

VisNetic MailFlow Agent Guide

VISNETIC MAILFLOW PRODUCT DOCUMENTATION

VisNetic MailFlow Agent Guide

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VisNetic MailFlow Concepts

Understanding VisNetic MailFlow concepts and terminology.

VisNetic MailFlow was designed to be intuitive and easy to use; chances are very good that you'll be able to start using the web-based interface almost immediately after connecting to it. It will help, however, for you to have a basic understanding of the concepts and terminology used within the remainder of this document. In this chapter, we'll cover both.

Essential Terminology

First we'll start by defining some of the basic functional terms associated with VisNetic MailFlow.

DEFINITIONS

-  **Messages** – Email messages, which can be either incoming (sent into the system from an external source) or outgoing (sent to an external source from within VisNetic MailFlow)

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

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

-  **Agent** – An Agent is an individual representative of your company, and a user of VisNetic MailFlow.

-  **Group** – Agents may or may not be part of a larger Group of Agents.



Agent Shortcuts and Folders

For every Agent in the VisNetic MailFlow system, there are common shortcuts and folders that act as a means of navigating through the system. The table below explains the purpose of each of these, as well as how they are used and where additional information about them can be found.

Shortcut	Function	For details, see...
<i>Agent Status</i>	An indicator to the left of the logged in Agents name represents the Agents status in the system. To change status, select the indicator then the desired status.	"About Agent Preferences", chapter 6
<i>My Tickets</i>	Folder storing references to Tickets owned by the logged-in Agent.	"About Tickets", chapter 3
<i>Outbox</i>	Folder containing messages currently awaiting delivery to their recipients.	"Sending a message", chapter 5
<i>Sent Items</i>	Folder containing links to messages which have already been sent to their recipients	"Sent Items", chapter 5
<i>Drafts</i>	Folder storing messages that are presently in draft form. Drafts are retained indefinitely until they are deleted or sent.	"Composing an Email Message", chapter 5
<i>Alerts</i>	Shortcut to alert viewer. This shortcut will be displayed in bold when it contains alert messages.	"About Alerts", chapter 10
<i>Approval Queue</i>	Shortcut to approval queue. This shortcut will be displayed when you are an approval Agent.	" Approval Queue", chapter 12
<i>My Notes</i>	Shortcut to access an Agent's personal My Notes viewer.	"My Notes", chapter 4
<i>TicketBoxes</i>	This shortcut will appear only after an Agent uses the preferences shortcut to add TicketBox views.	"About TicketBoxes", chapter 2
<i>Agent Views</i>	This shortcut will appear only after an Agent uses the preferences shortcut to add Agent views.	"Agent Views", chapter 6
<i>Preferences</i>	Shortcut to configure a range of general per-Agent preferences, including TicketBox subscriptions, My Alerts, My Contacts, and My Folders.	"About Agent Preferences", chapter 6
<i>Standard Responses</i>	Shortcut used to access and manage the Standard Response Library, a centralized knowledge base of responses to common issues.	"About Standard Responses", chapter 8
<i>Ticket Search</i>	Allows an Agent to search the entire VisNetic MailFlow Ticket database.	"Searching for Tickets", chapter 3
<i>Ticket Links</i>	Displays a list of Ticket Links owned by the logged	"Ticket Links", chapter

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	in Agent.	3
<i>Contacts</i>	Used to access and manage a shared, centralized repository of customer contact information.	"About Contacts", chapter 7
<i>Help Topics</i>	Shortcut to MailFlow Online Help.	N/A
<i>Agent Guide</i>	Shortcut to VisNetic MailFlow Agent Guide.	N/A
<i>Logout</i>	Logs out the currently logged-in Agent.	N/A

About TicketBoxes

In VisNetic MailFlow, Tickets (which contain sent and received messages) are housed within TicketBoxes. The TicketBoxes will normally be set up to reflect the needs of your company's organizational structure – for example, there may be a *Sales* TicketBox for sales related correspondence, a *Support* TicketBox for customer support requests, and an *Info* TicketBox for product or service information requests.

The system administrator will handle the configuration of TicketBoxes within VisNetic MailFlow. Once set up, you will have the ability to access Tickets in these TicketBoxes, based upon the access rights assigned to you.

Note

Agents can access TicketBoxes by “subscribing” to them. This process is described fully in Chapter 6, “TicketBox Subscriptions”.

Connecting to VisNetic MailFlow

This chapter discusses how to connect to the VisNetic MailFlow system.

Accessing VisNetic MailFlow

Agents interact with VisNetic MailFlow using only a standard web browser. This allows them to connect from anywhere in the world that has an Internet connection. The VisNetic MailFlow system administrator will provide Agents with a web address that their web browser will use to access the system.

Agents may use Internet Explorer, Google Chrome, and Apple Safari to access the VisNetic MailFlow system.

Once connected, VisNetic MailFlow Agents are required to authenticate to the system. The VisNetic MailFlow system administrator will have assigned each Agent a username and password for this purpose.

Note

Agents may use Internet Explorer, Google Chrome, and Apple Safari to access the VisNetic MailFlow system.

Handling Tickets and Messages

This chapter describes the process of handling Tickets and messages within VisiNetic MailFlow.

About Tickets

When email messages come into the VisNetic MailFlow system, they are always associated with a Ticket. The message may be associated either with an existing Ticket (if the new message fits into an existing thread of discussion) or a new Ticket.

When Tickets are created, they are routed into a TicketBox. Tickets may be assigned directly to you, in which case they will appear in the “My Tickets” view. Although these Tickets are assigned directly to you, they still reside within TicketBoxes. This means that, in certain circumstances, other Agents could process messages currently assigned to you. Tickets not assigned to any specific Agent will be accessible from whatever TicketBox it currently resides in.

Viewing Tickets and Messages

To view the contents of a specific Ticket, first click either the “My Tickets” shortcut, or one of the TicketBoxes you are currently participating in (see “TicketBox Subscriptions”, chapter 6). You will then be taken to the TicketBox View.

For each Ticket, the following columns exist:

TICKET PROPERTIES

- Expand Ticket** () – Click to expand a Ticket.

- State** () – The status of the Ticket, which can be “open”, “closed”, “on hold”, or “waiting response”.

- Priority** () – The priority level of the Ticket, which can be “normal”, “low”, or “high”.

- Notes** () – Indicated whether the Ticket has notes associated with it.

- Ticket ID** – The Ticket number used to track this thread of correspondence.

- Message Count** () – The number of messages that the Ticket currently contains.

- Attachment Count** () – The number of attachments to messages that the Ticket currently contains.

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- ❑ **Subject** – The subject of the Ticket; derived from the message that prompted its creation.

- ❑ **Contact** – Lists one or more contacts currently associated with the Ticket.

- ❑ **Date** – The Ticket date stamp; normally derived from the date the message was sent.

- ❑ **Category** – The Ticket Category the Ticket is assigned to.

- ❑ **TicketBox** – The TicketBox that contains this Ticket. This field will appear only when viewing Tickets from within the “My Tickets” view.

- ❑ **Owner** – The current owner (or NONE). This field will appear only when viewing Tickets from within a TicketBox.

By default, Tickets in the Ticket list view are sorted by date in descending order (oldest at the top of the view). You can click on any column header (for example, the subject header) to sort by that column. Click again to sort by that column in the reverse order.

When Tickets are expanded, they reveal the messages and notes that they contain. To expand a Ticket, click the plus sign (+) next to the Ticket subject (click the minus sign (-) to collapse it again). You will then see a listing of messages relating to this Ticket, both inbound and outbound. These messages can be viewed either “by Inbound”, in which case messages appear in the order they were received, or “by Thread”, which will display messages in a threaded fashion.

Clicking on a message within the Ticket will display the message. A single click will display the message in a preview window directly beneath the Ticket view (if the preview window is enabled in Agent Preferences). This view will also include message attachments below the preview pane. An agent can open a single attachment by selecting the attachment and choosing the “Open Selected” button. To open all attachments, select the “Open All” button in the bottom preview pane. Double-clicking a message will open the message into a new window. Holding the Shift button while double-clicking a message will open the entire Ticket into a new window. Which method you use to open a message is largely a matter of preference.

Viewing a message will display the message envelope (To, From, Date, etc.) as well as the body text.

The TicketBox View Toolbar

The TicketBox View toolbar provides direct access to several important Ticket functions.

TICKET TOOLBAR

- * **New** – Tickets can be created with an email message or note attached. If a Ticket is created with an email message, the Agent will be taken directly to the message composition

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screen. If a Ticket is created with a note, then a dialog will appear that allows for the manual specification of the new Ticket attributes (along with an attached note). A ticket can be created with a phone note, which creates an elapsed timer for the duration of a phone call. A new message can also be created as part of an existing Ticket.

 **Refresh** – This toolbar button is used to refresh the page.

 **View** – Toggles whether the current Ticket list displays Tickets owned by other Agents. Also determines whether to display Tickets that have been closed.

 **Columns** – Select which Standard and Custom Ticket Field Columns to show in the current Ticket List View. Set the default Standard Column view in Agent Preferences.

