

5.2 Cases

Bright Pattern Documentation

Generated: 11/29/2021 8:48 pm

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Table of Contents

Table of Contents	2
Understanding Email Cases and Threads	3
Cases	3
Threads	3
General Information About Contacts	4
How to Access Contacts	5

Understanding Email Cases and Threads

Every email interaction is associated with a *case* and can be part of a *thread*. The following is an explanation of these

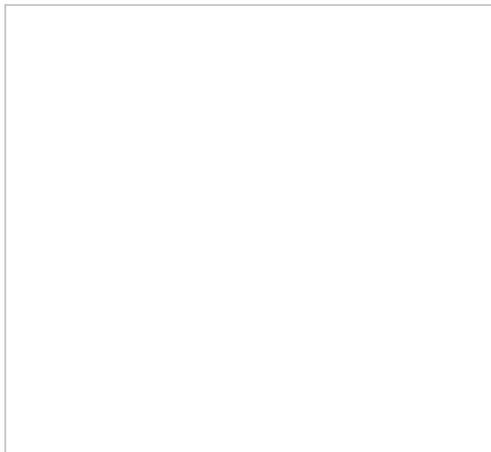
Cases

A case is an instance of customer service that is created to track all communications related to a specific customer request. It is created when the request arrives, maintained as an active entity while the request is being worked on, and closed when the request is fulfilled.

When a new email request arrives, the system creates a case for it automatically and assigns a number to this case that is unique within your contact center (e.g., 14355). This number is typically communicated to the customer and can be used by both the customer and yourself to refer to the given request in all future communications. This number also helps you quickly find all past communications related to the case in the email history.

You can view cases by selecting *My Cases* on the Agent Desktop menu.

A case is closed when you assign a final [disposition](#) to an email associated with this case. A final disposition is a disposition that indicates that no further follow-up is expected or necessary for the given case (e.g., the customer has confirmed request fulfillment). Dispositions are fully customizable and can often be service-specific. Your system administrator will explain how to use dispositions and point out the ones that can be used to close cases.



My Cases

Threads

A group of emails related to the same case is called an *email thread*. Threads are created when the system matches in-reply-to email headers. Additionally, when you reply to a customer's request for the first time, the system will generate a unique thread identifier and attach it to the email subject. Unlike the case number, the email thread identifier may contain both numbers and letters (e.g., JXA6PDRNQ2SO) and is intended primarily for automatic processing.

For example, when a new email comes in, the system will analyze the subject to see if there is a matching email header. If a matching header is found and recognized, the system will automatically assign that email to the corresponding case. Depending on your service configuration, the system may also attempt to deliver that email to you if you have previously worked on this case.



When you reply to an email, a thread ID is added to the email subject

General Information About Contacts

One of Agent Desktop's many useful features is the *Contacts* section. From Contacts, you may quickly reference a wide variety of stored information. The Contacts section stores information about:

- A person's contact details
- Activity history
- Cases
- Call recordings
- Chat transcripts

All information is searchable, enabling you to look up records and contact information, even while handling an active conversation.



Agent Desktop Contacts section overview

How to Access Contacts

The Contacts section of Agent Desktop is accessed by clicking the Contacts icon  in the main menu.

Upon opening Contacts, you will first see the Search page, which allows you to search all stored contacts in your contact center. From there, you can do the following:

- Enter [Search](#) terms for quick lookup
- Open [Contact](#) details
- [Create](#) Create new contacts
- [Delete](#) contacts
- Browse [Cases](#)

