5.2 How to Accept an Email

Bright Pattern Documentation

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How to Review an Incoming Email

After you have accepted or retrieved an email for processing, normally your next step is to review its content. The recommended order of email content analysis is given as follows.

Step 1: Check for an email thread identifier

1. Locate the email subject line that is displayed above the email message body in the *Message* tab of the *Reading Pane*.
2. If the subject line has an email thread identifier, this is an indication that the email is part of an existing case.

Step 2: If there is an email thread identifier, review the case history

1. If you want to review the case history before replying, click the *History* tab.
2. All incoming ☐, transferred ☐, and outgoing ☐ emails related to this case will be listed in the chronological order.
3. Any notes that you or other agents provided with respect to this case will also be listed with the notes icon ☐ . You can select any particular message to view its content in the message body area.
4. To return to the current message, click the *Message* tab.

If the email subject does not contain a thread identifier, this is an indication that the email is a new customer request and a new case has just been created for this request in the system.

Step 3: Read the email message

Your next step is to review the email message itself and understand how this email should be processed. Some emails may contain attachments that may also have to be reviewed before any further processing steps. If the email was sent with attachments, the file names of those attachments will be listed in the *Reading Pane* below the subject line of the email message.
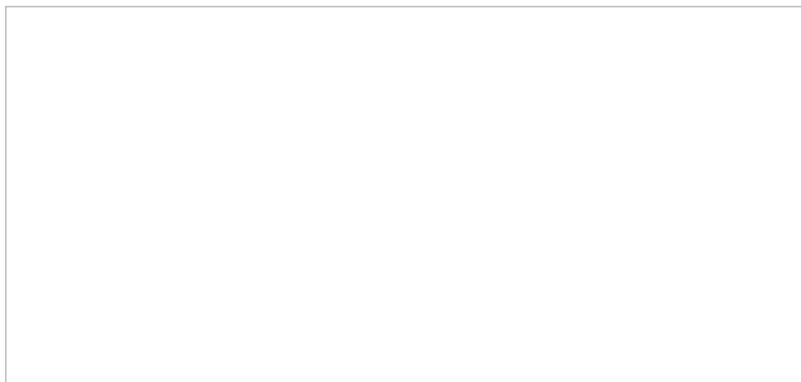
Attachments

Step 4: Open attachments

To open an attached file, click its file name in the *Reading Pane*. The exact attachment viewing process depends on a number of factors including the type of file, your computer settings, and your company security policies. You will receive detailed instructions about working with email attachments from your system administrator.

Incoming email interactions can also be accompanied with web pages and forms that can provide additional information about the requested service. In this case, you will see a *URL* tab next to the *Case* tab above the reading pane. To view the web page content, click the *URL* tab. The content of this tab depends entirely on the type of services that you provide and is not discussed in this *Agent Guide*. If this tab is displayed for emails that you handle, you will receive detailed instructions about its content from your system administrator. See section [Understanding Screen-pop](#) for more information.
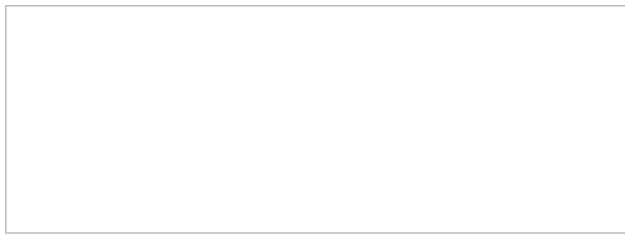

URL tab

Step 5: Select a case category

A case can be categorized according to its content. After reviewing the email content, you may wish to select a category (e.g., "Miscellaneous" or "Damaged Product") for this case, which will help you to sort cases of differing categories later.The category selector is found underneath the case number and subject line at the top of the email.

Case Category selector

Step 6: Review other included information

You can also look for information related to the content of the incoming email in the *Knowledge Base*. In the *Reading Pane*, select a fragment of the original email that is likely to be found in some articles of the Knowledge Base (e.g., a product name or model number). Click the [ ] button. The Knowledge Base will display a list of articles that contain phrases matching the selected fragment. For more information, see section [Knowledge Base](#).
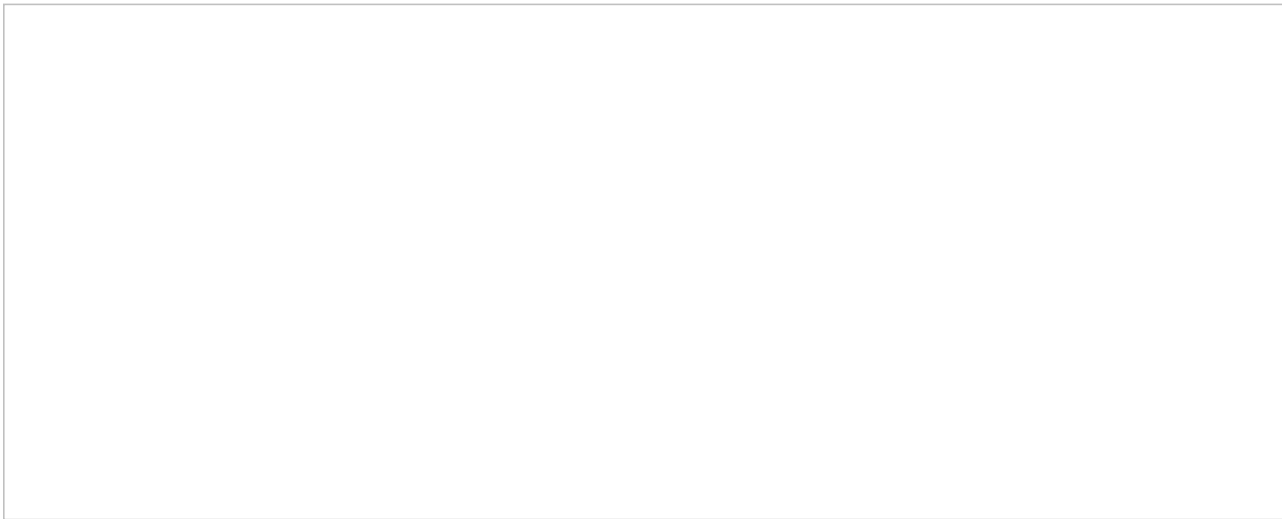
Reading Pane with selected text and Search Knowledge Base button