 **Reset Columns** – Reset the column widths to fit the current view.

 **Ticket Search** – Click this button to display the Ticket Search facility.

 **Contact(s)** – Click this button to display one or more contact records associated with the selected Ticket.

 **Notes** – This toolbar button is used to add, read, or delete notes from a specific Ticket.

 **Get Oldest** – Use this button to take ownership of the oldest Tickets in the current TicketBox.

 **Take Ownership** – Allows Agent to take ownership of the Ticket that's currently selected.

 **Reassign** – Allows for the assignment of the selected Ticket to another Agent.

 **Move to another TicketBox** – Move the selected ticket(s) to another TicketBox.

 **Merge with another Ticket** – Merge the selected ticket(s) with another ticket.

 **Display Ticket Link Options** – Link the selected ticket(s) with another ticket, display links the selected Ticket is in.

 **Change the State** – Change the state of the selected ticket(s).

 **Escalate the Ticket** – Escalates the ticket(s) to the designated Agent or Escalation Group.

 **Properties** – Provides the ability to view and modify the attributes of the selected Ticket. Properties include the current owner, TicketBox location, category, priority, and status of the Ticket. A note can also be added when Ticket properties are changed.

 **View Ticket in new Window** – Open the selected Ticket in a new Window.

 **Mark Ticket as Read** – Mark all items (messages and notes) within the selected ticket(s) as read.

 **Mark Ticket as Unread** – Mark all items (messages and notes) within the selected ticket(s) as unread.

 **Close** – Closes the currently selected Ticket. Optionally set the Ticket to reopen on a specified date.

 **Delete** – Allows the Agent to delete the selected Ticket. May or may not appear on toolbar, based upon Agent rights.

 **Help** – Shows online help for the Ticket view.

The Message Toolbar

Selecting a message to view results in the message display window will enable the message toolbar at the top of this window.

MESSAGE TOOLBAR	
	Reply – Replies to the originator of the email.
	Reply All – Replies to the originator of the email, as well as the recipients.
	Forward – Forwards the email to an email address external to the system.
	Mark as Read – Mark this message as read.
	Mark as Unread – Mark this message as unread.
	View – Can be used to view the contact properties, contact history, or headers for the specified message.
	Delete – Appears if the Agent has delete access rights.
	Move – Moves the message to another Ticket (can be a new Ticket or an existing one).
	Copy – Copies the message to a new Ticket.
	Print – Displays the message in a printer-friendly format.
	Help – Opens VisNetic MailFlow Help section.
	Attachments – Appears when attachments are associated with the message. Click to display a list of attachments.
	Send Again – Appears if this is an outbound message that has already been sent. Allows for the message to be sent again.
	Ticket Note Editor – Appears for outbound messages. Displays the Ticket note editor for the selected ticket.
	Contact(s) – Appears for outbound messages. Displays one or more contact records associated with the message.

Replying to a Message

You can reply to messages that have been assigned to you, or messages in TicketBoxes to which you have access permissions.

The following steps will allow you to reply to a specific message within a Ticket:

1. Open a Ticket by clicking the plus sign (+) button next to it, or by double-clicking the Ticket subject
2. Select the message to which you intend to reply.

3. In the message display window, click either the Reply or Reply All button¹
4. Write a response to the message using the message composition functions available within VisNetic MailFlow. For more information on composing messages within VisNetic MailFlow, see “Message Composition”, Chapter 5.
5. Select “Yes” from the “Route Replies To Me” drop-down box if you wish to take ownership of the Ticket. If you do not wish to take ownership of the Ticket, select “No.” You may set Agent Preferences to prompt you each time, or save your routing preference. System Defaults may prevent you from altering this setting.
6. Select “Yes” from the “Close Ticket After Send” drop-down box to set the status of the message to Closed upon sending.² If you wish to keep the Ticket open, you can choose “No.” You may set Agent Preferences to prompt you each time, or save your common choice. System Defaults may prevent you from altering this setting.
7. Click the Send toolbar button to send the message to the designated recipient(s), or Save to save the message as a draft (at which point it appears within the Agent’s Drafts folder).

Note

The VisNetic MailFlow system will automatically place a “lock” on messages as they are being replied to. This will prevent more than one Agent from replying to a single Ticket message at the same time.

¹ The Reply and Reply All functions behave similarly to how they would in standard email clients. “Reply” allows an Agent to reply to the sender directly, while “Reply All” also includes the carbon copy recipients of the original message.

² It is important to note that if you close a Ticket as you reply to a message within it, it may be re-opened if another new message comes into the system that relates to the Ticket.



Replying With a Standard Response

When you reply to a message within VisNetic MailFlow, you have the option of inserting a Standard Response into the body of your reply. This function is provided by the Standard Response Library, and can create huge savings in time when repeatedly answering similar questions. To learn more about how to add standard responses to the library, see Chapter 8, “The Standard Response Library”.

To reply to a message with a Standard Response, first follow the steps above up to the point of sending the message. Then:

1. Within the response message body, place your cursor where you'd like the standard response text to appear.
2. Click the Insert Response button.
3. Select a standard response from the “My Most Frequently Used,” “My Favorites,” “Recommended,” “By TicketBox,” or “By Ticket Category” menu.³
4. The standard response text will appear within the message body at the cursor position set in step 1.

Forwarding a Message

VisNetic MailFlow allows Agents to forward email messages to one or more external email addresses as required. However, it's important to note that the message forwarding function **should not** be used to reassign a Ticket or message to another VisNetic MailFlow Agent. To learn more about how to reassign Tickets (and the messages they contain), see the next section, “Reassigning Tickets”.

1. Select the message that you wish to forward.
2. Click the Forward toolbar button within the message display window.
3. Enter the email addresses of the recipients into the To, CC, and BCC fields.
4. Click the Send toolbar button to send the message to the recipient(s), or Save to save it as a draft.

³ In addition to selecting “favorite”, “most frequently used” or “recommended” standard responses from the Standard Responses drop-down menu, you can also select the “Standard Response Browser” menu option. This will launch the standard response browser window, which allows you to utilize any standard response available within the system.

Remote Reply

VisNetic MailFlow provides Agents the ability to reply to Tickets from any standard email client, i.e Outlook, Thunderbird, and Apple Mail and have their reply added to the Ticket message thread.

The feature forwards a copy of the inbound message to the Agent's "Remote Reply" email address. The Agent then replies to the message, automatically threading the reply into the Ticket, with the outbound message sent from MailFlow.

Contact your MailFlow administrator to enable this feature.

Reassigning a Ticket

Tickets can be assigned to Agents in a number of ways.

1. By a system-level routing rule, which assigns ownership of a Ticket as it enters the system based upon administrative criteria
2. As the result of an Agent taking ownership of a Ticket from within a TicketBox
3. As the result of replying to a Message within a Ticket, and selecting "yes" from the "Route Replies to Me" drop-down box
4. Manual assignment of a Ticket to an Agent by another Agent (such as a supervisor or team member)

Agents can reassign Tickets to other Agents, in which case they appear in the receiving Agent's "My Tickets" view. Reassigning a Ticket in VisNetic MailFlow changes the ownership of that Ticket. Tickets can also be set as having no owner, in which case they remain unassigned within the TicketBox that currently contains them.

To reassign a Ticket to another Agent:

1. Select the Ticket that you wish to reassign
2. Click the Reassign toolbar button ()
3. Select the new Ticket owner from the Owner drop-down box
4. Add any notes relating to the Ticket reassignment to the optional note field
5. Click the Save button

Tip: When reassigning a Ticket, it's often a good idea to add a quick note indicating the reason for the reassignment.

Tickets can also be assigned a specific owner when an Agent creates a new message. For more details on creating new Tickets, see Chapter 4, “Creating Tickets”.

Moving a Ticket to another TicketBox

Agents can move Tickets from one TicketBox to another. This is useful if a Ticket might more appropriately belong in another TicketBox. For example, if you find a new sales-oriented Ticket in the support TicketBox, it would normally be best to move it to the sales TicketBox for handling by those who monitor sales-oriented Tickets.

To move a Ticket to another TicketBox:

1. Select the Ticket that you'd like to move
2. Click the Properties button or Move the Selected Ticket button in the Ticket list toolbar ( )
3. Select the new TicketBox location from the appropriate drop-down list
4. Click the Save button

Merging Tickets

Agents can combine multiple tickets into an existing Ticket. If you receive multiple Tickets about the same incident you have the ability to merge these Tickets. This combines all the Tickets into one request, keeping only one open Ticket awaiting your response.

To merge Tickets:

1. Use the CTRL button to select the Tickets you wish to merge
2. Select the “Merge” button on the Ticket toolbar ()
3. Select either “Merge selected Tickets” or “Merge selected Tickets with an existing Ticket”
4. Select “Ok”

Ticket Links

There are times when it is necessary to keep multiple tickets, relating to the same topic, open in the system instead of merging the tickets together. You can link the related tickets into a new or existing Ticket Link. This option is only available if the Administrator has enabled Ticket Linking for the selected TicketBox.

