the Input Arguments view tab.
4. In the Name field, enter the RealTime input argument, and in the Value field enter False.

9 Defining Outbound Communication Requests

Defining Outbound Communication Requests

This chapter provides information about creating and submitting outbound communication requests and about monitoring the status of outbound communication requests. It includes the following topics:

- *About Outbound Communication Requests*
- *Creating and Submitting Outbound Communication Requests*
- *Fields for Outbound Communication Requests*
- *Restarting an Aborted Communications Outbound Manager Component*
- *Monitoring Outbound Communication Requests*

About Outbound Communication Requests

An outbound communication request is a defined request to send content from communications templates (optionally with field substitution) to recipients associated with business objects, such as to contacts associated with an account. Requests are sent using email, fax, wireless message, pager, or other channels, as defined in the specified templates and as supported for your communications infrastructure. Outbound communication requests use only advanced templates.

You can create and submit requests, or Siebel Workflow and business services can create and submit them.

Note: Administrators or advanced users can perform the procedures described in this chapter.

This topic contains the following information:

- *Prerequisite Information for Recipient Addressing*
- *Siebel Views for Working with Outbound Communication Requests*

Prerequisite Information for Recipient Addressing

An outbound communication request succeeds when the business component records, or other associated records, for the recipients of the communication have the appropriate contact information. Email address, fax number, and pager fields for contacts, employees, partners, prospects, or other potential recipients must contain valid data. For information about specifying the business component fields that contain addressing information, see *Configuring Recipient Sources Applets*.

Siebel Views for Working with Outbound Communication Requests

Users can create and submit communication requests in the following views in the Communications screen:

- My Outbound Requests
- My Outbound Request Overview

Administrators can create and submit communication requests in the following views in the Administration - Communications screen:

- All Outbound Requests
- Outbound Request Overview

Users see only the requests they create. Administrators see all requests.

Note: The procedures in the topics in this chapter apply to a nonadministrator who uses the My Outbound Requests and My Outbound Request Overview views of the Communications screen.

Creating and Submitting Outbound Communication Requests

The procedures to create and submit an outbound communications request are the same for users and administrators, but administrators generally use different views for this activity. For information about dividing high-volume requests into subrequests for efficient processing, see *Configuring Subrequests*. For information about configuring a list of values for a custom channel type, see *Siebel CTI Administration Guide* .

Communication requests submitted from Siebel Web Client are processed immediately. When you are connected to the local database and disconnected from the enterprise database, requests submitted from Siebel Mobile Web Client are saved until you synchronize. The Communications Outbound Manager server component then processes them for delivery.

This topic contains the following information:

- *Creating Outbound Communication Requests*
- *Submitting Outbound Communication Requests*
- *Configuring Subrequests*
- *Deleting Outbound Communication Requests*

Creating Outbound Communication Requests

This topic describes how to create an outbound communication request.

To create an outbound communication request

1. Navigate to the Communications screen, then the My Outbound Request Overview view.
2. Add a new record in the Communication Request form.
3. Provide information for the new communication request by completing the following steps.
   a. Specify a type of recipient group, such as Opportunity Contacts.
   b. Specify at least one instance of the recipient source (such as an opportunity) to determine the actual recipient group for the request.

   For more information, see *Fields for Outbound Communication Requests*.
4. Add templates for the request by completing the following steps:
   a. Click the Request Templates view tab.
   b. In the Request Templates list, add a new record.
   c. Choose one or more existing templates from the dialog box that appears.

      In the dialog box, a user can see the templates for which the primary business component of the associated recipient group matches the business component of the recipient group for the request. That user created the listed templates, or the listed templates are publicly accessible. In the dialog box, an administrator can see all templates.

      In the requests views, records for templates are read-only. You can modify the template in the end-user or administrator views for templates. For more information, see *Configuring Communications Templates*.
5. Optionally, specify the number of subrequests for the request by completing the following steps:
   a. Click Subrequests on the Communication Request form or the Communication Requests list.
   b. In the dialog box that appears, specify a number between 2 and 26 to indicate the number of subrequests that must process the parent request.

   For more information, see *Configuring Subrequests*.
6. Submit the request.

   For more information, see *Submitting Outbound Communication Requests*.

Submitting Outbound Communication Requests

This topic describes how to submit an outbound communication request that you create.

> **Note:** If the Communications Outbound Manager component aborts, then a communication request that is already submitted can be resumed automatically when restarting the Siebel Server. Alternatively, you can resubmit the request to process it from start to finish. For more information, see *Restarting an Aborted Communications Outbound Manager Component*, *Monitoring Outbound Communication Requests*, and *Monitoring Outbound Communication Requests as Server Requests*.

To submit an outbound communication request

1. Navigate to the Communications screen, then the My Outbound Requests view.
2. In the Communication Requests list, select the record for a communication request to submit.

   A user can see the requests that user created. An administrator can see all requests.

3. From the Show drop-down list, choose My Outbound Request Overview.
4. Verify that the request is correctly configured and includes the intended templates, and modify the request, as appropriate.
5. Click Submit in the Communication Request form.

   If the Server Request Processor, Server Request Broker, and Communications Outbound Manager server components correctly process the communication request, then the request is passed to the appropriate messaging applications for delivery to the intended recipients.
6. Monitor the progress of the request, as appropriate.

   For information about monitoring requests, see *Monitoring Outbound Communication Requests* and *Monitoring Outbound Communication Requests as Server Requests*.

Configuring Subrequests

You can divide an outbound communication request into subrequests. More than one instance of the Communications Outbound Manager server component can process the subrequests to achieve greater scalability for requests with a large number of recipients or high processing demands.

You can specify from two to 26 subrequests for a request. Subrequests are allocated by using the last name of each recipient.

For example, if you specify two subrequests, then one subrequest handles all recipients with last names A through M, and the second subrequest handles all recipients with last names N through Z. If you specify three subrequests, then recipients are allocated to three alphabetical groupings (A through I, J through R, and S through Z). If you specify four subrequests, then recipients are allocated to four alphabetical groupings (A through F, G through M, N through S, and T through Z), and so on.

Subrequests are distributed to multiple instances of the server component with a name that you specify for the request. This approach load-balances your communication requests to achieve scalability objectives, particularly when subrequests are divided among multiple Siebel Server computers. Server Request Processor and Server Request Broker distribute requests.

If you click the Subrequests button after you specify subrequests, then the number of subrequests appears. After a request is processed, the Communication Subrequests view tab displays a list of the subrequests for the request. The form that appears after the Communication Subrequests list includes the Recipient Search Specification field. This field might display information about how the set of recipients for the subrequest is defined.

To configure your application for optimal processing of high-volume outbound communication requests using subrequests, you can designate Siebel Server instances running on multiple server computers to run Communications Outbound Manager. For more information about Communications Outbound Manager, see *Administering Communications Outbound Manager*.

> **Note:** You cannot specify subrequests for any outbound communication request with more than one recipient source object. For example, for a request that is based on the Campaign Contacts recipient group, specify only one campaign record if you want to specify subrequests for the request.

Subrequest SQL File Option

Depending on the requirements for your deployment, your company might choose to implement alternative SQL for processing subrequests. In this scenario, you create a SQL file to be read in place of the default Siebel method of processing subrequests.

You must name this file commoutboundmgr.cfg and place it in the `CMS` subdirectory of the Siebel File System directory. For example, depending on your installation, the full path might be as follows:

```
C:\sba82\FS\CMS\commoutboundmgr.cfg
```

If no file with this name exists in the designated location, then the default hardcoded SQL from Oracle is used to process subrequests.

Deleting Outbound Communication Requests

You can delete a record for an outbound communication request. A user can delete any request the user creates. A Siebel administrator can delete any request.

If you delete a request, and the request is processing (the status changed from Submitted to Processing), then the request continues processing until completion.

Fields for Outbound Communication Requests

This topic describes the fields for outbound communication requests. Several fields are read only, and you reference them for tracking purposes.

> **Note:** All fields do not appear in all of the outbound request views. Check the application user interface for the specific views in which a particular field appears.

The following fields apply to outbound communication requests:

- **Description.** Enter a description for the request.
- **Request #.** (read only) A unique ID for each request. This ID is generated when you create the request.
- **Recipient Group.** Select from a drop-down list the group of intended recipients for the communication. The recipients might be, for example, all contacts associated with an opportunity. This group is Opportunity Contacts.

  After you specify the recipient group, the Recipient Sources list in My Outbound Request Overview changes to reflect the business object, such as Opportunities, that represents the source from which the recipients are derived. The source business object for the recipients is identified using a label that appears on the right side of the applet header area.

  You add records to the Recipient Sources list, which is renamed to reflect the specified business object, to specify one or more instances of the primary business component for this business object, such as particular opportunities.

The read-only Recipients list, which appears after the Recipient Sources list, shows every individual recipient to whom a separate instance of the communication is sent, such as the Opportunity Contacts for each opportunity.

> **Note:** The Recipient Group drop-down list displays recipient group types for many major business objects and business components. For a list of the predefined values and the business object and business component associated with each recipient group, see *Predefined Recipient Groups*.

You can customize the values that appear in the Recipient Group drop-down list. For more information, see *Configuring Recipient Groups for Requests and Advanced Templates*.

- **Default Preference.** Specify a default delivery type to use for communication requests to each recipient if the Only Send Preference check box is selected for the request, and no communications preference is specified for the recipient. For more information, see the description for Only Send Preference.
- **Only Send Preference.** Select this option to send to each recipient only the templates that match the recipient's communications preference, if this preference is specified, or that match the channel preference in the Default Preference field.

  If you construct a communication request that contains templates of more than one channel type, and you select this option, then a recipient can receive communications only for a single channel type.

  The communications preference field that the Only Send Preference check box affects generally corresponds to the setting of the Recipient Preferred Medium Field user property for the business component.

  For example, for both employees and contacts, the Preferred Communications field is the default field containing the channel preference. (For contacts, the caption for this field is Contact Method.) If you do not define this user property, then the preference is retrieved from the Preferred Communications field if the business component includes such a field. For more information, see *Siebel Applications Administration Guide* .

  If the communications preference is not specified for a recipient, and the Only Send Preference check box is selected, then the preference in the Default Preference field is used for that recipient.
- **Start Time.** (read only) The time that the Communications Outbound Manager server component starts to process the request.
- **End Time.** (read only) The time that the request is fulfilled.
- **Created.** (read only) The time that the request is created.
- **Created By.** (read only) The user who creates the request.
- **Status.** (read only) The current status of the request. For more information, see *Monitoring Outbound Communication Requests*.
- **Status Message.** (read only) Status message text, if any, that the Communications Outbound Manager server component for the request generates. For more information, see *Monitoring Outbound Communication Requests*.
- **Comments.** Enter comments about the request.
- **Component Name.** The name of the server component that is to process the outbound communication request. For more information, see *Administering Communications Outbound Manager* and *Siebel System Administration Guide* .

  The default component name is CommOutboundMgr (for Communications Outbound Manager). If you configure any new server components that are based on CommOutboundMgr, then you can specify another component name in this field.

For example, if you create and configure the CommOutboundMgr2 server component, and you want an instance of this component to process the current request, then specify this new component name in this field.

> **Note:** If your Siebel application deployment involves different Siebel runtime repositories, then run differently named server components that are based on CommOutboundMgr for each different repository file used by one or more Siebel Server. Otherwise, field data might not be correctly substituted in your communications templates.

> **Note:** According to your environment configuration, more than one server task (for the server component designated to handle a request) might process subrequests for the request. For more information about subrequests, see *Configuring Subrequests*.

Restarting an Aborted Communications Outbound Manager Component

If the Siebel Server aborts (or the host computer stops) while the Communications Outbound Manager component is processing a communication request, then Communications Outbound Manager creates a file in the Siebel File System containing information about the last sent message. The file is named CommOutboundMgr*xxx*.crf, where *xxx* is the ID number for the request.

If, later, a request with the same request ID is submitted, then Communications Outbound Manager detects the corresponding file CRF file and resumes processing the request where it stopped processing.

If a user modifies the request or the template data after the request was originally submitted, then the total message output of the resumed request plus the aborted request might not exactly match the output that the original request would have generated if the Communications Outbound Manager did not abort the original request.

You can delete the CRF file if you do not need it. If you delete the CRF file and resubmit the request, then the request is processed completely from start to finish.

The restart capability described in this topic applies only when the Communications Outbound Manager component aborts while processing a valid communication request. It does not apply when the component stops processing a request due to an error, such as incorrectly specified recipients. In such a scenario, Communications Outbound Manager does not abort and can continue to receive and process requests.

Monitoring Outbound Communication Requests

In the views for working with outbound communication requests, you can monitor outbound communication requests that users or administrators initiate. These views display the status of each communication request that the Communications Outbound Manager component processes.

> **Note:** It is recommended that you specify text for the Comments field when you create requests. Such comment text can help you to identify or differentiate requests or subrequests that you monitor.

For more information about monitoring requests, see the following content:

- *Status Settings for Outbound Communication Requests*
- *Monitoring Outbound Communication Requests as Server Requests*
- *Status Settings for Server Requests*
- *Viewing Activity Records for Outbound Communication Requests*

To monitor outbound communication requests

1. Navigate to one of the following views:
    - Administration - Communications screen, then the All Outbound Requests view
    - Communications screen, then the My Outbound Requests view
2. In the Communication Requests list, query the listed communication requests for all records matching certain criteria, and check the status for these requests.

    For example, you might want to find all email requests with a particular status, all requests that a particular user created or submitted, or all requests submitted to a specific server component.
3. As applicable, in the Communications Subrequests list, browse the listed subrequests for a submitted request, and check the status for each subrequest.

Status Settings for Outbound Communication Requests

For each outbound communication request record, or subrequest record, detailed status information might appear in the Status Message field. In addition, the Status field displays one of the following values:

- **In Progress.** The request is created but not yet submitted for the Communications Outbound Manager server component processing.
- **Submitted.** The request is submitted to the Communications Outbound Manager server component. The request has this status even if Communications Outbound Manager has not yet received it.
- **Processing.** Communications Outbound Manager received and is processing the request.
- **Done.** Communications Outbound Manager successfully completed processing the request.
- **Incomplete.** The request was not fully processed because it did not include all necessary information, for example, one or more recipients were not resolved, no templates were specified for the request, or a template was invalid.

    A request with subrequests might have the status Incomplete if only some of the subrequests were correctly processed. Each subrequest has its own status. Resubmit any subrequest that is not processed.

    > **Note:** If address information, such as the email address, is not available for any of the recipients of a communication request, then the request status after processing is Incomplete. However, this status does not indicate that Communications Outbound Manager did not deliver to the recipients with available addresses.

Monitoring Outbound Communication Requests as Server Requests

In the Jobs view of the Administration - Server Management screen, an administrator can monitor outbound communication requests that users or administrators initiate. This view displays the status of a request that is sent as a server request to the Communications Outbound Manager component for processing as a communication request. For more information about server requests, see *Siebel System Administration Guide* .

When a user or an administrator clicks the Submit button to submit an outbound communication request that Communications Outbound Manager sends, a Siebel Server request is created.

The Server Request Processor and Server Request Broker server components initially process the request, then pass it to the Communications Outbound Manager server component for further processing.

> **Note:** Server Request Processor and Server Request Broker must be running for Communications Outbound Manager to operate. Request processing depends on the availability of these components. Delays in request processing might be due to intermittent availability of these components.

In addition to submitting a request, the administrator can perform the following actions on a request:

- **Hold.** Hold back a request from the queue.
- **Resume.** Place a request back in the queue.
- **Cancel.** Cancel a request that is currently in the queue.

To monitor outbound communication requests as server requests

1. Navigate to the Administration - Server Management screen.
2. Click the Jobs link.
3. In the Jobs list or the Job Detail form, query for all server request records in which the value for the Component or Job field is Communications Outbound Manager (or the component name for your implementation).

Status Settings for Server Requests

For each outbound communication request record, the Status field in the Jobs view displays one of the following values:

- **Queued.** Server Request Processor and Server Request Broker queued the request, and the request is not yet passed to the Communications Outbound Manager server component.
- **Active.** The request is currently processing.
- **Success.** The request successfully processed.
- **On Hold.** An administrator placed the request on hold. Placing a request on hold removes it from the queue.
- **Cancelled.** An administrator cancelled the request.

> **Note:** After an outbound communication request is submitted for processing, you can cancel it as a server request only from the Jobs view. You can cancel a request only if it has a status of On Hold or Queued.

- **Error.** An error occurred during request processing, and Server Request Processor and Server Request Broker did not successfully pass the request to Communications Outbound Manager.

  Note: If a request has the Error status, then use one of the communication request views to obtain more detailed status information. For more information, see *Monitoring Outbound Communication Requests*.

Viewing Activity Records for Outbound Communication Requests

Users and administrators can monitor and troubleshoot communication requests that include particular templates by viewing activity logs or Siebel Communications Server logs.

You specify activity logging by selecting the Create Activity check box when you create an advanced template. You view activity records in the Activities screen. For more information, see *Fields for Templates*.

The procedure in this topic for the All Templates view of the Administration - Communications screen also applies to the My Templates view of the Communications screen.

If the Create Activity check box is selected for a template, then one activity is generated for each recipient after the message is sent to that recipient.

The message body text (and some other data, such as the sender name and the To line) appears in the Email Body field, up to a size of at least 16,000 characters. (The actual length depends on your Siebel database).

Note: When a message is sent to a large number of recipients, an equally large number of activity records is generated.

To set activity logging for any requests using a particular template

1. Navigate to the Administration - Communications screen, then the All Templates view.
2. In the Templates list, select a template to include in an outbound communication request.
3. Click the Advanced tab.
4. Select the Create Activity check box.

   Any outbound communication requests that include this template generate activity records.

Viewing Activity Records for Requests

Complete the procedure in this topic to view activity records for requests.

To view activity records for requests

1. Navigate to the Activities screen, then the Activity List view.
2. Choose All Activities.
3. In the All Activities view, query activities by searching for all relevant activity records.

   For example, the Activity Type differentiates Communications Outbound Manager activities as follows:

   - For activities logged for email templates, Email - Outbound is the activity type.
   - For activities logged for fax templates, Fax - Outbound is the activity type.
   - For activities logged for pager templates, Paging is the activity type.

10 Managing Workflows for Siebel Email Response

Managing Workflows for Siebel Email Response

This chapter provides information about Siebel Email Response workflows. It includes the following topics:

- *About Processing Email with Siebel Workflow*
- *About Process Properties for Siebel Email Response*
- *About Modifying Process Properties for Siebel Email Response*
- *Preconfigured Workflow Processes for Siebel Email Response*
- *eMail Response - Process Message Workflow*
- *eMail Response - Process Service Request Workflow*
- *eMail Response - Response Workflow*
- *eMail Response - Client Send Email Workflow*
- *Configuring Email Response to Capture Emails Sent with External Email Clients*
- *Managing Workflow Processes and Subprocesses*
- *Running the Process Simulator*
- *Process of Modifying Workflow Processes*

About Processing Email with Siebel Workflow

This chapter contains information about how Siebel Email Response works with Siebel Workflow, particularly the Workflow Process Manager component, to process incoming email. It also describes the following inbound email workflow processes included with Siebel Email Response:

- eMail Response - Process Message
- eMail Response - Process Service Request

Siebel Email Response processes each inbound email message using Siebel Workflow. Workflow processes are also used for user interface operations. Understanding Siebel Workflow and the way Siebel Email Response uses it is critical to a successful deployment. It is strongly recommended that you learn the basics of Siebel Workflow before implementing Siebel Email Response. For information about how to use Siebel Workflow and the Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

Siebel Email Response includes some preconfigured workflows that route email messages to the right agent at the right time. You can see a list of the preconfigured Siebel Email Response workflows by querying for eMail Response* in the Name field of the Workflow Processes view in the Administration - Business Process screen. You must activate preconfigured workflows before using them. For more information, see *Activating Workflow Processes*.

To use a workflow process, you must specify the Workflow Process Manager business service and RunProcess method in the response group and the workflow process name in the ProcessName input argument of the response group.

You can use Siebel Workflow with Siebel Assignment Manager or a third-party routing and queueing solution to further automate your email interactions. Regardless of the routing method you use, the routing process sets the Owned By field in the activity record so that the agent can view the email on the My Communications screen. For more information about Siebel Workflow and Siebel Assignment Manager, see *Siebel Business Process Framework: Workflow Guide* and *Siebel Assignment Manager Administration Guide* .

Workflow Processes for Siebel Email Response and Mobile Web Client

When you log in to the Mobile Web Client, only a subset of the workflow processes for the Siebel Email Response Web Client are available in the Workflow Processes list. The preconfigured Siebel Email Response workflows available through the Mobile Web Client include:

- eMail Response - Client Send Email
- eMail Response - Update Activity Status
- eMail Response - Response Workflow
- eMail Response - Append Thread Id

Terms for Workflow Processes

The following terms appear frequently in the workflow processes used for Siebel Email Response:

- **New message.** A new email work item entering the Siebel Email Response workflow for the first time. The message does not have a thread ID.
- **Follow-up message.** An email work item that has a thread ID.
- **Decision point.** The place in a workflow process at which a work item branches to other steps depending on a set of conditions. It includes possible branches for that point in the business process. Each branch consists of one or more conditions that must be met for a work item to follow that branch. A workflow process definition can have one or more decision points.
- **Business service.** An activity in a workflow process. Business services are logically linked together to create a workflow process definition.
- **Subprocess.** A workflow process that is embedded in another workflow process as part of the workflow process definition.

Status Values for Workflow Processes

Workflows initially have a status of *Inactive*, but a workflow can have the following statuses:

- **Inactive.** Preconfigured Siebel Email Response workflows have a status of *Inactive. You must activate inactive* workflows before using them.
- **In Progress.** You must change the status of a workflow process to *In Progress* before you can change the workflow.
- **Active.** An activated workflow is used to process Siebel Email Response work items. Only one workflow for each process can be active.

- **Outdated.** An outdated workflow is a workflow that is no longer used in Siebel Email Response.

About Process Properties for Siebel Email Response

A process property is a place to store values that the workflow process retrieves from your Siebel database or obtains during or after a processing step. You can add process properties (as input arguments) to a business service step in a workflow. When a business service process ends, the final value of a process property is available as an output argument. Process properties can be either of the following types:

- **Configurable.** These process properties enable the administrator to control the behavior of email message processing. You change them frequently during setup.

  Enable Test Mode? is an example of a configurable process property. The default value is False. If you set this process property to True, then the eMail Response - Process Message workflow loads a sample email message from a file, rather than a live email server, enabling the administrator to test the workflow using the Process Simulator. For more information about running the eMail Response - Process Message workflow in the Process Simulator, see *Siebel Business Process Framework: Workflow Guide* .

  > **Note:** Do not use test mode when you run the workflow process during normal operations. Use test mode only when you run the workflow process in Process Simulator mode.

- **Nonconfigurable.** These process properties primarily store variables. Application administrators rarely modify them.

  MsgBody is an example of a nonconfigurable process property. The body of the inbound email message is stored in this variable. No default value is available.

About Modifying Process Properties for Siebel Email Response

You can modify process properties in the following ways:

Process properties for Siebel Business Process Designer. If you modify process properties in the Process Properties view, then the changes apply to all instances of the workflow.

Input arguments for response groups for Siebel Communications Server. You can override process properties using input arguments for response groups. This override applies only to messages that are processed using that response group. For more information, see *Process of Setting Up Response Groups*.

In the eMail Response - Process Message workflow, you can change the process properties in a typical Siebel Email Response deployment. The following table shows the process properties for the workflow.

Name	Default Value	Description
AckTextTemplateName	Email Response - Auto Acknowledge	The name of the template for an auto-acknowledgement message. This process property is used for plain text email messages.

Name	Default Value	Description
AckHtmlTemplateName	Email Response - Auto Acknowledge	The name of the template for an auto-acknowledgement message. This process property is used for HTML email messages.
Catalog Name	KB	The name of the catalog that stores the solutions and templates that you use to respond to inbound messages.
CommOutboundMgrName	None	The name of the Siebel Server on which the Communications Outbound Manager runs.
Commit Time Entitlement ID	None	The workflow calculates the appropriate commit time by using an entitlement.
Enable Assignment Manager	False	Set to True to enable Assignment Manager for email routing.
Enable Test Mode	False	Set to True to enable test mode so that you can use the workflow in the Process Simulator. You must also specify the XMLTestFileName process property.
Enable Lookup Sender By Organization	False	Set to True to restrict contact lookup to a specific organization.
XmlTestFileName	None	The file path and file name of the XML file that is used for test mode.
Disable Auto Acknowledgement	False	Set to True to disable sending auto-acknowledgement email. This property is actually a response group input argument.

In the eMail Response - Process Service Request workflow, you can change the process properties in a typical Siebel Email Response deployment. The following table shows the process properties for the workflow.

Name	Default Value	Description
SRHelpAckName	Email Response - SR Help	The template that is used to respond when the Help keyword is processed.
SRQueryAckName	Email Response - SR Query	The template that is used to respond when the Query keyword is processed.
SRStatusAckName	Email Response - SR Status	The template that is used to respond when the Status keyword is processed.

Name	Default Value	Description
SRStatusErrorAckName	Email Response - SR Status Error	The template that is used to respond when the Status keyword is processed and an error is detected.
SRSubmitAckName	Email Response - SR Submit	The template that is used to respond when the Submit keyword is processed.
SRUpdateAckName	Email Response - SR Update	The template that is used to respond when the Update keyword is processed.
SRUpdateErrorAckName	Email Response - SR Update Error	The template that is used to respond when the Update keyword is processed and an error is detected.

Preconfigured Workflow Processes for Siebel Email Response

Siebel Business Applications provide the following two types of workflow processes with Siebel Email Response:

- **Message processing workflows**. When each inbound message is received, the Communications Inbound Processor server component executes these workflows. The primary message processing workflows are:
  - *eMail Response - Process Message Workflow*. Use this workflow primarily for unstructured email messages. This workflow processes each inbound message and ultimately creates an activity record.
  - *eMail Response - Process Service Request Workflow*. Use this workflow for structured or Web-form email messages. The workflow searches the subject of each inbound message for specific keywords, such as update or status. The workflow uses this keyword to call the appropriate subprocess.
- **User interface workflows.** Each time an agent clicks specified buttons in Siebel Email Response, these workflows are executed. The primary user interface workflows are:
  - *eMail Response - Response Workflow*. Click the Reply, Reply to All, and Forward buttons on the My, My Team's, and All Communications screens to call this workflow.
  - *eMail Response - Client Send Email Workflow*. Click the Send button in Siebel Email Response to call this workflow.

Message processing and user interface workflows can call subprocesses to accomplish subtasks. You can use Siebel Business Process Designer to customize preconfigured workflows or design new ones.

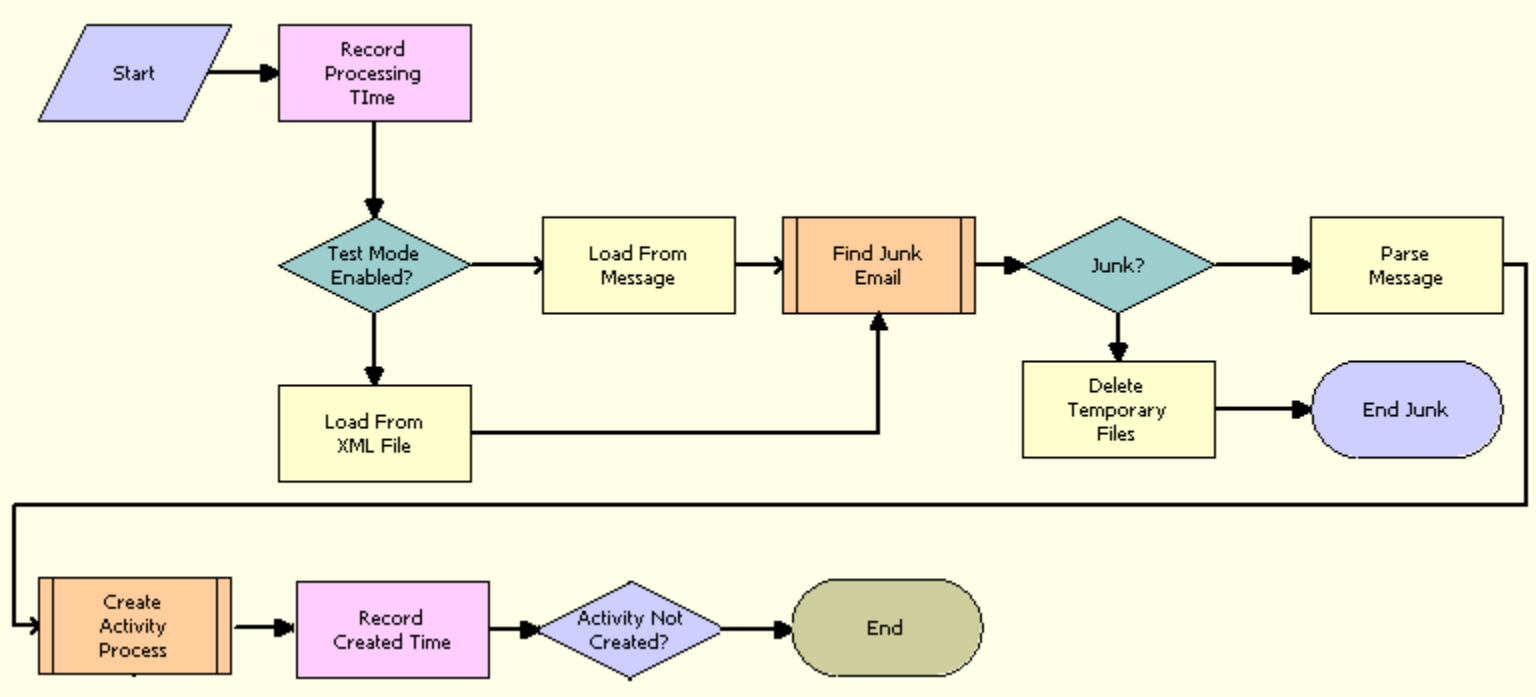
> **CAUTION:** If you use scripts to customize Siebel Email Response workflows, then do not attach any scripts to the BusComp_WriteRecord event. The script might execute more than once because a single process can write to a record multiple times. For information about scripting, see *Siebel Tools Online Help* .

Siebel Email Response uses business services in its workflow processes. For information about Siebel Email Response business services, methods, and input arguments, see *Business Service Methods for Siebel Email Response* .

eMail Response - Process Message Workflow

The eMail Response - Process Message workflow processes unstructured email messages. For information about setting up the eMail Response - Process Message workflow, see *Managing Workflow Processes and Subprocesses* and *Siebel Business Process Framework: Workflow Guide* .

This workflow is called when your organization receives an email message. The following figure illustrates this process.



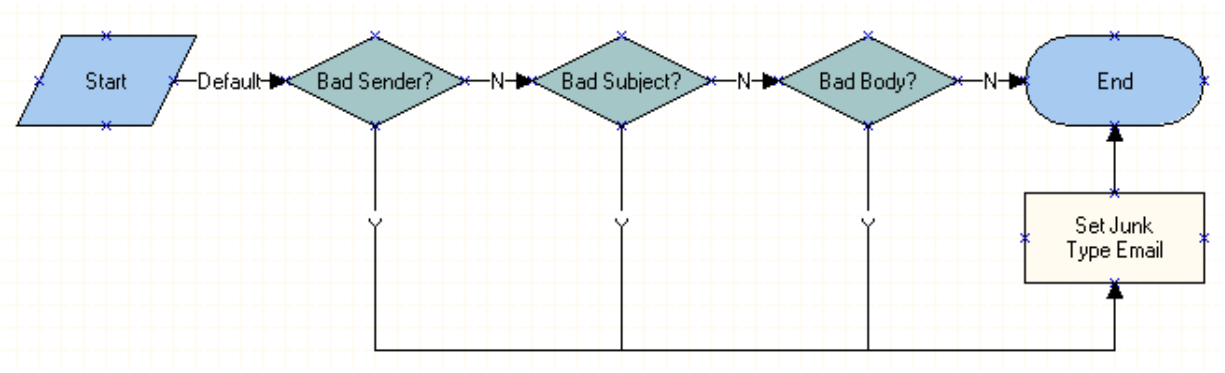
Workflow Description. This workflow performs the following actions:

1. **Record Processing Time.** This step records a timestamp for the email message.
2. **Test Mode Enabled?** This step examines the value of Enable Test Mode process property.
3. **Load From XML File.** If the value in the Enable Test Mode process property is True, then this step loads a sample email message from a file enabling the administrator to text the workflow using the Process Simulator.
4. **Load From Message.** If the value in the Enable Test Mode process property is False, then this step loads the email message from the email server.
5. **Find Junk Email.** This step calls the eMail Response - Parse Junk Mail workflow to find junk email. For more information, see *eMail Response - Parse Junk Mail Workflow*.
6. **Junk?** This step determines if the email message is junk email.
7. **Delete Temporary Files.** If the email message is junk email, then this step deletes the temporary files.
8. **Parse Message.** This step parses the email message for the [THREAD ID: text. For more information, see *Parse Message Step*.
9. **Create Activity Process.** This step calls the eMail Response - Create Activity workflow to create an activity record for the email message. For more information, see *eMail Response - Create Activity Workflow*.
10. **Record Created Time.** This step records that time that the activity record is created.
11. **Activity Not Created?** This step determines if an activity record was not created.

eMail Response - Parse Junk Mail Workflow

The eMail Response - Parse Junk Email workflow finds junk email. You can configure workflows to screen out many junk email messages. A junk email message is any message that you do not want to route to an agent for processing. Administrators can define keywords in workflow decision steps that detect junk email messages. A message that is identified as junk mail is not stored in your Siebel database, and workflow processing stops.