How to Interpret Your Current State Information

The agent state is the indication of your current availability to handle service calls. This information is used by the system to decide whether a new service call can be delivered to you. The information about the time you spend in each state also appears in reports about your performance.

The Agent Desktop application uses icons to represent agent states. Your current state is shown in the upper left-hand corner of Agent Desktop. These icons, the states they represent, and descriptions of those states are described as follows.

Note: Information in the main text of this section is valid if your system is configured to let you handle one customer interaction at a time. This configuration is most typical when you handle calls only. If you process interactions of other types (e.g., chats or emails), then, depending on your contact center practices, you may be expected to handle multiple interactions simultaneously. The differences in interpretation of your states in this case are briefly explained in the notes following a state description. For a more detailed explanation, see sections Handling Multiple Chat Sessions and General Information About Handling Email.

Agent States

Ready

You are available to take a service call. In most cases, you make yourself *Ready* manually. See How to Make Yourself Ready for more information.

Depending on your contact center practices, the *Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As soon as you finish a previous service call
- When the time allocated for after-call work associated with the previous call expires
- When the rest time associated with the previous call expires

You may also be forced into the *Ready* state by your supervisor.

Note: If you are expected to handle multiple interactions simultaneously, the *Ready* state will only be applied when you do not have any active interactions on your desktop. However, in this case you may receive new interactions in states other than *Ready*.

Ringing

You are unavailable to take service calls because one service call is already being delivered to you. The ringing icon is briefly displayed while your phone is ringing.

Busy

You are unavailable to take new service calls because you are already handling a service call. This state is displayed from the moment the call is connected and until it is released. For outbound calls, it also includes the call dialing phase. When your service call is released, depending on your contact center practices and the services that you provide, you will be switched automatically to either the *After Call Work* state, the *Not Ready* state, or the *Ready* state.

Note: Even if you are expected to handle multiple interactions simultaneously, your state will be displayed as *Busy* as long as you have at least one active interaction of any media type. However, your actual availability will depend on the number of interactions you are currently handling versus the maximum number of interactions you are expected to be able to handle simultaneously. Therefore, you may receive new interactions when you are in the *Busy* state.

After Call Work

You are unavailable to take new service calls because you are processing information related to the call that you previously handled. This state may or may not be used depending on your contact center practices and the services that you provide. If it is used, you will be switched to this state automatically as soon as the call is released by either the customer or yourself. You will remain in this state until you manually make yourself *Ready* or *Not Ready* to take another call. Note that your *After Call Work* state may also end automatically if the time allocated for the after-call work exceeds the limit set by your administrator.

Note: If you are expected to handle multiple interactions simultaneously, you may receive new interactions when you are in the *After Call Work* state. You will be switched to this state only when the last live interaction on your desktop is finished. (Otherwise, you will continue to be in the *Busy* state.)

Not Ready

You are unavailable to take service calls because you are temporarily away from your desktop or busy doing some work that is not directly related to handling of service calls. Under normal circumstances, you make yourself *Not Ready* manually. Your system may also be configured to let you indicate a specific reason for being *Not Ready*. For more information, see [How to Make Yourself Not Ready](#) and the following *Not Ready* agent states: *Lunch*, *Away From Desk*, and *Break*. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Depending on your contact center practices, the *Not Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As a short rest time after finishing processing of a service call
- Upon rejection of a service call
- If you do not answer a ringing service call within a reasonable time
- When your Agent Desktop loses connection to the system

You may also be forced into the *Not Ready* state by your supervisor.

Note: You will not receive any interactions while you are in this state regardless of how many interactions you are expected to handle simultaneously.

Lunch

You are unavailable to take service calls because you are on your lunch break. Under normal circumstances, you manually set the agent state to *Lunch* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Away From Desk

You are unavailable to take service calls because you are temporarily away from your desktop. Under normal circumstances, you manually set the agent state to *Away From Desk* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Break

You are unavailable to take service calls because you are taking a break. Under normal circumstances, you manually set the agent state to *Break* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.