Link Tickets:

1. Select a single Ticket or use the CTRL or Shift buttons in conjunction with the mouse select button to select the multiple Tickets you wish to link.
2. Select the “Link” button on the Ticket toolbar () or right click and select Ticket Link

Note: If multiple Tickets are selected an option to “Link the selected Tickets” will be presented.

3. To link the selected Tickets, enter a unique Link Name then select Ok.
4. To link the selected Ticket or Tickets to another Ticket in the system, select the option to “Link the selected Ticket or Tickets to another Ticket”, enter a unique Link Name then select Ok.

In the resulting Ticket Search dialog, enter your search options, search for and select a Ticket to link to then select the “Select Link Ticket” toolbar button ()

5. To add the selected Ticket or Tickets to an existing Link, select the option to “Add the selected Ticket or Tickets to an existing Ticket Link”, then select OK.

In the resulting Ticket Link Search dialog, enter your search options, search for and select a Ticket Link to add the selected Ticket or Tickets to then select the “Select Link” toolbar button ()

Note: Linked Tickets appear in Ticket lists with special Ticket State icons.

View Ticket Links:

1. Select the Ticket Links left menu option then search for the Ticket Link you wish to view.
2. Select a linked Ticket and either right click and select Ticket Link or take the Ticket Link toolbar button. Once in the Link dialog select the option to “View links for this Ticket” then Ok.

Note: Double click a listed Ticket Link to view the Tickets in the link.

Unlink Tickets:

1. Follow the steps above to access the list of Tickets in a Ticket Link.

2. Select one or more Tickets from the list of linked Tickets then select the “Remove selected Tickets from Link” toolbar button ().

Note: If less than two Tickets remain in a Ticket Link any remaining Ticket will also be removed and the Ticket Link will be deleted.

Delete Ticket Links:

1. Follow the steps to “View Ticket Links”.
2. From the list of Ticket Links, select one or more links then select the “Delete” toolbar button ().

Assigning a Ticket to a Ticket Category

Agents can change the Ticket Category assignment. This is useful if a Ticket might more appropriately belong in another Ticket Category. For example, if you find a new sales-oriented Ticket in the support Ticket Category, it would normally be best to reassign it to the sales Ticket Category for handling by those who monitor it.

To reassign a Ticket to another Ticket Category:

1. Select the Ticket that you’d like to reassign
2. Click the Properties button in the Ticket list toolbar (See “The TicketBox View Toolbar” earlier in this chapter)
3. Select the new Ticket Category from the appropriate drop-down list
4. Click the Save button

Changing the Status of a Ticket

Every Ticket in the VisNetic MailFlow system has a status associated with it. The status can be one of the following:

- ❑ **Open** – The Ticket is considered active, and requires attention.
- ❑ **Closed** – The Ticket is inactive, and requires no further action at this time. Note that if a new message comes into VisNetic MailFlow and is associated with a closed Ticket, the Ticket will be re-opened automatically.
- ❑ **On Hold** – Indicates that the Ticket is intentionally

Tip: Always close Tickets once they require no further action. This reflects positively in system reports.

being held open without action for some period of time.

- ❑ **Waiting Response** – Indicates that the Ticket is intentionally being held open, in wait of a response.

To change the status of a Ticket, do the following:

1. Select the Ticket
2. Click the Properties button or Change the State button in the toolbar ( )
3. Change the status of the Ticket using the Status drop-down box
4. Click the Save button

Tip: You can also use the Close toolbar shortcut to quickly close a Ticket 

Populating Custom Ticket Fields

Custom ticket fields can be populated within the Ticket Properties dialog or within the Message Composition dialog while creating a new message or replying to or forwarding an existing message. Custom ticket fields are defined by the system administrator and are associated with TicketBoxes.

If a custom ticket field is set to “Is Required” for a particular TicketBox, you must enter a value in the relevant custom ticket field before sending any messages from that TicketBox.

To set the value of a custom ticket field from the Ticket Properties dialog, perform the following steps:

1. Select the Ticket that you’d like to assign values to
2. Click the Properties button in the Ticket list toolbar ()
3. Enter the values in any custom ticket fields
4. Click the Save button



Deleting Tickets & Messages

Agents with appropriate access rights can delete Tickets using the Delete function on the Ticket toolbar. Deleting a Ticket removes the Ticket from all views and places it in the VisNetic MailFlow system trashcan, which can only be accessed by administrators.

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Deleting a Ticket also deletes all the messages it contains.

In VisNetic MailFlow, a Ticket should only be deleted when you're certain that it (and all the messages it contains) will never be needed again.

Like Tickets, messages can also be deleted using the message window toolbar. Once deleted, a message is no longer a part of the Ticket that originally contained it. Deleted messages are placed in the system trashcan.

To delete a ticket:

1. Select the Ticket
2. Click the Delete button in the Ticket Toolbar
3. Select "OK" in the pop-up window

To delete a message:

1. Select the message
2. Click the Delete button in the Message Toolbar
3. Select "OK" in the pop-up window

Note

If you delete a Ticket or message by accident, contact a VisNetic MailFlow system administrator, and request that they restore it for you.

Note

New in version 5.1, Agents now have the ability to delete a message from their Drafts folder regardless of access rights.

Moving Messages

VisNetic MailFlow allows you to move messages from one Ticket to another. The destination Ticket may already exist, or can be created as part of the message move process.

If you elect to move a message to a new Ticket, the new Ticket will be created in the same TicketBox as the message being moved. The new Ticket's status and owner properties will reflect those of the Ticket containing the original message being moved.

To move a message to a new Ticket:

1. Select the "Move" button from the message toolbar or Right-click the message and select "Move" ()
2. In the pop-up window, select to move this message and its entire thread "To a new ticket" or "To an existing ticket."
3. Select "OK."

VisNetic MailFlow allows you to copy a message, creating a new Ticket. The new Ticket's Subject, Ticket Category, Priority, and Owner properties can be set.

To copy a message to a new Ticket:

1. Select the "Copy" button from the message toolbar ()
2. Define the properties of the new Ticket
3. Select "Save"

If you choose to move a message to an existing Ticket, you will then be prompted to search for the destination Ticket into which this message will be moved. Once located, the destination Ticket can be "selected" (via the search results toolbar), and the message is then moved into it.

Taking Ownership of Tickets

Within VisNetic MailFlow, a specific Agent can either own Tickets, or Tickets may have no owner at all. When an Agent owns a Ticket, it has the following effects:

1. The owned Ticket appears within the My Tickets shortcut of the owning Agent
2. All future correspondence relating to this Ticket will be owned by the Agent

When a Ticket is owned by a specific Agent, it will no longer appear in the TicketBox that contains it *unless* that TicketBox view is set to show owned Tickets (See "The TicketBox View Toolbar" earlier in this chapter).

There are a few different ways in which an Agent can become the owner of a Ticket:

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1. Tickets with specific attributes are automatically assigned directly to Agents via an administrative routing rule
2. An Agent uses the Take Ownership toolbar button within a TicketBox view to acquire ownership of the currently-selected Ticket ()
3. An Agent uses the Get Oldest toolbar button within a TicketBox view to acquire ownership of one or more “oldest” Tickets ()
4. An Agent is assigned a Ticket by another Agent

The “Get Oldest” function (available as a toolbar button within a TicketBox view) acts as a functional shortcut, allowing Agents to quickly acquire ownership of the oldest Ticket(s) within a TicketBox. Administrators are also able to require that the Get Oldest button *always* be used to process Tickets from within one or more TicketBoxes. For such TicketBoxes, a notice will be displayed to Agents indicating the requirement for the use of the Get Oldest button.

Ticket Notes

One or more notes can be associated with any Ticket within the VisNetic MailFlow system. Ticket notes are completely private, and are not displayed or otherwise referenced outside of VisNetic MailFlow (e.g. customers do not see them).

When a Ticket is expanded to reveal the messages it contains, any notes for that Ticket will also be displayed. The Notes toolbar button can be used to add, remove, and modify the notes associated with the currently selected Ticket.

Ticket Priorities

VisNetic MailFlow allows for any Ticket within the system to have a priority associated with it. The priority for any given Ticket can be “High”, “Normal”, or “Low”. The default Ticket priority is “Normal”.

“High” and “Low” Ticket priorities can be assigned either manually by an Agent, or by an administrative routing rule.

To change the Ticket priority:

1. Select the Ticket
2. Click the Properties button in the Ticket Toolbar
3. Change the priority of the ticket using the priority drop-down box
4. Click the Save button

Note

Ticket priorities are distinct from message priorities, which are also recognized by VisNetic MailFlow. The priority of messages is normally set by the email client of the originator, and can also be set explicitly for outbound messages sent from within VisNetic MailFlow.

**Escalating Tickets**

Agents within VisNetic MailFlow may optionally have a designated person or group to whom they are able to escalate Tickets. The person or group to whom they escalate Tickets is often a supervisor or manager.