The Find Junk Mail step in the eMail Response - Process Message workflow calls this workflow as a subprocess. The following figure illustrates this workflow.



Workflow Description. This workflow performs the following actions:

1. **Bad Sender?** This step examines the Sender field of an email message to find keywords that the administrators specifies.
2. **Bad Subject?** If no keywords are found in the Sender field of the email message, then this field examines the Subject field of the email message to find keywords that the administrator specifies.
3. **Bad Body?** If no keywords are found in the Subject field of the email message, then this field examines the message body of the email message to find keywords that the administrator specifies.
4. **Set Junk Type Email.** If any of the steps in this workflow find a keyword that the administrator specifies, then this step flags the message as junk email.

About Adding Keywords to Decision Points

Examples of keywords and keyword phrases that you might use to detect junk email messages include:

- Sender: postmaster@example.com
- Subject: out of office
- Body: [specified objectionable language]

> **Note:** Important messages might be lost unless administrators consider each keyword carefully. It is recommended that only experienced administrators add keywords to the junk message processing workflow.

You can add keywords to decision points in the junk message processing workflow. The decision point you modify depends on the field you want to examine. You also can create decision points to examine other fields for keywords. For information about modifying decision steps for junk mail processing, see *Setting Up Junk Mail Processing for Certain Messages*.

Decision points are the diamond-shaped steps in the Process Designer view of the Administration - Business Process screen. Each decision point contains a Next Steps list, a Conditions list, and a Values list. For information about working with decision points, see *Siebel Business Process Framework: Workflow Guide* .

The Next Steps list includes the following fields:

- Branch Name. This field can be N (conditions are not met) or Y (conditions are met).
  - If the conditions for Branch Name Y are met, then the work item is passed to the workflow step in the Next Step field.
  - If the conditions for Branch Name N are not met, then the work item is passed to the Next Step field on the Branch Name N record.
- Next Step. This field specifies the workflow step where the message is passed after branch conditions are examined.

In the Next Steps list, a branch can have one or more conditions in the Conditions list and each condition has a value in the Values list. For information about operators, expressions, and conditions, see *Using Siebel Tools* .

Parse Message Step

Siebel Email Response uses the following features to process email:

- **Threading.** Maintains an association with related messages that are sent between a customer and an organization.
- **Parsing.** Analyzes an email message to look for predefined, structured fields that are typically used to process Web-form email messages.

The Parse Message step in the eMail Response - Process Message workflow provides both of these features.

By default, this step parses an email message for the [THREAD ID: text. When that text is found, the workflow copies all the characters before the right bracket (]). These characters are stored in the Thread ID process property. The eMail Response - Process Message workflow uses the thread ID in the following functionality:

- In an agent's Communications views, the thread ID enables all messages with the same thread ID to appear in the History view.
- Messages that have a thread ID are treated as follow-up messages. Automatic responses are never sent in response to follow-up messages.

Note: Spell check does not review misspelled words that appear after the [THREAD ID: tag.

An example of message threading follows:

- The customer sends a new incoming email message.

```
From: customer@example.com

To: customersupport@example.com

Subject: Help
Please help.
- Customer
```

  Note: A thread ID does not appear at the end of the message.

- The company sends a response to customer.

```
From: customersupport@example.com
```

```
To: customer@example.com

Subject: RE: Help
Attached is the answer to your question.
- Support
[THREAD ID:1234]
```

Note: A thread ID appears at the end of the response.

- The customer replies to the response with a follow-up question.

```
From: customer@example.com

To: customersupport@example.com

Subject: RE: Help
I already tried that. Any other ideas?
- Customer
-----Original Message-----

From: customersupport@example.com

To: customer@example.com

Subject: RE: Help
Attached is the answer to your question.
- Support
[THREAD ID:1234]
```

Note: A thread ID appears at the end of the response.

In this example, each message is associated with the same thread ID (1234). The Parse Message step identifies messages as part of the same thread by looking for the text [THREAD ID:1234]. Each of these messages appears in the History view on the Communications screen.

About Parsing for New Fields

In addition to the preconfigured capabilities of the Parse Message step, you can modify the step to identify additional fields in an email message. After these fields are extracted from a message, you can modify other steps in the workflow to use these values. One example is parsing an email message for a campaign code. In email marketing campaigns, a code is often included in the bottom of the email message so that agents can perform a marketing analysis. For information about parsing messages for campaign codes, see *Parsing Message Text for the Campaign ID* and *Parsing Message Subjects for the Campaign ID*. For information about the ParseText method and its input arguments, see *Inbound Email Manager Business Service*.

An example of an outgoing marketing message follows:

```
From: marketing@example.com

To: customer@example.com

Subject: Important marketing message
Please visit our Web site www.example.com for information about Siebel Email
Response.
- Oracle Marketing
[CID:1234]
```

Note: A campaign ID appears at the bottom of the email.

An example of a response to the marketing message that a customer might send follows:

```
From: customer@example.com

To: marketing@example.com

Subject: RE: Important marketing message
Please have a sales representative contact me. Thanks.
- Customer
-----Original Message-----

From: marketing@example.com

To: customer@example.com

Subject: Important marketing message
Please visit our Web site www.example.com for information about Siebel Email
Response.
- Oracle Marketing
[CID:1234]
```

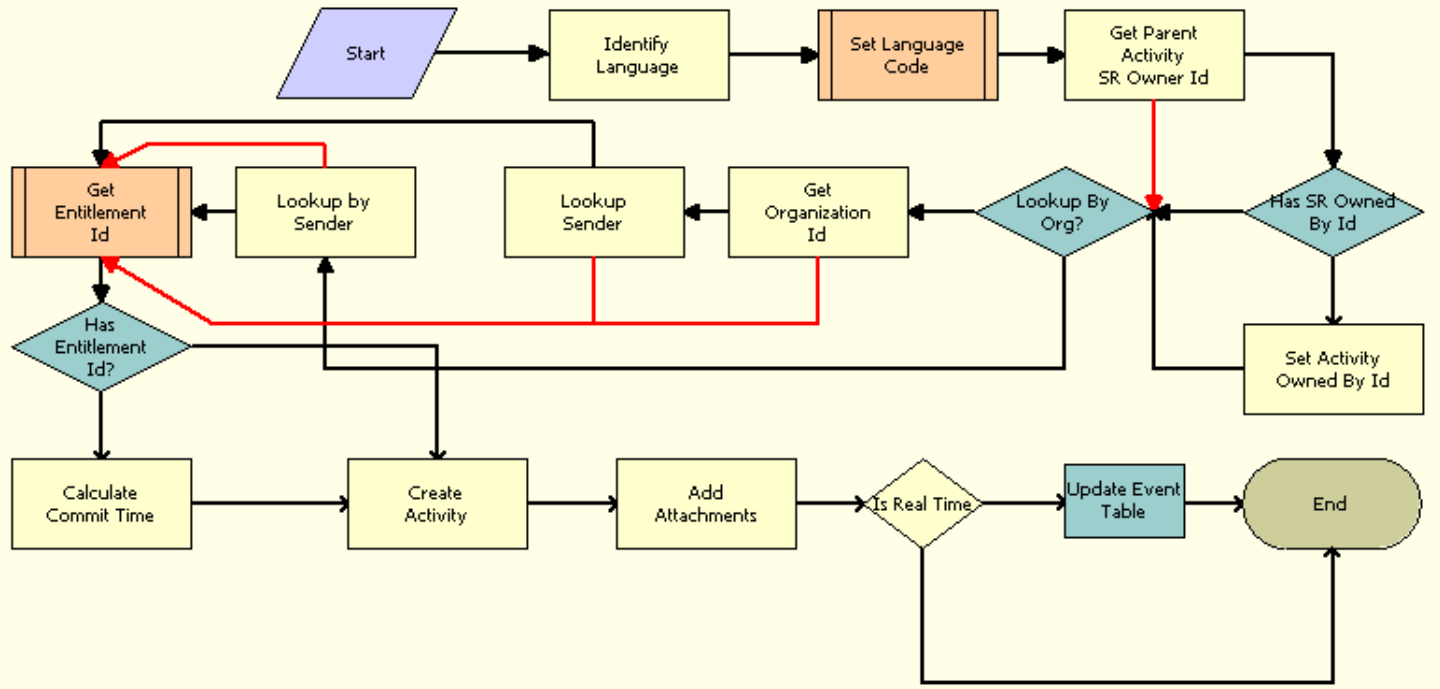
Note: The campaign ID still appears at the bottom of the customer's inquiry.

eMail Response - Create Activity Workflow

The eMail Response - Create Activity workflow creates activity records from inbound email messages. Agents review these activity records on the Communications screen.

To create activity records, the list of values for event status (EVENT_STATUS) must contain the following values at a minimum: Done, Cancelled, Queued, and In Progress. In Siebel Email Response, these minimum values and other values are included in the list of values for event status. If you inactivate any of these minimum values, then you cannot successfully create activity records.

The Create Activity step in the eMail Response - Process Message workflow calls this workflow as a subprocess. The following figure illustrates this workflow.



Workflow Description. This workflow performs the following actions:

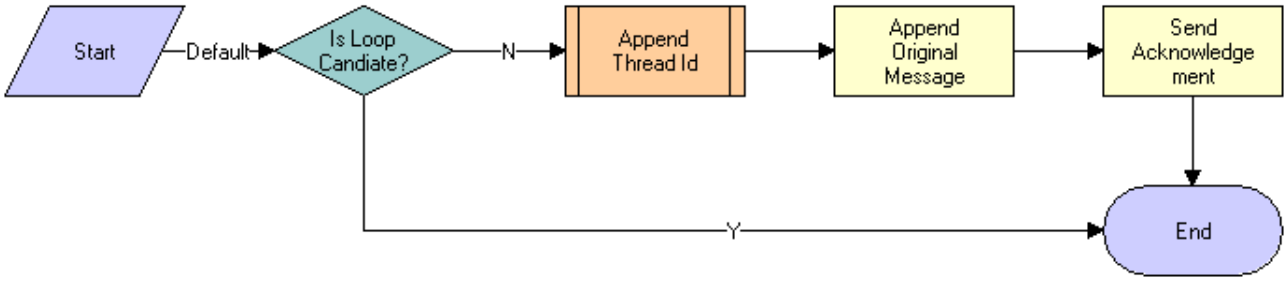
1. **Identify Language.** This step performs a language detection process on the email message to identify the language of the inbound email message. The language is used to route the email message to an agent with the appropriate language skills.
2. **Set Language Code.** This step sets the language code for the identified language.
3. **Get Parent Activity SR Owner Id.** This step retrieves the ID for the owner of the service request if the email message is associated with a service request. Consequently, follow-up messages can be associated with the service request.
4. **Has SR Owned By Id.** This step determines of the service request has an ID for its owner.
5. **Set Activity Owned By Id.** If the service request has an ID for its owner, then this step sets the ID for the owner of the activity.
6. **Lookup By Org?** If the service request does not have an ID for its owner, then this step determines the value in the Lookup Sender By Organization process property.
7. **Lookup by Sender.** If the value in the Lookup Sender By Organization process property is N, then this step looks for a contact that matches the email address of the sender. For more information, see *Lookup Sender Step*.
8. **Get Organization Id.** If the value in the Lookup Sender By Organization process property is Y, then this step identifies the organization that is associated with the email profile (mailbox) in which the message is received. If you set up multiple organizations, then you can restrict the contact lookup to a specific organization. For more information, see *Configuring Communications Drivers and Profiles for Email*.
9. **Lookup Sender By Org.** This step looks for a contact who is a member of the organization identified in the *eMail Response - Create Activity Workflow*.
10. **Get Entitlement Id.** This step calls the eMail Response - Get Entitlement Id workflow to retrieve the ID of the entitlement that is associated with the service request.
11. **Has Entitlement Id?** This step determines if the service request is associated with an ID for an entitlement.
12. **Calculate Commit Time.** If the service request is associated with an ID for an entitlement, then this step uses the entitlement to calculate the commit time for the service request.
13. **Create Activity.** This step creates an activity record for the email message.
14. **Add Attachments.** This step stores the original message and attachments as activity attachments in your Siebel database.

15. **Is Real Time.** This step determines if the activity is created in real time.
16. **Update Event Table.** This step updates the event table.

eMail Response - Send Acknowledgement Workflow

When organizations receive messages, they want to acknowledge the customer's message and tell the customer that they are working on the issue. Siebel Workflow calls the eMail Response - Send Acknowledgement workflow when an auto-response message is not sent. An auto-response message is not sent if an organization does not want to use auto-response or the message is a follow-up.

The following figure illustrates this workflow.



Workflow Description. This workflow performs the following actions:

1. **Is Loop Candidate?** This step determines if an acknowledgement email message is already sent.
2. **Append Thread Id.** If an acknowledgement email message is not already sent, then this step calls the Append Thread Id workflow to determine the thread ID of the original email message.
3. **Append Original Message.** This step appends the original message to the acknowledgement email message.
4. **Send Acknowledgement.** This step sends the customer the acknowledgement email message stating that the organization received the customer's message. After the acknowledgement message is sent, the inbound message is routed to an agent for further review.

Route Message Subprocess

Email messages usually are routed to agents by setting the Owned By field in the activity record, enabling an agent to see the message in the Communications List view. New email messages and follow-up email messages are routed differently. The routing and queueing methods that you use to identify the correct agent also determine how messages are routed.

- **New Message Routing.** New messages do not have thread IDs. Therefore, new messages are identified by the absence of a thread ID in the message. When a new message is found, the workflow determines the routing process that is employed (Assignment Manager, custom routing and queueing, or manual routing) on the Enable Assignment Manager process property.
    - **Assignment Manager.** If the Enable Assignment Manager process property is True, then Siebel Assignment Manager assigns messages to the appropriate agent. Using assignment rules and criteria, Assignment Manager assigns specific activities to employees by using their skills, competencies, and other email assignment attributes. Assignment Manager can assign email to employees dynamically or interactively, and can assign a batch of email to an agent.

- **Manual routing.** If the Enable Assignment Manager process property is False, then agents manually route each message to the appropriate agent. The default value for this process property is False.

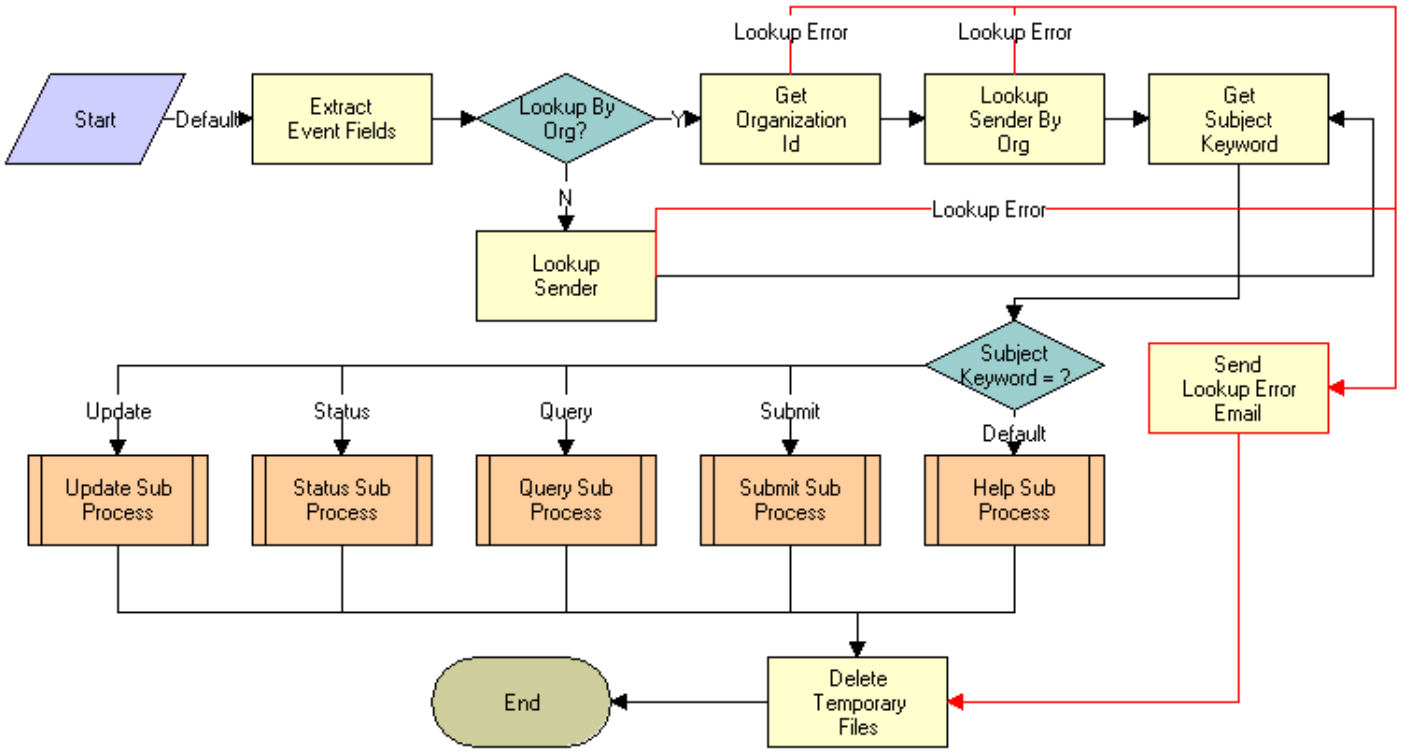
- **Follow-up message routing.** A follow-up message is an incoming email message containing a thread ID. By default, a follow-up message is routed to the agent who handled the original email message. For example, if Casey Cheng is routed the initial email message, then the follow-up message is routed to Casey Cheng if the thread ID is detected in the response from the customer. However, if the agent escalates the email message to a service request and assigns the service request to a different person, then the message is routed to the service request owner, not to the original email owner.

  - **Assignment Manager.** If the initial agent is not available, then Assignment Manager can route the email to another agent who, because of defined assignment criteria, can handle the message.
  - **Manual routing.** Agents manually route each follow-up message to the appropriate agent.

eMail Response - Process Service Request Workflow

The eMail Response - Process Service Request workflow processes structured or Web-form messages, which must be submitted in *plain text*. This workflow attempts to identify a contact record that matches the sender's email address and processes the messages by identifying a keyword at the beginning of the subject line of the inbound email message. This workflow ignores the other words in the subject line. For information about setting up the eMail Response - Process Service Request workflow, see *Managing Workflow Processes and Subprocesses* and *Siebel Business Process Framework: Workflow Guide* .

This workflow is called when your organization receives an email message. The following figure illustrates this workflow.



Workflow Description. This workflow performs the following actions:

1. **Extract Event Fields.** This step extracts fields from the email message.
2. **Look Up Org?** This step determines the value in the Lookup Sender By Organization process property.
3. **Lookup Sender.** If the value in the Lookup Sender By Organization process property is N, then this step looks for a contact that matches the email address of the sender. For more information, see *Lookup Sender Step*.
4. **Get Organization Id.** If the value in the Lookup Sender By Organization process property is Y, then this step identifies the organization that is associated with the email profile (mailbox) in which the message is received. For more information, see *Configuring Communications Drivers and Profiles for Email*
5. **Lookup Sender By Org.** This step looks for a contact who is a member of the organization identified in Step 4.
6. **Send Lookup Error Email.** This step sends an error email if the Lookup Sender, Get Organization Id, or Lookup Send By Org step returns a lookup error.
7. **Get Subject Keyword.** This step gets the text of the subject line of the email message and returns the first word in the subject line.
8. **Subject Keyword =?.** This step uses the subject keyword to call the appropriate Service Request (SR) subprocess.
9. **Update Sub Process.** If the subject key word is Update, then this step calls the eMail Response - SR Update workflow to update a service request record in the form of an activity associated with the service request. For more information, see *Update Subprocess*.
10. **Status Sub Process.** If the subject key word is Status, then this step calls the eMail Response - SR Status workflow to request the current status of the service request record. For more information, see *Status Subprocess*.
11. **Query Sub Process.** If the subject key word is Query, then this step calls the eMail Response - SR Query workflow to find service request records in your Siebel database. For more information, see *Query Subprocess*.
12. **Submit Sub Process.** If the subject key word is Submit, then this step calls the eMail Response - SR Submit workflow to create a service request record in your Siebel database. For more information, see *Submit Subprocess*.
13. **Help Sub Process.** If the subject key word is not Update, Status, Query, or Submit, then this step calls the eMail Response - SR Help workflow to send instructions for the supported keywords. For more information, see *Help Subprocess*.
14. **Delete Temporary Files.** This step deletes the temporary files.

Lookup Sender Step

This step uses the inbound email sender's email address to search the list of contact records in the Siebel database for a matching email address. When the match is found, the step returns the row ID of the contact and the row ID of the contact's primary account and continues processing the request. The eMail Response - Process Service Request workflow uses the row ID values in the following ways:

- The Submit and Update subprocesses use the row ID values to set values for the service request and activity records.
- The Status subprocess uses the row ID values to find the service request record.
- If the workflow finds no records, then the workflow branches to an error condition and sends the inbound email sender a notification that authentication failed.

The Lookup Sender step uses the FindRecord method in the Inbound Email Siebel Operation business service to query a specific business object and business component. The step uses developer-defined input arguments to specify the business object, the business component, the field, the value to search the field with, and the field to provide the return value. The output argument of the step maps a process property from the workflow process to the value field that the query returns.

In the standard workflow process, the Lookup Sender step finds the Mail Agent Contact business component in the Mail Agent Activity business object. In the Mail Agent Contact business component, the step gets the value from the Email

Address field and compares this value to the MsgSenderAddress process property. When the step finds a matching contact record, it returns the Account ID field value and ID field value from that record. In some cases, users might need to modify the authentication logic so that the processing is based on a different business component, a different field, and so on.

Update Subprocess

The eMail Response - Process Service Request workflow calls the eMail Response - SR Update workflow when it detects the Update keyword as the first word in the Subject line of an incoming email.

This workflow parses the subject of the email message for a service request number. If it finds a service request number, then the workflow creates an activity record containing the contents of the email message and associates the record with the service request. If a customer sends an email to update the service request, and the email contains an attachment, then the attachment is associated with the service request record.

Siebel Email Response sends an email message notifying the customer that the update is received. If the workflow does not identify a service request, then it sends an error message to the customer.

An example of an incoming Web-form Update message follows:

```
From: customer@example.com

To: webform-processor@example.com

Subject: Update 2-1CR
Here is the update to my service request.
```

An example of a response that you might send to a customer follows:

```
From: webform-processor@example.com

To: customer@example.com

Subject: RE: Update
Your update was submitted successfully.
```

Status Subprocess

The eMail Response - Process Service Request workflow calls the eMail Response - SR Status workflow when it detects the Status keyword as the first word in the Subject line of an incoming email.

This workflow parses the subject of the email message for a service request number. It then sends the status of the service request in the subject line to the customer in an email message. If the workflow does not identify a service request, then it sends an error message to the customer.

An example of an incoming Web-form Status message follows:

```
From: customer@example.com

To: webform-processor@example.com

Subject: Status 2-1CR
```

An example of a response that you might send to a customer follows:

```
From: webform-processor@example.com

To: customer@example.com

Subject: RE: Status

The current status for service request number 2-1CR is:

Status: Open

Sub-Status: Assigned

Area: Network

Severity: 1-Critical

Abstract: Important issue
```

Submit Subprocess

The eMail Response - Process Service Request workflow calls the eMail Response - SR Submit workflow when it detects the Submit keyword as the first word in the Subject line of an incoming email.

This workflow parses the body of the email message for a set of structured fields that it uses to create the service request.

This workflow works with the Abstract, Area, Description, and Severity fields in the Mail Agent Service Request business component, but administrators can configure this workflow to work with other fields in that business component. For more information about modifying this workflow to process other keywords, see *Parsing for Fields in Incoming Email*. For information about extending the Mail Agent Service Request business component, see *Using Siebel Tools* .

> **Note:** The Mail Agent Service Request business component and the Service Request business component are based on the same table. Therefore, they share some fields.

After parsing the email message, the workflow looks for an entitlement record, using the Get Entitlement ID subprocess, and calculates a commit time for the service request. For more information, see *eMail Response - Create Activity Workflow*.

The workflow creates a new service record, adds attachments that are received with the incoming email message to the service request, and notifies the sender that a service request is created.

An example of an incoming Web-form Submit message follows:

```
From: customer@example.com

To: webform-processor@example.com

Subject: Submit
[Severity]

1 - Critical

[Area]

Usage
```

The eMail Response - Process Service Request workflow generates a service request, stores it in the Siebel database, and sends a notification to the customer confirming that the message is received.

An example of a response that you might send to a customer follows:

```
From: webform-processor@example.com

To: customer@example.com

Subject:
Your email was received.
Your reference number is 2-1CR. Please use the number for future reference.
```

Query Subprocess

The eMail Response - Process Service Request workflow calls the eMail Response - SR Query workflow when it detects the Query keyword as the first word in the Subject line of an incoming email.

This workflow parses the body of the email message for a set of structured fields that it uses to find a set of matching service requests and sends an email message to the customer with a list of the matching service requests.

This workflow queries the Abstract, Area, Description, and Severity fields in the Mail Agent Service Request business component, but administrators can configure the workflow to query other fields in that business component. For more information about modifying this workflow to query other fields, see *Adding Query Fields to the Search Spec Workflow*.

Note: The Mail Agent Service Request business component and the Service Request business component are based on the same table. Therefore, they share some fields.

An example of an incoming Web-form Query message follows:

```
From: customer@example.com

To: webform-processor@example.com

Subject: Query
[Severity]

1 - Critical

[Area]

Usage
```

An example of a response that you might send to a customer follows:

```
From: webform-processor@example.com

To: customer@example.com

Subject: RE: Query
The following is a list of service requests that match your criteria. They appear
in comma-delimited format.
2-1CR, 12:51 9/13/2001, Open, Assigned, Important issue

2-1CY, 12:51 9/15/2001, Closed, Closed, Very important issue
```

Help Subprocess

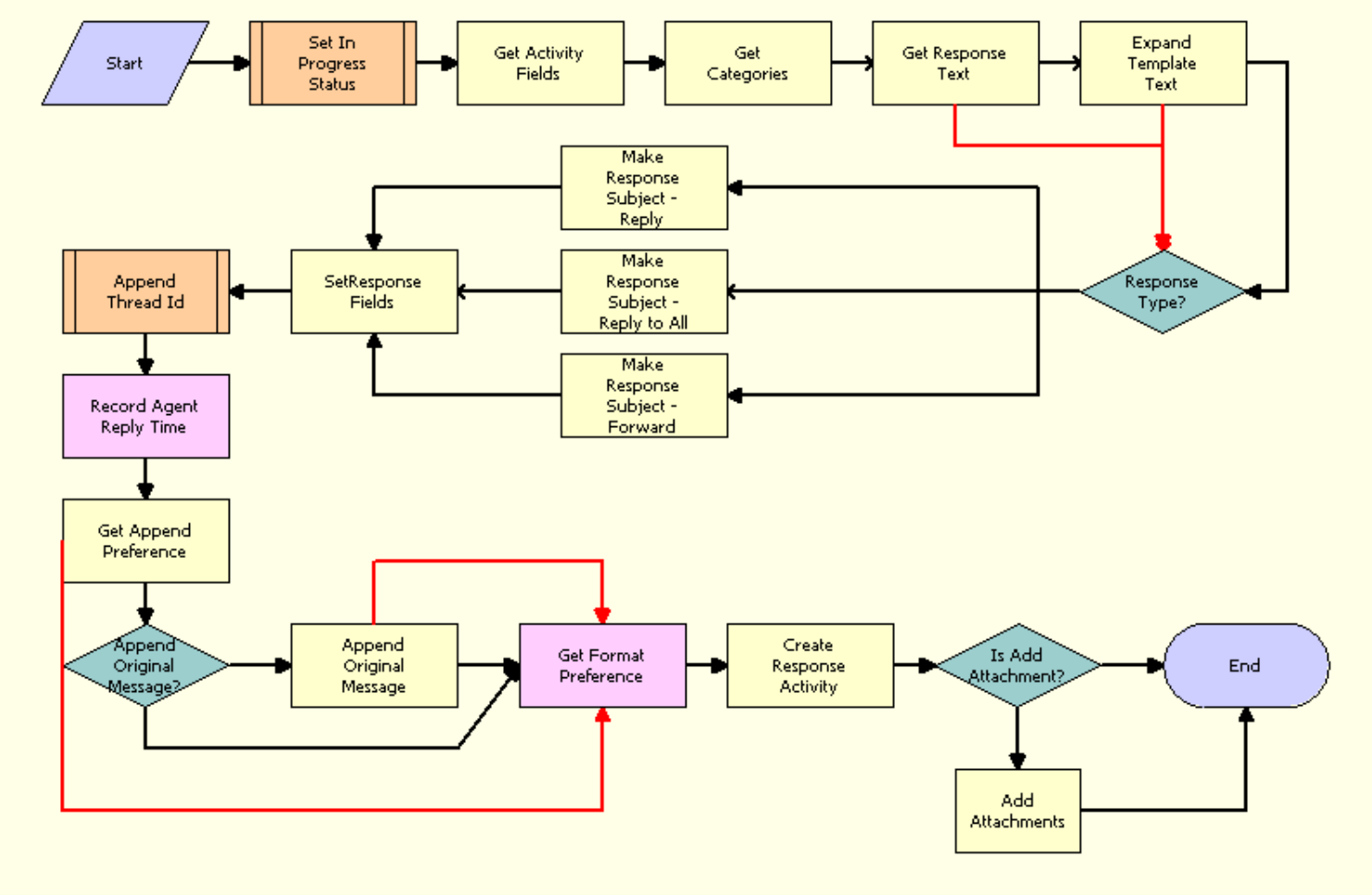
The eMail Response - Process Service Request workflow calls the eMail Response - SR Help workflow when it does not detect a matching keyword as the first word in the Subject line of an incoming email.

If the workflow does not find a contact in the Siebel database with a matching email address, then it sends an error notification to the sender, stating that a contact is not identified.

eMail Response - Response Workflow

The eMail Response - Response workflow creates the outbound email message and navigates agents to the view where they can compose a response message. In addition to creating the activity, this workflow also appends the original message to the bottom of the email message.

This workflow is called when users click the Reply, Reply to All, and Forward buttons on the Communications screen. The following figure illustrates this workflow.



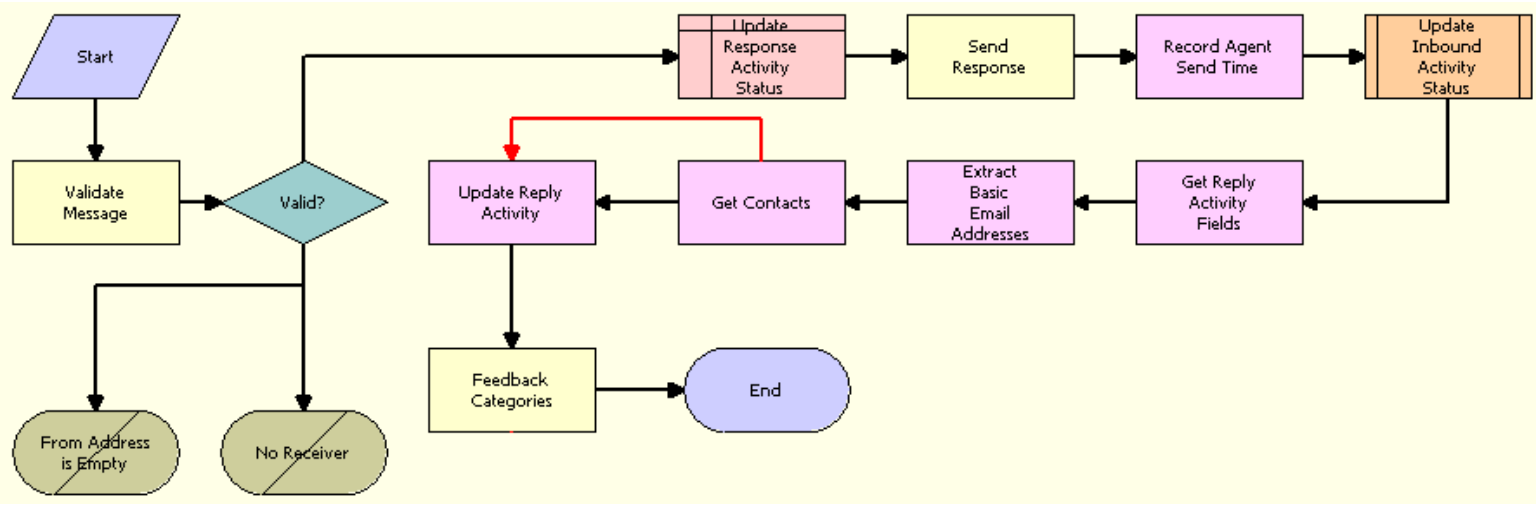
This workflow performs the following actions:

1. It changes the activity status to In Progress.
2. It retrieves the email template and returns the agent to the view where they can compose a response message.
3. It generates a response based on three types: Reply, Reply to All, Forward.
4. Once the message is composed, it appends the original message to the end of the email response and adds the file attachments as needed.

eMail Response - Client Send Email Workflow

The eMail Response - Client Send Email workflow performs message validation steps, updates the status of the inbound message to Done, and sends the email message.

This workflow is called when users click the Send button on the Siebel Email Response Reply view. The following figure illustrates this workflow.



This workflow performs the following actions:

1. It first validates the message sender, the message subject and message body.
2. When sending out an email message, it records the agent send time and updates the inbound activity status to Done.
3. It then finds the contacts based on email addresses and associates those contacts with the activity.

Configuring Email Response to Capture Emails Sent with External Email Clients

This topic describes how to configure eMail Response to capture emails sent using external email clients.

To configure eMail Response to capture emails sent using external email clients

1. Configure Siebel Open UI to send outbound emails using an external email client.

   For more information about selecting an external email client, see *Specifying Preferences for Outbound Communications*.
2. Activate the following workflow processes:
   - eMail Response - Update Activity from BCC Message
   - eMail Response - Parse Junk Email
   - eMail Response - Append Thread Id

   For information about activating workflow processes, see *Activating Workflow Processes*.
3. Define the BCC email address.

   For information about defining a BCC email address see *Defining the BCC Email Address*.
4. Create a communications driver profile.

   Specify the email address defined in Step 3 as the From Address in the communications driver profile. For information about creating communications profiles, see *Creating Communications Driver Profiles*.
5. Create a response group. Follow these guidelines when creating your response group:
   - Specify the following in the Process Name field:

     eMail Response - Update Activity from BCC Message

     Note: Do not use the value specified when using the Generate Defaults button.
   - Associate the response group with the profile created in *Configuring Email Response to Capture Emails Sent with External Email Clients*.

   For more information about setting up response groups, see *Process of Setting Up Response Groups*. For more information about associating profiles with response groups, see *Associating Profiles with Response Groups*.

eMail Response - Update Activity from BCC Message

The eMail Response - Update Activity from BCC Message workflow parses emails sent to a BCC address with a specific Thread ID and updates the activity record originally created with the final Subject, Body, To, and CC lines. It also creates activity attachments for email attachments. Additionally, the workflow changes the Status of the activity to Done.

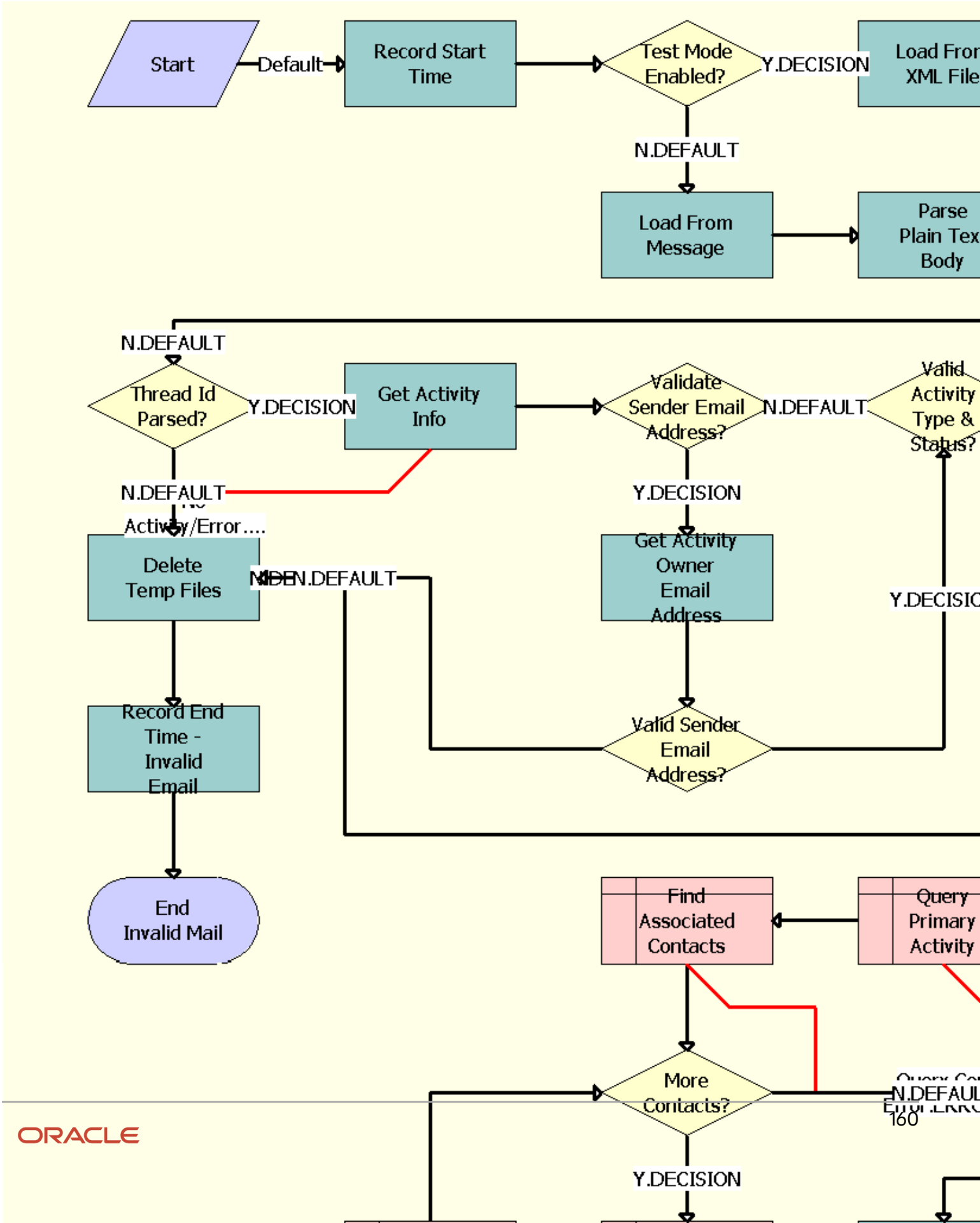
This workflow is applicable only when an external email client is being used with Siebel Open UI. When sending an email using an external email client without this workflow activated, Siebel Open UI does not track the recipients, body text and attachments of the email, nor does it monitor whether or not the email was sent.

The eMail Response - Update Activity from BCC Message workflow examines emails sent to a defined BCC address. When an email is received by the defined BCC address, emails sent via an external email client are recorded in the Siebel database. For more information about defining the BCC email address for this purpose, see *Defining the BCC Email Address*.

The following are known limitations of the workflow:

- If the user never sends the email, a notification will not be sent, resulting in the original activity having a Status of Queued indefinitely.
- Siebel Open UI does not capture the recipients on the BCC list.

This workflow is called when your organization receives a email message with a specific email address in the BCC field. The following figure illustrates this workflow.


Start
Default
Record Start Time
Test Mode Enabled?
Y.DECISION
Load Fron XML File
N.DEFAULT
Load From Message
Parse Plain Tex Body
N.DEFAULT
Thread Id Parsed?
Y.DECISION
Get Activity Info
Validate Sender Email Address?
N.DEFAULT
Valid Activity Type & Status?
N.DEFAULT
Y.DECISION
Y.DECISIO
Delete Temp Files
N.DEFAULT
Get Activity Owner Email Address
Record End Time - Invalid Email
Valid Sender Email Address?
End Invalid Mail
Find Associated Contacts
Query Primary Activity
More Contacts?
N.DEFAUL
Y.DECISION

This workflow performs the following actions:

1. It first identifies whether an inbound email message is junk email or not.
2. For valid inbound messages, it retrieves the Thread ID to get the activity information.
3. Next it validates the sender's email addresses, activity type, and status, and starts to parse out the message.
4. It then updates the Activity information, changes the status to Done, and associates the Employee with Activity.

Defining the BCC Email Address

This topic describes how to define the BCC email address for the eMail Response - Update Activity from BCC Message workflow. It includes the following topics:

- *Defining the BCC Email Address at the Enterprise Level*
- *Defining the BCC Email Address at the Component Level*

Defining the BCC Email Address at the Enterprise Level

This topic describes how to define the BCC email address for the eMail Response -Update Activity from BCC Message workflow at the enterprise level.

To define the BCC email address at the enterprise level

1. Navigate to the Administration Server Configuration screen, then the Enterprises view.
2. Select the Parameters tab.
3. Click the Query button.
4. In Name field, enter Activity Status Update Email Address.
5. Click Go.
6. Enter the BCC email address in the Value field.

Defining the BCC Email Address at the Component Level

This topic describes how to define the BCC email address for the eMail Response -Update Activity from BCC Message workflow at the component level.

To define the BCC email address at the component level

1. Navigate to the Administration - Server Configuration screen, then Enterprises View.
2. Select Component Definitions tab.
3. Select the Call Center Object Manager (ENU) component.

   Note: Alternatively, you can select a different AppObjMgr component.

4. Click the Query button.
5. In the Name field, enter Activity Status Update Email Address
6. Enter the BCC email address in the Value field.

Note: The email address specified in this step will supersede the email address specified at the enterprise level.

Managing Workflow Processes and Subprocesses

Workflow processes using Siebel Workflow control the way incoming email is processed. Siebel Email Response has some predefined workflow processes that enable organizations to deploy Siebel Email Response without needing to create an entire workflow.

This topic contains the following procedures:

- *Setting the Log Levels for Workflow Steps*
- *Revising Workflow Processes*
- *Testing Workflow Processes*
- *Activating Workflow Processes*
- *Determining Workflow Subprocesses*

Setting the Log Levels for Workflow Steps

The Workflow Step Execution Log Level enables you to monitor the steps in a workflow as the workflow processes an email.

To set the Workflow Step Execution Log Level

1. Navigate to the Administration - Server Configuration screen, then the Servers view.
2. In the Siebel Servers list, select the server containing the workflow that you want to monitor.
3. Click the Components view tab.
4. Query for Communications Inbound Receiver.
5. In the Components list, select Communications Inbound Receiver.
6. Click the Events subview tab.
7. In the Event Type list, query for Workflow Step Execution.
8. Select Workflow Step Execution and set the log level to 5.

Revising Workflow Processes

Some organizations might want to use one or more workflows with a few modifications. An organization with complex needs might want to revise one of the existing workflows or create its own custom workflow. After you complete your revisions, you must activate the workflow processes in Siebel Email Response. For more information about creating and revising a workflow process, see *Siebel Business Process Framework: Workflow Guide* .

This topic contains general information about revising workflow processes. For information about revising specific workflow processes, see *Process of Modifying Workflow Processes*.

To revise a workflow process

1. In the Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail**.
3. In the Workflow Processes list, select the workflow process that you want to change and click Revise.
   The status of the workflow process changes to *In Progress*.

4. Right-click the workflow process that you want to change and choose Edit Workflow Process.

   The Business Process Designer appears.
5. In the Business Process Designer, change to the workflow process and return to Siebel Tools.
6. Right-click the workflow process that you change and choose Validate.
7. In the Workflow Processes list, select the workflow process that you change and click Deploy.

Testing Workflow Processes

Before activating a workflow process, you can test it to make sure that the workflow functions correctly.

The InsertRecord method in the Inbound Email Database Operation business service calls 5 other actions to complete the operation. When you test (or simulate) a workflow with a step that calls this method, you must click the Next button in the Process Simulator to advance to the next action for the method in the step. After you click the Next button, it might appear that the step processing terminates, but actually step processing continues. For more information about the Process Simulator, see *Running the Process Simulator* and *Siebel Business Process Framework: Workflow Guide* .

To test a workflow process

1. In the Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail**.
3. Right-click the workflow process that you want to test and choose Simulate Workflow Process.

Activating Workflow Processes

You must activate all Siebel Email Response workflows *before* starting Siebel Email Response. From Siebel Email Response, you can *only* view and activate workflow processes. If you want to change workflow processes, then you must use Siebel Tools.

A server parameter (Workflow Version Checking Interval) controls how often the server component checks for recently activated versions of each process definition. Workflows are refreshed approximately every hour. After each refresh, recently activated workflows are available. For information about how to generate a list of predefined Siebel Email Response workflows, see *About Processing Email with Siebel Workflow*.

To activate workflow processes

1. Navigate to the Administration - Business Process screen, then the Workflow Deployment view.
2. In the Repository Workflow Processes list, query for Siebel Email Response workflow processes with a status of *Completed*.
3. Select the workflow process that you want to activate and click Activate.

   In the Repository Workflow Processes list, the status of the workflow process changes to *Active*.
4. Repeat Step 1 through Step 3 for each Siebel Email Response workflow that you want to use.

Determining Workflow Subprocesses

Some preconfigured workflow processes use other preconfigured workflow processes to complete specific tasks. These processes, which are part of the primary workflow process, are workflow subprocesses.

The following table shows the primary Siebel Email Response workflow processes and associated workflow subprocesses. You must activate all associated subprocesses for a primary process to function.

Primary Process	Associated Subprocesses
eMail Response - Client Send Email	eMail Response - Update Activity Status
eMail Response - Create Activity	eMail Response - Get Entitlement Id eMail Response - Identify Language
eMail Response - Process Message	eMail Response - Analyze Message eMail Response - Create Activity eMail Response - Parse Junk Email eMail Response - Route Email eMail Response - Send Acknowledgement eMail Response - Send Auto Response
eMail Response - Process Service Request	eMail Response - SR Help eMail Response - SR Query eMail Response - SR Status eMail Response - SR Submit eMail Response - SR Update
eMail Response - Response Workflow	eMail Response - Append Thread Id eMail Response - Update Activity Status
eMail Response - SR Query	eMail Response - Search Spec
eMail Response - SR Submit	eMail Response - Get Entitlement Id
eMail Response - Send Auto Response	eMail Response - Append Thread Id eMail Response - Update Activity Status

To determine the workflow subprocesses that are associated with a workflow process

1. Navigate to the Administration - Business Process screen, then the Workflow Processes view.
2. In the Workflow Processes list, query for and select the required workflow process.
3. Scroll down and click the Process Designer view tab.
4. In the Designer drop-down list, select Steps.
5. In the Steps list, query for steps of type Sub Process.
6. For each of the steps of type Sub Process, click the link in the Name field.

   The Subprocess view appears. The value in the Subprocess field is the name of the workflow subprocess. You can activate this workflow subprocess from the Workflow Deployment view.

Running the Process Simulator

After modifying a workflow, test the changes to make sure they are working properly. To modify and test changes to the workflow process, use the Process Simulator. To use the Process Simulator, the administrator must set up the eMail Response - Process Message workflow to run in test mode. For more information about the Process Simulator, see *Siebel Business Process Framework: Workflow Guide* .

In the production environment, Communications Inbound Processor executes the eMail Response - Process Message workflow. In test mode, process properties for the workflow are loaded from an XML file, not dynamically loaded by the Communications Inbound Processor server component, to enable the administrator to modify each parameter individually.

To modify test XML files (example)

1. Copy the test XML files from the sample database subdirectory.

   (`sample\applications\email_response`).

   > **Note:** Test XML files are installed when you install the Sample Database.

2. Create a new directory on your Siebel Server (for example, `c:\testmode`).

   > **Note:** You do not need to use this exact location on your Siebel Server as long as you modify the XML file to reference the new directory. If the directory in which you copy the test mode files is not `c:\testmode`, then you must modify the OrigMsgFile parameter in the XML file to match the directory that you create for the files.

3. Copy the test files from the sample database subdirectory to your new directory.
4. Open the testmode.xml file in the text editor that you use for these files.

   > **Note:** If files with the XML extension are mapped to open in your Web browser, open the text editor, and then open the file from the text editor.

5. Modify the required parameters in the following table.

Output Argument	Example of a Value	Description
CcList	“replaceme@example.com;test @test.com;casey_cheng @example.com”	Optional. A semicolon-delimited list of email addresses in the CC field of the message, enclosed in double quotation marks.
HasAttach	N	Do not modify.
Loopback_spcCandidate	N	Optional. Change to Y if the message is a loop-back candidate.
MsgClass	IPM.Note	Do not modify.

Output Argument	Example of a Value	Description
OrigMsgFile	`C:\testmode\OriginalMessageText _ 3B88245D00000001.txt`	Optional. A file path pointing to the original message file.
Prefix	None	Do not modify.
Received	08/25/11 15:20:40	Optional. The time the email server receives the message.
ReceiverAddress	replaceme@example.com	Required. The email address of a working Siebel Communications Server profile on your server.
ReceiverName	replaceme@example.com	Required. The name of a working Siebel Communications Server profile on your server.
SenderAddress	casey_cheng@example.com	Required. The email address of the sender of the message.
SenderAddrType	None	Optional. The type of sender address.
SenderName	Casey Cheng	Required. The text name of the message sender.
SenderReplyNames	The customer's name	The text name of the person to whom the reply is sent.
Sent	08/25/11 15:20:26	Optional. The time that the message is sent.
SiebelChannelProfile	replaceme@example.com	Required. Same as the ReceiverAddress field.
SiebelChannelType	Email	Do not modify.
SiebelChannelTypeString	POP3SMTP	Do not modify.

Output Argument	Example of a Value	Description
SiebelDriverEventName	MsgRead	Do not modify.
SiebelDriverNotifyWhen Done	0	Do not modify.
SiebelWorkItemID	10-3SYAC##998778040:1	Do not modify.
Subject	This subject is a test.	Optional. The text in the subject line of an email message.
TextNote	Fundamentally, computers just deal with numbers.	Optional. The plain text version of the email message body.
TextNoteCharset	us-ascii	Do not modify.
ToList	test2@example.com	Required. The email address to which the message is sent.

6. Save and close the XML file.

Setting Up Test Mode Process

After modifying the XML file, the administrator must use Siebel Tools to set up the Enable Test Mode process.

To set up the Enable Test Mode process

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Process Message*.
3. In the Workflow Processes list, select *eMail Response - Process Message* and then click Revise.

   The status of the workflow changes to *In Progress*.
4. In the WF Processes list, right-click *eMail Response - Process Message* and choose Edit Workflow Process.

   The Business Process Designer appears.
5. In the Workflow Process Props list, select XmlTestFileName.
6. In the Default String field, enter the complete directory path and the file name of the test XML file.

   > **Note:** You must include the complete directory path to this file.

7. In the History Toolbar, click Back to return to Siebel Tools.
8. In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Simulate Workflow Process.

   The Process Simulator starts.

Process of Modifying Workflow Processes

To modify workflows, perform the following tasks:

- *Setting Up Junk Mail Processing for Certain Messages*
- *Parsing Message Text for the Campaign ID*
- *Parsing Message Subjects for the Campaign ID*
- *Parsing for Fields in Incoming Email*
- *Adding Query Fields to the Search Spec Workflow*

Setting Up Junk Mail Processing for Certain Messages

Use the procedure in this topic to revise the eMail Response - Parse Junk Email workflow to detect messages that are sent from an email account.

This task is a step in *Process of Modifying Workflow Processes*.

To set up junk message processing for certain messages

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Parse Junk Email*.
3. In the Workflow Processes list, select *eMail Response - Parse Junk Email* and then click Revise.

   The status of *the workflow* changes to *In Progress*.
4. In the Workflow Processes list, right-click *eMail Response - Parse Junk Email* and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click each decision step that you want to modify (such as Bad Sender?) and add the new value to compare with Process Property.

   For example, you can create a condition with the values in the following table.

Compare To	Operation	Property Name
Process Property	One Must Match (Ignore Case)	MsgSenderAddress

   In this example, the MsgSenderAddress property name is compared to Process Property. To complete this condition, enter the junk email address (for example, junk.email@example.com).
6. In the History Toolbar, click Back to return to Siebel Tools.
7. In the Workflow Processes list, right-click *eMail Response - Parse Junk eMail* and choose Validate.

   Note: For information about validating workflow processes, see *Running the Process Simulator*.
8. In the Workflow Processes list, select *eMail Response - Parse Junk eMail and* click Deploy.

Parsing Message Text for the Campaign ID

You can modify the eMail Response - Process Message workflow to look for a Campaign ID field in the message body or subject. Use the procedure in this topic to complete this task. For more information, see *Siebel Business Process Framework: Workflow Guide* .

When the workflow receives a message with the specified field, the text is copied into the new process property (CampaignID). Using this same approach, you can modify the eMail Response - Create Activity Process workflow and associate the activity record with the appropriate campaign.

You can also parse an email message generated from a Web form. The Parse Message step can look for a first name, last name, and telephone number, and then use this data to create a contact record.

This task is a step in *Process of Modifying Workflow Processes*.

To parse text for the campaign ID

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of *eMail Response - Process Message*.
3. In the Workflow Processes list, select *eMail Response - Process Message* and then click Revise.

   The status of *the workflow* changes to *In Progress.*
4. In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click the Parse Message step and choose Show Process Properties.
6. In the WF Process Props list, add a new record with Name field of CampaignID.
7. Right-click the Parse Message step and choose Show Input Arguments.
8. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Value
CampaignID	Literal	[CID:%s]

9. Right-click the Parse Message step and choose Show Output Arguments.
10. In the Output Arguments list, add the output argument in the following table.

Property Name	Type	Output Argument
CampaignID	Output Argument	CampaignID

> **Note:** This output argument name must match the input argument name that you create in Step 8.

11. In the History Toolbar, click Back to return to Siebel Tools.
12. In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Validate.

> **Note:** You can also make sure the workflow works correctly by starting Communications Inbound Processor and sending test messages. For information about validating workflow processes, see *Running the Process Simulator*.

13. In the Workflow Processes list, select *eMail Response - Process Message and* click Deploy.

Parsing Message Subjects for the Campaign ID

You can modify the eMail Response - Process Message workflow to look for a Campaign ID field in the subject line of email messages. Use the procedure in this topic to complete this task. For more information, see *Siebel Business Process Framework: Workflow Guide* .

This task is a step in *Process of Modifying Workflow Processes*.

To parse message subject for the campaign ID

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of eMail Response - Process Message.
3. In the Workflow Processes list, select eMail Response - Process Message and click Revise.

   The status of the workflow changes to In Progress.

   > **Note:** This example uses the version of the workflow with a status of Completed.

4. In the Workflow Processes list, right-click eMail Response - Process Message and choose Edit Workflow Process.

   The Business Designer appears.
5. In the WF Process Props list, add a new record with Name field of CampaignID.
6. Navigate to the Process Designer view and add a new business service step.

   For information about adding business service steps, see *Siebel Business Process Framework: Workflow Guide* .
7. Right-click the new business service step and complete the fields in the following table.

Name	Business Service	Method
Parse Subject for Campaign	Inbound Email Manager	Parse Text

8. Right-click the Parse Subject for Campaign business service step and choose Show Input Arguments.
9. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Property Name	Property Data Type
Text	Process Property	MsgSubject	String

10. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Value	Property Name	Property Data Type
CampaignID	Literal	[CID:%s]	MsgSubject	String

11. Right-click the Parse Subject for Campaign business service step and choose Show Output Arguments.
12. In the Output Argument list, add the output argument in the following table.

Property Name	Type	Output Argument
CampaignID	Output Argument	CampaignID

> **Note:** This output argument name must match the input argument name that you create in Step 10.

13. Use the Connector tool to connect the new step (Parse Subject for Campaign) that you create in Step 7 to the eMail Response - Process Message workflow.
14. In the History Toolbar, click Back to return to Siebel Tools.
15. In the Workflow Processes list, right-click eMail Response - Process Message and choose Validate.
16. In the Workflow Processes list, select eMail Response - Process Message and click Deploy.

Parsing for Fields in Incoming Email

You can modify the eMail Response - SR Submit workflow to process other keywords in the Service Request business component.

Identify the additional fields that you want to parse from incoming email and locate them in the Service Request business component. In the following example, you want to look for the Priority field. Verify that the field is available in the Mail Agent Service Request business component. If the field is not in the business component, then extend the business component. For information about extending the Mail Agent Service Request business component, see *Using Siebel Tools* . For more information, see *Siebel Business Process Framework: Workflow Guide* .

This task is a step in *Process of Modifying Workflow Processes*.

To parse for other fields in incoming email

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of eMail Response - SR Submit.
3. In the Workflow Processes list, select eMail Response - SR Submit and click Revise.

   The status of the workflow changes to In Progress.
4. In the Workflow Processes list, right-click eMail Response - SR Submit and choose Edit Workflow Process.

   The Business Process Designer appears.
5. Right-click the Extract SR Fields step and choose Show Input Arguments.
6. In the Input Argument list, create the input argument in the following table.

Input Argument	Type	Value
Priority	Literal	[Priority]%s[

7. Right-click the Extract SR Fields step and choose Show Output Arguments.
8. Create the output argument in the following table.

Property Name	Type	Output Argument
Priority	Output Argument	Priority

9. Right-click the Create Service Request business service step and choose Show Input Arguments.
10. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Property Name
Priority	Process Property	Priority

11. In the History Toolbar, click Back to return to Siebel Tools.
12. In the Workflow Processes list, right-click *eMail Response - SR Submit* and choose Validate.
13. In the Workflow Processes list, select *eMail Response - SR Submit* and click Deploy.

Adding Query Fields to the Search Spec Workflow

If you want to change the eMail Response - SR Query workflow to query using the Priority field, then modify the eMail Response - Search Spec workflow. The following example describes the steps for modifying the eMail Response - Search Spec workflow. For more information, see *Siebel Business Process Framework: Workflow Guide* .

This task is a step in *Process of Modifying Workflow Processes*.

To add query fields to the Search Spec workflow

1. In Siebel Tools Object Explorer, select the Workflow Processes object.
2. In the Workflow Processes list, query for a process name of eMail Response - Search Spec.
3. In the Workflow Processes list, select eMail Response - Search Spec and click Revise.

   The status of the workflow changes to *In Progress.*
4. In the Workflow Processes list, right-click eMail Response - Search Spec and choose Edit Workflow Process.

   The Business Process Designer appears.
5. In the WF Process Props list, add a new record with a Name field of Priority.
6. Right-click the Extract SR Fields step and choose Show Input Arguments.
7. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Value
Priority	Literal	[Priority]%s[

8. Right-click the Extract SR Fields step and choose Show Output Arguments.
9. In the Output Arguments list, add the output argument in the following table.

Property Name	Type	Output Argument
Priority	Output Argument	Priority

10. Right-click the Get Search Criteria step and choose Show Input Arguments.
11. In the Input Arguments list, add the input argument in the following table.

Input Argument	Type	Property Name
Priority	Process Property	Priority

12. In the History Toolbar, click Back to return to Siebel Tools.
13. In the Workflow Processes list, right-click eMail Response - Search Spec and choose Validate.
14. In the Workflow Processes list, select eMail Response - Search Spec and click Deploy.

11 Managing Email, Fax and Other Communications Products

Managing Email, Fax, and Other Communications Products

This chapter provides information about configuring and managing integrations with email servers, fax servers, and other communications products. It includes the following topics:

- *Managing Integrations with Email and Fax Servers*
- *Configuring Client-Side Integration for Send Email Command*
- *Process of Configuring Third-Party Email Integrations*
- *Modem-Based TAP Paging Driver*
- *FTP Driver*

Managing Integrations with Email and Fax Servers

Siebel Business Applications include communications drivers that support email and fax. These drivers are the Internet SMTP/IMAP Server driver and the Internet SMTP/POP3 Server driver. For more information about specifying recipients for email or fax messages, see *Configuring Recipient Groups for Requests and Advanced Templates* and *Configuring Recipients for Send Commands*. For more information about communications drivers, see *Communications Drivers Provided with Siebel CRM* and *Process of Setting Up Communications Driver Profiles*.

The Internet SMTP/IMAP Server driver and the Internet SMTP/POP3 Server driver support inbound email for Siebel Email Response and support outbound email and fax messages for other Siebel application modules and features. Outbound email and fax messages are sent using:

- Siebel Email Response (email only).
- Send Email and Send Fax commands.
- Outbound communication requests views in the Administration - Communications screen (for administrators) and Communications screen (for users).
- Workflow policies and workflow processes that you create using Siebel Workflow.
- Any module that invokes methods of the Outbound Communications Manager business service to send email or fax messages.

Integrating with Email Server Products

Sending outbound email messages and receiving inbound email messages using Siebel Communications Server requires that you integrate your email server products. You must configure profiles for the Internet SMTP/IMAP Server driver or the Internet SMTP/POP3 Server driver by using the parameters described in the table in the topic *Parameters*

for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver. For information about support for third-party products, see the Certifications tab on My Oracle Support.

> **Note:** After an outbound email message is sent to the email server, the Communications Outbound Manager server component might indicate in the log file that the email is successfully sent. However, the log file cannot indicate whether the email is sent to a valid email address. If the email server subsequently fails to deliver the message, then a nondelivery report is sent from the email server to the sending mailbox.

Client-side email integration with Lotus Notes or Microsoft Outlook, options for the Send Email command, does not use Siebel Communications Server. For more information, see *Configuring Client-Side Integration for Send Email Command*.

Using HTML Email

HTML email messages are supported for both outbound and inbound email and for all Siebel application features that use Siebel Communications Server to process email.

For inbound email, the HTML email is rendered in the browser (running the Siebel client) according to the capabilities of the browser.

For outbound email, HTML tagging is applied in various ways or by various features, including any combination of the following:

- The Web browser might apply tagging when you use HTML editing controls with the Send Email command with Siebel Email Response replies, or when you edit template text.
- Tagging might be included in text or other elements you copy from a browser and paste into an email message or template text.
- You might manually apply tagging to template items for advanced templates.
- You might specify tagging in HTML wrapper templates.

User preferences determine whether users can access editing controls for formatting HTML outbound email. When you specify HTML, the tags that the HTML editing controls apply are subject to the capabilities of the supported browser. You specify the HTML editing preference separately for Send Email or for Siebel Email Response. Some tags are implicitly inserted, regardless of whether a user uses any specific HTML editing controls. The browser applies, or removes, other tags as the user formats the email text using these controls.

If HTML outbound email is generated, then an email message that is actually sent might be constructed as a MIME multipart or alternative email message, containing an HTML version and a plain-text version of the message. You can specify this behavior by setting the Create Plain Text From HTML parameter to TRUE for the Internet SMTP/IMAP Server driver (or the Internet SMTP/POP3 Server driver) or for applicable profiles.

The Ignore HTML Tags setting, in the Spelling view of the User Preferences screen, causes the spell check features to ignore any text enclosed in angle brackets - < (less than symbol) and > (greater than symbol) - even text that did not originate from HTML tags. If an open angle bracket (<, or less than symbol) appears in the text, then the spell check feature ignores all subsequent message text because it expects a matching close angle bracket (>, or greater than symbol).