If the logged-in Agent has a Ticket escalation recipient defined, they will find an Escalate toolbar button in the Ticket properties dialog. Clicking this button will escalate the Ticket accordingly, effectively changing its ownership.

Searching for Tickets

Agents can quickly locate specific Tickets within the VisNetic MailFlow system via the Ticket Search facility.

The Ticket Search window provides a number of search criteria. These include:

- ❑ **Ticket ID** - equal to, less than, or greater than a specific Ticket ID
- ❑ **Ticket Subject** – either containing or exactly matching a given phrase or word and/or matching a second given phrase or word
- ❑ **Contact Name** – either containing or exactly matching a given name
- ❑ **Contact Email Address** – either containing or exactly matching a given address
- ❑ **Owner** – select a specific owner or “All Owners” from the drop-down box
- ❑ **TicketBox** – select a specific TicketBox or “All TicketBoxes” from the drop-down box
- ❑ **Ticket Priority** – select a specific Ticket priority or “All Ticket Priorities” from the drop-down box
- ❑ **Ticket State** – select a specific Ticket state or “All Ticket States” from the drop-down box

- ❑ **Ticket Category** – select a specific Ticket category or “All Ticket Categories” from the drop-down box
- ❑ **Ticket Lock State** – select a specific Ticket lock state or “All Locked States” from the drop-down box
- ❑ **Custom Ticket Field** – select a custom Ticket Field to include in the search then provide additional search criteria, depending the type of Ticket Field
- ❑ **Search Messages** – Select “Inbound”, “Outbound”, or “All Messages” from the drop-down box
- ❑ **Message Subject** – either containing or exactly matching a given subject
- ❑ **Where Message Body Contains** – enter text to match within “Inbound”, “Outbound” or (by default) “All Messages”
- ❑ **Where Ticket Note Contains** – enter text to match within a ticket note
- ❑ **Date Ticket Created** – select either “All Dates” or specify a date range
- ❑ **Date Last Opened** – select either “All Dates” or specify a date range
- ❑ **Inbound Message Date** – select either “All Dates” or specify a date range
- ❑ **Use SQL Full Text Searches** – if enabled, select this option to use a Full Text Search when Subject or Body contains a search string. Certain common words are not included in the Full Text index so if you receive invalid or inaccurate results you may want to disable this option.
- ❑ **Max number of Results** – by default, the value defined for this Agent in his or her Agent preferences; can be modified to suit this specific query
- ❑ **Sort Results By** – select “Contact”, “Date”, “Subject”, etc. from the drop-down box
- ❑ **Sort Order** – choose “Ascending” or “Descending” from the drop-down box
- ❑ **Database Timeout** – the maximum amount of time, in seconds, the Ticket search query will be allowed to run before timing out

To search for a Ticket:

1. Select Ticket Search in the left pane menu
2. Choose criteria

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3. Select the Search button
4. Once the Ticket search is complete, a list of Tickets that match the provided criteria will be displayed, and can be treated like any other Ticket. These results can be sorted by: Date, Contact, Subject, etc.

Creating Tickets and MyNotes

This chapter describes how to create new Tickets and Notes

New Ticket Creation

As previously noted, VisNetic MailFlow automatically creates Tickets for new messages coming into the system or associates those messages with existing Tickets when appropriate. However, it will sometimes be necessary to create a new Ticket manually - because you wish to send a new outbound message not relating to any existing Ticket, for example.

The New button on the TicketBox View toolbar allows an Agent to manually create a new Ticket, or associate a new message with an existing Ticket.

1. **Ticket with Message** – this creates a new email message destined for one or more recipients, along with a containing Ticket
2. **Ticket with Note** – this creates a new Ticket with an associated note. These may be used to log information taken in a phone call, for example
3. **Ticket with Phone Note** – this creates a new Ticket with an associated note and an elapsed timer for the duration of a phone call, allowing an Agent to record conversation notes. The call time is recorded in the contact record, along with the notes
4. **Message for Current Ticket** – requires that a Ticket be selected, and creates a new email message within that Ticket

Choosing to create a new “Ticket with Message” or “Message for Current Ticket,” results in an email composition window similar to that which is displayed when you reply to an email within an existing Ticket (See “Message Composition”, chapter 5).

If you decide to create a new “Ticket with Note” a pop-up dialog will appear that allows you to define the attributes of the new Ticket, as well as enter the associated note text.

Once a Ticket has been created manually, it behaves and appears the same as any other Ticket in the system.

If an Agent creates a “Ticket with Note” as a result of a telephone call or direct customer interaction, that Agent can always find that Ticket again later and use the “Message for Current Ticket” function (via the New button on the TicketBox View toolbar) to send them an email from within VisNetic MailFlow.

My Notes

The My Notes tool allows an Agent to create internal notes that are not associated with a Ticket. This tool includes a spellchecker for accurate communication and clarity. Agents also have the ability to add attachments to their internal notes.

To Add an Internal Note:

1. Select My Notes from the left navigation pane
2. In the resulting dialog box, click the Add button
3. Enter a subject and message for your note
4. Click the Save button

To Add an Attachment to a Note:

1. Select My Notes from the left navigation pane
2. In the resulting dialog box, click the Add button, or click to open an existing note
3. Click the Attachments tab in the note composition window
4. Click the Browse button to find the file you wish to attach. Choose the proper file and click the Open button within the file browser window
5. Click the Compose tab and select the Save button

Message Composition

This chapter describes the process of composing email messages within VisiNetic MailFlow

Composing an Email Message

VisiNetic MailFlow strives to make the composition of email messages as simple, friendly, and familiar as possible. In fact, the process will probably feel very similar to composing an email message within your favorite email client or word processing application.

At the very top of the message composition window, resides a toolbar with the following functions:

PRIMARY MESSAGE COMPOSITION TOOLBAR

 **Send** – Begins the message transmission process by placing this email message into the Agent's Outbox.

 **Save** – Saves the message into the Agent's Drafts folder; the message will not be sent.

 **Spell Check** – Initiates a spell check of the message body.

 **Notes** – Used to add, edit, and delete notes for this Ticket.

 **Contacts** – Opens the Contacts window for quick access to Contacts Search.

 **Print** – Prints a copy of the message currently being composed.

 **Help** – Provides context-sensitive help regarding the message composition process.

The next part of the message composition window shows the message delivery fields and options.

- ❑ **From** – this drop-down box allows the Agent to change the originator of the email message. Available “from” email addresses will often include that of the Agent and that of the TicketBox from within which the message was created.
- ❑ **To** – the email address of the message recipient. Clicking on the To field button will display a contact search window that can be used to designate message recipients.

- ❑ **CC** – the Carbon Copy field designates the email address of a recipient to receive a copy of this email message. Clicking on the CC field button will display a contact search window that can be used to designate message recipients.
- ❑ **BCC** – the Blind Carbon Copy field designates the email address of a recipient to receive a “blind” copy of this email – the To and CC recipients will have no knowledge of this person’s receipt of the message. Clicking on the BCC field button will display a contact search window that can be used to designate message recipients.
- ❑ **Subject** – the subject of the email message itself.
- ❑ **TicketBox** – select from this drop-down box the TicketBox in which the Ticket containing this message will be created.
- ❑ **Ticket Category** – select from this drop-down box the Ticket Category that best suits the Ticket.
- ❑ **Ticket State** – select from this drop-down box the Ticket State that describes the ticket: Closed, Open, On-Hold, or Waiting Response. Ticket State has a direct relation to the Close Ticket After Send setting. Changing the Ticket State to Open, On-Hold, and Waiting Response will set the Close Ticket After Send to No.
- ❑ **Ticket Owner** – select from this drop-down box the name of the Agent that will own this message once it is sent or saved. This option will only appear when a new message is being created (e.g. does not appear for replies). If you would like to send the message and have a potential reply route to another Agent’s My Tickets, you could set the Ticket Owner to the other Agent prior to Sending the message.
- ❑ **MultiMail** – the following options are presented for New Outbound Messages (not replies or forwards).
 - Send individual message to each To: Address – a unique singularly addressed message is created for each recipient in the To: field.
 - Create a new Ticket for each Message – a unique Ticket is created for each message.
 - Omit Ticket Tracking Data – Ticket tracking data [xxxxxx:yyyyy] is not included in the outbound messages. In order for replies to be associated back to the original Ticket the Tickets must be in a non-closed state.

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- ❑ **Message Format** – select either the “Text” or “HTML” radio button. This will determine the display format of the message. The Agent can set a default in their Preferences.
- ❑ **Route Replies To Me** – setting this option to “yes” will cause the current Agent to take ownership of this Ticket when the message is sent.
- ❑ **Close Ticket After Send** – instructs VisNetic MailFlow to close the containing Ticket after this email message is sent.⁴
- ❑ **Reopen On** – enabling this function and selecting a date from the calendar will instruct MailFlow to re-open this Ticket on the specified date. The Ticket is automatically re-opened assuming no additional messages have been received since closing the Ticket.
- ❑ **Request Read Receipt** – setting this option to “yes” will request the message recipient acknowledge the message has been read.
- ❑ **Request Delivery Confirmation** – setting this option to “yes” will request the receiving mail server to confirm delivery of the message.