Related Topics

Content and Formatting for Templates

Editing and Formatting Controls for Text in Templates

Preference Settings for Outbound Communications

Editing and Formatting Controls for Send Email and Send Fax Commands

Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver

Integrating with Fax Products

Sending outbound fax messages requires that you integrate your email server products with Siebel Communications Server and integrate your fax server with your email server. In addition, you must prepare your Siebel applications to format fax addressing data correctly.

Siebel applications do not directly send any fax messages. Instead, they send an email message to an email address that is formatted to include the recipient fax number. The email-fax gateway server passes this email to the fax server. The fax server converts the email to a fax and sends it to the recipient fax number. For information about support for third-party products, see the Certifications tab on My Oracle Support.

> **Note:** After a fax is sent to the email server for submission to the fax server, the Communications Outbound Manager server component might indicate in the log file that the fax is successfully sent. However, this log file message does not indicate whether the fax is sent to a valid fax number.

Most fax software sends a notification message when a fax is not transmitted to the destination. You can set up some fax software to send a notification when a fax is transmitted successfully. If you configure the fax server to send notifications to the sender, then the notification appears in the mailbox that corresponds to the profile that is used to send the fax.

You must configure your fax software, such as OpenText RightFax, to communicate with the email server over a configured gateway connection (or communications link). For example, when installing OpenText RightFax, use the gateway for SMTP, IMAP, or POP3. For more information about email-fax gateways, see the documentation for your fax software.

You must also create an email account (mailbox) that only the fax server monitors. For example, email messages addressed to the email account that OpenText RightFax uses are transmitted through the gateway connection, and the fax server automatically retrieves them, converts them into faxes, and sends them. Each OpenText RightFax email gateway for SMTP, IMAP, or POP3 can monitor a single such email account.

> **Note:** If you use Siebel Communications Server with OpenText RightFax, then to support Unicode configurations, download the Unicode patch for OpenText RightFax. For more information, see the Certifications tab on My Oracle Support.

Configuring Fax Integration Elements in Siebel Tools

Siebel Business Applications contain default configuration data for sending messages for OpenText RightFax processing. You must modify the configuration data in Siebel Tools to process fax recipient information correctly for your fax server, as necessary, and to work with your email account for the fax server. For more information about

configuring user properties and working with Siebel Tools, see *Configuring Siebel Business Applications* and *Siebel Developer's Reference* .

For each business component from which you want to extract fax addressing information for recipients, set the Recipient Fax Address Field user property to the appropriate field, such as the Fax Address field for the Contact business component.

For example, in views that are based on the Contact business component, users might enter customer fax information in the Fax Phone # field. The Fax Address field is a calculated field that prepares fax addressing data obtained from the Fax Phone # field for use with your fax server. In this scenario, specify the Fax Address field in the Recipient Fax Address Field user property.

The formatting for fax-related fields depends on your fax server requirements. By default, the calculated field value for the Fax Address field or equivalent fields contains fax formatting that applies to OpenText RightFax and specifies the email account that the fax server monitors. You must modify all such field values as appropriate for your specific fax integration.

For example, for OpenText RightFax, the calculated value must specify the email account that the fax server monitors and the field, such as Fax Phone #, that contains the specific fax address for the recipient.

By default, the Fax Address field for the Contact business component, for example, contains the following value for the Calculated Value field in Siebel Tools:

```
IIF([Fax Phone #] IS NOT NULL, '"/fax='+ToChar([Fax Phone #])+'/"

<replace_me@replace.me.com>', "")
```

For OpenText RightFax, modify replace_me@replace.me.com to specify the email address for your fax integration. Retain the angle brackets (<>) enclosing the email address. Also make sure that a space character precedes the open angle bracket (<) that precedes the email address.

Settings for Internet SMTP/IMAP Server Driver

The following table lists the settings for the driver record for the Internet SMTP/IMAP Server driver. These settings appear in the Communications Drivers and Profiles view of the Administration - Communications screen.

CAUTION: The values in the following table are for reference only. Do not modify the predefined values for this driver.

Field Name	Value
Name	Internet SMTP/IMAP Server
Channel Type	Email
Inbound	On
Outbound	On
Interactive	Off

Field Name	Value
Channel String	IMAPSMTP
Library Name	sscmmail

Settings for Internet SMTP/POP3 Server Driver

The following table lists the settings for the driver record for the Internet SMTP/POP3 Server driver. These settings appear in the Communications Drivers and Profiles view of the Administration - Communications screen.

CAUTION: The values in the following table are for reference only. Do not modify the predefined values for this driver.

Field Name	Value
Name	Internet SMTP/POP3 Server
Channel Type	Email
Inbound	On
Outbound	On
Interactive	Off
Channel String	POP3SMTP
Library Name	sscmmail

Parameters for Internet SMTP/IMAP Server Driver and Internet SMTP/POP3 Server Driver

The following table lists the supported parameters for the Internet SMTP/IMAP Server and Internet SMTP/POP3 Server communications drivers. Some parameters apply only to inbound email processing of messages retrieved from an IMAP server or a POP3 server (for Siebel Email Response). Some parameters apply only to outbound email sent using an SMTP server.

Note: Required parameters might be required only for profiles used for inbound IMAP or POP3 messages, or only for profiles used for outbound SMTP messages, The applicable profiles depend on the function of the parameter.

Name	Required	Default Value	Description
Charset	No	UTF-8	The character set that might apply to an outbound email message. For more information about character sets and how they apply to Siebel Business Applications, see *Siebel Global Deployment Guide* . For an outbound email message that is a reply to an inbound email message, this parameter has effect only when the character set of the inbound message cannot be determined. For all other outbound email messages, the value of this parameter for the driver profile determines the character set. If you do not define this parameter, then the UTF-8 character set applies. When an inbound email message is received that uses a specific character set, the character set is stored on the activity record for the inbound message. If you do not define this parameter, then the UTF-8 character set applies. The default Response Email Encoding parameter is UTF-8. In replying emails, the character set will always use UTF-8 as default. The character set from inbound email and driver profile will be ignored. You can configure Response Email Encoding to use SMART CHAR SET or SMART CHAR SET VALIDATION. In this case when an agent replies to this message, the character set is retrieved from the activity record, so the reply uses the same character set. If, however, the character set of the inbound email message cannot be determined, then the character set for the value of the Charset parameter for the driver profile is used.
Convert Incoming To Plain Text	No	FALSE	A value that specifies whether incoming HTML email is converted to text/plain format. You can set this parameter to TRUE, for example, if your incoming email accounts receive HTML spam messages that are image-based and consequently cannot be easily filtered out. When this setting is TRUE, such images do not appear for your contact center agents.
Create Plain Text From HTML	No	FALSE	A value that specifies whether plain text is created from HTML. If this parameter is TRUE, and an outbound message contains text tagged with HTML but no plain text, then the plain text is synthesized (extracted) from the HTML and sent as an alternate to the HTML. This situation might apply in the following scenarios: • A user sends email using Send Email command when Send Email: Default Message Format is set to HTML in the Outbound Communications view of the User Preferences screen. • A user sends reply email using Siebel Email Response when Email Response: Default Message Format is set to HTML in the Outbound Communications view of the User Preferences screen.

Name	Required	Default Value	Description
			• A user sends outbound communication request for the email channel, for which a template contains either or both of the following: o HTML template text o At least one HTML template item. Sending separate plain-text and HTML versions of the same message body is called MIME multipart or alternative support. To increase performance when sending HTML messages to recipients known to use email clients that can read or convert HTML messages, set this parameter to FALSE. For more information about HTML email, see *Using HTML Email*. For more information about setting outbound communications user preferences, see *Preference Settings for Outbound Communications*. **Note:** When you set this parameter to TRUE, the results might not be compatible with all major email clients. Consider this factor before you set this parameter to TRUE.
Delete Processed Messages	No	TRUE	A value that specifies whether processed messages are deleted. If you set this parameter to TRUE, then messages are deleted from the incoming email directory after they are processed. If you set this parameter to FALSE, then messages are moved to the processed email directory after they are processed. For more information, see the descriptions of the Incoming Email Directory and Processed Email Directory parameters.
Delivery Status Domain	No	Not applicable	The domain name for the email server that handles delivery status notification messages. Such messages might be generated in response to outbound mail messages sent using this profile. This parameter and the Delivery Status Mailbox parameter specify the email address for delivery status notification messages that the SMTP command MAIL FROM uses. **Note:** Use these parameters only if delivery status notification messages are processed on a separate email server than the email server that processes normal customer responses. Regular customer responses to outbound messages are sent to the email address in the Reply-To Address or From Address parameters. For more information, see the description of the Delivery Status Mailbox parameter.
Delivery Status Mailbox	No	Not applicable	The email address, in the domain for the Delivery Status Domain parameter, that receives delivery status notification messages. For more information, see the description of the Delivery Status Domain parameter.

Name	Required	Default Value	Description
Enable SSL for Backup SMTP	No	FALSE	A value that specifies whether SSL (Secure Sockets Layer) is used to encrypt the SMTP session (for the backup SMTP server) between the email server and the Siebel Server. Use the SMTP Backup Server parameter to specify the backup SMTP server name. For more information, see the descriptions of the Enable SSL for SMTP, Use EHLO, and SMTP Backup Server parameters.
Enable SSL for IMAP (Internet SMTP/IMAP Server driver only)	No	FALSE	A value that specifies whether SSL (Secure Sockets Layer) is used to encrypt the IMAP session between the email server and the Siebel Server. If an SSL session cannot be negotiated, then the IMAP connection is aborted. IMAP over SSL normally uses port 993.
Enable SSL for POP3 (Internet SMTP/POP3 Server driver only)	No	FALSE	A value that specifies whether SSL (Secure Sockets Layer) is used to encrypt the POP3 session between the email server and the Siebel Server. If an SSL session cannot be negotiated, then the POP3 connection is aborted. POP3 over SSL normally uses port 995.
Enable SSL for SMTP	No	FALSE	A value that specifies whether SSL (Secure Sockets Layer) is used to encrypt the SMTP session between the email server and the Siebel Server. The STARTTLS command executes after the EHLO command executes successfully. If the STARTTLS command fails, then the connection is aborted. An attempt is made to use the backup SMTP server instead. Use the SMTP Server parameter to specify the SMTP server name. For more information, see the descriptions of the Enable SSL for Backup SMTP and Use EHLO parameters.
Enable TLS for Backup SMTP	No	FALSE	A value that specifies whether TLS (Transport Security Layer) is used to encrypt the SMTP session (for the backup SMTP server) between the email server and the Siebel Server. Use the SMTP Backup Server parameter to specify the backup SMTP server name. For more information, see the descriptions of the Enable TLS for SMTP, Use EHLO, and SMTP Backup Server parameters.
Enable TLS for IMAP (Internet SMTP/IMAP Server driver only)	No	FALSE	A value that specifies whether TLS (Transport Security Layer) is used to encrypt the IMAP session between the email server and the Siebel Server. If a TLS session cannot be negotiated, then the IMAP connection is aborted. IMAP over TLS normally uses port 143.

Name	Required	Default Value	Description
Enable TLS for POP3 (Internet SMTP/POP3 Server driver only)	No	FALSE	A value that specifies whether TLS (Transport Security Layer) is used to encrypt the POP3 session between the email server and the Siebel Server. If a TLS session cannot be negotiated, then the POP3 connection is aborted. POP3 over TLS normally uses port 110.
Enable TLS for SMTP	No	FALSE	A value that specifies whether TLS (Transport Security Layer) is used to encrypt the SMTP session between the email server and the Siebel Server. The STARTTLS command executes after the EHLO command executes successfully. If the STARTTLS command fails, then the connection is aborted. An attempt is made to use the backup SMTP server instead. Use the SMTP Server parameter to specify the SMTP server name. For more information, see the descriptions of the Enable TLS for Backup SMTP and Use EHLO parameters.
Failed Email Directory	No	Not applicable	The directory where failed incoming email messages retrieved from the IMAP or POP3 server are stored. An incoming message is a failed message if any error or exception occurs while the message is parsed. The communications driver breaks down the MIME data and mail structure content of each email message into event fields and message properties. This process is called parsing. By default, failed email messages are saved to the **`bin/failed`** subdirectory of the Siebel Server installation directory.
From Address	Yes	Not applicable	The sender's default email address for outbound communications. Use one of the following forms: • *sendername@example*.com • *sender_display_name* <sendername@example.com> Use the second form if you want the recipient to see a display name for the sender, in addition to the email address. The specified address is passed to the SMTP server in the MAIL FROM command within the SMTP message transmission envelope, and is used as the *From:* address in the message header. **Note:** Users who create email or fax profiles for personal use can use a profile parameter override to specify their own email address for the From Address parameter. For more information, see *Creating Communications Profiles for Personal Use*. If no parameter value is available, then the driver tries to use the *SenderAddress* that is passed to it when it composes and sends an email.

Name	Required	Default Value	Description
			Note: For a profile for inbound communications, the From Address parameter represents the recipient's email address. You specify this profile for a response group.
IMAP Account Name (Internet SMTP/IMAP Server driver only)	Yes	Not applicable	The account name for the IMAP mailbox from which to retrieve inbound communications.
IMAP Account Password (Internet SMTP/IMAP Server driver only)	Yes	Not applicable	The password for the IMAP mailbox account. The maximum length is 250 characters.
IMAP Server (Internet SMTP/IMAP Server driver only)	Yes	Not applicable	The host name or IP address of the computer on which the IMAP server runs. **Note:** If you specify a host name instead of an IP address for this parameter value, then you must include a corresponding entry in your DNS server or the local hosts file. If an IP address parameter value works correctly, but a problem occurs when you specify a host name parameter value, then consult your network system administrator to verify that host name lookup is correctly configured.
IMAP Server Port (Internet SMTP/IMAP Server driver only)	No	143	The port the IMAP server uses to listen for new socket connections.
IMAP Timeout (Internet SMTP/IMAP Server driver only)	No	60	The number of seconds to wait for a response from the IMAP server before timing out.
Incoming Email Directory	No	Not applicable	The directory where email messages retrieved from the IMAP or POP3 server are stored prior to processing. By default, incoming email messages are saved to the `bin/incoming` subdirectory of the Siebel Server installation directory. Messages move to the processed email directory after processing. If Delete Processed Messages is TRUE, then messages are deleted from the processed email directory. For more information, see the descriptions of the Delete Processed Messages and Processed Email Directory parameters.

Name	Required	Default Value	Description
			Note: When inbound email messages are processed, they are saved in a series of formats and filenames in the incoming email directory and related directories. Corresponding attachment files to the Email - Inbound activity record are saved to the Siebel File System. For more information, see *Activity Attachments Stored for Incoming Messages*.
LogDebug	No	FALSE	The amount of detail in the log file. When the value is TRUE, data output in the log file is more detailed than when the value is FALSE. The additional detail in the log file can help you to troubleshoot. Log files are created in the `log` subdirectory of the Siebel Server installation directory as follows: • Log files for the Internet SMTP/IMAP Server driver have the following name: IMAPSMTP_*xxxxxxxxxxxxxxx*.log, where *xxxxxxxxxxxxxxx* is a unique string of numerals. • Log files for the Internet SMTP/POP3 Server driver have the following name: POP3SMTP_*xxxxxxxxxxxxxxx*.log, where *xxxxxxxxxxxxxxx* is a unique string of numerals.
Loopback Detection Interval	No	90	An integer value that specifies the number of seconds between receipt an inbound email message and receipt of a previous email message from a sender with the same email address. Inbound email messages with this parameter value or less are flagged as loopback messages. A message is a loopback message if the following factors apply: • The value for Loopback Detection Interval is greater than 0 (zero), and • The message is received no later than the specified number of seconds after a previous message was received from the same email address. This parameter is based on the premise that a message received within a short period of time is probably an auto-response. For example, if you receive a message, and an auto-acknowledgement is sent, then that auto-acknowledgement message can generate a return auto-response when the recipient processes it. Setting this parameter can prevent message looping that can occur in this scenario. If you set this parameter value too high, then you might reject valid follow-up messages. If you set this parameter value too low, then the driver might not correctly detect an inbound message that is an auto-response. Loopback messages are not auto-acknowledged or auto-responded. They might be moved to a loopback email directory or processed like other messages. For more information, see the descriptions of the Loopback Email Directory and Process If Loopback Detected parameters.
Loopback Email Directory	No	Not applicable	The directory where email messages that are loopback messages are stored, if they are not to be processed.

Name	Required	Default Value	Description
			By default, loopback messages are saved to the **`bin/loopback`** subdirectory of the Siebel Server installation directory. For more information, see the description of the Loopback Detection Interval and Process If Loopback Detected parameters.
Max Line Length	No	74	An integer value that specifies the maximum line length, in characters, for outbound messages sent using this profile. The parameter value is enforced only if you use a text/plain encoding or text/html encoding parameter value of None, 7bit, or 8bit, *and* one or more text lines exceed 998 bytes without a carriage return line feed. (The character set in use also determines the line length in bytes.) The value must be between 40 and 124. If you specify no value, then the default line length is 74 characters. If the encoding in effect is quoted-printable or base64, then the Max Line Length parameter is not enforced. For more information, see the descriptions of the text/html encoding, text/plain encoding, and Charset parameters.
Max Sends Per Session	No	0	An integer value that forces the driver to log off of the SMTP server after sending the number of messages in this parameter. The driver then logs on again for the next send request. Some SMTP servers might have problems sending a large number (1000 or more) of messages in one session. A value of *0* (zero) means that the driver never logs off of the SMTP server.
Parse Embedded Messages	No	TRUE	A value that specifies whether embedded messages are parsed to display inbound message content as attachments in the Siebel application. If you set this parameter to FALSE, then embedded messages are not parsed, but are instead turned into attachments with the EML file extension. You can use programs that can view MIME files, including Microsoft Outlook Express, to view EML files. For more information, see *Activity Attachments Stored for Incoming Messages*.
PollingInterval	No	30	The number of seconds the communications driver waits between consecutive POP3 and IMAP sessions before checking again for new inbound email on the POP3 or IMAP mail server. It is recommended that you set the PollingInterval parameter to 120 when you assign parameter overrides for a communications driver profile. Increase the time in this way so that all email messages on the POP3 or IMAP proxy server are polled successfully, regardless of the message size.
POP3 Account Name	Yes	Not applicable	The account name for the POP3 mailbox from which to retrieve inbound communications.

Name	Required	Default Value	Description
(Internet SMTP/POP3 Server driver only)			
POP3 Account Password (Internet SMTP/POP3 Server driver only)	Yes	Not applicable	The password for the POP3 mailbox account. The maximum length is 250 characters.
POP3 Server (Internet SMTP/POP3 Server driver only)	Yes	Not applicable	The host name or IP address of the computer on which the Internet POP3 server runs. **Note:** If you specify a host name instead of an IP address for this parameter value, then you must include a corresponding entry in your DNS server or the local hosts file. If an IP address parameter value works correctly, but a problem occurs when you specify a host name parameter value, then consult your network system administrator to verify that host name lookup is correctly configured.
POP3 Server Port (Internet SMTP/POP3 Server driver only)	No	110	The port the Internet POP3 server uses to listen for new socket connections.
POP3 Timeout (Internet SMTP/POP3 Server driver only)	No	60	The number of seconds to wait for a response from the POP3 server before timing out.
Priority	No	3	The priority level for an outbound message, such as a reply to an inbound email message for a customer. Depending on the email client program a customer uses, additional information might appear with the message that the customer receives. For example, an exclamation point might appear for a high-priority message. You can specify the priority level using an Internet standard number scheme (1 through 5) or the Microsoft priority scheme (Low, Normal, or High).
Processed Email Directory	No	Not applicable	The directory where email messages retrieved from the IMAP or POP3 server are moved after they are processed, unless they are to be deleted instead. The Delete Processed Messages parameter determines whether processed messages are deleted or moved to this directory. By default, if the Delete Processed Messages parameter is FALSE, then the processed email directory is the `bin/processed` subdirectory of the Siebel Server installation directory. For more information, see the description of the Delete Processed Messages parameter.

Name	Required	Default Value	Description
Process If Loopback Detected	No	TRUE	A value that specifies how to handle an incoming message that is a loopback message. If you set this parameter to TRUE, then Communications Inbound Receiver, Communications Inbound Processor, and associated workflows process the loopback message like any other message. If you set this parameter to FALSE, then the loopback message is saved to the loopback email directory. Loopback messages are not auto-acknowledged or auto-responded. The Loopback Detection Interval parameter determines whether a message is flagged as a loopback message. For more information, see the descriptions of the Loopback Detection Interval and Loopback Email Directory parameters.
Reply-To Address	No	Not applicable	An optional reply-to email address for the message, if the address is different than the address for the From Address parameter. You can specify multiple email addresses. Separate the address with semicolons. If you specify a reply-to address, then outgoing messages have a *Reply-To:* header field added to the message envelope with the specified value. Use one of the following forms: • *sendername@example*.com • *sender_display_name* <sendername@example.com> Use the second form if you want the recipient to see a display name for the sender, in addition to the email address.
Return Attachments	No	TRUE	A value that specifies whether to accept or discard attachments. If you set this parameter to TRUE, then any attachments parsed from the incoming message are passed into the Siebel application. If you set this parameter to FALSE, then the attachments are discarded.
Save Sent Messages	No	FALSE	A value that specifies whether to save sent messages. If you set this parameter to TRUE, then sent messages are saved into the sent email directory. If you set this parameter to FALSE, then sent messages are not saved. Each message is saved as a separate, MIME-encoded file in the exact format in which it was sent to the SMTP server. For more information, see the description of the Sent Email Directory parameter.
Sent Email Directory	No	Not applicable	The directory where sent messages are saved, if the Save Sent Messages parameter is TRUE.

Name	Required	Default Value	Description
			By default, if Save Sent Messages is TRUE, then messages are saved into the `bin/sent` subdirectory of the Siebel Server installation directory. For more information, see the description of the Save Sent Messages parameter.
Siebel Server	No	Not applicable	The name of the Siebel Server that handles the delivery of outbound communications sent using this profile. For more information, see *Specifying Siebel Server for Communications Outbound Manager*.
SMTP Account Name	No	Not applicable	The account name to use for logging in to the Internet SMTP server. Use the AUTH LOGIN command to log in. Use this parameter if your SMTP server requires authentication. When you define this parameter, also specify a password in the SMTP Account Password parameter. Using the SMTP Server parameter to specify the SMTP server name **Note:** You can use authentication independent of SSL or TLS encryption using the Enable SSL for SMTP or Enable TLS for SMTP parameter. If you use both authentication and SSL or TLS encryption for SMTP, then the session is encrypted before authentication, so the account name and password are not sent in clear text. For more information, see the descriptions of the Enable SSL for SMTP, Enable TLS for SMTP, and SMTP Server parameters.
SMTP Account Password	No	Not applicable	The password for the account to use for logging in to the Internet SMTP server. For more information, see the description of the SMTP Account Name parameter.
SMTP Backup Account Name	No	Not applicable	The account name to use for logging in to the backup Internet SMTP server. Use the AUTH LOGIN command to log in. Use this parameter if your backup SMTP server requires authentication. When you define this parameter, also specify a password in the SMTP Backup Account Password parameter. Use the SMTP Backup Server parameter to specify the SMTP server name. For more information, see the description of the SMTP Account Name parameter. For more information, see the descriptions of the Enable SSL for Backup SMTP, Enable TLS for Backup SMTP, and SMTP Backup Server parameters.
SMTP Backup Account Password	No	Not applicable	The password for the account to use for logging in to the backup Internet SMTP server.

Name	Required	Default Value	Description
			For more information, see the description of the SMTP Backup Account Name parameter.
SMTP Backup Server	No	Not applicable	The host name or IP address of the computer on which the backup Internet SMTP server runs. You use this parameter when you implement a failover strategy for your SMTP server handling of outbound email or fax communications. If the primary SMTP server fails, then outbound communications that use profiles that include these parameters are sent to the backup SMTP server instead, until the primary SMTP server restarts. Note the following points: • If you implement failover support for your SMTP server, then you must use both the SMTP Server and SMTP Backup Server parameters. • If you do not implement failover support for your SMTP server, then use only the SMTP Server parameter. Do not define the SMTP Backup Server parameter. **Note:** If a message cannot be sent to an SMTP server because it is unavailable, then the driver returns a message to Communications Outbound Manager. Later, another attempt is made to send the message. (This behavior is not specific to a failover configuration.) For more information, see the description of the SMTP Server parameter.
SMTP Backup Server Port	No	25	An integer value that specifies the port to use for connecting to the backup Internet SMTP server. For more information, see the description of the SMTP Backup Server parameter.
SMTP Server	Yes	Not applicable	The host name or IP address of the computer on which the Internet SMTP server runs. **Note:** If a message cannot be sent to an SMTP server because it is unavailable, then the driver returns a message to Communications Outbound Manager. Later, another attempt is made to send the message. **Note:** If you specify a host name instead of an IP address for this parameter value, then you must include a corresponding entry in your DNS server or the local hosts file. If an IP address parameter value works correctly, but a problem occurs when you specify a host name parameter value, then consult your network system administrator to verify that host name lookup is correctly configured. For more information, see the description of the SMTP Backup Server parameter.

Name	Required	Default Value	Description
SMTP Server Port	No	25	The port the Internet SMTP server uses to listen for new socket connections. If you use Secure Sockets Layer (SSL), then set this parameter to 25. If you use Transport Layer Security (TLS), then set this parameter to 465.
SMTP Timeout	No	60	The number of seconds to wait for a response from the Internet SMTP server before timing out. This parameter applies to both the primary SMTP server and the backup SMTP server.
text/html encoding	No	Auto	The content-transfer encoding behavior for text/html message parts. You can specify one of the following values: base64, quoted-printable, 7bit, 8bit, Auto, or None. Auto is the default value if you do not specify this parameter, or you do not specify one of these values. For the Auto value, the driver uses the simplest encoding that can safely be transported over SMTP, without needing to wrap the text. Note the following points. • If no line exceeds 998 bytes, and all characters are 7-bit, then 7-bit, then encoding is used. • If the character stream exceeds the SMTP transport restriction of 998 bytes for each line, and most of the character data is 7-bit, then quoted-printable encoding is used. If most of the character data is 8-bit, then base-64 encoding is used. For the None value, the driver uses 7-bit or 8-bit encoding and wraps the text, if necessary, so that it can be safely transported over SMTP. Note the following points: • If the character data is all 7-bit, then 7-bit encoding is used. • If any of the character data is 8-bit, then 8-bit encoding is used. • In each case, if the character stream exceeds the SMTP transport restriction of 998 bytes for each line, then hard carriage return line feeds are inserted, so no line has more than the number of characters in the Max Line Length parameter. For more information, see the description of the Max Line Length parameter.
text/plain encoding	No	Auto	The content-transfer encoding behavior for text/plain message parts. **Note:** For a detailed description of valid options, see the description of the text/html encoding parameter.
Use EHLO	No	TRUE	A value that specifies whether to user the EHLO command. Set this parameter to TRUE if you use SMTP extension (ESMTP) commands on a particular email server. With this setting, the first

Name	Required	Default Value	Description
			command sent to the server is EHLO. Consequently, the extension commands are available. Set this parameter to FALSE if you use an SMTP server that cannot handle the EHLO command.

Configuring Client-Side Integration for Send Email Command

You can deploy the Send Email command to support three different email client options. You can configure users to use Lotus Notes or Microsoft Outlook to send outbound email messages to use the native Siebel email client. For information about support for third-party software, see the Certifications tab on My Oracle Support.

> **Note:** The third-party email client integrations for Lotus Notes or Microsoft Outlook are supported for only users on Microsoft Windows client computers using the legacy ActiveX Siebel Web Client. Users on UNIX client computers must use the native Siebel email client.

The following list describes the assumptions for Send Email integrations:

- Send Email integrations for Microsoft Outlook use Microsoft Exchange Server as the email server.
- Send Email integrations for Lotus Notes use Lotus Domino as the email server.

The third-party email client integration options use email client software on each user's client computer and do not use Siebel Communications Server.

By contrast, the native Siebel email client integrates with your email server by using Siebel Communications Server and the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver. If you do not configure third-party email client integration, then the Siebel application uses the native Siebel email client. For more information, see *Managing Integrations with Email and Fax Servers*.

You can configure your application so that all users use the same email client for the Send Email command. Alternatively, you can support multiple email clients, and let individual users specify their preferred email client. For information about using the Send Email command with a third-party email client integration, see *Sending Email Messages Using Lotus Notes or Microsoft Outlook*. For information about activity records and email, see *Creating Activities for Send Commands*.

> **Note:** If you use Microsoft Outlook for the Send Email command, then communications between Microsoft Outlook and the Siebel application, which scripts handle for the email form, might cause alert messages to appear. Whether such messages appear, and the messages that appear, depends on the current security settings for Microsoft Outlook.

Email-related error messages that users receive use the language applicable to the source of the message. For example, an error message returned from a French version of Microsoft Outlook is in French.

Errors generated from the Siebel application might use the language and locale of the Siebel Server, such as when executing a script in the email form, or use the language and locale the user specifies as a user preference or temporary setting for sending messages.

> **Note:** For Microsoft Outlook, use separate email forms for each code page. Configure each form according to the requirements for using each language version of Microsoft Windows that you support.

Process of Configuring Third-Party Email Integrations

To configure third-party email client integrations, perform the following general steps:

1. Create and configure one or more directories to use for temporary storage of email attachment files. For more information, see *Creating and Configuring the Attachments Directory*.
2. Install the Siebel email form for Lotus Notes or Microsoft Outlook. For more information, see the following topics:
    - *Installing Siebel Email Form for Lotus Notes*
    - *Installing Siebel Email Form for Microsoft Outlook*
3. As appropriate for your Siebel client deployment, set component parameter values for the Application Object Manager, or set parameter values for the application configuration file, such as uagent.cfg for Siebel Call Center. For more information, see the following topics:
    - *Completing Configuration for Lotus Notes*
    - *Completing Configuration for Microsoft Outlook*
4. (Optional) Set user preferences for each user. For more information, see the topics listed for Step 3 and *Preference Settings for Outbound Communications*.

Creating and Configuring the Attachments Directory

If you configure the Send Email command to generate activity records, then when a Siebel user sends an email message using Lotus Notes or Microsoft Outlook, email attachment files are used to create attachment records for the activity record. You must define a temporary storage directory to facilitate transferring attachments in this manner.

When the email message is sent, the email form invokes a script that invokes a Siebel business service method that transfers the files from this attachments directory to the Siebel Server and deletes the files from this directory. For more information about activity records and email, see *Creating Activities for Send Commands* and *Specifying Preferences for Outbound Communications*.

The attachments directory is typically located on the Siebel Server computer. For users on the Siebel Mobile Web Client who use Lotus Notes or Microsoft Outlook for the Send Email command when disconnected from the network, an attachments directory on each local client *must* be specified.

The attachments directory must be accessible from each Microsoft Windows computer where the Siebel client might run. Configure access to this directory as follows:

- For all Siebel users on applicable client computers, provide write access. Do not provide read and execute access.
- For the system user login that starts the Siebel Server, provide read and execute access.

You later specify the attachments directory you configure in this topic for use for all users or for individual users. For more information, see *Overview of Completing Configuration for Email Client*.

Next, install the Siebel email form for Lotus Notes or Microsoft Outlook.

About Installing Siebel Email Form

Users can use either Lotus Notes or Microsoft Outlook for the Send Email command if you copy Siebel-customized files described in this topic to designated locations on server or client computers, and you make applicable email forms available to your users.

For each of these email client programs, an email form is installed. This form is set up for use with Siebel Business Applications. Initiating an email message from the form invokes a script that interacts with the Siebel application. The script updates the activity record for the email message and generates attachment records for this activity record by using any email attachment files. If the email is canceled, then the activity is deleted.

You later specify for use the Lotus Notes or Microsoft Outlook form you install in this topic for all users or for individual users. For more information, see *Overview of Completing Configuration for Email Client*.

Note: Oracle does not support customizing the Lotus Notes or Microsoft Outlook forms.

Locations of Source Files for Siebel Email Forms

The Siebel email form for Lotus Notes is part of a Lotus Notes database file. The Siebel email form for Microsoft Outlook is part of a Microsoft Outlook template file.

When you create a Siebel network image from Siebel media files, the Siebel7Email.nsf Lotus Notes database file is extracted to the following directory:

```
Windows\Client_Ancillary\Send_Email_Client\enu\lotus_notes
```

You install Siebel7Email.nsf from this location. This database file supports only ENU (U.S. English) in the user interface. However, error messages reflect the currently deployed supported language, if you choose to use this file in deployments other than ENU. For information about how to create a Siebel network image, see the *Siebel Installation Guide* .

Note: Siebel Business Applications do not provide the Microsoft Outlook template file containing the Siebel email form. For more information about how to configure the email form, see 476690.1 (Article ID) on My Oracle Support. This document was previously published as Siebel Alert 522.

Installing Siebel Email Form for Lotus Notes

This topic describes how to install the Siebel email form for Lotus Notes. You can install the email form on the server computer where Lotus Domino runs or on each client computer where Lotus Notes runs.

For users on the Siebel Mobile Web Client who use Lotus Notes for the Send Email command when disconnected from the network, the email form must be installed locally on the client computer.

If you deploy the form on local client computers, then you must redistribute any subsequent updates to all client computers.

> **Note:** For additional deployment options for the Lotus Notes database and email form, contact your administrator for Lotus Notes and Lotus Domino.

The Siebel email form for Lotus Notes, Siebel Memo, is in the Siebel7Email.nsf Lotus Notes database file.

You can rename the default Siebel email form, or add to this database additional Siebel email forms that are based on the default. For either of these actions, make sure that the names of all supported Siebel forms are included in the List of Values type for the Siebel/Lotus Form drop-down list. This list is located in the Outbound Communications view of the User Preferences screen.

To specify a custom form as a global default, you must also specify its name using the Siebel/Lotus Form server component parameter (for Siebel Web Client deployments) or the LotusForm configuration file parameter (for Siebel Mobile Web Client). For more information, see *Parameters for Email Client*.

To install the Siebel email form for Lotus Notes

1. Locate the Siebel7Email.nsf Lotus Notes database file on the Siebel network image.

   For more information, see *About Installing Siebel Email Form*.
2. Copy the file to the clipboard.
3. Paste the file into the appropriate destination location by performing one of the following steps:

   - On the Lotus Domino server computer, paste the file into the appropriate subdirectory in the Lotus Domino installation directory. An example directory follows:

     ```
     D:\Lotus\Domino\Data\Siebel
     ```

   - On each client computer, paste the file into the `Data` subdirectory in the Lotus Notes client installation directory. An example directory follows:

     ```
     D:\Lotus\Notes\Data\Siebel
     ```
4. Right-click the Siebel7Email.nsf file, select Properties, clear the check box for the Read-only attribute to allow read-write access, and click OK.

   > **Note:** If the Read-only attributes is set in the file, then error messages might appear to users when they use the Send Email command.
5. On each client computer, add a line to the notes.ini file in your Lotus Notes installation to indicate the location of the Siebel7Email.nsf Lotus Notes database file by performing one of the following steps:

   - If you paste the file onto the Lotus Domino server computer, then add an entry like the following (on one line):

     ```
     SIEBELFORMPATH = dominoserver_hostname\dominoserver_name:Siebel\Siebel7Email.nsf
     ```

     where *dominoserver_hostname* is the name of the host computer on which the Lotus Domino server runs and *dominoserver_name* is the name of the Lotus Domino server.

     In this example, a `Siebel` subdirectory is created in the `Data` directory. A variable definition in this form is appropriate for an actual location, such as the following path on the Lotus Domino server computer:

```
D:\Lotus\Domino\Data\Siebel\Siebel7Email.nsf
```

- If you paste the file onto each client computer, then add an entry like one of the following (on one line):

```
SIEBELFORMPATH = Siebel7Email.nsf

SIEBELFORMPATH = :D:\Lotus\Notes\Data\Siebel\Siebel7Email.nsf
```

The first example shows that you can specify the name of the file if it is located in the Lotus Notes database directory.

> **CAUTION:** If you specify a full path on the client computer as the value for SIEBELFORMPATH, then you must define this variable using a leading colon (:). Otherwise, you cannot open the file.

(If you add the file to mail files of users on each client computer, then you might not need to define the SIEBELFORMPATH variable. For more information, see your third-party vendor documentation for Lotus Notes.)

The email form for Lotus Notes, Siebel Memo, is now ready for use. To finish configuring your use of Lotus Notes, see *Overview of Completing Configuration for Email Client*.

Installing Siebel Email Form for Microsoft Outlook

This topic describes how to install the Siebel email form for Microsoft Outlook. You can install the email form on the server computer where Microsoft Exchange Server runs or on each client computer.

For users on the Siebel Mobile Web Client who use Microsoft Outlook for the Send Email command when disconnected from the network, the email form must be installed locally on the client computer. Deploying the form on local client computers has implications for subsequent updates. Also, a form in the Personal Form Library takes precedence over a form of the same name in the Organizational Form Library.

> **Note:** For additional deployment options for the Microsoft Outlook template and email form, contact your administrator for Microsoft Outlook and Microsoft Exchange Server.

The default name for the Siebel email form for Microsoft Outlook is IPM.Note.Siebel. This form must be in a Microsoft Outlook template file. For more information, see *About Installing Siebel Email Form*.

You can rename the default Siebel email form when you publish it, or publish additional Siebel forms that are based on the default. For either of these actions, make sure that the names of all supported Siebel forms are included in the List of Values type for the Siebel/Outlook Form drop-down list. This list is located in the Outbound Communications view of the User Preferences screen.

To specify a custom form as a global default, you must also specify its name using the Siebel/Outlook Form server component parameter (set on the Application Object Manager component, for Siebel Web Client deployments) or the OutlookForm configuration file parameter (for Siebel Mobile Web Client). For more information, see *Parameters for Email Client*.

To install the Siebel email form for Microsoft Outlook

1. Locate the Microsoft Outlook template file that contains the Siebel email form.

For more information, see *About Installing Siebel Email Form*.

2. Optionally, you can copy this file to the clipboard, and paste it to the network before continuing.
3. Publish the email form to the Organizational Form Library on Microsoft Exchange Server or to the Personal Form Library on a local client computer by completing the following steps:
   a. On the server computer or on the client computer, double-click the Siebel7Outlook.oft template file.
   b. At the prompt, specify Enable Macros.
   c. In Microsoft Outlook, choose Tools, Forms, and then Publish Form As.
   d. From Look In, choose Organizational Form Library (for installation on the Exchange Server computer) or choose Personal Form Library (for installation on a client computer).
   e. Specify the *Siebel* display name for this form, then save the form.

      The actual name of the email form is IPM.Note.Siebel.
   f. At the prompt, specify to not send the form definition to email recipients.
   g. Close the Microsoft Outlook window without saving a message draft.

      The Microsoft Outlook email form is now ready for use. To finish configuring your use of Microsoft Outlook, see *Overview of Completing Configuration for Email Client*.

Overview of Completing Configuration for Email Client

To configure third-party email integration using Lotus Notes or Microsoft Outlook, you must set several parameter values, according to your Siebel client deployment as follows:

- For Siebel Web Client deployments, configuration is on the Application Object Manager.
- For Siebel Mobile Web Client deployments, configuration is in the Siebel client's configuration file.

For more information about setting parameters for Siebel Server, including specifying component parameters using the Siebel Server Manager (GUI or command-line interface), see *Siebel System Administration Guide* . For more information about specifying Siebel client parameters in the configuration file, see *Siebel System Administration Guide* .

Completing Configuration for Lotus Notes

This topic describes the remaining steps for configuring Siebel Business Applications to use Lotus Notes for the Send Email command.

To complete configuration for Lotus Notes email client

1. Set the EnableWebClientAutomation parameter to TRUE to enable Web client automation.
   - For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager component, such as Call Center Object Manager for Siebel Call Center.
   - For Siebel Mobile Web Client deployments, specify this parameter as a parameter in the application configuration file, such as uagent.cfg for Siebel Call Center. This parameter is located in the [InfraUIFramework] section of the configuration file.

     By default, this parameter is FALSE. This parameter allows the Siebel desktop integration object (ActiveX control) to be downloaded. (The source CAB file of this object is SiebelAx_Desktop_Integration.cab. The

downloaded object name is Siebel Desktop Integration.) For more information about the CAB file and ActiveX control, see *Siebel System Administration Guide* .

2. Set the EnableEmailClientAutomation parameter to TRUE to enable email client automation.

   - For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager component, such as Call Center Object Manager for Siebel Call Center.
   - For Siebel Mobile Web Client deployments, specify this parameter as a parameter in the application configuration file, such as uagent.cfg for Siebel Call Center. This parameter is located in the [InfraUIFramework] section of the configuration file.

   By default, this parameter is FALSE. This parameter allows the Siebel email automation object (ActiveX control) to be downloaded. (The source CAB file of this object is SiebelAx_OutBound_mail.cab. The downloaded object name is Siebel Email Support for Microsoft Outlook and Lotus Notes.) For more information about the CAB file and ActiveX control, see *Siebel System Administration Guide* .
3. As appropriate, specify a global default designating Lotus Notes as the email client your users use for the Send Email command.

   Use the following information:

   - **Default Email Client.** For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager.
   - **DefaultMailClient.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the application configuration file, such as uagent.cfg for Siebel Call Center.

   If you do not specify a global default, then the Siebel native email client is the default. For more information, see *Parameters for Email Client*.
4. Specify a global default designating Siebel Memo as the name of the email form you use with Lotus Notes.

   Use the following information:

   - **Siebel/Lotus Form.** For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager.
   - **LotusForm.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the local Siebel client configuration file.

     For more information, see *Parameters for Email Client*.
5. Specify a global default specifying where email attachments are temporarily stored.

   Use the following information:

   - **Email Temporary Attachment Location.** For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager.
   - **SiebelExtMailClientAttDir.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the local Siebel client configuration file.

   For more information, see *Creating and Configuring the Attachments Directory* and *Parameters for Email Client*.

As appropriate for your deployment, users might specify Siebel user preference settings for their email client. Users might set user preferences, for example, if you support more than one email client option for Send Email. For more information, see *Preference Settings for Outbound Communications*.

The global defaults apply if no user preference is set. User preferences override the corresponding global defaults that the Default Email Client or Siebel/Lotus Form parameters specify. For more information about these parameters, see the table in the topic *Parameters for Email Client*.

Applicable user preferences in the Send Email section of the Outbound Communications view of the User Preferences screen follow:

- **Email Client.** Set to Lotus Notes.
- **Siebel/Lotus Form.** Set to Siebel Memo.

Completing Configuration for Microsoft Outlook

This topic describes the remaining steps for configuring Siebel Business Applications to use Microsoft Outlook for the Send Email command.

To complete configuration for Microsoft Outlook email client

1. Set the EnableWebClientAutomation parameter to TRUE to enable Web client automation.
   - For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager component, such as Call Center Object Manager for Siebel Call Center.
   - For Siebel Mobile Web Client deployments, specify this parameter as a parameter in the application configuration file, such as uagent.cfg for Siebel Call Center. This parameter is located in the [InfraUIFramework] section of the configuration file.

   By default, this parameter is FALSE. This parameter allows the Siebel desktop integration object (ActiveX control) to be downloaded. (The source CAB file of this object is SiebelAx_Desktop_Integration.cab. The downloaded object name is Siebel Desktop Integration.) For more information about the CAB file and ActiveX control, see *Siebel System Administration Guide* .
2. Set the EnableEmailClientAutomation parameter to TRUE to enable email client automation.
   - For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager component, such as Call Center Object Manager for Siebel Call Center.
   - For Siebel Mobile Web Client deployments, specify this parameter as a parameter in the application configuration file, such as uagent.cfg for Siebel Call Center. This parameter is located in the [InfraUIFramework] section of the configuration file.

   By default, this parameter is FALSE. This parameter allows the Siebel email automation object (ActiveX control) to be downloaded. (The source CAB file of this object is SiebelAx_OutBound_mail.cab. The downloaded object name is Siebel Email Support for Microsoft Outlook and Lotus Notes.) For more information about the CAB file and ActiveX control, see *Siebel System Administration Guide* .
3. As appropriate, specify a global default designating Microsoft Outlook as the email client your users use for the Send Email command.

   Use the following information:
   - **Default Email Client.** For Siebel Web Client deployments, specify this parameter for the Application Object Manager.
   - **DefaultMailClient.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the application configuration file, such as uagent.cfg for Siebel Call Center.

   If you do not specify a global default, then the Siebel native email client is the default. For more information, see *Parameters for Email Client*.
4. Specify a global default designating IPM.Note.Siebel as the name of the email form you use with Microsoft Outlook.

Use the following information:

- **Siebel/Outlook Form.** For Siebel Web Client deployments, specify this parameter for the Application Object Manager.
- **OutlookForm.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the local Siebel client configuration file.

For more information, see *Parameters for Email Client*.

5. Specify a global default specifying where email attachments are temporarily stored.

   Use the following information:

   - **Email Temporary Attachment Location.** For Siebel Web Client deployments, specify this parameter as a component parameter for the Application Object Manager.
   - **SiebelExtMailClientAttDir.** For Siebel Mobile Web Client deployments, specify this parameter in the [EMail] section of the local Siebel client configuration file.

   For more information, see *Creating and Configuring the Attachments Directory* and *Parameters for Email Client*.

As appropriate for your deployment, users might specify Siebel user preference settings for their email client. Users might set user preferences, for example, if you support more than one email client option for Send Email. For more information, see *Preference Settings for Outbound Communications*.

The global defaults apply if no user preference is set. User preferences override the corresponding global defaults that the Default Email Client or Siebel/Outlook Form parameters specify. For more information about these parameters, see the table in the topic *Parameters for Email Client*.

Applicable user preferences in the Send Email section of the Outbound Communications view of the User Preferences screen follow:

- **Email Client.** Set to Microsoft Outlook.
- **Siebel/Outlook Form.** Set to IPM.Note.Siebel.

Parameters for Email Client

The following table describes the parameters to specify settings applicable to your client-side email integration. You set these parameters either as server component parameters or as parameters in the [EMail] section of the configuration file, depending on your Siebel client type. For more information about user preferences, see *Preference Settings for Outbound Communications*.

Component Parameter for Application Object Manager	Parameter in [EMail] Section of Configuration File	Description
Default Email Client	DefaultMailClient	The default email client. Set this parameter to one of the following values: • Siebel Mail Client • Lotus Notes • Microsoft Outlook

Component Parameter for Application Object Manager	Parameter in [EMail] Section of Configuration File	Description
		The default value is Siebel Mail Client. If the value is Lotus Notes or Microsoft Outlook, then you must use other parameters to specify the name of the applicable email form. This parameter corresponds to the Outbound Communications user preference of Email Client. The parameter setting is in effect unless this user preference overrides it.
Email Client Debug Level	DebugLevel	The level of debugging information to log when you use Lotus Notes or Microsoft Outlook for Send Email. Set this parameter to one of the following values: • **0.** No logging occurs for the email client. • **1.** Logging occurs for ActiveX and JavaScript (Siebel eScript) associated with the email client. Debugging information is logged to the siebelmail.log file on each user's desktop. The siebelmail.log file tracks the execution of scripts associated with the Lotus Notes or Microsoft Outlook form. When this parameter is 1, email client debugging information is logged as follows: • For Microsoft Outlook, the siebelmail.log file is overwritten for each new email message that is sent. Additional debugging data appears as messages in the user's email mail, with a subject line in the form SiebelDebugLog_ *activity_ID*. • For Lotus Notes, additional debugging data is logged to the SiebelEmaildbg.log file on in the Lotus Notes directory. **Note:** For a development or test environment, set this parameter to 1. For a production environment, set it to 0.
Email Temporary Attachment Location	SiebelExtMailClientAttDir	The name of the directory to use to temporarily store email attachments. Specify the name in the following general form (on one line): ***`clientpath;serverpath`*** where *clientpath* identifies the server computer and path to the attachments directory as accessed from client computers, and *serverpath* identifies the *same directory* as accessed from the server. Note the following examples:

Component Parameter for Application Object Manager	Parameter in [EMail] Section of Configuration File	Description

		• If the server computer runs Microsoft Windows, then the two elements you define must be identical. For example:
		
		`\\servername\attachment;`
		
		`\\servername\attachment`
		
		• If the server computer runs on a supported UNIX platform, then the left element represents how Windows clients access the directory, and the right element represents the path on the UNIX server computer. For example:
		
		`\\aixhost\attachment;`
		
		`/export/user/attachment`
		
		• For Siebel Mobile Web Client deployments on Microsoft Windows platforms, a local attachments directory is required if users run the Siebel application when disconnected from the network. The two elements you define must be identical. For example:
		
		`C:\temp;C:\temp`
		
		For more information, see *Creating and Configuring the Attachments Directory*.

Siebel/Lotus Form	LotusForm	The name of the email form to use as a global default when Lotus Notes is the email client. Typically, set this parameter to Siebel Memo. This parameter corresponds to the Outbound Communications user preference of Siebel/Lotus Form. The parameter setting is in effect unless this user preference overrides it. For more information, see topics applicable to Lotus Notes and *About Installing Siebel Email Form*. **Note:** This parameter is not available in Siebel Open UI.
Siebel/Outlook Form	OutlookForm	The name of the email form to use as a global default when Microsoft Outlook is the email client. Typically, set this parameter to IPM.Note.Siebel. This parameter corresponds to the Outbound Communications user preference of Siebel/Outlook Form. The parameter setting is in effect unless this user preferences overrides it. For more information, see topics applicable to Microsoft Outlook and *About Installing Siebel Email Form*.

Component Parameter for Application Object Manager	Parameter in [EMail] Section of Configuration File	Description
		Note: This parameter is not available in Siebel Open UI.

Modem-Based TAP Paging Driver

The Modem-Based TAP Paging communications driver is a feature of Siebel Paging. For more information about communications drivers, see *Communications Drivers Provided with Siebel CRM* and *Process of Setting Up Communications Driver Profiles*.

Note: Siebel Paging is included with all base applications of the Siebel Business Applications.

Settings for Modem-Based TAP Paging Driver

The following table lists the settings for the driver record for the Modem-Based TAP Paging driver. These settings appear in the Communications Drivers and Profiles view of the Administration - Communications screen.

CAUTION: The values in the following table are for reference only. Do not modify the predefined values for this driver.

Field Name	Value
Name	Modem-Based TAP Paging
Channel Type	Page
Inbound	Off
Outbound	On
Interactive	Off
Channel String	TAP
Library Name	sscmtapm

Parameters for Modem-Based TAP Paging Driver

The following table lists the supported parameters for the Modem-Based TAP Paging communications driver. This driver supports the TAP (Telocator Alphanumeric Paging) protocol.

When using CommOutboundMgr with the Modem-Based TAP Paging communications driver, the following error message might appear:

- **`Unable to connect to the paging host system. The phone line may be busy or the phone number may be invalid.`**

  Check the paging phone number the modem dials, including area code. If *9* is required, make sure that it is included in the number.

- **`Unable to open the communication port.`**

  Verify the communications settings for your application.

- **`Error communication profile`** *profile_name* **`for CommSrvr paging.`**

  An error occurred using a specific profile (*profile_name*) for the communications driver Modem-Based TAP Paging. Verify that driver and profile parameter values are defined appropriately for your application.

Name	Required	Default Value	Description
Dial Prefix	No	9	The prefix for outbound dialing.
Local Area Code	No	Not applicable	The area code of the phone line for sending pages. There is no default value for this parameter, but a user must specify a value at the customer site to dial local numbers successfully.
LogDebug	No	FALSE	The amount of detail in the log file. When the value is TRUE, data output in the log file is more detailed than when the value is FALSE. Log files are created in the **`log`** subdirectory of the Siebel Server installation directory.
Long Distance Prefix	No	1	The long-distance prefix to add to long-distance calls.
Modem Dial String	No	ATDT	The modem command for dialing a phone number.
Modem Hangup String	No	ATH	The modem command for hanging up.
Modem Init String	No	AT&FQ0V1	The modem command for initializing the modem. You might need to change the default value to work with different modems. For example, some modems expect a numeric value such as *AT&F1Q0V1* after the *&F* string.

Name	Required	Default Value	Description
			Consult your modem's manual for valid modem commands and values. You might need to add other commands to initialize your modem properly. For example, you might need to disable any compression or speed-enhancing features on your modem. Consult your modem's manual for more information.

Modem Port	No	COM1	The computer's communications port to which the modem is attached.
			
			The exact value for Modem Port depends on the platform and on the specific devices. For example, for Oracle Solaris, you can use the following value:
			
			`/dev/cua/a`
			
			For AIX, you can use the following value:
			
			`/dev/tty1`

Modem Reset String	No	ATZ	The modem command for resetting the modem.
Modem Restore String	No	AT&F	The modem command for restoring the default settings of the modem.
Siebel Server	No	Not applicable	The name of the Siebel Server that handles the delivery of the communications. For more information, see *Specifying Siebel Server for Communications Outbound Manager*.

FTP Driver

Siebel Marketing uses the FTP communications driver to send contact lists to vendors who are contracted to execute campaigns. You can also use it to send outbound communication requests from any Siebel application. For more information about Siebel Marketing, see *Siebel Marketing Installation and Administration Guide* . For more information about communications drivers, see *Communications Drivers Provided with Siebel CRM* and *Process of Setting Up Communications Driver Profiles*.

Note: This feature sends files to the root directory of the specified user. This feature does not support specifying a particular target directory on the remote FTP server.

Settings for FTP Driver

The following information lists the settings for the driver record for the FTP driver. These settings appear in the Communications Drivers and Profiles view of the Administration - Communications screen.

CAUTION: The values in the following table are for reference only. Do not modify the predefined values for this driver.

Field Name	Value
Name	FTP
Channel Type	FTP
Inbound	Off
Outbound	On
Interactive	Off
Channel String	FTP
Library Name	sscmftp

Parameters for FTP Driver

The following table lists the supported parameters for the FTP communications driver. This driver supports FTP (File Transfer Protocol). Note the following requirements for sending files using the FTP driver:

- You must identify (in the hosts file or equivalent on the Siebel Server computer) the name of the FTP server computer (such as a vendor's FTP server) to which the files are sent using FTP.
- You must define the user (that the Username and Password FTP driver parameters specify) as a user locally on the FTP server to which the files are sent using FTP.

Name	Required	Default Value	Description
Filename	No	Not applicable	The name of a specific file to upload each time the profile for this driver is used.
Hostname	No	Not applicable	The fully qualified domain name of the computer to which the FTP connection is established. **Note:** You must define either Hostname *or* IP Address for any profile that you create for this driver.
IP Address	No	Not applicable	The IP address of the computer to which the FTP connection is established. **Note:** You must define either Hostname *or* IP Address for any profile that you create for this driver.

Name	Required	Default Value	Description
LogDebug	No	FALSE	The amount of detail in the log file. When the value is TRUE, data output in the log file is more detailed than when the value is FALSE. Log files are created in the `log` subdirectory of the Siebel Server installation directory.
Password	Yes	Not applicable	The password for the user account that accesses the FTP server.
Port	No	21	The port that the FTP server uses.
Siebel Server	No	Not applicable	The name of the Siebel Server that handles the delivery of the communications. For more information, see *Specifying Siebel Server for Communications Outbound Manager*.
Username	Yes	Not applicable	The login name for the account that accesses the FTP server.

12 Using Communications Operations

Using Communications Operations

This chapter provides information for agents about managing email messages. It includes the following topics:

- *About Email Messages for Siebel Email Response*
- *Process of Managing Email Messages for Siebel Email Response*
- *Specifying Preferences for Outbound Communications*
- *Creating Communications Profiles for Personal Use*
- *Using Send Commands to Send Messages*
- *Creating Activities for Send Commands*
- *Specifying Settings for Mobile Devices*

About Email Messages for Siebel Email Response

Agents receive incoming email messages in the Communications screen in the Communications List view. They select incoming email messages from their communications list. Their deployment might allow them to accept messages using the communications toolbar. In replying to email messages, agents can select appropriate templates and solutions, or they can compose free-form content. For more information, see *Process of Managing Email Messages for Siebel Email Response*.

An agent can attach useful literature or files to a reply and use the spell check feature to find spelling errors. For more information about the spell check feature, see *Spell Check*.

Whether or not the Siebel database uses Unicode, incoming email content is converted to Unicode. If the Siebel database uses Unicode, then all characters are saved in the Siebel database after the conversion. Any characters that the in-use code set does not support are *not* saved after the conversion. When agents reply to incoming email, the Smart Character Set feature determines the character set of the reply. For information about this feature, see *Smart Character Set for Siebel Email Response*.

About Status Field Changes for Email Messages

The Set ParentEmail Status business service controls the Status field changes in an original email message (the parent email) and in subsequent email messages that are associated with the original message (child email).

The following table shows user actions and the resulting values in the Status field of parent and child email for parent outbound messages. For the user actions in this table, child messages are always outbound.

User Action	Parent Email Status	Child Email Status
Action 1: Click the Reply, Reply to All, or Forward button for an outbound parent email with a Status field value of Done. Result: A child email is created.	Done	In Progress
Action 2A: Click the Save as Draft button for the child email with a Status field value of In Progress.	Done	Draft
Action 2B: Step off the child email with a Status field value of In Progress.	Done	Draft
Action 3A: Click the Resume button for the child email with a Status field value of Draft.	Done	In Progress
Action 3B: Step off the child email with a Status field value of Partial.	Done	Draft
Action 4: Select Undo Record from the menu for the child email with a Status field value of In Progress. Result: All changes to the child email are reversed.	Done	In Progress
Action 5A: Click the Delete button for the child email with a Status field value of In Progress. Result: The child record is deleted.	Done	None
Action 5B: Click the Send button for the child email with a Status field value of In Progress.	Done	Queued then, Done
Action 6: Assume the Status field value for the child email is Cancelled. Click the Re Send button for the child email with a Status field value of Cancelled.	Done	Queued then, Done or Cancelled
Action 7A: Assume the Status field value for the child email is Partial. Click the Resume button for the child email with a Status field value of Partial.	Partial or Done	Partial or In Progress.
Action 7B: Select the Recipient with the Status Failed. Correct the failed email address, then Click Send.	Done or Partial	Queued then, Done or Cancelled

The following table shows user actions and the resulting values in the Status field of parent and child email for parent inbound messages. For the user actions in this table, child messages are always outbound.

User Action	Parent Email Status	First Child Email Status	Second Child Email Status	Third Child Email Status
Action 1: Click the Reply, Reply to All, or Forward button for an inbound parent email with a Status field value of Not Started. Result: The first child email is created.	In Progress	In Progress	None	None

User Action	Parent Email Status	First Child Email Status	Second Child Email Status	Third Child Email Status
Action 2: Click the Save as Draft button for the first child email with a Status field value of In Progress.	In Progress	Draft	None	None
Action 3: Click the Reply, Reply to All, or Forward button for the parent email with a Status field value of In Progress. The second child email is created.	In Progress	Draft	In Progress	None
Action 4: Click the Send button for the second child email with a Status field value of In Progress.	In Progress	Draft	Done	None
Action 5: Click the Resume button for the first child email with a Status field value of Draft.	In Progress	In Progress	Done	None
Action 6: Select Undo Record from the menu for the first child email with a Status field value of In Progress. Result: All changes to the first child email are reversed.	In Progress	In Progress	Done	None
Action 7: Click the Delete button for the first child email with a Status field value of In Progress. Result: The first child email is deleted	Done	None	Done	None
Action 8: Click the Reply, Reply to All, or Forward button for the inbound parent email with a Status field value of Done. Result: The third child email is created.	In Progress	None	Done	Draft
Action 9A: Select Delete Record from the menu for the third child email with a Status field value of Draft. The third child email is deleted.	Done	None	Done	None
Action 9B: Assume the Status field value for the first child email is Queued. Select Delete Record from the menu for the third child email with a Status field value of Draft. The third child email is deleted.	In Progress	Queued	Done	None

Process of Managing Email Messages for Siebel Email Response

To manage email messages, perform the following tasks:

- *Replying to Incoming Messages*
- *Resending Outgoing Messages*
- *Resending Outgoing Messages That Have Failed Because of Incorrect Email Addresses*
- *Using Templates in Outgoing Messages*
- *Saving Drafts of Outgoing Messages*
- *Retrieving Drafts of Outgoing Messages*
- *Saving Messages as Templates*

Replying to Incoming Messages

After you send or cancel an outgoing message:

- If you select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the outgoing message form continues to appear. You must navigate to the Communications List view to see a record of the sent message.
- If you do not select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the Communications List view appears.

Complete the procedure in this topic to reply to an incoming message.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To reply to an incoming message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Inbox in the Saved Queries field of the toolbar.
3. In the list of email messages, select the incoming message to which you want to reply.
4. To see more details about this message you can:
    - Click the Body view tab to review the main text of the incoming message.
    - Click the Attachments view tab, and then click the Name field in the list of attachments to review the content of an attachment for the incoming message.

      The original message also appears in the list of attachments.
    - (Optional) Click the More Info view tab to review information about the header, customer, attributes, and transmission of the incoming message.
    - (Optional) Click the History view tab to review any other messages that have the same email thread ID as the incoming message.
    - (Optional) Drill down on the Last Name field for the message to review information about the contact for the message.
5. Navigate to the outgoing message form:

- Click Reply to respond to only the individual who sent the message.
- Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
- Click Forward to respond to the individuals whom you select in the outgoing message form.

  The form for the incoming message appears at the beginning of the screen. To show or hide the body of the incoming message, you can click the show more or show less button in the incoming message form.

  The form for your outgoing message appears after the form for the incoming message.

6. (Optional) Link additional data to the email thread for the outgoing message.

   a. Click the select button in the SR # (number), Opportunity, Contact, or Account field of the outgoing message form.
   b. Select the appropriate record, and click OK.

      If the SR # (number), Opportunity, Contact, or Account field already contains a value, then click the preview button to view more details about that value.

7. Enter text for the outgoing message in the area of the message body that is before the Thread ID reference.

   In the outgoing message form, click Delete if you want to delete the outgoing message. To expedite text entry, you can use templates. For more information, see *Using Templates in Outgoing Messages*.

8. (Optional) In the outgoing message form, click Check Spelling to verify the spelling in the outgoing message.
9. (Optional) In the list of Outgoing Attachments that appears after the outgoing message form, insert the supporting documents in your outgoing message:

   - To add an attachment, click the Attachment icon (the paperclip), navigate to the attachment, and select it.
   - To add literature, click the Add Literature icon (the sheet of paper), select the document from the list, and click Add.

10. In the outgoing message form, click Send after you finish composing the outgoing message.

    The outgoing message is sent.

11. (Optional) To view the record for the sent message, select Sent Items in the Saved Queries field of the toolbar.

Resending Outgoing Messages

When Communications Outbound Manager fails to send an outgoing message, the Status field of the outgoing message changes to Cancelled. You can resend these cancelled messages.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To resend an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Cancelled Items in the Saved Queries field of the toolbar.
3. In the list of email messages, select the outgoing message that you want to resend.
4. Click Re-Send.

Resending Outgoing Messages That Have Failed Because of Incorrect Email Addresses

When Communications Manager fails to send an outgoing message to multiple recipients in which some of the recipients have incorrect email addresses, the Status field of the outgoing message changes to Partial. You can resend these messages to those recipients who failed on the first attempt.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To resend an outgoing message that failed because of incorrect email address

1. Navigate to the Communications screen, then the Communications List view.
2. In the list of email messages, select the outgoing message with a Partial status that you want to resend.
3. Click Recipients and look for a Failed status.
4. Click Resume to navigate to the outgoing message form.
5. Correct the email address.
6. Click Send.

Using Templates in Outgoing Messages

To expedite entry of greeting, body, and closing text in outgoing messages, agents can use templates. Before using a template for body text, you must create the template, associate the template with a category, and include the category in a catalog. For more information about creating templates, see *Creating Simple Templates*. For more information about catalogs and categories, see *About Catalogs and Categories for Siebel Email Response*.

To use a template, you insert the template text into the outgoing message. Then you can change that text, if necessary. You can also delete that text, and insert other template text. You insert text for a solution into an outgoing message in the same way that you insert any other template text.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To use a template in an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. In the list of email messages, select the message for which you want to use a template.
3. Navigate to the outgoing message form:
    - If the message that you select does not have a status of Draft, perform one of the following actions:
        - Click Reply to respond to only the individual who sent the message.
        - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
        - Click Forward to respond to the individuals whom you select in the outgoing message form.
    - If the message that you select has a status of Draft, then click Resume.

      The form for the incoming message appears at the beginning of the screen. To show or hide the body of the incoming message, you can click the show more or show less button in the incoming message form.

The form for your outgoing message appears after the form for the incoming message.

4. If you want to insert template text for the greeting of the message, then select the template in the Greeting field of the outgoing message form.

   The greeting template text appears at the beginning of the outgoing message.