Next, just above the text editing window will appear a secondary message composition toolbar.

SECONDARY MESSAGE COMPOSITION TOOLBAR

Ticket Priority – Used to alter the priority level of the containing Ticket.

Message Priority – Used to set the message priority level. The email client of the recipient will typically display this priority.



Insert Response – Allows for the insertion of a standard response. (See “Inserting Standard Responses Into Messages”, chapter 8).



Insert Signature – Allows for the insertion of a signature.

At the bottom of the message composition screen, there may or may not appear an HTML formatting toolbar. This toolbar will only be visible if HTML formatting is permitted within the email currently being composed, and if HTML is selected as the desired formatting method. These formatting functions are very similar to those of any common word processor, and include the ability to select the current font, font size, and font color, as well as apply bold, underline, and italics effects to text. Hyperlinks may also be added to the message if HTML formatting is being used.

⁴ It is important to note that if you close a Ticket after sending a message, it may be reopened if another new message comes into the system that relates to the Ticket.

Note

Inserting an HTML-based Standard Response requires the message composition be set to HTML. Inserting HTML Standard Response into a Text-based message will remove the HTML elements of the Standard Response.

Inserting an Image in the Message Body

To add an image to the message body, follow these steps:

1. Ensure that the message is in HTML format
2. Place the cursor where you would like the image to be placed within the body of the message
3. Select the “Image” button in the HTML toolbar
4. Choose an image and select “Open”
5. The image will appear in the message body, as well as the attachments tab

Note

Depending on the security settings of your browser it may be necessary to add your VisNetic MailFlow login URL as a Trusted Site in your browser. Images failing to insert are commonly browser security settings related.

Message Attachments

To add one or more attachment files to the message being composed, follow these steps:

1. Click the Attachments tab in the message composition window
2. Click the Browse button to find a file in your computer’s hard drive. When you’ve located the file you wish to attach, double-click that file, or click the Open button within the file browser window.

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Each time a file is added to the attachments window, that file will be uploaded to the VisNetic MailFlow server.

Note: Some browsers allow the simultaneous selection of multiple files to be uploaded to the message. Use your mouse and the CTRL or Shift keys to select multiple files.

Note: Some browsers support the drag and drop of one or more files to the “Choose Files” button within the Attachments dialog. Select one or more files, drag and drop on the “Choose Files” button to add the files as attachments to the message.

To view a file from the attachments listing, highlight the file and click the Open button, or double-click on the file you wish to view.

To remove a file from the attachments listing, simply highlight the file and click the Delete button.

When the addition of attachments is complete, simply return to the message composition window by clicking the Compose tab and either send your message or continue composition.

Note

Although VisNetic MailFlow can handle attachment files of nearly any size or type, it's wise to consider the size of a given attachment file prior to adding it to an email message. Large attachments may create significant retrieval delays for the message recipient. Adding multiple smaller attachment files can have a similar effect.

Spell Checking

VisNetic MailFlow provides the ability to check the spelling of the message body text during the message composition process.

A spell check can be initiated manually using the appropriate button on the message composition toolbar. VisNetic MailFlow will also, by default, check the spelling of the message body when the composed message is sent (See “Agent Preferences”, chapter 6 for details on how to change this behavior).

The spell checking process is similar to that provided in many popular word processing applications. Once started, a spell check window will appear and any misspelled words within the message body will be highlighted. Agents will then have the following options:

- Ignore** – ignores the currently-selected word

- ❑ **Change** – changes the spelling of the currently-selected word according to the selection made in the “Suggestions” list
- ❑ **Add** – adds the currently-selected word to the Agent’s personal dictionary
- ❑ **Cancel** - cancels the spell-check currently in progress and allows further editing of the message being composed
- ❑ **Send Message** – if the spell-check was initiated automatically upon sending the message, this button allows you to skip the spell-check in progress and send the message immediately

Sending a Message

Once an Agent sends the email message they’ve composed, that message is placed into their Outbox folder. The message will remain in the Agent’s outbox until it is delivered by the VisNetic MailFlow system. The length of time the message sits in the Outbox is configurable under Preferences.

Revoking a Message

The Outbox also has a special toolbar function called "Revoke". This feature allows the Agent to revoke a message from the Outbox, thus preventing it from being sent. The revoked message will then appear in the Drafts folder. A setting in the Agent’s general preferences allows for the specification of a delivery delay for outbound messages (See “Agent Preferences”, chapter 6 for details on setting an outbound message delivery delay).

Sent Items

Once VisNetic MailFlow has sent an email message, a reference to that message can be found in the Agent’s Sent Items folder. To re-send a message:

1. Navigate to the Sent Items Folder
2. Open the message that you wish to re-send
3. Click the Send Again button in the message toolbar

Agent Preferences

This chapter discusses the various preferences that can be set by VisNetic MailFlow Agents.

About Agent Preferences

Each Agent within VisNetic MailFlow has a unique set of preferences that they can modify to suit the way they interact with the system. Use the Preferences shortcut in the left-hand pane to access these settings.

Note

Access to Preferences or portions within Preferences may be restricted by an Administrator.

General Preferences

General preferences include the following:

1. **Display Theme** – the color scheme preferred by the current Agent
2. **Max Number of Rows to Display** – indicates how many rows should be displayed by default in Ticket and contact searches, reports, and Ticket list views
3. **Double-click Ticket Behavior** – allows the Agent to select their preference of Expanding the Ticket, or opening the Ticket in a new window
4. **Show Messages within Ticket** – messages that are contained within Tickets can be displayed in a “threaded” fashion or “by inbound” (newest messages sorted to the top). This setting controls the default display method
5. **Use Preview Pane when Viewing Messages** – if this is set to “yes”, then selecting a message within a Ticket will cause the message contents to be displayed in a preview pane at the bottom right of the screen. If this option is set to “no”, then messages must always be double-clicked in order to view them

in a separate window. A message may be viewed in a new window with keyboard shortcut shift+double-clicking the Ticket.

There is also a toolbar option to view in a new window. ()

6. **Automatically mark selected messages and notes as read after** – if this option is enabled, messages and notes will automatically be marked as read after the number of seconds indicated in the dialog. If this option is not enabled, messages and notes will not be automatically marked as read, the Agent will need to manually mark them read using the right-click menu, keyboard or relevant toolbar buttons
7. **Quote Original Message in Reply** – when replying to a message, this setting indicates whether or not the original message should be quoted (included in the reply with each line prefixed by a special character)
8. **Original Message Prefix** – if “Quote Original Message in Reply” is turned on, this character will prefix each line of the original message in the quoted reply
9. **Signature Position on Reply** – indicates whether the Agent’s signature should be inserted at the top or bottom of messages when replying
10. **Default Format for New Messages** – indicates whether new messages should be formatted in Text or HTML
11. **Use email address autofill** – when set to “yes”, this will automatically add the email addresses of the recipient to the Agent’s My Contacts. The email address will “autofill”, presenting possible matches when composing a new message. (Agent-specific)
12. **Initiate Spell Check before Sending** – when set to “yes”, this will automatically start a spell check session when a message is sent from within VisNetic MailFlow
13. **Default TicketBox for New Tickets** – The system default when composing a new message from MyTickets is for that Ticket to be associated with the Unassigned TicketBox. The Agent now has the ability to select their preferred default TicketBox for new message composition originating from MyTickets
14. **Route Replies To Me** – determines whether or not, by default, the Agent takes ownership of Tickets when a contained message is sent. Can be over-ridden on a per-message basis
15. **Close Ticket after Sending** – determines whether or not, by default, Tickets are closed when contained outbound messages are sent. Can be over-ridden on a per-message basis

16. **Request Read Receipt** – determines whether or not, by default, the message recipient will be asked to confirm they have read the message
17. **Request Delivery Confirmation** - determines whether or not, by default, the receiving mail server will be asked to confirm the message has been delivered
18. **Keep Sent Messages in Outbox for at Least** – specifies how long sent messages should remain in an Agent’s Outbox before being delivered by the system. Provides Agents with an opportunity to revoke outbound messages before they are delivered
19. **Status Settings** – define Agent Status settings
 - a. **Default Status at Login** – sets Agent status to the selected value when the Agent logs into MailFlow
 - b. **Default Status at Logout** – sets Agent status to the selected value when the Agent logs out of MailFlow or when their session expires due to inactivity
 - c. **Auto Status** – sets the Agent status to the selected value after the defined number of minutes of inactivity
 - d. **Default Status Text** – sets the default text to display for the different Agent statuses (this can be changed when the Agent manually sets their status)
20. **Default Column View**– specifies the ticket list columns to show by default. The visible columns within each unique ticket list view can also be independently defined by selecting the “Columns” toolbar button within the ticket list

TicketBox Subscriptions

Which TicketBoxes that are displayed as shortcuts in the left-hand pane is determined by the selections made within the TicketBoxes tab of the Agent preferences window.

Only the TicketBoxes for which the logged-in Agent has proper access rights are shown within the TicketBoxes tab. Each TicketBox listed has a name, description, and number of open items associated with it.

To subscribe to one or more TicketBoxes, simply check the box next to those that you want to participate in, and click the Save button in the toolbar. Click the Cancel toolbar button to revert to the last saved settings.



Agent Views

Agent Views allow the logged-in Agent to view the workload of other Agents within the VisNetic MailFlow system. These Agents will appear beneath the Agent Views shortcut in the left-hand navigation pane. Once an Agent View has been added, the folders of the specified Agent will become accessible to the logged-in Agent.

Which Agent profiles appear under the Agent Views tab depend upon the rights assigned to the current, logged-in Agent.

Agent View selections are comprised of columns representing the full name, username, and number of open items associated with the Agents listed.

To subscribe to one or more Agent Views, simply check the box next to those that you wish to have access to, and click the Save button in the toolbar. Click the Cancel toolbar button to revert to the last saved settings.

Agent Signatures

Each Agent within VisNetic MailFlow has the ability to define one or more personal signatures, as well as having access to any group signatures defined by system administrators.

Agents and Groups may define default signatures for TicketBoxes and Ticket Categories. This provides the Agent a more efficient workflow, eliminating the need to change signatures based on originating TicketBox. This is ideal for Agents monitoring multiple TicketBoxes or Multi-Domain organizations.

Selecting the Signatures tab within the Agent Preferences window lists the Agent and group signatures currently available. To set a signature as your default, highlight the intended signature and click the Default toolbar button. A small checkmark will appear next to the selected signature in the column named “Default”.

To create a new private (Agent-level) signature, click the New toolbar button on the toolbar. This will cause the signature editor dialog to be displayed, allowing you to define a signature name and body.

My Dictionary

Agents have the option of adding words to their private (Agent-specific) dictionary. Words can be added during spell check operations (See “Spell Checking”, chapter 5) or manually within the Dictionary tab in the Agent Preferences screen.

To add a word to the private dictionary, enter the word in the input box and click the Add button (or press Enter). Delete words by selecting them and clicking the Delete toolbar button.

Custom dictionary words added via the spell checking process will also appear here.

My Folders

Agents have the option of adding organizational folders to their My Tickets view via the My Folders tab in the Agent Preferences screen.

To add a folder, enter the folder name in the input box and click the Add button. Delete folders by selecting the folder name and clicking the Delete toolbar button. Tickets within folders that are being deleted will be moved to the My Tickets view.

The Agent moves tickets to or from their folders using the ticket view properties dialog. Agents access the properties dialog by selecting a ticket or tickets, right-clicking one of the selected tickets and then selecting the properties option. Alternatively, an Agent may select a ticket or tickets and then select the properties button from the ticket view toolbar.

My Alerts

Agents have the option of being alerted on a variety of MailFlow events. Alerts can be “Internal” (they appear within the left menu “Alerts” dialog) or “External” (the Alert is sent via email to the defined recipient).

The Agent can be alerted on a number of MailFlow events, including the following:

- ❑ **Inbound Message to Owned Ticket** - When a new Inbound Message is received and placed in a Ticket owned by the Agent.
- ❑ **Inbound Message from Owned Contact** - When a new Inbound Message is received from a Contact owned by the Agent.
- ❑ **Ticket assigned to you** - When a Ticket is assigned to the Agent, either automatically by the MailFlow system or by another Agent.
- ❑ **Outbound Message Requires Approval** - If an Agent has been assigned the responsibility to approve another Agent's Outbound Messages, an Alert can be triggered to notify the Agent that an Outbound Message requires their review and approval.
- ❑ **Outbound Message Approved** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been approved.
- ❑ **Outbound Message Returned** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been returned and they need to review, modify and resend the message.

To add an Alert, select the “New” button and then enter the relevant information in the resulting dialog. Select the “Save” button when finished. Edit an existing Alert by selecting it in the list and then select the “Edit” button. Modify the settings as desired

and then select the “Save” button. Delete an existing Alert by selecting it in the list and then selecting the “Delete” toolbar button.

My Alerts configuration options:

- ❑ **Alert On Event** - the event that will trigger the Alert.
- ❑ **Alert To Method** - signifies whether the Alert will be Internal (left menu "Alerts" option) or External via email.
- ❑ **Alert To Recipient** - if the Alert is External, the recipient email address.

My Contacts

Used in conjunction with the “Use Email Address Autofill” option under General Preferences. The Agent may manually add email addresses to be considered for the email address autofill. As the Agent replies to messages, the recipients email address is automatically added to My Contacts. My Contacts is Agent-specific.

Add Contacts:

1. Select the “Add” toolbar button ().
2. Search for the contacts you wish to add to “My Contacts”.
3. Select one or more contacts from the search results.
4. Select the Ok toolbar button ().

Edit a Contact:

1. Select a contact from the list of “My Contacts”.
2. Select the “Properties” toolbar button ().
3. Make any required changes then select the “Save” toolbar button ().

View Contact History:

1. Select a contact from the list of “My Contacts”.
2. Select the “History” toolbar button ().

Remove Contacts:

1. Select one or more contacts from the list of “My Contacts”.

2. Select the “Remove” toolbar button ().

Note: The contacts are removed from “My Contacts” but are not deleted from the MailFlow system.

My Contact Groups

Create logical groups of contacts that can be used during message composition. Once a group is defined simply use the Group Name during message composition and the System will do the rest, automatically adding the Group email addresses to the To: Cc: or Bcc: message fields.

Use the Contact search dialog during message composition and instruct it to “Include Groups” in the search results. Select the resulting group or groups and add them to the message. Need to know the email addresses within a particular Contact Group? Double click the group name or click the Properties or Edit toolbar button, depending on the relevant dialog.

Create a Contact Group:

1. Select the “New” toolbar button ().
2. Enter a unique Group Name.

Note: The Group Name must be unique within the entire MailFlow system.

3. Search for the contacts you wish to add to the group.

Note: Only contacts from the Agents “My Contacts” can be added to an Agents Contact Group. If the contact or contacts you want to add to a Contact Group are not returned in the search results you must first add the contact or contacts to “My Contacts”.

4. Select from the list of available Contacts or “Select All” then select the “Add Selected” button.
5. Select the “Save” toolbar button ().

Edit a Contact Group:

1. Select the “Edit” toolbar button ().
2. Modify the Group Name (optional).

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Note: The Group Name must be unique within the entire MailFlow system.

3. Search for the contacts you wish to add to the group.
4. Select from the list of available Contacts or “Select All” then select the “Add Selected” button (optional).
5. Select from the list of “Contacts in Group” or “Select All” then select the “Remove Selected” button (optional).
6. Select the “Save” toolbar button (.

Delete a Contact Group:

1. Select the “Delete” toolbar button (.

Note: Contacts are removed from the Contact Group but they are not deleted from the MailFlow system.

Managing Contacts

This chapter discusses the management of contacts within VisNetic MailFlow

About Contacts

Contacts within VisNetic MailFlow are logical representations of the individuals that you communicate with via the system. Contacts are typically your customers, business partners and other associates.

Contacts are created automatically when email messages are sent and received, as long as they don't duplicate existing contact records. For example, sending a new message to an email address not already in the VisNetic MailFlow contact database will create a new contact record for that email address. The same is true for incoming email messages.

Existing contact records can be edited and new contact records created via the VisNetic MailFlow contact editor.

Custom Contact Fields

Contact records within VisNetic MailFlow can contain custom fields, as defined by a system administrator. Once defined, these custom fields can be added to any contact within the system, and typically represent information specific to your organization such as "Customer ID", etc.

Custom contact fields are also fully searchable from within the contact search screen.



Searching for Contacts

The VisNetic MailFlow contact database is fully searchable. To search for contacts, click the Contacts shortcut in the left-hand navigation pane. This will display the contact search screen.

By default, the contact search window displays fields representing the name and the email address of the contact for which you are searching, as well as field to control the maximum number of results from this search.

Clicking the Show Advanced hyperlink within this window will display a larger array of built-in contact record fields, as well any custom contact fields that have been defined.

Once the desired contact has been located, the relating contact record can be edited, deleted, or merged with another contact record. These functions are accessed from the contact search screen toolbar.

Editing Contacts

The contact editor dialog, will be displayed whenever an Agent decides to edit an existing contact record or create a new one.

Contact records consist of a number of built-in fields, such as name, email address, physical address, and other common information, along with any number of custom contact fields.

To edit a contact record:

1. Search for the contact record you wish to edit
2. Select the contact record from the search results and click the Properties button within the Contact Search toolbar, or double-click on the contact record you wish to edit
3. Use the Contact Properties window to make changes to contact record fields as needed
4. Click the Save button on the Contact Properties toolbar

It is also possible to associate one or more private notes with a contact record by using the Notes toolbar button on the contact editor toolbar.

Merging Contacts

Contact records can also be merged from within the search results screen by using the Merge toolbar button.