   If you select another greeting template, then the template text replaces the greeting text of the outgoing message. If you delete the greeting template text and want to reinsert the same text, then you must clear the Greeting field, and then reselect the template in the Greeting field.
5. If you want to insert template text for the body of the message:

   a. In the Categories field of the outgoing message form, select the category that applies to the body template.
   b. Select the template in the Body field of the outgoing message form.

      The body template text appears after the text for the greeting template. If you enter greeting or body text before you insert the template text for the body of the message, then the body template text appears after the text that you enter.
   c. If necessary, insert other body template text.

   The text for each selected template appears after the text for the previously selected template.

   If you delete the body template text and want to reinsert the same text, then you must reselect the category that applies to the template, and then reselect the template in the Body field.
6. If you want to insert template text for the closing of the message, then select the template in the Closing field of the outgoing message form

   The closing template text appears at the end of the outgoing message before the Thread ID reference.

   If you select another closing template, then the template text replaces the closing text of the outgoing message. If you delete the closing template text and want to reinsert the same text, then you must clear the Closing field, and then reselect the template in the Closing field.

Saving Drafts of Outgoing Messages

When composing an outgoing message, agents might not have the time or information that they need to complete the message and then send it. They can save this incomplete message, and then later retrieve this draft to complete the message before sending it. For more information, see *Retrieving Drafts of Outgoing Messages*.

You can also save a draft of a sent message.

After you save a draft of an outgoing message:

- If you select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the outgoing message form continues to appear. You must navigate to the Communications List view to see a record of the draft of the outgoing message.
- If you do not select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the Communications List view appears.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To save a draft of an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Inbox or Sent Items in the Saved Queries field of the toolbar.
3. In the list of email messages, select the message that you want to save as a draft.
4. Navigate to the outgoing message form:
   - Click Reply to respond to only the individual who sent the message.
   - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
   - Click Forward to respond to the individuals whom you select in the outgoing message form.

   The form for the incoming message appears at the beginning of the screen. To show or hide the body of the incoming message, you can click the show more or show less button in the incoming message form.

   The form for your outgoing message appears after the form for the incoming message.
5. Enter text for the outgoing message in the area of the message body that is before the Thread ID reference.

   In the outgoing message form, click Delete if you want to delete the outgoing message. To expedite text entry, you can use templates. For more information, see *Using Templates in Outgoing Messages*.
6. In the outgoing message form, click Save As Draft.
7. If you want to make further changes to the draft, then click Resume, enter the changes, and click Save As Draft again.

   The message is saved as a draft.

   > **Note:** If you do not click Save As Draft, then the message is still saved as a draft when you navigate to another screen or view in Siebel Email Response.

8. (Optional) To view the record for the draft message, select Drafts in the Saved Queries field of the toolbar.

Retrieving Drafts of Outgoing Messages

When composing an outgoing message, agents might not have the time or information that they need to complete the message and then send it. They can save this incomplete message, and then later retrieve this draft to complete the message before sending it. For more information, see *Saving Drafts of Outgoing Messages*.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To retrieve a draft of an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Drafts in the Saved Queries field of the toolbar.
3. In the list of email messages, select the draft message.
4. Click Resume to navigate to the outgoing message form for the draft.

   The form for the incoming message appears at the beginning of the screen. To show or hide the body of the incoming message, you can click the show more or show less button in the incoming message form.

   The form for your outgoing message appears after the form for the incoming message, and this form contains the draft text.

5. If necessary, change the content in the draft message.

   Note: If you want to rescind your changed content, then you must delete that content. Do not click Delete to rescind your changed content. Click Delete only if you want to delete the draft message.

6. To save the draft message, click Save As Draft at the beginning of the outgoing message form.
7. If you want to make further changes to the draft, then click Resume, enter the changes, and click Save As Draft again.

   The message is saved as a draft.

   Note: If you do not click Save As Draft, then the message is still saved as a draft when you navigate to another screen or view in Siebel Email Response.

8. To send the draft message, click Send on the outgoing message form.

   The outgoing message is sent.
9. (Optional) To view the record for the sent message, select Sent Items in the Saved Queries field of the toolbar.

Saving Messages as Templates

An agent might decide that the content of a message is likely to apply to replies for future incoming messages. The agent can save the message as a simple template, so that the agent or other agents can use that simple template to expedite text entry in future outgoing messages.

After you save a message as a template, the Status field of the template is Draft. You must change this field to Active, so that when agents create outgoing messages, this template is available for selection in the Body field of the outgoing message form. Also, templates are available for selection in the Body field of the outgoing message form only after you associate them with a category and include that category in a catalog. For more information about associating a template with a category and about including a category in a catalog, see *Setting Up a Catalog for Siebel Email Response*.

When you save a message as a template, the Thread ID reference from the message is not included in the template.

To save a message as a template, you select an initial message, and then navigate to the outgoing message form. When you save a message as a template, you also create a draft of that message. You can delete this draft message, or you can use this draft message to respond to the initial message that you select.

This task is a step in *Process of Managing Email Messages for Siebel Email Response*.

To save a message as a template

1. Navigate to the Communications screen, then the Communications List view.
2. Select Inbox, Sent Items, or Drafts in the Saved Queries field of the toolbar.
3. In the list of email messages, select the message for which you want to save a message template.
4. Navigate to the outgoing message form:
   - If the message that you select does not have a status of Draft, then perform one of the following actions:
     - Click Reply to respond to only the individual who sent the message.
     - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
     - Click Forward to respond to the individuals whom you select in the outgoing message form.

- If the message that you select has a status of Draft, then click Resume.

  The form for the incoming message appears at the top of the screen. To show or hide the body of the incoming message, you can click the show more or show less button in the top-right corner of the incoming message form.

  The form for your outgoing message appears below the form for the incoming message.

5. At the beginning of the outgoing message form, click Save as Template.

   The Templates dialog box appears.
6. Change the fields and message text in the Templates dialog box as necessary, and click OK.

   The template is created, and the form for your outgoing message appears again after the form for the incoming message.
7. To view the record for the template, navigate to the Communications screen, then the My Templates view.
8. Change the Status field of the template record from Draft to Active to make the template available to other users.

Specifying Preferences for Outbound Communications

This topic describes how users can specify outbound communications preferences.

To specify preferences for outbound communications

1. From the application-level menu, choose Tools, then User Preferences.
2. From the link bar, choose Outbound Communications.
3. Specify the preferences.

   For more information about preference settings, see *Preference Settings for Outbound Communications*.
4. As necessary for the particular setting, log out of the Siebel application, and log in again.

   The descriptions for each user preference setting indicate whether this step is required.

Preference Settings for Outbound Communications

This topic describes the preferences in the Outbound Communications view of the User Preferences screen. The preference settings are grouped by category. Each preference applies only to certain communications features.

Preferences for Send Email Category

This topic contains information about the outbound communications preferences in the Send Email category. These preferences apply to using some or all of the following Send commands: Send Email, Send Fax, Send Wireless Message, or Send Page. Also refer to the settings under the Advanced Features category.

The Send Email category includes the following preferences:

- **Upon Sending Messages Generate.** Specifies activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. For more information, see *Creating Activities for Send Commands*.

  The drop-down list displays the following values:

  - **Public activities.** Sets the Internal flag to FALSE for activity records that sent outbound messages generate. The Internal flag restricts visibility of activity records.
  - **Private activities.** Sets the Internal flag to TRUE for activity records that sent outbound messages generate.
  - **No activities.** Specifies that sent outbound messages do not generate activity records.

- **Default Profile.** Specifies the default communications profile for a user for the Send Email and Send Fax commands.

  The default profile information is copied to the From field in the Send Email and Send Fax windows. Alternatively, agents can specify the profile.

  The profile provides access to the communications driver (the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server driver) that serves as the interface from the Siebel Business Applications deployment to the email or fax server. For the Send Email and Send Fax commands, the profile handles outbound communications using the SMTP protocol.

  The visibility applicable to the user determines the profiles that are available for selection. A profile is available in the following scenarios:

  - The user created the profile for personal use in the My Profiles view of the Communications screen.
  - The user's responsibility is one of the responsibilities associated with the profile.

  In the Mobile screen, you associate profiles applicable to wireless messages with the recipient's mobile device. For more information, see *Specifying Settings for Mobile Devices*.

- **Default Recipient Class.** Specifies the default choice for where recipient email or fax address information is populated for the Send Email and Send Fax commands. Choices are To, Cc, and Bcc.

  For example, an individual user might generally want to populate recipients to the To field. However, depending on the user's typical activities and on your company's business needs, it might be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.

- **Email Client.** Specifies whether to use a supported third-party email client application for the Send Email command. If you do not specify a third-party option, then you can use the native Siebel email client. (You do not need to specify any value if the administrator sets a global setting.)

  Available options follow:

  - **Lotus Notes.** Specifies that you use Lotus Notes for the Send Email command.
  - **Microsoft Outlook.** Specifies that you use Microsoft Outlook for the Send Email command.
  - **Siebel Email Client.** Specifies that you do not use a third-party email client. You use the email client option that Siebel Business Applications provide. This option is also referred to as the *native Siebel email client*.
  - **External Email Client.** Specifies that you use an external email client for the Send Email command.

The administrator must perform additional configuration and integration steps for each option. For more information, see *Managing Integrations with Email and Fax Servers* and *Configuring Client-Side Integration for Send Email Command*.

Note: The Send Fax command does not support Lotus Notes or Microsoft Outlook.

- **Siebel Or Outlook Form.** Specifies the Microsoft Outlook form you use if you specify Microsoft Outlook for the Email Client setting. The name you specify must match the name of the form the administrator installs and specifies. (You do not need to specify any value if the administrator sets a global setting.)
- **Siebel Or Lotus Form.** Specifies the Lotus Notes form you use if you specify Lotus Notes for the Email Client setting. The name you specify must match the name of the form the administrator installs and specifies. (You do not need to specify any value if the administrator sets a global setting.)
- **Default Message Format.** Specifies whether you can format and send email or fax messages composed in the Send Email or Send Fax windows using HTM or only plain text.

  Specify the HTML option to enable HTML editing controls for Send Email and Send Fax, or specify Plain Text to edit and send messages as only plain text.

  When the default message format is HTML, formatting is preserved for email and fax messages you send. Email messages are sent as HTML messages. Fax messages are, of course, sent as facsimiles.

  This preference also specifies the templates you can select for Send Email and Send Fax. These templates are based on the setting of the HTML Template check box for each applicable template. HTML templates are listed when the default message format is HTML, and plain-text templates are listed when the default message format is Plain Text.

Related Topics

Sending Email Messages Using Native Siebel Email Client

Sending Email Messages Using Lotus Notes or Microsoft Outlook

Sending Faxes

Editing and Formatting Controls for Send Email and Send Fax Commands

Configuring Communications Templates

Preferences for Email Response Category

This topic contains information about the outbound communications preferences in the Email Response category. These preferences apply only to using Siebel Email Response. Also refer to the settings under the Advanced Features category.

The Email Response category includes the following preferences:

- **Default Greeting Template.** Specifies a communications template (for the email channel) to use as a greeting for an email reply sent using Siebel Email Response. The template content is automatically inserted into the message.
- **Default Closing Template.** Specifies a communications template (for the email channel) to use as a closing for an email reply sent using Siebel Email Response. The template content is automatically inserted into the message.

- **Default Message Format.** Specifies whether you can format and send email replies to inbound messages using HTML or only plain text.

  Specify the HTML option to enable HTML editing controls in the Outbound Message form, or specify Plain Text to edit and send messages as only plain text.

  When the default message format is HTML, formatting is preserved for email messages you send. Messages are sent as HTML messages.

  This preference also specifies the templates that appear in the Body drop-down list in the Outbound Message form. These templates are based on the setting of the HTML Template check box for each applicable template. HTML templates are listed when the default message format is HTML, and plain-text templates are listed when the default message format is Plain Text. For more information, see *Configuring Communications Templates*.
- **Include Original Message in Reply.** Specifies if the content of the original inbound message is included in a reply to that message.
- **Remain on Same View After Send (Cancel).** Specifies that, after clicking Send or Cancel in the Outbound Message form, the agent stays in the same view, and is not automatically navigated to the Communications list. If the agent clicks Send, then the next record in the current list of communications appears.

Preferences for Advanced Features Category

This topic contains information about the outbound communications preferences in the Advanced Features category. These settings apply to both the Send Email command and email replies you compose using Siebel Email Response.

The Advanced Features category includes the following preferences:

- **Language.** Specifies the language that determines the templates that appear in the Body drop-down list for each of the Send commands or for the Outbound Message form for email replies. For more information about setting up languages, see *Siebel Global Deployment Guide* and *Siebel Applications Administration Guide* .

  Templates appear only if the language you specify matches the language for the template. Template filtering is based on both the language and locale as well as other factors. For more information, see *Visibility and Access for Templates*.

  If this field is blank, then template filtering applies to the language in effect for the Application Object Manager.

  You can override this setting at runtime in the window for the Send command or in the Outbound Message form to display other templates.
- **Locale.** Specifies the locale that determines the templates that appear in the Body drop-down list for each of the Send commands or for the Outbound Message form for email replies. For more information about setting up locales, see *Siebel Global Deployment Guide* and *Siebel Applications Administration Guide* .

  Templates appear only if the locale you specify matches the locale for the template. Template filtering is based on both the language and locale as well as other factors. For more information, see *Visibility and Access for Templates*.

  If this field is blank, then template filtering applies to the locale in effect for the Application Object Manager.

  You can override this setting at runtime in the window for the Send command or in the Outbound Message form to display other templates.

Related Topics

Sending Email Messages Using Native Siebel Email Client

Sending Email Messages Using Lotus Notes or Microsoft Outlook

Configuring Communications Templates

Creating Communications Profiles for Personal Use

Each user can create profiles for personal use in the My Profiles view of the Communications screen. Such profiles are available to only the user who creates them.

> **Note:** By default, end-user responsibilities such as Email Response Agent and Universal Agent do not have access to the My Profiles view (CommSrv CM Profile Personal View). Administrators can add this view to any responsibility, as required.

Profiles that users create are generally applicable only to the Send Email and Send Fax commands. Administrators must generally create profiles for the Send Wireless Message command. For more information about using these commands, see *Using Send Commands to Send Messages*.

Communications administrators, who create communications profiles for various purposes, can provide guidance to users about creating personal profiles. These administrators can address the following issues:

- Naming personal profiles.
- The drivers for which to create profiles. For more information about communications drivers and profiles, see *Communications Drivers Provided with Siebel CRM* and *Process of Setting Up Communications Driver Profiles*.
- The profile parameters and the override values. For more information about communications drivers provided with Siebel Business Applications and about driver parameters for which you can provide override values in profiles, see *Managing Email, Fax, and Other Communications Products*.
- Using personal profiles.

To create a communications profile for personal use

1. Navigate to the Communications screen, then the My Profiles view.
   The Profiles list displays the profiles that you created.
2. In the Profiles list, add a new record.
3. Enter the name of the profile.
   The name can be any unique name among existing profiles. Existing profiles include the profiles that you cannot view. Typically, you specify your email address as the name. You also specify this name as a parameter override value for the From Address parameter.
4. Specify a communications driver on which to base this profile.
   For profiles for email or fax, select Internet SMTP/IMAP Server or Internet SMTP/POP3 Server.
5. Specify parameter override values for the profile by performing the following steps:
   a. In the Profile Parameter Overrides list, add a new record.
   b. For the Name field, specify a driver parameter name for which you want to provide an override value.

For example, if you want to add the From Address parameter, then you might also want to provide a value for the Reply-To Address parameter. In some cases, your administrator might instruct you to add the SMTP Server parameter.

c. For the Value field, specify the value for the parameter. Note the following examples:
   - For From Address, specify your own email address, using the appropriate form.
   - For Reply-To Address, specify a reply address if it differs from the From Address.
   - For SMTP Server, specify the name of the SMTP server that is to process your outbound email communications.

Using Send Commands to Send Messages

This topic describes using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. It contains the following information:

- *About Send Commands*
- *Sending Email Messages Using Native Siebel Email Client*
- *Sending Email Messages Using Lotus Notes or Microsoft Outlook*
- *Sending Email Messages Using an External Email Client in Siebel Open UI*
- *Sending Faxes*
- *Editing and Formatting Controls for Send Email and Send Fax Commands*
- *Sending Wireless Messages*
- *Sending Pages*

About Send Commands

By default, the Send Email, Send Fax, Send Wireless Message, and Send Page commands are available in the File application-level menu for Siebel Business Applications users.

Apart from the Send Page command, these commands use communications drivers and profiles and are available when the communications infrastructure is in place. (The Send Email command does not use communications drivers and profiles when it is integrated with Microsoft Outlook or Lotus Notes.)

Employees can access these menu commands without a communications configuration. When you use the Send commands, you can specify communications templates to provide content. Siebel field data might be substituted in these templates. Alternatively, you can directly enter text or (for email or fax) attachments. Other users can create the templates for you, or you can create your own templates. For information about creating your own templates, see *Configuring Communications Templates* .

When you use the Send Email (with the native Siebel email client) or Send Fax commands, you can specify a profile to indicate who is sending the message. The profile might exist for your individual use or for group use, and typically includes your own email address or another email address as the sender. Alternatively, users might be allowed to create their own profiles. Among the profiles available to you, you can specify a default profile as a user preference. For information about creating your own profiles for email or fax, see *Creating Communications Profiles for Personal Use*. For information about specifying communications preferences for the Send commands, such as a preferred default profile, see *Specifying Preferences for Outbound Communications*. For more information about user preferences, see *Siebel Applications Administration Guide* .

Note: When you use the Send Email command, information about the email, such as recipients for To or CC or Bcc fields, is stored as an activity in the S_EVT_MAIL extension table. The base table for this extension table is S_EVT_ACT.

Communications sent from the Siebel Web Client are processed immediately. When you are connected to the local database and disconnected from the enterprise database, communications for email, wireless message, or fax sent from the Siebel Mobile Web Client are saved until you synchronize. The Communications Outbound Manager server component then processes them for delivery.

Settings in the Spelling tab of the User Preferences screen generally apply to all of the Send commands. However, note the following exceptions:

- The Always Check Spelling Before Sending setting applies to only Siebel Email Response.
- The Ignore HTML Tags setting applies to only Siebel Email Response, Send Email, and Send Fax.

Sending Email Messages Using Native Siebel Email Client

This topic describes using the Send Email command when your default email client is the native Siebel email client. You can send email to any recipient. Optionally, you can include Siebel application content in the email. Email addresses are retrieved from the Siebel database for email to employees or contacts. For more information about editing and formatting controls for Send Email message text, see *Editing and Formatting Controls for Send Email and Send Fax Commands*.

Whether the Pick Recipient dialog box appears after Step 2 in the following procedure depends on the kind of data that currently has the focus when you choose the Send Email command. Note the following points:

- If the current record is a person, such as a contact or employee, then the Pick Recipient dialog box does not appear. The Send Email window appears.
- If the current record is an element, such as a service request or account, then the Pick Recipient dialog box appears if generic recipients are configured. Choose generic recipients, such as the contacts associated with the current service request.

  Note: Users must generally select a single record before invoking Send Email when using templates for which field substitution is performed. If they select multiple records, then selected generic recipients are drawn from all the selected records. However, field substitution applies only to the first selected record, and a single email message is sent to all recipients.

- If the current record is a Siebel attachment or literature item, then the Pick Recipient dialog box does not appear. The Send Email window appears, and the item is added as an attachment to the pending email message. (Siebel attachments with a URL type are not added as email attachments.)

To send email messages using the native Siebel email client

1. Optionally, select one or more records of contacts, employees, or other persons for whom email addresses are defined in the Siebel database.

   Alternatively, select one or more records of attachments or literature items to send as attachments to the email message.
2. Perform one of the following steps:
   - From the application-level menu, choose File, then Send Email.

- Press F9.
- Click to the right of Initiate Work Item on the communications toolbar, then click Send Email, or click Initiate Work Item when *Send Email* is the displayed ToolTip text.

If you do not specify recipients in Step 1, then the Pick Recipient dialog box appears. If you specify recipients before invoking the command, then the Send Email window appears. If the Send Email window appears, then go to Step 4.

3. In the Pick Recipient dialog box, specify the recipient or specify no recipient yet.

   The available recipients to choose from depend on the application context. For example, if Send Email is invoked from a Service Requests list, then the choices are Service Request Contact and Service Request Owner.

   The Send Email window appears.
4. For the From field, specify the profile to represent who is sending the message.

   The listed profiles are the profiles created for communications drivers that support email, such as Internet SMTP/IMAP Server or Internet SMTP/POP3 Server. In some cases, a profile might be automatically inserted into this field. You can specify a default profile in the Outbound Communications view of the User Preferences screen.
5. For the To, Cc, or Bcc fields, perform one or more of the following steps:

   - Verify any recipients that were automatically inserted in previous steps.
   - Type any additional recipient email addresses. The email addresses you enter are not automatically validated. You must verify that the email addresses you enter are valid.
   - Use the address book to enter additional recipients. Click To, Cc, or Bcc and explicitly specify individual persons from the address book dialog box. For each intended recipient, select the To, CC, or BCC check box. After specifying all recipients, click OK. Verify that the addresses appear correctly.
6. Optionally, for the Body drop-down list, choose the name of a communications template (with a Body type) to insert into the message body.

   You can configure a template to insert automatically, according to where you invoked the Send Email command. For more information, see *Configuring Default Templates for Send Email Command*.

   Field substitution applies to template text when you insert the text into a message. Substitution functions correctly if the fields must in the current list or form (containing focus) in the Siebel application. Field substitution applies to only a single selected record.

   You can insert more than one template. Any template you choose is appended to the existing text.

   The listed templates are subject to filtering that is based on several factors, including channel, language, locale, and whether the template is HTML or plain text. For more information, see *Visibility and Access for Templates*.
7. Click Change Language or Locale to change the language or locale, as necessary.

   Setting the language and locale changes the list of available templates to those associated with the language and locale you specify.
8. Optionally, verify or enter text for the subject line.

   Text might be automatically inserted into the subject line when you select a template.
9. Optionally, enter and format free-form text to modify or add to the template text.

   For information about the available text-editing controls, see *Editing and Formatting Controls for Send Email and Send Fax Commands*.

10. Optionally, if you edit in plain text mode, then you can click Remove HTML Tags to remove any HTML tagging in your message text.
11. Optionally, click the icons on the bottom far side to specify the operating system files (paper clip icon) or literature items (document icon) as attachments to the email message.

    The attachments icon lets you specify files from the operating system as attachments and displays a list of all files and literature items you previously specified for the email message.

    The literature icon displays a list of literature items you can specify as attachments.

    The Attachments field displays the most recently specified attachment if you specify more than one attachment. All email attachments are saved as attachments to the activity record that is updated when the message is sent.
12. Optionally, check the spelling for your message.
13. Click Send, or click Cancel if you decide not to send the email message.

> **Note:** If you cancel the email, then the corresponding Siebel activity record (created to track the send operation) is deleted.

Sending Email Messages Using Lotus Notes or Microsoft Outlook

This topic describes using the Send Email command when your default email client is set to Lotus Notes or Microsoft Outlook. You can send email to any recipient. Optionally, you can include Siebel application content in the email. Email addresses are retrieved from the Siebel database for email to employees or contacts.

For additional information about using Lotus Notes or Microsoft Outlook, see your documentation for these third-party products. For more information about setting user preferences for using third-party email clients, see *Preference Settings for Outbound Communications*.

Whether the Recipient field appears in the Recipient or Template dialog box after Step 2 in the following procedure depends on the kind of data that currently has the focus when you choose the Send Email command. Note the following points:

- If the current record is a person, such as a contact or employee, then the Recipient field does not appear.
- If the current record is an element, such as a service request or account, then the Recipient field appears if generic recipients are configured. Choose generic recipients, such as the contacts associated with the current service request.

  > **Note:** Users must generally select a single record before invoking Send Email when using templates for which field substitution is performed. If they select multiple records, then selected generic recipients are drawn from all the selected records. However, field substitution applies only to the first selected record, and a single email message is sent to all recipients.

- If the current record is a Siebel attachment or literature item, then the Recipient field appears if generic recipient are configured. The item is added as an attachment to the pending email message. (Siebel attachments with a URL type are not added as email attachments.)

To send email messages using Lotus Notes or Microsoft Outlook

1. Optionally, select one or more records of contacts, employees, or other persons for whom email addresses are defined in the Siebel database.

Alternatively, select one or more records of attachments or literature items to send as attachments to the email message.

2. Perform one of the following steps:
   - From the application-level menu, choose File, then Send Email.
   - Press F9.
   - Click to the right of Initiate Work Item on the communications toolbar, then click Send Email, or click Initiate Work Item when *Send Email* is the displayed ToolTip text. For more information about initiating work items, see *Siebel CTI Administration Guide* .
3. In the Recipient or Template dialog box, perform the following steps:
   a. From the Recipient field, specify the recipient or specify no recipient yet.

      If you select recipients before invoking the command, then the Recipient field does not appear.

      The available recipients to choose from depend on the application context. For example, if Send Email is invoked from a Service Requests list, then the choices are Service Request Contact and Service Request Owner.
   b. From the Message Template field, choose the name of a communications template (with a Body type) to insert into the message body.

      Field substitution applies to template text when you insert the text into a message. Substitution functions correctly if the fields exist in the current list or form (containing focus) in the Siebel application. Field substitution applies to only a single selected record.

      The listed templates are subject to filtering that is based on several factors, including channel, language, locale, and whether the template is HTML or plain text. For more information, see *Visibility and Access for Templates*.

      > **Note:** If the current record type (business component) has a default template associated with it, then you do not need to specify a template. If you specify a template, then its text is appended to the default template text in the email message. Consult your administrator, or verify the software behavior to see whether a default template is configured.

   c. From the Attachments field, specify literature items from the Siebel database to add as attachments.

      The literature icon (paper clip icon) displays a list of Siebel literature items you can specify as attachments.

      The Attachments field displays the most recently specified attachment if you specify more than one attachment. You can add file attachments later from the Lotus Notes or Microsoft Outlook window. All email attachments are saved as attachments to the activity record that is created when the message is sent.
   d. Click Change Language or Locale to change the language or locale, as necessary.

      Setting the language and locale changes the list of available templates to those associated with the language and locale you specify.
   e. In the Recipient or Template dialog box, click OK to continue to the email message window for Lotus Notes or Microsoft Outlook.
4. In the Lotus Notes or Microsoft Outlook email message window, complete the following steps:
   a. For the To, Cc, or Bcc fields, perform one or more of the following steps:

- Verify any recipients that were automatically inserted in previous steps.
- Specify any additional recipient email addresses from the email directories available through your email client program.

b. Optionally, verify or enter text for the subject line.

   Text might be automatically inserted into the subject line when you select a template.

c. Optionally, enter and format free-form text to modify or add to the template text.

d. Optionally, specify operating system files as attachments to the email message.

   Siebel literature items you previously specified are also saved as attachments for the email message.

   All email attachments are saved as attachments to the activity record that is updated when the message is sent.

e. Optionally, check the spelling for your message, according to the support of your email client program.

f. Send the message, or cancel the message if you decide not to send the email message.

> **Note:** If you cancel the email, then the corresponding Siebel activity record (created to track the send operation) is deleted.

Sending Email Messages Using an External Email Client in Siebel Open UI

This topic describes using the Send Email command when you are running Siebel Email Response in Siebel Open UI mode and want to send an email using the default email client as defined by your operating system. For more information about selecting an external email client, see *Specifying Preferences for Outbound Communications*. For more information about setting user preferences for using third-party email clients, see *Preference Settings for Outbound Communications*.

The invocation of the default email client is done through the use of a mailto URL. Mailto URLs have the following characteristics:

- They do not provide a mechanism to pass HTML to the email client. Only plain text email templates work with the defined External Email Client.
- They do not allow for attachments to be passed to the email client. If attachments are required, then the user must manually attach them after the email client opens.

To send email messages using an External Email Client

1. Select a record or set of records in the Siebel application.

   > **Note:** Users must generally select a single record before invoking Send Email when using templates for which field substitution is performed. If they select multiple records, then selected generic recipients are drawn from all the selected records. However, field substitution applies only to the first selected record, and a single email message is sent to all recipients.

2. Perform one of the following steps:

   - From the application-level menu, choose File, then Send Email.

- Press F9.
- Click to the right of Initiate Work Item on the communications toolbar, then click Send Email, or click Initiate Work Item when Send Email is the displayed ToolTip text.

For more information about initiating work items, see *Siebel CTI Administration Guide* .

3. In the Recipient or Template dialog box, perform the following steps:
   a. If the Recipient field is shown, then specify the recipient or specify no recipient yet.

      > **Note:** Whether the Recipient field appears depends on the kind of data that currently has the focus when you choose the Send Email command.

      If the current record is a person, such as a contact or employee, then the Recipient field does not appear.

      If the current record is some other entity, such as a service request or opportunity, then the Recipient field appears if recipients are configured for that object. The type of recipients varies by object, such as the contacts associated with the current service request or the employees associated with an opportunity.
   b. If necessary, click Change Language or Locale to change the language or locale, as necessary.
   c. From the Message Template field, choose the name of a communications template to insert into the message body.

      The listed templates are subject to filtering that is based on several factors, including channel, language, locale, and whether the template is HTML or plain text. For more information, see *Visibility and Access for Templates*.

      > **Note:** If the current record type (business component) has a default template associated with it, then you do not need to specify a template. If you specify a template, then its text is appended to the default template text in the email message. Consult your administrator, or verify the software behavior to see whether a default template is configured.

   d. In the Recipient or Template dialog box, click OK to continue to the email message window for the external email client.
4. In the external email client, complete the following steps:
   a. For the To, Cc, or Bcc fields, perform one or more of the following steps:
      - Verify any recipients that were automatically inserted in previous steps.
      - Specify any additional recipient email addresses from the email directories available through your email client program.
   b. Optionally, verify or enter text for the subject line. Text might be automatically inserted into the subject line when you select a template.
   c. Optionally, enter and format free-form text to modify or add to the template text.
   d. Optionally, specify files as attachments to the email message.
   e. Optionally, check the spelling for your message, according to the support of your email client program.
   f. Send the message, or cancel the message if you decide not to send the email message.

> **Note:** When a message is canceled, the Status is set to Queued for the original activity.

Note: If the eMail Response - Update Activity from BCC Message workflow has been enabled and configured, the Siebel application parses emails sent to a BCC address with a specific Thread ID and updates the activity record originally created with the final Subject, Body, To, and CC lines. It also creates activity attachments for email attachments. Additionally, the workflow changes the status of the activity to Done. For more information about the eMail Response - Update Activity from BCC Message workflow, see *eMail Response - Update Activity from BCC Message*.

Sending Faxes

You can send a fax to any recipient. Optionally, you can include Siebel application content in the fax. Fax addresses are retrieved from the Siebel database for faxes to employees or contacts.

Whether the Pick Recipient dialog box appears after Step 2 in the following procedure depends on the kind of data that currently has the focus when you choose the Send Fax command. Note the following points:

- If the current record is a person, such as a contact or employee, then the Pick Recipient dialog box does not appear. The Send Fax window appears.

  Note: The fax activity record is associated with a recipient derived from the current record (such as a contact or employee) if a user does not change the fax addressing information in the To, Cc, or Bcc line. In addition, the fax addressing field must be configured in Siebel Tools for your deployment.

- If the current record is an element, such as a service request or account, then the Pick Recipient dialog box appears if generic recipients are configured. Choose generic recipients, such as the contacts associated with the current service request.
- If the current record is a Siebel attachment or literature item, then the Pick Recipient dialog box does not appear. The Send Fax window appears, and the item is added as an attachment to the pending fax message. (Siebel attachments with a URL type are not added as email attachments.)

To send a fax

1. Optionally, select one or more records of contacts, employees, or other persons for whom fax numbers are defined in the Siebel database.

   Alternatively, select one or more records of attachments or literature items to send as attachments to the fax message.
2. Perform one of the following steps:

   - From the application-level menu, choose File, then Send Fax.
   - Press Ctrl+F9.
   - Click to the right of Initiate Work Item on the communications toolbar, then click Send Fax, or click Initiate Work Item when *Send Fax* is the displayed ToolTip text. For more information about initiating work items, see *Siebel CTI Administration Guide* .

     If you do not specify recipients in Step 1, then the Pick Recipient dialog box appears. If you specify recipients before invoking the command, then the Send Fax window appears. If the Send Fax window appears, then go to Step 4.
3. In the Pick Recipient dialog box, specify the recipient or specify no recipient yet.