1. Click the Merge toolbar button on the contact search toolbar
2. Search for and select the contact that you wish to merge into
3. Search for and select the contact that you wish to merge with the first contact
4. Click the Complete Merge toolbar button

When merging two contacts, the information associated with the second contact will be lost. However, Tickets, history, and messages for both contacts will be combined.

Manually Creating New Contacts

New contact records can be created manually by clicking the New toolbar button on the contact search screen. This will cause the contact editor to be displayed – complete the contact fields and click the Save button to create a new contact.

Contact History

VisNetic MailFlow allows for you to view the complete history of communications with any given contact within the system. To view the contact history of a specific contact, click the Contacts toolbar button for any given Ticket. Then select the contact for which you'd like to view historical communications, and click the Contact History button.

You may also search for a contact using the Contacts menu. Once you find the contact, highlight it and select the History button in the toolbar.

The Standard Response Library

This chapter discusses how to develop and manage the VisNetic MailFlow Standard Response Library

About Standard Responses

One of VisNetic MailFlow's most powerful features, the Standard Response Library allows Agents to develop a database of common responses to questions asked frequently by customers, business partners, and others.

To manage items within the Standard Response Library, click the Standard Responses shortcut in the left-hand navigation pane.

The Standard Response Library window is comprised of three distinct panes. To the left, a list of categories is displayed. The top pane lists all of the Standard Responses available within a category when a specific category is selected. The bottom pane is where Standard Responses and Standard Response categories are managed.

Managing Categories

All Standard Responses are contained within one or more Standard Response categories. To create a new Standard Response category, take the following steps:

1. Open the Standard Response Library
2. Click the New button in the top left corner
3. Enter a name for the new Standard Response category and click the Save toolbar button

Standard Response categories can also be renamed or deleted by using the correlating toolbar buttons within the category editor pane.

There are also three special, built-in categories within VisNetic MailFlow that cannot be deleted or renamed.

 **Drafts** – Standard Responses created in this category are not available for immediate insertion into outbound messages, as they are in a “draft” state.

Draft Standard Responses can be edited and moved to another category when they're ready.

 **My Favorites** – adding Standard Responses to this category requires selecting a standard response and clicking the “Add to My Favorites Button”. Once added, Standard Responses in this category are accessible via a special shortcut menu during message composition (See “Message Composition”, chapter 5)

 **My Most Frequently Used** – this category is automatically populated by the VisNetic MailFlow system. It provides quick access to those Standard Responses that each Agent uses the most. “My Most Frequently Used” Standard Responses are accessible via a special shortcut menu during message composition (See “Message Composition”, chapter 5)

Managing Standard Responses

Creating, editing, deleting and otherwise managing standard responses are simple and straight-forward.

To create a new Standard Response entry, follow these steps:

1. Select an appropriate category for the new Standard Responses from the categories listed in the Standard Response Library window. The Standard Response editor window will appear in the bottom pane.
2. Click the New button in the bottom-pane toolbar.
3. Enter a subject for your new Standard Response. Try to give the Standard Response a name that will help you remember its purpose.
4. Select an appropriate category for the new Standard Response; by default the drop-down list of categories will be set to the category selected in Step 1 above.
5. Enter the Standard Response message body within the “Content” section of the editor pane.
6. Click the Add Attachment button if you wish to add one or more file attachments to this Standard Response. Doing so will cause the selected file(s) to be included with this Standard Response every time it is attached to an outbound email message.
7. Create any private text notes that you wish to associate with this Standard Response. These notes will not be visible to the recipient of any messages into which a Standard Response is inserted.

8. Enable the Keywords option and add any keywords relevant to this Standard Response. Keywords are utilized by the MailFlow engine to make Standard Response recommendations to the Agent for inbound messages.

Note

The greater number of keywords entered for a Standard Response, the greater the resulting relevance of the recommended response to the Agent.

9. Click the Save toolbar button within the Standard Response editor pane

Editing a Standard Response is similar to the process of creating a new one, as described above. Simply select a Standard Response from the category that contains it and click the Edit button in the bottom-pane toolbar.

Note

Remember that you can always move a Standard Response from one category to another simply by editing it, and then selecting a new category from the appropriate drop-down box within the editor pane.



Inserting Standard Responses into Messages

When composing an outbound message, a Standard Response toolbar button () will appear just above the message body input field. Clicking this toolbar button will display a pop-up menu that allows for the quick insertion of Standard Response entries contained within the “My Favorites”, “My Most Frequently Used” and “Recommended” categories. Selecting a Standard Response from one of these categories will cause it to be inserted at the current cursor position within the message body.

The Standard Response menu can also be used to launch the Standard Response Library window, from which any Standard Response can be selected and inserted into the message currently being composed.

About Standard Response Attachments

As noted in “Managing Standard Responses” above, Standard Responses can include one or more attachment files. When inserted into an outbound email message, a Standard Response that contains attachments will automatically include those file attachments along with the outbound email message.

Although there is no limit to the number or size of the files that can be attached to a Standard Response, it’s advisable to keep in mind the potential bandwidth limitations of the message recipients.

Reporting

This chapter discusses the reports that are available within the VisNetic MailFlow system

About VisNetic MailFlow Reporting

VisNetic MailFlow offers a robust pre-defined set of reports that can provide a wealth of information about how your organization handles email.

Standard Reports within VisNetic MailFlow are generated in real-time, so the data that they reveal is never stale. Scheduled Reports are scheduled to run at defined intervals with the results emailed or a link to the results included in an Agent Alert.

Reports can either be viewed on-screen (which is the default), or downloaded as a CSV (Comma Separated Values) file. CSV files can then be imported into many other popular reporting tools for further analysis.

Available Reports

The available built-in reports are as follows:

-  **Inbound Messages** – this group of reports describe the flow of inbound messages by TicketBox, Agent, Ticket Category, Routing Rule, or Message Source
-  **Outbound Messages** – this report group is similar to the “Inbound Messages” report above, but describes the flow of messages out of the system
-  **Open Ticket Age** – reports on the age and quantity of open Tickets within the system, by TicketBox, Agent, or Ticket Category
-  **Open Tickets** – reports on the number of open Tickets, by TicketBox, Owner, or Ticket Category
-  **Ticket Activity** – reports on Tickets that have been moved, restored, opened, etc., by TicketBox

- ☞ **Ticket Count Summary** – reports on the number of open and closed Tickets, total number of Tickets, and the percentage of Tickets closed, by TicketBox, Owner, or Ticket Category
- ☞ **Ticket Distribution** – report that illustrates the current distribution of Tickets within the system by TicketBox, Owner, or Ticket Category. Can be filtered by Ticket state.
- ☞ **TicketBox Details** – a report detailing the owners of Tickets within a TicketBox, also shows the status of Tickets for each owner, by TicketBox
- ☞ **Standard Response** – offers reports regarding the Standard Response Library, by Usage, Category, or Author
- ☞ **Avg. Response Time** – reports on the average time before new Tickets were responded to, by TicketBox, Agent, or Ticket Category
- ☞ **Avg. Time to Resolve** – reports on the average time before new Tickets were closed by an Agent, by TicketBox, Agent, or Ticket Category
- ☞ **Busiest Time** – reports on the busiest times within the VisNetic MailFlow system, either by Hour or Day of Week
- ☞ **History** – presents the history of inbound and outbound messages for a particular Agent, TicketBox, Contact, or Ticket Category
- ☞ **Agent Audit** – returns detailed Agent Activities for a specified time period



Rights & Reporting

Your Agent rights within the system will determine whether or not you have access to Standard and Scheduled Reporting and what elements are displayed (or not displayed) when you view a given report. For example, if the logged-on Agent doesn't have “read” rights to specific Ticket box, they will not be able to report on that Ticket box. In addition, the Tickets contained in that Ticket box will not be included in aggregate totals.

Alerts

This chapter briefly discusses the VisNetic MailFlow Agent alerting system

About Alerts

VisNetic MailFlow has the ability to send alerts when specific events occur within the system. These alerts can be delivered either internally, in which case they appear within the Alerts Agent folder, or externally, in which case they are delivered via email. Alerts may be sent directly to an Agent, or indirectly to a group of which the Agent is a member.

Alerts can only be edited by a VisNetic MailFlow Agent with administrative rights. This topic is further discussed within the VisNetic MailFlow Administrator's Guide.

Alerts that may be enabled and edited by the Agent found under Preferences / My Alerts.

Receiving Alerts

When an Agent receives one or more internal alerts, those alerts will appear within the Alerts folder in the left-hand navigation pane. The Alerts folder text will appear in bold whenever it contains Alerts that have not yet been read.

To view Alerts sent to you:

1. Click on the Alerts folder in the left-hand navigation pane
2. Select the alert that you'd like to view
3. Click the View button in the Alerts toolbar

Tip: You can also double-click on an alert to view it.

Similarly, you can also delete an Alert by selecting it from the Alerts view and clicking the Delete toolbar button. To delete all alerts in one step, click the Delete All toolbar button. You will be prompted to confirm the deletion of Alerts.



Understanding Alerts

As mentioned previously, VisNetic MailFlow sends Alerts in response to the occurrence of specific system events. System Administrators decide which Agents are notified when these events occur.