The available recipients to choose from depend on the application context. For example, if Send Fax is invoked from a Service Requests list, then the choices are Service Request Contact and Service Request Owner.

The Send Fax window appears.

4. For the From field, specify the profile to represent who is sending the message.

   The listed profiles are the profiles created for communications drivers that support email or fax, such as Internet SMTP/IMAP Server or Internet SMTP/POP3 Server. In some cases, a profile might be automatically inserted into this field. You can specify a default profile in the Outbound Communications view of the User Preferences screen.
5. For the To, Cc, or Bcc fields, perform one or more of the following steps:
   - Verify any recipients that were automatically inserted in previous steps.
   - Type any additional recipient fax addresses, using the appropriate format for your fax integration.
   - Use the address book to enter additional recipients. Click To, Cc, or Bcc and explicitly specify individual persons from the address book dialog box. For each intended recipient, select the To, CC, or BCC check box. After specifying all recipients, click OK. Verify that the addresses appear correctly.
6. Optionally, for the Body drop-down list, choose the name of a communications template (with a Body type) to insert into the message body.

   You can configure a template to insert automatically, according to where you invoke the Send Fax command. For more information, see *Configuring Default Templates for Send Email Command*.

   Field substitution applies to template text when you insert the text into a message. Substitution functions correctly if the fields exist in the current list or form (containing focus) in the Siebel application.

   You can insert more than one template. Any template you choose is appended to the existing text.

   The listed templates are subject to filtering that is based on several factors, including channel, language, locale, and whether the template is HTML or plain text. For more information, see *Visibility and Access for Templates*.
7. Optionally, verify or enter text for the subject line.

   Text might be automatically inserted into the subject line when you select a template.
8. Optionally, enter and format free-form text to modify or add to the template text.

   For information about the available text-editing controls, see *Editing and Formatting Controls for Send Email and Send Fax Commands*.
9. Optionally, if you edit in plain text mode, then you can click Remove HTML Tags to remove any HTML tagging in your message text.
10. Optionally, click the icons to specify operating system files (paper clip icon) or literature items (document icon) as attachments to the fax message.

    The attachments icon lets you specify files from the operating system as attachments and displays a list of all files and literature items you previously specified for the fax message.

    The literature icon displays a list of literature items you can specify as attachments.

    The Attachments field displays the most recently specified attachment if you specify more than one attachment. All fax attachments are saved as attachments to the activity record that is created when the message is sent.
11. Optionally, check the spelling for your message.
12. Click Send, or click Cancel if you decide not to send the fax.

> **Note:** If you cancel the fax, then the corresponding Siebel activity record (created to track the send operation) is deleted.

Editing and Formatting Controls for Send Email and Send Fax Commands

For the Send Email command (native Siebel email client only) and for the Send Fax command, you can edit and format your message text before sending it by using controls in an editing bar that appears when you click in the message area of the Send Email or Send Fax window.

The editing bar appears only when HTML is the setting for the Send Email: Default Message Format preference in the Outbound Communications view of the User Preferences screen. For more information about this user preference setting, see *Preference Settings for Outbound Communications*.

> **Note:** If you use Lotus Notes or Microsoft Outlook for the Send Email command, then the third-party vendor provides the editing and formatting capabilities. The Siebel application attempts to specify an editing environment by using to the user's Send Email: Default Message Preference setting. However, the behavior of the third-party email client software is not guaranteed. Users can also specify editing preferences in Lotus Notes or Microsoft Outlook.

For email messages, message recipients who cannot view HTML messages in their email client program can instead view a plain-text version of each message. Formatting is eliminated from this plain-text version.

Managing Line Breaks for HTML Messages

When HTML editing is enabled, note the following behavior regarding line breaks:

- Pressing ENTER creates a new paragraph.
- Pressing SHIFT+ENTER creates a new line.

Managing Links and HTML Elements from Other Sources

For email messages, when HTML editing is enabled, you can directly enter URL or mailto links, and they are automatically converted to links in the HTML output. Examples of these links follow:

- www.example.com
- http://www.example.com
- ftp://ftp.example.gov
- mailto:user@example.com

You might select graphics or other tag-based elements that appear on Web pages, such as horizontal rules or tables, by dragging the mouse pointer. In some cases, you can copy and paste such elements into the Send Email or Fax message body.

If you use plain-text mode in the Send Email or Send Fax window, then you can remove any remnant HTML formatting by clicking the Remove HTML Tags button.

Note: You cannot add content other than text or HTML tag elements directly to the message text. For example, you cannot copy and paste graphics or other files into the message text. You cannot drag and drop text, but you can cut and paste text.

Editing and Formatting Options

This topic lists HTML formatting options in the order in which they appear from the near side to the far side in the user interface. The following HTML formatting options are available:

- **Find Or Replace.** Click the arrow to display the Find controls before the editing bar or to hide these controls. When the Find controls appear before the editing bar, click the arrow on the left to toggle between the Find controls and the Find and Replace controls. Enter text to find, or enter replacement text, and then click Go. Find operations are not case-sensitive.
- **Cut.** Click to cut selected text to the clipboard.
- **Copy.** Click to copy selected text to the clipboard.
- **Paste.** Click to paste text from the clipboard into the message area. Depending on the source, the text you paste might include HTML formatting.
- **Font.** Choose a font from a drop-down list to apply to selected text. Available fonts include Arial (the default), Verdana, Times New Roman, and Courier.
- **Size.** Choose a size from a drop-down list to apply to selected text. Point sizes include 8 (the default), 10, 12, 14, 18, 24, and 36.
- **Font Color.** Click the arrow to display font colors before the editing bar, and then click to choose a color to apply to selected text.
- **Bold.** Click to apply bold formatting to selected text or to remove bold formatting.
- **Italic.** Click to apply italic formatting to selected text or to remove italic formatting.
- **Underline.** Click to apply underlining to selected text or to remove underlining.
- **Ordered List.** Click to apply numbering to selected text or to remove numbering. Apply numbering to make the text an ordered list.
- **Unordered List.** Click to apply bullets to selected text or to remove bullets. Apply bullets to make the text an unordered list. Bullets appear differently at different levels of indenting.
- **Indent.** Click to increase indenting for selected paragraphs.
- **Outdent.** Click to decrease indenting for selected paragraphs.
- **Left Align.** Click to left-align selected paragraphs.
- **Center Align.** Click to center selected paragraphs.
- **Right Align.** Click to right-align selected paragraphs.

Sending Wireless Messages

You can send a wireless message to any recipient whose mobile device and device address information is stored in the Siebel database. Optionally, you can include Siebel application content in the wireless message.

Whether the Pick Recipient dialog box appears after Step 2 in the following procedure depends on the kind of data that currently has the focus when you choose the Send Wireless Message command. Note the following points:

- If the current record is a person, such as a contact or employee, then the Pick Recipient dialog box does not appear. The Send Wireless Message window appears.
- If the current record is an element, such as a service request or account, then the Pick Recipient dialog box appears if generic recipients are configured. Choose generic recipients, such as the contacts associated with the current service request.

To send a wireless message

1. Optionally, select one or more records for contacts, employees, or other persons for whom mobile device information is defined in the Siebel database.
2. Perform one of the following steps:
   - From the application-level menu, choose File, then Send Wireless Message.
   - Press Alt+F9.
   - Click after Initiate Work Item on the communications toolbar, then click Send Wireless Message, or click Initiate Work Item when *Send Wireless Message* is the displayed ToolTip text. For more information about initiating work items, see *Siebel CTI Administration Guide* .

   If you do not specify recipients in Step 1, then the Pick Recipient dialog box appears. If you specify recipients before invoking the command, then the Send Wireless Message window appears. If the Send Wireless Message window appears, then go to Step 4.
3. In the Pick Recipient dialog box, specify the recipient or specify no recipient yet.

   The available recipients to choose from depend on the application context. For example, if Send Wireless Message is invoked from a Service Requests list, then the choices are Service Request Contact and Service Request Owner.

   The Send Wireless Message window appears.
4. For the To field, perform one or more of the following steps:
   - Verify any recipients that were automatically inserted in previous steps. (No more than one recipient appears in the To line, but all specified recipients receive the message.)
   - Click the select button after the To field, and explicitly specify individual persons from the Siebel database for the To field.
5. Optionally, from the Body drop-down list, choose the name of a communications template (with a Body type) to insert into the message body.

   Field substitution applies to template text when you insert the text into a message. Substitution functions correctly if the fields exist in the current list or form (containing focus) in the Siebel application.

   You can insert more than one template. Any template you choose is appended to the existing text.

   The listed templates are subject to filtering that is based on several factors, including channel, language, and locale. For more information, see *Visibility and Access for Templates*.
6. Optionally, enter free-form text to modify or add to the template text.

   > **Note:** Wireless network operators and wireless messaging protocols impose limits of message text length. Customers must consult their network operators to find out the limits that apply, and then observe the limits.

7. Optionally, check the spelling for your message.

8. Click Send, or click Cancel if you decide not to send the wireless message.

> **Note:** If you cancel the wireless message, then the corresponding Siebel activity record (created to track the send operation) is deleted.

Sending Pages

You can send a page to any recipient whose paging data is stored in the Siebel database. Optionally, you can include Siebel application content in the page.

The Send Page command requires the Page Manager server component. For more information about setting up and using Page Manager, see *Siebel Business Process Framework: Workflow Guide* .

Siebel Paging, and not the Send Page command, uses the Modem-based TAP Paging driver.

To send a page

1. Optionally, select a record for a contact, an employee, or another person for whom paging data is defined in the Siebel database.
2. Perform one of the following steps:
   - From the application-level menu, choose File, then Send Page.
   - Press Shift+F9.
   - Click after Initiate Work Item on the communications toolbar, then click Send Page, or click Initiate Work Item when *Send Page* is the displayed ToolTip text. For more information about initiating work items, see *Siebel CTI Administration Guide* .
3. For the To field, perform one or more of the following steps:
   - Verify any recipient that was automatically inserted in previous steps.
   - Click the select button after the To field, and explicitly specify an individual person from the Siebel database for the To field.
4. Specify page addressing information, including the pager company, paging phone number, and pager PIN, as appropriate.
5. Optionally, from the Body drop-down list, choose the name of a communications template (with a Body type) to insert into the message body.

   Field substitution applies to template text when you insert the text into a message. Substitution functions correctly if the fields exist in the current list or form (containing focus) in the Siebel application.

   You can insert more than one template. Any template you choose is appended to the existing text.

   The listed templates are subject to filtering that is based on channel and other factors. For more information, see *Visibility and Access for Templates*.
6. Optionally, enter free-form text to modify or add to the template text.
7. Optionally, check the spelling for your message.
8. Click Send.

Creating Activities for Send Commands

Activity records can be generated for all of the Send commands that you use to send outbound communications. These Send commands include Send Email, Send Fax, Send Wireless Message, and Send Page. For more information about using the Send commands, see *Using Send Commands to Send Messages*.

This topic contains the following information:

- *Activity Types for Send Commands*
- *Contact Matching for Activity Records*

In the Outbound Communications view of the User Preferences screen, you can specify whether to generate activity records for the Send commands and, if so, whether the activity records are public or private. For more information about setting the Upon Sending Messages Generate preference, see *Preference Settings for Outbound Communications*.

Each activity record documents a communication initiated in the Siebel application. Generally, this activity is also a child record of another record that was current when the command was invoked. For example, if the Send Email command is invoked when a service request record was active, then the activity record for the email message is a child of the service request record and you can access it from the service request. You can populate other fields to complete the activity record to accommodate your company's use of activities.

> **Note:** For an activity that the Send Email command generates, the Status field is set to Done when the message is sent. If the message is sent to an invalid address, then the sender is notified by email that the message was not delivered. However, the Status field is not updated in this scenario. The activity record is not updated to indicate that a message was not delivered.

The owner for an activity that a Send command generates is the sender of the communication. If the Siebel application can match activity recipients with persons in the Siebel database, then the recipients are contacts. For more information, see *Contact Matching for Activity Records*.

Activity Types for Send Commands

The following table shows the types for activity records that each Send command generates.

For Siebel Email Response, activity records for inbound email messages use the Email - Inbound activity type, and activity records for outbound email messages use the Email - Outbound activity type. For more information about activity records and attachments, see *Administering Communications Inbound Receiver*.

Send Command	Activity Type
Send Email	Email - Outbound
Send Fax	Fax - Outbound
Send Wireless Message	Wireless Message
Send Page	Paging

Send Command	Activity Type

Text from the Subject line of the message appears in the Description field of the activity record. (For wireless messages and pages, this text comes from the Subject field of the template.) Message body text appears in the Comments field of the activity record. This text can have a maximum possible size of 1,500 characters.

For the Send Email and Send Fax commands, message body text appears in the Email Body field. This text can have a size of at least 16,000 characters. (The actual length depends on your Siebel database.)

For the Send Email and Send Fax commands, message body content that is longer than the Email Body field allowance is saved as activity attachments. The attachment files are named SiebelLongEmailBody.txt (for plain-text messages) or SiebelLongEmailBody.htm (for HTML messages). If you use Microsoft Outlook as your email client, then RTF messages are saved in HTML format.

For the Send Email and Send Fax commands, attachments (such as files or literature items) to email or fax messages are saved as attachments to the activity record.

Contact Matching for Activity Records

If the Siebel application can match activity recipients with persons in the Siebel database, then the recipients are contacts. For the Send Email command, this matching is based primarily on the email address. If more than one record that includes the same email address exists in the Siebel database, then the first such record is associated with the activity as a contact.

For a third-party email integration with Lotus Notes, an email address for Lotus Notes is passed back to the Siebel application to match recipients to contacts and to associate these contacts with the activity. If no match is found in the Siebel database, then the recipients are not associated with the activity as contacts.

For a third-party email integration with Microsoft Outlook, an email address might not be passed back to the Siebel application to match recipients to contacts and to associate these contacts with the activity. If the email address is *not* passed back, then the Siebel application tries to match recipients to contacts by using the first and last names of the recipient, or by using the first, middle, and last names. If no match is found in the Siebel database, then the recipients are not associated with the activity as contacts.

Note: When Collaborative Data Object (CDO) is included on a client computer that runs Microsoft Outlook, the email address (not just the name) is passed to the Siebel application for matching purposes.

Specifying Settings for Mobile Devices

In the Mobile screen, you can manage your mobile devices and wireless messaging addresses for these devices. You can perform the following actions:

- Register your mobile devices and specify device priority.
- Specify mobile device addresses and specify address priority.
- Specify the types of wireless messages you want to receive automatically from the Siebel application.

You can access the Mobile screen in the following Siebel applications: Siebel Call Center, Siebel Sales, Siebel Service, and Siebel Partner Portal.

Note: You can access the Mobile screen from your Siebel Business Application running the Siebel Web Client. The Siebel Mobile Web Client does not support the Mobile screen.

To specify settings for mobile devices

1. Navigate to the Mobile screen.

   The Message Delivery view appears (the default view in this screen).
2. In the Mobile Devices list, select the mobile device you want to work with, or, if necessary, create a new mobile device record.
3. Configure the selected device as described in the following topics:
   - *Configuring Mobile Devices* (Message Delivery view)
   - *Configuring Message Delivery* (Message Delivery view)
   - *Configuring Mobile Alerts* (Mobile Alerts view)

Configuring Mobile Devices

In the Message Delivery view, you can register your mobile devices and establish the device priority. The Mobile Devices list includes the following fields to support wireless messaging:

- **Device Name.** Enter any name you want for your device. It can be any descriptive name, for example, *John Cheng's Nokia cell phone*. The mobile device name must be unique for each device that you register.
- **Device Priority.** Select a priority, from 1 - Highest to 6 - Unranked, for each mobile device you register. Wireless messages are generally sent to the mobile device with the highest device priority.

  To guarantee message delivery, make sure that only one registered device is assigned the highest device priority. Only one device registered for a particular user can have a device priority set to 1 - Highest. Any other registered devices must have the device priority set to 2 or a higher number. Do not attempt to register any additional devices if a device with priority 6 already exists.

Configuring Message Delivery

In the Message Delivery view, you can enter wireless messaging address information for each of your mobile devices. You must enter information in the following fields to define a wireless messaging address:

- **Message Delivery Profile.** Select a profile. The profile describes the network and message type to use to send wireless messages to your device.

  For example, your device is connected to the ABC wireless network operator. ABC can accept messages using the SMTP protocol. ABC then transmits the messages to your mobile device using the SMS protocol. This transmission can occur if your administrator creates a message delivery profile, such as ABC Network SMTP, for the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver.

  To receive messages, you must associate the appropriate profile with your mobile device if your administrator has not done so. Consult your administrator for guidance about the profile to choose, or to have a profile

added for your device. For more information about using communications profiles for message delivery, see *Configuring Communications Drivers and Profiles for Wireless Messaging*.

- **Device Address.** Enter a unique identifier for a particular mobile device. This identifier enables messages to be sent to this device. Frequently, the device address is the phone number.
- **Address Priority.** Select a priority, from 1 - Highest to 6 - Unranked, for each address of each mobile device. Wireless messages are sent to the device with the highest device priority and to the highest priority address for that device.

  To guarantee message delivery, make sure that only one device address is assigned the highest address priority. Only one address for a particular mobile device can have an address priority set to 1 - Highest. Any other address must have the address priority set to 2 or a higher number. Do not attempt to define any additional addresses if an address with priority 6 already exists.

Configuring Mobile Alerts

In the Mobile Alerts view, you can select the types of event-driven wireless message alerts that you want to receive on your device. Before configuring mobile alerts, you must configure your mobile device. For more information, see *Configuring Mobile Devices* and *Configuring Message Delivery*.

Normally, all event-driven alert messages are sent to the highest priority device and address for a recipient. In this scenario, individual settings for receiving alerts are ignored. However, if your system administrator allows it, then you can override the device priority settings in the Mobile Alerts list and specify that a specific device receives an alert.

When you enable an alert for a particular device in the Mobile Alerts list, the alert is sent to the highest priority address for that device. Existing priority settings for the device are ignored. For information about alert configuration in your organization, consult your system administrator.

For example, your system administrator can activate an alert so that you automatically receive a wireless message alert each time you are assigned a new activity. In this scenario, you can enable or disable this specific alert for a mobile device by creating a record in the Mobile Alerts list for each alert and setting the alert's status to On or Off.

Note: Alternatively, your company might manually send some alert messages to your highest priority device and address by using the Send Wireless Message command. A manual alert message is not event-driven. You cannot customize such alerts through the Mobile Alerts list.

The following settings are available in the Mobile Alerts list:

- **Alert Name.** Select the particular alert you want to enable or disable for the selected device in the Mobile Devices list. To see more alerts from which you can select, contact your system administrator.
- **Status.** For each mobile alert that you add to a device, specify whether the alert is activated or deactivated as follows:
  - To enable an alert so you receive wireless message alerts of the specified type on this device, set the value to On.
  - To disable an alert so you do not receive message alerts of the specified type on any device, set the value to Off.

Note: Disabling an alert for one of your devices disables it for all of your devices if the alert is not enabled for any other device. If you want to receive a particular alert on a particular device, then set the Status to On.

13 Using Wireless Messaging

Using Wireless Messaging

This chapter provides information about implementing wireless messaging in Siebel Business Applications. It includes the following topics:

- *About Wireless Messaging*
- *Configuring Wireless Messaging*
- *Administering Mobile Devices*

About Wireless Messaging

Siebel users can send one-way (outbound) wireless messages automatically or manually from various Siebel application modules and features. These outbound wireless messages are sent to various kinds of recipients in the following scenarios:

- A user selects File, then Send Wireless Message from the application-level menu to manually invoke the Send Wireless Message command. For more information, see *Sending Wireless Messages*.

  A user can invoke the Send Wireless Message command from the communications toolbar. For more information about using the communications toolbar, see *Siebel CTI Administration Guide* .
- To specify outbound communication requests, an administrator uses the views in the Administration - Communications screen, and a user uses the views in the Communications screen. For more information, see *Defining Outbound Communication Requests*.
- Any module that invokes the methods of the Outbound Communications Manager business service can send outbound communications for the wireless message channel.

Configuring Wireless Messaging

This topic describes how to configure wireless messaging. It contains the following information:

- *Connecting Directly to Wireless Network Operators*
- *Configuring Siebel Server Components for Wireless Messaging*
- *Configuring Communications Drivers and Profiles for Wireless Messaging*

Connecting Directly to Wireless Network Operators

For outbound wireless messaging, you must connect to all the operators required to reach the entire population of wireless message recipients. You can use outbound wireless messaging only if the network operators make public

a connection to an SMTP server. This SMTP server receives a message in email format from the Siebel application, converts it to SMS format, and forwards it to the wireless message recipient that the Siebel application specifies.

Configuring Siebel Server Components for Wireless Messaging

Siebel applications that can send wireless messages use the Communications Outbound Manager (alias CommOutboundMgr) server component. This component is part of the Communications Management (alias CommMgmt) component group.

To send wireless messages, you must first enable the Communications Management component group on the Siebel Server. You can enable component groups when installing the Siebel Server or after the Siebel Server installation. Make sure that the state of Communications Outbound Manager is online. For more information, see *Administering Siebel Communications Server for Siebel Email Response* and *Siebel System Administration Guide* .

Configuring Communications Drivers and Profiles for Wireless Messaging

Siebel applications use the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver to send wireless messages to the SMTP server that the wireless network operator of the wireless message recipient makes available. Contact your wireless network operator for more information. For more information about communications drivers, see *Communications Drivers Provided with Siebel CRM* and *Process of Setting Up Communications Driver Profiles*.

To complete configuring wireless messaging, you must create a separate communications driver profile for each wireless network operator that contains recipients to whom you want to send wireless messages. The procedure in this topic describes how to configure a profile for recipients on XYZ wireless network. For information about how to configure each recipient, see *Administering Mobile Devices*.

Note: After a wireless message is sent to a wireless messaging gateway using the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver, the Communications Outbound Manager server component might indicate in a log file that the message was successfully sent. However, the log file cannot indicate if the wireless messaging gateway ultimately delivered the wireless message to a valid wireless messaging address.

To configure a profile for wireless messaging

1. Navigate to the Administration - Communications screen, then the Communications Drivers and Profiles view.
2. In the Communications Drivers list, select the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver.
3. Click the Profiles view tab, create a new record, and complete the necessary fields.

   The fields are described in the following table.

Field	Description
Name	Enter a name for the profile. For example, *XYZ_wireless_SMTP*.

Field	Description
Organization	(Optional). Select the organization to which you want to restrict access to the profile. By default, the default organization is assigned to the profile. Select another organization to override the default setting.
Responsibilities	(Optional). Select a responsibility to which you want to restrict access to the profile. For example, you might want only the users with the Siebel Administrator responsibility to access the profile.

4. In the Profile Parameters Overrides subview, create new records for the parameters in the following table, and enter the described values.

For this parameter	Enter
SMTP Server	The name of the SMTP server on which the network operator for wireless message recipients opened a connection to receive messages.
From Address	The sender's default email address for outbound communications. Use one of the following two forms: o *sendername@example.com* o *sender_display_name <sendername@example.com>* Use the second form if you want the recipient to see a display name for the sender in addition to the email address for the sender. The specified address is passed to the SMTP server in the MAIL FROM command within the SMTP message transmission envelope, and is used as the *From:* address in the message header.

Administering Mobile Devices

Siebel users must enter and store the following mobile device address information required to send wireless messages to their employees, customers (contacts), and partners:

- **Mobile devices.** Users might specify device names for each person in the Siebel database. Mobile devices are stored in the S_MBL_DVC table.
- **Device addresses.** Users might specify device addresses for each mobile device. Each device must have a minimum of one associated address. Device addresses are stored in the S_MBL_DVC_ADDR table.

Mobile device and device address information can be entered in the Siebel database in any of the following ways:

- Using the Mobile Devices view in the Administration - Communications screen. This view allows system administrators to enter and edit mobile device and address information for all persons defined in the Siebel database. For information about using the Mobile Devices view, see *Specifying Information for Mobile Devices*.
- Using the Mobile screen. This screen allows individual employees and partners to update information about their own mobile devices and device addresses defined in the Siebel database. For information about using the Mobile screen, see *Specifying Settings for Mobile Devices*.
- In batch mode using Siebel Enterprise Integration Management (EIM) or similar methods. For more information, see *Siebel Enterprise Integration Manager Administration Guide* .

In the user interface, address information for wireless messages appears with common naming conventions.

Specifying Information for Mobile Devices

A system administrator enters mobile device data required to send wireless messages in the Mobile Devices view in the Administration - Communications screen. This view allows you to associate one or more wireless devices with a person and to associate one or more addresses with each wireless device.

To specify information for a mobile device

1. Navigate to the Administration - Communications screen, then the Mobile Devices view.
   The Mobile Devices view displays the Persons list, the Mobile Devices list, and the Device Addresses list.
2. In the Persons list, select the person to whom you want to assign a mobile device.
3. In the Mobile Devices list, create a new record, and complete the mobile device information.
   You can associate multiple mobile devices with a particular person. Specifying a mobile device for a person is also known as registering the device. For each person, each device name must be unique. For more information about mobile devices, see *Settings for Mobile Devices*.
4. In the Mobile Devices list, select the device for which you want to establish the address.
5. In the Device Addresses list, create a new record, and complete the address information for the selected device.
   You can associate multiple addresses with a particular device. For more information about mobile device addresses, see *Settings for Device Addresses*.

Settings for Mobile Devices

For each person in the Siebel database, the Mobile Device list in the Mobile Devices view contains settings for device name, login preference, and device priority for each mobile device that receives wireless messages. Mobile device information includes the following data:

- **Device Name.** The name to assign to the mobile device. It can be any descriptive name. For each person, each device name must be unique.
- **Login Preference.** The Auto Login level for the mobile device. You can set the value for each registered device to any of the following values:
  - Automatic Login
  - Password Only
  - User Name and Password

- **Device Priority.** The priority of the mobile device. Select a priority, from 1 - Highest to 6 - Unranked, for each mobile device you register. Wireless messages are generally sent to the mobile device with the highest priority for each user.

  To guarantee message delivery, make sure that only one registered device is assigned the highest device priority. Only one device registered for a particular user can have a device priority set to 1 - Highest. Any other registered devices must have the device priority set to 2 or a higher number. Do not attempt to register any additional devices if a device with priority 6 already exists.

  > **Note:** Normally, all messages are sent to the highest priority device and address for a recipient. However, users might override the device priority settings in the Mobile Alerts view of the Mobile screen. When a user enables an alert for a particular device, the alert is sent to that device, regardless of the device priority settings established for the user. For information about configuring mobile alerts, see *Specifying Settings for Mobile Devices*.

- **Comments.** Comments you can enter about a particular mobile device.

Settings for Device Addresses

The Device Addresses list in the Mobile Devices view contains settings for message delivery profile, device address, and address priority for each mobile device that receives wireless messages. Device address information includes the following data:

- **Message Delivery Profile.** Specify a message delivery profile. This profile describes the network and message type that to use to send wireless messages to the mobile device. For information about configuring the Internet SMTP/IMAP Server or Internet SMTP/POP3 Server communications driver and profiles to receive wireless messages on the mobile device, see *Configuring Communications Drivers and Profiles for Wireless Messaging*.
- **Device Address.** Specify a unique identifier for a particular mobile device. This identifier enables messages to be sent to the device. Generally, you enter the phone number of the device.
- **Address Priority.** Select a priority, from 1 - Highest to 6 - Unranked, for each address of each mobile device, for each applicable recipient. Wireless messages are sent to the device with the highest device priority and to the highest priority address for that device.

  To guarantee message delivery, make sure that only one device address is assigned the highest address priority. Only one address for a particular mobile device can have an address priority set to 1 - Highest. Any other address must have the address priority set to 2 or a higher number. Do not attempt to define any additional addresses if an address with priority 6 already exists.
- **Comments.** Comments you can enter about a particular mobile device address.

14 Troubleshooting Siebel Email Response

Troubleshooting Siebel Email Response

This chapter explains how to diagnose and resolve many Siebel Email Response issues. It includes the following topics:

- *About Troubleshooting Siebel Email Response*
- *Troubleshooting Siebel Email Response Issues*
- *About Investigating and Reporting Processing Abnormalities*
- *Process of Troubleshooting Siebel Email Response*
- *Resolving Issues for Nonreal-Time Processing*
- *Resubmitting Failed Email*
- *Synchronizing Batch Components*
- *Diagnosing Errors for Communications Inbound Receiver*
- *Finding Last Encountered Error in Communications Inbound Receiver*
- *Resolving Issues for Response Groups*
- *Tagging Inbound Email Messages as Faxes*

About Troubleshooting Siebel Email Response

If you encounter issues using the Siebel Email Response client, then use this chapter to try to resolve the issues. This chapter details some of the common issues encountered when setting up and using Siebel Email Response. It provides solutions and workarounds for these issues to make it easier for you to use Siebel Email Response.

Troubleshooting Siebel Email Response Issues

The following table provides solutions for Siebel Email Response symptoms and error messages.

Problem	Cause	Solution
When I activate Siebel Email Response workflows in the Administration - Business Process screen, the following error appears: Cannot activate workflow process 'ProcessName' version [VersionNumber]. Make sure it has 'In Progress' status.	You cannot activate a workflow process unless it has a status of *In Progress*.	Verify the status of the workflow process that you want to activate. If the status of the workflow is not *Active*, then activate the workflow. For more information, see *Activating Workflow Processes*.

Problem	Cause	Solution
The Communications Inbound Receiver and Communications Inbound Processor server tasks stop and nonreal-time email processing stops.	Unknown	Use the Communications Inbound Events view to begin diagnosing nonreal-time processing errors. For more information, see *Resolving Issues for Nonreal-Time Processing*.
Reprocessing email in **`siebsrvr/bin/queued`** is not working automatically.	An email fails after not processing correctly.	Resubmit the failed email. For information, see *Resubmitting Failed Email*.
Unable to find definition for CommOutboundMgr component.	The Communications Outbound Manager server component is not synchronized correctly.	Synchronize the batch components on the Siebel Server. For more information, see *Synchronizing Batch Components*.
Communications Inbound Receiver error.	Unknown	Use the State Value view for components to trace the last encountered error in Communications Inbound Receiver. For more information, see *Finding Last Encountered Error in Communications Inbound Receiver*.
I set up and start my response group. However, I do not see a reply to an inbound email.	Possible causes for this issue are: • The POP3 or IMAP parameters are incorrect. • Communications Outbound Manager is not running. • Communications Outbound Manager is running, but you still do not see any reply email. • Communications Inbound Processor is not running.	Review the possible solutions for this issue. For information about the possible solutions for this issue, see *Resolving Issues for Response Groups*.
I set up multiple response groups and want to increase this number. However, I find that I reach a limit of response groups that I can create.	Possible causes for this issue are: • Resource limitations. • Each response group can spawn a preconfigured number of threads. The thread limitation might play a role.	The number of resource groups that you can create is limited only by the resources available for each response group.
I believe I set up everything correctly for Fax, but I cannot see the incoming fax when I use F9 Fax.	The fax server or fax machine might be incorrectly set up.	Two possible solutions to this issue are: • Dial the fax number to see whether it actually reaches the fax machine. • Send an email using a working email client with the exact syntax from Send Fax. Then, check to see whether you receive the fax.
I create an outbound email or fax request, but the intended recipient does not receive the email or fax.	Possible causes for this issue are: • Communications Outbound Manager is not running.	Possible solutions to this issue are: • Check the outbound request to see whether it has a status of *Success*.