The events that are able to trigger the delivery of an alert are as follows:

- ❑ **Low Watermark** - alert sent when number of open tickets in the TicketBox exceed this value; assists in determining resource needs when TicketBox count reaches specified value
- ❑ **High Watermark** - alert sent when number of open tickets in the TicketBox exceed this value; works well in conjunction with Low Watermark alert to provide 2nd stage alert when resources become critical in responding to messages
- ❑ **Ticket Age** - alert sent when an open Ticket in the TicketBox exceeds value specified in Age Alerting Threshold
- ❑ **Product Registration** – alert sent when events relating to VisNetic MailFlow product registration occur, such as the expiration of a trial registration key, etc.
- ❑ **Disk or Database Full** – alert sent when the disk that VisNetic MailFlow is installed on is full or nearly full, and disk operations begin to fail
- ❑ **Inbound Delivery** – covers a range of alerts related to the inbound delivery of email messages (e.g. messages coming into the system)
- ❑ **Outbound Delivery** – covers a range of alerts related to the outbound delivery of email messages (e.g. messages leaving the system)
- ❑ **Critical Error** – covers a range of critical system error events
- ❑ **Inbound Message to Owned Ticket** - When a new Inbound Message is received and placed in a Ticket owned by the Agent.
- ❑ **Inbound Message from Owned Contact** - When a new Inbound Message is received from a Contact owned by the Agent.
- ❑ **Ticket assigned to you** - When a Ticket is assigned to the Agent, either automatically by the MailFlow system or by another Agent.
- ❑ **Outbound Message Requires Approval** - If an Agent has been assigned the responsibility to approve another Agent's Outbound Messages, an Alert can be triggered to notify the Agent that an Outbound Message requires their review and approval.

- ❑ **Outbound Message Approved** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been approved.
- ❑ **Outbound Message Returned** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been returned and they need to review, modify and resend the message.

Each delivered alert should contain descriptive text that helps receiving Agents to understand why the Alert was sent, and what system objects (such as Tickets) the Alert refers to. If there are any questions about the intent of the Alert, please discuss the matter with a VisNetic MailFlow System Administrator.

My Alerts

Agents have the option of being alerted on a variety of MailFlow events. Alerts can be “Internal” (they appear within the left menu “Alerts” dialog) or “External” (the Alert is sent via email to the defined recipient).

The Agent can be alerted on a number of MailFlow events, including the following:

- ❑ **Inbound Message to Owned Ticket** - When a new Inbound Message is received and placed in a Ticket owned by the Agent.
- ❑ **Inbound Message from Owned Contact** - When a new Inbound Message is received from a Contact owned by the Agent.
- ❑ **Ticket assigned to you** - When a Ticket is assigned to the Agent, either automatically by the MailFlow system or by another Agent.
- ❑ **Outbound Message Requires Approval** - If an Agent has been assigned the responsibility to approve another Agent's Outbound Messages, an Alert can be triggered to notify the Agent that an Outbound Message requires their review and approval.
- ❑ **Outbound Message Approved** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been approved.
- ❑ **Outbound Message Returned** - If an Agent's Outbound Messages require approval by another Agent, an Alert can be triggered to notify an Agent that their Outbound Message has been returned and they need to review, modify and resend the message.

To add an Alert, select the “New” button and then enter the relevant information in the resulting dialog. Select the “Save” button when finished. Edit an existing Alert by selecting it in the list and then select the “Edit” button. Modify the settings as desired and then select the “Save” button. Delete an existing Alert by selecting it in the list and then selecting the “Delete” toolbar button.



Approval Queue

This chapter discusses the approval queue within the VisiNetic MailFlow system

Approval Queue

VisiNetic MailFlow can be configured to require outbound messages, drafted by specified Agents, before they are sent to the recipient.

The Approval Queue contains outbound messages waiting approval.

The Approval Queue only exists for those Agents who have been defined as the Approval Agent for an object or those Agents that belong to an Agent Group that has been assigned as the Approval Group for an object.

Outbound Message Approval Options:

- ❑ **Contacts** - view Contacts associated with the Ticket the Outbound Message belongs to.
- ❑ **Notes** - add/edit Ticket Notes associated with the Ticket the Outbound Message belongs to.
- ❑ **Return Message** - return the Outbound Message to the authoring Agent.
- ❑ **Edit and Release Message** – make changes to the message and release it for delivery to the recipient.
- ❑ **Release Message** - release the message for delivery to the recipient.

To view Contacts:

1. Select the Contact(s) button to display a list of Contacts associated with the Ticket the Outbound Message belongs to.
2. To "Edit" a Contact, select a Contact from the list and then select the "Edit Contact" button. Make any required changes, then select the "Save" button.
3. To view the Contact History, select the "Contact History" button, a new window will open showing a list of Tickets associated with the selected Contact.

To view Notes:

1. Select the Notes button to display a list of Notes associated with the Ticket the Outbound Message belongs to.

To Return a Message:

1. To Return an Outbound Message to the authoring Agent, select one or more Outbound Messages from the list and then select the "Return" button.
2. In the resulting dialog, add any relevant Notes and then select the "Return" button.

Note

All Alerts associated with the returned Outbound Message (s) will be cleared.

Note

Returned Outbound Message(s) will be placed in the authoring Agent's "Drafts".

To Edit and Release a Message:

1. Select the Outbound Message from the list
2. Click the "Edit" button in the message pane window
3. A dialog will be displayed, warning you that the message will be sent back to the author. Select "OK"
4. Edit the message
5. Select the "Send" button

To Release a Message:

1. To Release an Outbound Message for delivery to the recipient, select one or more Outbound Messages from the list and then select the "Release" button.
2. In the resulting dialog, add any relevant Notes and then select the "Release" button.

Note

All Alerts associated with the released (approved) Outbound Message(s) will be cleared.

Chapter 12

Keyboard Shortcuts

This chapter briefly discusses VisNetic MailFlow keyboard shortcuts

About Keyboard Shortcuts

VisNetic MailFlow supports the use of Keyboard Shortcuts within designated Ticket and Message lists and within message edit dialogs.

Please see the tables on the following pages for the Windows keyboard shortcuts presently supported in VisNetic MailFlow.

Ticket List Shortcuts

The following keyboard shortcut keys can be utilized in ticket list dialogs such as My Tickets, Ticket Boxes and Ticket Search Results

Key Combination	Action
Alt+C	Open Contact Dialog
Alt+G	Get Oldest Ticket
Alt+N	Open Notes Dialog
Alt+O	Take Ownership of Ticket
Alt+P	Show Ticket Properties
Alt+R	Reassign Ticket
Ctrl+A	Select All
Ctrl+M	New Message for selected Ticket
Ctrl+T	New Ticket with Message
Ctrl+N	New Ticket with Note
Ctrl+R	Restore Ticket (Search results only)
Ctrl+D	Delete Selected Ticket(s)
Alt+F1	Display Help
Alt+F5	Refresh Page
Spacebar	Toggle Ticket Open/Close
Home	Move to Top of List
End	Move to End of List
Right Arrow	Open Ticket
Left Arrow	Close Ticket
Down Arrow	Move down List
Up Arrow	Move up List

The following keyboard shortcut keys can be utilized when a Ticket is toggled open and a single message is selected

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Key Combination	Action
Alt+C	Open Contact Dialog
Ctrl+P	Print Message
Ctrl+R	Reply to Message
Ctrl+L	Reply to All
Ctrl+F	Forward Message
Ctrl+D	Delete Message
Ctrl+O	Open Message in new Window
Ctrl+P	Print Message
Ctrl+Q	Mark Message as Read
Ctrl+U	Mark Message as Unread
Ctrl+V	Move Message
Alt+F1	Display Help
Alt+F5	Refresh Page
Enter	Open Message in new Window
Home	Move to Top of List
End	Move to End of List
Down Arrow	Move down List
Up Arrow	Move up List

Message List Shortcuts

The following keyboard shortcut keys can be utilized in message list dialogs such as Sent Items, Drafts and Outbox

Key Combination	Action
Alt+C	Open Contact Dialog
Alt+R	Revoke Message (Outbox only)
Ctrl+T	New Ticket with Message
Ctrl+N	New Ticket with Note
Ctrl+P	Print Message
Ctrl+R	Reply to Message
Ctrl+L	Reply to All
Ctrl+F	Forward Message
Ctrl+D	Delete Message (Drafts only)
Alt+F1	Display Help
Alt+F5	Refresh Page
Down Arrow	Move down List
Up Arrow	Move up List

Message Composition Shortcuts

The following keyboard shortcut keys can be utilized in message composition dialogs such as new message, reply, forward, etc...

Key Combination	Action
Esc	Close Window
Alt+A	Select Attachment Tab
Alt+C	Open Contact Dialog
Alt+P	Select Compose Tab
Ctrl+P	Print Message
Ctrl+Q	Close Window
Ctrl+S	Save Message as Draft
Alt+S	Send Message
Alt+F1	Display Help
F7	Spell-check Message

Note: All key combinations are case insensitive