Problem	Cause	Solution
	• Communications Outbound Manager is running, but sending email results in an error. • Communications Outbound Manager is running, but the email is sent to the wrong recipient.	• If the status is not *Success*, then check for errors in the Request view or the log file. • If the log file indicates an error, but does not provide enough information about the error, then increase the event log level for Communications Outbound Manager.
I perform an F9 Send Mail from Microsoft Outlook on a contact. After I send the email, the activity still has a status of *Queued*.	Because you see an email, an activity is created. You must determine if the right contact is associated with the email.	A possible way to diagnose and solve this issue is: When you press F9 Send Mail and go into Microsoft Outlook before sending the email, you create an activity. You can go back to the contact where you press F9 Send Mail and drill down on the contact name, and then click the Activity view tab. You see a new activity with a status of *Queued*. After you send the email, the status of the activity changes to *Done*. If the activity status remains *Queued,* and you do not see an error after clicking the Send button, then close all Internet browsers, and clear all downloaded objects. To delete all objects from Internet Explorer, navigate to Tools, Internet Options, Settings, and then View Objects. You might need to remove all objects from `C:\WINNT\Downloaded Program Files`, and then restart the Siebel application.
I perform an F9 Send Mail on a contact from Microsoft Outlook. After I send the email, I do not see an activity associated with the email.	Previously created activity records are removed.	Two possible solutions to this issue are: • An activity record is created when you press F9 Send Mail and go into Microsoft Outlook. After finishing your email and possibly adding or removing a contact, you click the Send button to send the email. After you send the email, a script in the form notifies the Siebel Server to update all email information including the contact list, the email subject, and the email content. In a preconfigured Siebel application, the script first removes all existing contacts from the activity, and then adds any new contacts by using the new contact list from Microsoft Outlook. The contact information from Microsoft Outlook can be in the following format: o Firstname LastName o Firstname LastName<email@example.com> o someemail@example.com • On the server side, the server code uses Firstname, Lastname, and the email address as search criteria in the contact table. For a match (either single or multiple), the server code also associates the first found contact with the activity. Therefore, if you think no association to the contact of your choice exists, then check your Siebel database for multiple entries of the same first name, last name, or email address.

About Investigating and Reporting Processing Abnormalities

Communications Inbound Receiver and Communications Inbound Processor do not stop if an incoming work item (such as an email or a phone call) causes abnormal behavior during processing. Instead, a log file entry is created for the abnormal behavior. An example of abnormal behavior is a missing From address in an email.

The log files are:

- Comminboundrcvr.log for Communications Inbound Receiver
- Comminboundprocessor_xxxxx.log for Communications Inbound Processor

To investigate abnormal behavior during processing, access the Administration - Communications screen, Communications Inbound Events, and then the Components view and make sure entries exist for each email that is processing. After an email is successfully processed, the entry is deleted. If the email is not successfully processed, then make sure that the status and comments are correct. Also check the URL to make sure that the name is correct. For information about resubmitting a failed email for processing, see *Resubmitting Failed Email*.

Before reporting any abnormal behavior during processing, make sure CommInboundRcvr and CommInboundProcessor are set to the proper debugging level and MIME message. Attach both of these files to the abnormal behavior when reporting the issue.

Process of Troubleshooting Siebel Email Response

To troubleshoot Siebel Email Response, perform the following tasks:

- *Resolving Issues for Nonreal-Time Processing*
- *Resubmitting Failed Email*
- *Synchronizing Batch Components*
- *Diagnosing Errors for Communications Inbound Receiver*
- *Finding Last Encountered Error in Communications Inbound Receiver*
- *Resolving Issues for Response Groups*
- *Tagging Inbound Email Messages as Faxes*

Resolving Issues for Nonreal-Time Processing

The procedure in this topic describes how to resolve some of the common nonreal-time email processing issues.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

To resolve issues for nonreal-time processing

1. Navigate to the Administration - Communications screen, then the Communications Inbound Events view.
2. In the Communications Inbound Events list, review the fields and the possible causes in the following table.

Field	Value	Possible Cause
SRM Request Id	Id	• If null, then the issue might be in Communications Inbound Receiver. • If not null, then the issue might be in Communications Inbound Processor.
Status	• Queued • CIP Processing • Error • CIP Fatal	• *If the value is Queued* or *CIP Processing, then* no issues exist for the email processing. • If the value is *Error* or *CIP Fatal,* then the email is not processed.
Receiving Siebel Server	Siebel Server Name	If the Siebel Server name is in this field, then Communications Inbound Processor received the event.
Activity Id	Id	If this field is not null, then the error might be in one of the steps in the workflow after creating the activity.
Comments	Description	Use the DriverTrackID to find the location of the error in the log files.

Resubmitting Failed Email

You can resubmit a failed email by completing the procedure in this topic.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

To resubmit a failed email

1. Navigate to the Administration - Communications screen, then the Communications Inbound Events view.
2. From the Communications Inbound Events menu drop-down list, choose Submit Request.

Synchronizing Batch Components

The procedure in this topic describes how to synchronize Siebel Server batch components. For more information about performing this task, see *Siebel System Administration Guide* .

This task is a step in *Process of Troubleshooting Siebel Email Response*.

To synchronize the Siebel Server batch components

1. Navigate to the Administration - Server Configuration screen, then the Enterprises view.
2. In the Enterprise Servers list, select the Siebel Server for which you want to synchronize batch components.
3. Click the Synchronize view tab.
4. Select the batch components that you want to synchronize and then click Synchronize.

Note: You do not need to stop and restart the Siebel Server process.

Diagnosing Errors for Communications Inbound Receiver

The procedure in this topic describes how to diagnose Communications Inbound Receiver errors using the Component Statistics and State Value views.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

To diagnose error for Communications Inbound Receiver

1. Navigate to the Administration - Server Management screen, then the Components view.
2. In the Components list, query for *Communications Inbound Receiver*.
3. Click the State Values view tab.

   All currently loaded response groups appear.
4. Click the Statistics view tab.

   The number of response groups, profiles loaded, real-time events processed, and processing times appear.

Finding Last Encountered Error in Communications Inbound Receiver

The procedure in this topic describes how to find the last error encountered in Communications Inbound Receiver.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

To find the last error encountered in Communications Inbound Receiver

1. Navigate to the Administration - Server Management screen, then the Tasks view.
2. In the Tasks list, query for *Communications Inbound Receiver*.
3. Click the State Values view tab.
4. In the State Value list, select Last Real Time Error, and check the Description field for information about the last encountered error in Communications Inbound Receiver.

Resolving Issues for Response Groups

After setting up and starting a response group, you might not see a reply to an inbound email. Actions that you can take for this issue include:

- Check in the *server* `/bin` directory (where: *server* is the name of the server) to see whether a POP3SMTP*.log file or IMAPSMTP*.log file exists.
- Check the log file with the closest timestamp to the time the error occurred to see whether an obvious error exists on the POP3 or IMAP side.
  - Set up a POP3 or IMAP email account in Microsoft Outlook using the same profile information, and perform a test to see whether you are using good information.
  - Determine if the server can actually see your email server. Determine the current users on the mailing list by sending an email (asking for a response) to the mailing list.
  - Use an IP address instead of a hostname.
- Perform an F9 Send Mail from a contact and determine if you can see the outbound email. If you see an error about no definition for Communications Outbound Manager, then perform a batch component synchronization. For information about performing this procedure, see *Synchronizing Batch Components*.
- Navigate to the Administration - Server Management screen, then the Jobs view to see whether a Communications Outbound Manager request is created. Examine the record to determine the status of the request. If the status is *Queued*, then the request is created and is awaiting Communications Outbound Manager retrieval. If the status is Active, then Communications Outbound Manager is executing the request. If the status is *Error*, then you must determine the type of error.
- If you use nonreal-time email processing, Communications Inbound Processor processes email. Navigate to the Administration - Communications screen, then the Communications Inbound Events view and determine the status of the email. Each inbound email that is processed in nonreal-time mode has an entry if the processing is not started or the processing results in an error.
- If everything seems correct, then determine if the email actually reaches the email server.

  Log in to the POP3 email server and check the following information:
  - command: `telnet` *emailserver* `pop3`

    where: *emailserver* is the name of the email server.

    response: +OK Microsoft Exchange 2000 POP3 server version 6.0.4417.0 (smtdl380exch1.esexch1.oracle.com) ready.

    > **Note:** The version information depends on the Exchange Server that you use.

  - command: `user qatest99`

    > **Note:** You do not see the characters that you enter.

    response: +OK
  - command: `pass resource`

    response: +OK User successfully logged on.

- command: `stat`

  response: +OK 0 0

  > **Note:** This value indicates no pending email. The first *0* is the number of messages. The second *0* is total size of all messages.

- command: `quit`

Test the IMAP email server using the following commands:

- `telnet` *emailserver* `143`

  where: *emailserver* is the name of the email server.
- `LOGIN username password`
- `SELECT Inbox`
- `LIST "" "INBOX"`
- `LOGOUT`

- If your POP3 or IMAP email server has email messages but your Siebel application email POP3 or IMAP driver is not retrieving them, then set the POP3 or IMAP driver to a LogDebug value of True and resubmit the profile changes. After setting this parameter, a log file named POP3SMTP*.log or IMAPSMTP*.log is generated. Check the log file for any errors.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

Tagging Inbound Email Messages as Faxes

In some cases, you might want to mark inbound email messages as faxes received using the Communications List. However, you must make several changes in Siebel Tools so that these faxes appear in the refreshed Communications List. To make sure that inbound faxes are accepted and appear in the Communications List, complete the following procedures:

- *Changing the Allowed Activity Type*
- *Adding a Conditional Step to the Create Activity Workflow*

If you do not make these changes, when you query for items in the Communications List with an activity type of Fax - Inbound, then an error message appears, and you cannot view inbound faxes.

This task is a step in *Process of Troubleshooting Siebel Email Response*.

Changing the Allowed Activity Type

To display inbound faxes in the Communications List, you must change the Allowed Activity Type user property of the Comm Inbound Item List applet to include Fax - Inbound activities.

To change the Allowed Activity Type for the Comm Inbound Item List applet

1. In the Siebel Tools Object Explorer, select the Applet object.

2. In the List Editor, query for the Comm Inbound Item List applet.
3. Select the Comm Inbound Item List applet, and check out the project.
4. Click Applet User Property link in the Object Explorer, and in the List Editor, select the Allowed Activity Types user property.
5. In the Value field, change the existing values to include Fax - Inbound.

After completing this procedure, you must add a conditional step to the Create Activity workflow.

Adding a Conditional Step to the Create Activity Workflow

After you provide for Fax - Inbound activity type display in the Communications List, you must add a conditional step to the eMail Response - Create Activity workflow. This step determines if an inbound item is an email message or fax depending on the item's receiving address, and tags the inbound item accordingly. For more information about the eMail Response - Create Activity workflow process, see *eMail Response - Create Activity Workflow*.

To add a conditional step to the eMail Response - Create Activity Workflow

1. In the Siebel Tools Object Explorer, select the Workflow object.
2. In the List Editor, query for the eMail Response - Create Activity workflow.
3. Select the eMail Response - Create Activity workflow, and check out the project.
4. Right-click the eMail Response - Create Activity workflow, and select Edit Workflow Process.
5. Add a conditional step before the Create Activity step that:

   Determines if the inbound item is a fax or an email depending on the item's Receiving Email Address.

   Tags the inbound item as Email - Inbound or Fax - Inbound.
6. Check in all open projects.
7. Deploy the changes to the Siebel runtime repository.

15 Business Service Methods for Siebel Email Response

Business Service Methods for Siebel Email Response

This chapter provides information about business services for Siebel Email Response and other outbound communications, and it also includes information about applicable methods and arguments. It includes the following topics:

- *Siebel Email Response and Business Services*
- *Inbound Email Manager Business Service*
- *Inbound Email Database Operations Business Service*
- *Outbound Communications Manager Business Service*

Siebel Email Response and Business Services

Siebel Email Response uses business services to interact with your Siebel database. A business service provides a new top-level object (such as a business object or applet) that you can use to implement reusable business logic and to implement business rule capabilities. For more information about business services, see *Using Siebel Tools* .

Inbound Email Manager Business Service

The following table lists the methods for the Inbound Email Manager business service.

Method Name	Comment
AddAttachments	Creates attachment records for the attachments in EventFields.
AddCategories	Associates categories with an activity record.
DeleteTempFiles	Deletes temporary files specified in EventFields.
GetCategories	Gets the list of categories and scores that are associated with an activity.
GetEventCategories	Enumerates the categories in EventFields and returns them in a hierarchy.
GetPreference	Gets the value of a user preference.

Method Name	Comment
GetResponseText	Gets the auto-suggest response text for a set of categories by using the scores and thresholds for the categories.
GetSearchSpec	Creates a search specification by using the fields included as input arguments. For example, if Abstract and Area are input arguments, then the search specification named [Area]="Installation" AND [Abstract]="Production" is called the SRSearchSpec output argument.
GetTokens	Gets a specified number of tokens from a string. The tokens are returned in output properties such as Token 1, Token 2, and so on.

ParseText	Extracts response properties from the email. The input arguments of this method include a fixed argument named Text, which contains the text to parse, and one additional argument of the Literal type for each response property to extract. The values indicate the patterns to match and are in the following format:
	`expression=exp | "Last("`*`{prefix}`*`%s[`*`{suffix}`*`]")"`
	For example:
	`expression=exp | "Last("Billing Account Number%s\n")"`
	where:
	• `"Last("` and `")"` are optional and indicate that the last occurrence of the pattern is used if multiple occurrences exist. If you do not specify these values, then the first occurrence is used.
	• *{prefix}* is any literal that marks the beginning of the pattern and is required. In the example, Billing Account Number is the literal prefix.
	• `%s` marks the value to extract and is required.
	• *{suffix}* is any literal that marks the end of the pattern. If you do not specify this value, then all the text between the prefix and the end of line is extracted. In the example, \n is a suffix that indicates that the text is parsed to the end of the line.
	You must implement the \n suffix to parse the text between the prefix and the end of line. If you do not implement this suffix, then all text in the message that follows the prefix is parsed.
	Therefore, in the example, the last occurrence of the Billing Account Number text is extracted, along with the text to the end of the line in which this value is present.
	The workflow process uses the extracted response properties.

ReturnPropSet	Returns a hierarchy that contains the input properties and properties from the input hierarchy.
SetResponseFields	Constructs To, CC, and BCC lines for outbound email by using corresponding lines from inbound email.

Input Arguments for Methods of Inbound Email Manager

The following table lists and describes the input arguments for each method of the Inbound Email Manager business service.

Method	Input Argument Name	Comment
AddAttachments	Business Component	Business component in which attachment records are created.
	Business Object	Business object in which attachment records are created.
	EventFields	Hierarchy that contains the file properties, such as FileName0, FilePath0, FileName1, FilePath1, and so on.
AddCategories	ActivityID	ID of the activity record with which categories are associated.
	BusComp	Business component in which category associations are created.
	BusObj	Business object in which category associations are created.
	Catalog	Catalog that contains the categories.
	Categories	List of the categories and the corresponding scores.
DeleteTempFiles	EventFields	Hierarchy that contains the file properties, such as FilePath0, FilePath1, and so on.
GetCategories	ActivityID	ID of the activity record from which categories are obtained.
	BusComp	Business component of the associated categories.
	BusObj	Business object of the associated categories.
	Categories	List of the categories and the corresponding scores.
GetEventCategories	Categories	List of the categories that are extracted from EventFields.
	EventFields	Event fields that contain category properties with a CATEGORY prefix.
GetPreference	Category	Category of the preference.
	Preference	Name of the preference.
	Value	Value of the preference.
GetResponseText	Catalog ID	ID of the catalog in which the categories are stored. If the Catalog ID input argument contains a value, then the Catalog ID input argument is used to locate the catalog.

Method	Input Argument Name	Comment
	Categories	List of the categories and the corresponding scores.
	CheckThreshold	If Y, checks category scores against the threshold to determine if response text for a category is used. If N, gets the response text by using scores alone.
	CatalogName	Name of the catalog in which the categories are stored. If the Catalog ID input argument contains a value, then the Catalog Name input argument is ignored.
	ClosingTemplate	Name of the template that is used for the closing section of the email.
	EmailFormat	Format in which the email is sent, that is, plain text or HTML.
	GreetingTemplate	Name of the template that is used for the greeting section of the email.
	MaximumSections	Maximum number of categories for which response text is returned.
	ResponseText	Response text for the set of categories.
GetSearchSpec	[Name of a business component field]	The name of a business component field, such as Area or Extract.
GetTokens	Delimiter	One or more characters that separate a token from the surrounding characters. The default value is the space character.
	NumTokens	Number of tokens to obtain. The default value is 1.
	Text	Text from which the tokens are obtained.
ParseText	Text	String to parse.
ReturnPropSet	PropSetType	Type of the output hierarchy.
SetResponseFields	InputEmailBccLine	BCC line in the inbound email.
	InputEmailCcLine	CC line in the inbound email.
	InputEmailToLine	To line in the inbound email.
	InputMsgReceiveAddress	Receiver address in the inbound email.

Method	Input Argument Name	Comment
	InputMsgSenderAddress	Sender address in the inbound email.
	InputResponseType	Type of response. Values include Reply, Reply to All, and Forward.
	OutputEmailBccLine	BCC line for the outbound email.
	OutputEmailCcLine	CC line for the outbound email.
	OutputEmailToLine	To line for the outbound email.

Inbound Email Database Operations Business Service

This business service performs database-level actions. The following table lists the methods for the Inbound Email Database Operations business service.

Method Name	Comment
AttachFile	Creates an attachment record.
DeleteRecord	Deletes a record.
ExpandBCTemplate	Substitutes values in a template.
FindRecord	Finds a record. This method recognizes the CaseInsensitive parameter in the CFG file. By default, the CFG file is configured to perform case-sensitive searches.
FindRecordEx	Matches contacts when processing inbound email. Only Siebel Email Response uses this business service. This business service finds all contacts in the Siebel database with a primary or alternate email address that matches the From email address of the inbound email and then associates each contact with the email activity record.
GetFieldValues	Gets the field values from a record.
GetRecordList	Gets a list of records.
InsertRecord	Inserts a record.
UseLocale	Designates the hour clock for the server. A value of False (the default) indicates the server runs on a 24-hour clock. A value of True indicates the server runs on a 12-hour clock.

Method Name	Comment
	The Run Process workflow receives the date (Planned) from the driver in 24-hour format. Workflow executes the request on the server side. Siebel Server can run on a computer using a 12-hour or 24-hour clock.

Input Arguments for Methods of Inbound Email Database Operations

The following table lists and describes the input arguments for each method of the Inbound Email Database Operations business service.

Method	Input Argument Name	Comment
AttachFile	BusComp	Name of the attachment business component.
	BusObj	Name of the business object.
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	FileName	Name of the file to attach.
	FilePath	Path of the file to attach.
DeleteRecord	BusComp	Name of the business component from which to delete a record.
	BusObj	Name of the business object.
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	ID	ID of the record to delete.
ExpandBCTemplate	BusComp	Name of the business component used to get values for template substitutions.
	ReplyMessage	Reply message with the substituted values.
	ReplyTemplate	Reply template.

Method	Input Argument Name	Comment
FindRecord	BusComp	Name of the business component from which to find a record.
	BusObj	Name of the business object.
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	ID	ID of a found record.
	QueryFields	List of comma-separated fields to query. Query values are passed in additional arguments, with one argument for each field.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name, and the value set to the field value.
FindRecordEx	Contact Alternate Email Address QueryField: Email Address	Alternate email address for the contact.
GetFieldValues	BusComp	Name of the business component from which to get record values.
	BusObj	Name of the business object.
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	ID	ID of record from which to get values.
	IDField	Field on which to query for the ID.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name, and the value set to the field value.
GetRecordList	BusComp	Name of the business component from which to get record values.
	BusObj	Name of the business object.

Method	Input Argument Name	Comment
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	NumberofRows	Number of records returned. The default value is 10.
	QueryFields	List of comma-separated fields on which to query. Query values are passed in the additional argument fields, with one argument for each field.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name, and the value set to the field value.
InsertRecord	BusComp	Name of the business component to insert record into. Each field value to be set is passed as an additional input argument with the name set to Field: followed by the field name.
	BusObj	Name of the business object.
	ErrorMessage	Error message if an error occurs during method execution.
	FatalErrCode	Error code if a fatal error occurs during method execution.
	ID	ID of the new record if the insert is successful.

Outbound Communications Manager Business Service

This business service provides an interface to the outbound communications functionality of the Communications Outbound Manager server component, and it runs on the Siebel Server on which the Communications Outbound Manager server component runs. For more information about the Siebel application features for creating and submitting communication requests, see *Defining Outbound Communication Requests* .

This topic primarily shows the display names (Method Display Name) for each method. The internal names (Method Name) are also shown. Use internal names in any scripts that invoke these methods. All of the methods use profiles for a communications driver such as Internet SMTP/IMAP Server or Internet SMTP/POP3 Server.

The following table lists the methods for the Outbound Communications Manager business service.

Method Display Name and Method Name	Comment
Create and Submit Request	Creates a record for a communication request, then submits it to the Communications Outbound Manager server component.

Method Display Name and Method Name	Comment
(CreateRequest)	This method uses the Action business component to create recipient activity records for any template that creates activities.
Create and Submit Synchronous Request (CreateRequestSync)	Creates a record for a communication request, then submits it to the Communications Outbound Manager server component. This method waits until the current request is processed before continuing to the next request. The response from the Communication Outbound Manager includes the ActivityIDList argument, which lists email addresses and activity IDs. This method uses the Action business component to create recipient activity records for any template that creates activities. **Note:** You can determine the Activity ID for a particular email address by parsing the output string.
Send Message (SendMessage)	Sends a message to recipients in explicit semicolon-delimited lists of addresses (To list, CC list, and BCC list). This method accepts only literal subject and message body text, and does not support field substitution. This method supports file attachments. Argument values are provided directly, such as from a workflow process or a script.
Send SMTP Message (SendSmtpMessage)	Sends an SMTP message to recipients in explicit semicolon-delimited lists of addresses (To list, CC list, and BCC list). This method accepts only literal subject and message body text, and does not support field substitution or file attachments. Unlike the Send Message method, this method does not require a specified communications profile. The profile Default SMTP Profile is used. Argument values are provided directly, such as from a workflow process or a script.
Submit Request (SubmitRequest)	Submits a communication request by using the name or ID of a request that was previously created. Submits the request to the Communications Outbound Manager server component. This method uses the Action business component to create recipient activity records for any template that creates activities.
Submit Synchronous Request (SubmitRequestSync)	Submits a communication request by using the name or ID of a request that was previously created. Submits the request to the Communications Outbound Manager server component. This method waits until the current request is processed before continuing to the next request. The response from the Communication Outbound Manager includes the ActivityIDList argument, which lists email addresses and activity IDs. This method uses the Action business component to create recipient activity records for any template that creates activities. **Note:** You can determine the Activity ID for a particular email address by parsing the output string.

Arguments for Methods of Outbound Communications Manager

This topic lists the arguments for each method of the Outbound Communications Manager business service.

Note: Oracle Siebel Tools might include arguments omitted from these lists. Disregard any arguments that are flagged as Hidden or Inactive.

Arguments for Create and Submit Request Method

The following table lists the arguments for the Create and Submit Request (CreateRequest) method.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
# of Recipients (type: String)	NumRecipients	Input	No	Estimated total number of recipients. Used as a hint for auto-adjustment of number of subtasks. (Not available from the user interface for creating outbound requests.)
# of Tasks (type: String)	NumTasks	Input	No	Number of subtasks to run. This number is based on each recipient's last name.
Child Recipient Search Spec (type: String)	ChildRecipSearchSpec	Input	No	Search specification to filter iteration child business component in the form *child_BC_name*: *child_recip_search_spec*.
Comm Profile Override (type: String)	CommProfileOverride	Input	No	Communications profile to use for all communications templates in this request.
Comm Template Name List (type: String)	PackageNameList	Input	Yes	Semicolon-delimited list of communications template names.
Comments (type: String)	Comments	Input	No	Comments for the request. Corresponds to Comments field for the request.
Create Only (type: String)	CreateOnly	Input	No	Creates the communication request without any associated source, recipient, or template records specified. Used when creating a parent request.
Default Preference (type: String)	RequestDefaultMedium	Input	No	Communications channel to use if Only Send Preference is selected for the request and the channel preference is not specified for a recipient. Corresponds to Default Preference field for the request.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Defined Component (type: String)	DefinedComponent	Input	No	Name of the defined Siebel Server component to receive this request. This name is based on CommOutboundMgr. Corresponds to Component Name field for the request.
Message Reply Address List (type: String)	MsgReplyAddressList	Input	No	Semicolon-delimited list of email addresses. Recipients of email messages generated by the request can use this list. The list specifies email addresses that the recipient can reply to.
Only Send Preference Flag (type: String)	RequestSendFlag	Input	No	(Currently you can set this argument only from the user interface for creating outbound requests.) Corresponds to Only Send Preference field for the request.
Recipient Group (type: String)	RecipientGroup	Input	Yes	Source business object and recipient business component that is selected from the Recipient Group drop-down list. Corresponds to Recipient Group field for the request.
Recipient Search Spec (type: String)	RecipSearchSpec	Input	No	Search specification to filter the recipients that the recipient business component returns.
Request End Date (type: String)	EndDate	Output	No	Date or time that the request finished. Corresponds to End Time field for the request.
Request ID (type: String)	CommRequestId	Output	No	ID for this communication request. A request must use either Request ID or Request Name. Corresponds to Request # field for the request.
Request Language Code (type: String)	RequestLanguageCode	Input	No	Language applicable to this request. The value for this argument is derived, in priority order, from: • A value explicitly specified for this parameter, such as in a workflow process, or • The language specified for the first template for the request, or • The language applicable to the current Application Object Manager. It is assumed that all recipients for a request share a common language and locale.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Request Locale Code (type: String)	RequestLocaleCode	Input	No	Locale applicable to this request. The value for this argument is derived, in priority order, from: • A value explicitly specified for this parameter, such as in a workflow process, or • The locale specified for the first template for the request, or • The locale applicable to the current Application Object Manager. It is assumed that all recipients for a request share a common language and locale.
Request Name (type: String)	RequestName	Input	No	Name for this communication request. A request must use either Request ID or Request Name. Corresponds to Description field for the request.
Request Parent ID (type: String)	CommRequestParentId	Input	No	ID for the parent request of this communication request (when current request is a subrequest). Corresponds to Request # field for the request.
Request Start Date (type: String)	StartDate	Output	No	Date or time the request started. Corresponds to Start Time field for the request.
Source ID List (type: String)	SourceIdList	Input	Yes	Semicolon-delimited list of IDs for recipient source records.
SRM Request ID (type: String)	SRMRequestId	Output	No	ID for the server request for this communication request, as known to Server Request Broker.
Status (type: String)	Status	Output	No	Status of the request. Corresponds to Status field for the request.
Status Message (type: String)	StatusMessage	Output	No	Request status message. Corresponds to Status Message field for the request.
Task Recipient Minimum (type: String)	TaskRecipMin	Input	No	Preferred minimum number of recipients for a subtask. A warning issued if this number is not met. (Not available from the user interface for creating outbound requests.)

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Test Address (type: String)	TestAddress	Input	No	Recipient address (for the To line) to use for testing. This address overrides all other addresses. If set to Null (case insensitive), then communications drivers are not loaded and messages are note sent.
Web Server (type: String)	WebServer	Input	No	Web server to use for Siebel bookmarks (URLs). This argument corresponds to the WebServer parameter for Communications Outbound Manager. For more information, see *Configuring Communications Outbound Manager*. For information about the description for the Create Bookmark check box for advanced templates, see *Fields for Templates*.

Arguments for Send Message Method

The following table lists the arguments for the Send Message (SendMessage) method.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Bcc Address List (type: String)	MsgBccList	Input	No	Semicolon-delimited list of email addresses for the BCC line.
Cc Address List (type: String)	MsgCcList	Input	No	Semicolon-delimited list of email addresses for the CC line.
Communication Profile (type: String)	CommProfile	Input	Yes	Name of the communications profile used to send the message.
Message Body (type: String)	MsgBody	Input	No	Email message body content. This content might be specified from a workflow process or script. Content processing depends in part on whether the argument type is Expression or Literal. For example, when the type is Expression, you can enter operators such as +, specify field names for substitution, and enclose literal strings in quotes. You must enclose carriage returns to include in output in quotes, such as in the following example:

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
				"New Quote" + " " + [Quote Number] For more information, see *Siebel Business Process Framework: Workflow Guide* .
Message Subject (type: String)	MsgSubject	Input	No	Descriptive subject line for the email message.
Mobile Media Type (type: String)	MobileMediaType	Input	No	For a wireless message, set this argument to Wireless. This argument must be empty in all other cases.
Reply to Address List (type: String)	MsgReplyAddressList	Input	No	Semicolon-delimited list of email addresses to use for all recipients. The list specifies email addresses that the recipient can reply to.
To Address List (type: String)	MsgToList	Input	No	Semicolon-delimited list of email addresses for the To line. For a wireless message, this argument must contain a list of contact IDs to send the message to.

Arguments for Send SMTP Message Method

The following table lists the arguments for the Send SMTP Message (SendSmtpMessage) method.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Bcc Address List (type: String)	MsgBccList	Input	No	Semicolon-delimited list of email addresses for the BCC line.
Cc Address List (type: String)	MsgCcList	Input	No	Semicolon-delimited list of email addresses for the CC line.
From Address (type: String)	FromAddress	Input	Yes	Email address of the sender.
Message Body (type: String)	MsgBody	Input	No	Email message body content. This content might be specified from a workflow process or script. Content processing depends in part on whether the argument type is Expression or Literal. For example, when the type is Expression, you can enter operators such as +, specify field names for substitution, and enclose literal strings in quotes. You must enclose

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
				carriage returns to include in output in quotes, such as in the following example: "New Quote" + " " + [Quote Number] For more information, see *Siebel Business Process Framework: Workflow Guide* .
Message Subject (type: String)	MsgSubject	Input	No	Descriptive subject line for the email message.
To Address List (type: String)	MsgToList	Input	No	Semicolon-delimited list of email addresses for the To line.

Arguments for Submit Request Method

The following table lists the arguments for the Submit Request (SubmitRequest) method.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
# of Recipients (type: String)	NumRecipients	Input	No	Estimated total number of recipients. Used as a hint for auto-adjustment of number of subtasks. (Not available from user interface.)
# of Tasks (type: String)	NumTasks	Input	No	Number of subtasks to run. This number is based on each recipient's last name.
Child Recipient Search Spec (type: String)	ChildRecipSearchSpec	Input	No	Search specification to filter iteration child business component in the form *child_BC_name*: *child_recip_search_spec*.
Comm Profile Override (type: String)	CommProfileOverride	Input	No	Communications profile to use for all communications templates in this request.
Defined Component (type: String)	DefinedComponent	Input	No	Name of the defined Siebel Server component to receive this request. This name is based on CommOutboundMgr. Corresponds to Component Name field for the request.
Recipient Search Spec (type: String)	RecipSearchSpec	Input	No	Search specification to filter the recipients that the recipient business component returns.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Request End Date (type: String)	EndDate	Output	No	Date or time the request finished. Corresponds to End Time field for the request.
Request ID (type: String)	CommRequestId	Input	No	ID for this communication request. A request must use either Request ID or Request Name. Corresponds to Request # field for the request.
Request Language Code (type: String)	RequestLanguageCode	Input	No	Language applicable to this request. The value for this argument is derived, in priority order, from: • A value explicitly specified for this parameter, such as in a workflow process, or • The language specified for the first template for the request, or • The language applicable to the current Application Object Manager. It is assumed that all recipients for a request share a common language and locale.
Request Locale Code (type: String)	RequestLocaleCode	Input	No	Locale applicable to this request. The value for this argument is derived, in priority order, from: • A value explicitly specified for this parameter, such as in a workflow process, or • The locale specified for the first template for the request, or • The locale applicable to the current Application Object Manager. It is assumed that all recipients for a request share a common language and locale.
Request Name (type: String)	RequestName	Input	No	Name for this communication request. A request must use either Request ID or Request Name. Corresponds to Description field for the request.
Request Parent ID (type: String)	CommRequestParentId	Input	No	ID for the parent request of this communication request (when current request is a subrequest). Corresponds to Request # field for the request.

Argument Display Name and Data Type	Argument Name	Type	Req'd	Comment
Request Start Date (type: String)	StartDate	Output	No	Date or time the request started. Corresponds to Start Time field for the request.
Status (type: String)	Status	Output	No	Status of the request. Corresponds to Status field for the request.
Status Message (type: String)	StatusMessage	Output	No	Request status message. Corresponds to Status Message field for the request.
Task Recipient Minimum (type: String)	TaskRecipMin	Input	No	Preferred minimum number of recipients for a subtask. A warning issued if this number is not met. (Not available from the user interface for creating outbound requests.)
Test Address (type: String)	TestAddress	Input	No	Address to use for testing. This address overrides all other addresses. If it is set to Null (case insensitive), then communications drivers are not loaded and message are note sent.
Web Server (type: String)	WebServer	Input	No	Web server to use for Siebel bookmarks (URLs). This argument corresponds to the WebServer parameter for Communications Outbound Manager. For more information, see *Configuring Communications Outbound Manager*. For information about the description for the Create Bookmark check box for advanced templates, see *Fields for Templates*.