5.2 How to Change an Assigned Email Service

Bright Pattern Documentation

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Table of Contents

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

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Reading Pane with selected text and Search Knowledge Base button

How to Accept an Email

When an email interaction is delivered to your desktop via the push method, you will see an alert pop-up window titled **Email / incoming**.

The alert pop-up window will display the following items:

- Name of the service requested by the customer
- Customer’s display name (if available)
- Customer's email address
- Subject line content

To accept the email for immediate processing, click the **Reply** button. The *Active Communications List* will display the email icon indicating that you now have an active email on your desktop.

For subsequent email handling steps, see How to Review an Incoming Email.

When you click **Reply**, the accepted email becomes your in-focus interaction (i.e., the interaction that you intend to handle right away). If you are busy with another task when an email arrives and do not want to shift your focus immediately to this new email, you can click **Postpone**. The new email will be placed in your *Active Communications List*, but it will be out of focus until you manually select it from that list for processing.

Note: If you do not accept an incoming email within a predefined amount of time by clicking either **Reply** or **Postpone**, the email will be returned to the service queue for distribution to another agent, and you will be automatically switched to the *Not Ready* state. You will need to make yourself manually *Ready* when you are ready to receive another email. Unaccepted emails will appear in your performance and activity reports.

How to Compose a Reply

If you are qualified to handle an incoming email, then after reviewing it, your next step will be to reply to the customer. This section explains how to compose an email reply from scratch. For using articles from the *Knowledge Base* in your email communications, see section Knowledge Base.

Step 1: Begin writing your draft

1. To compose a reply, click the Reply button .
2. An email draft will open with the original subject preceded by *Re:* and the *To* field showing the customer's email address.
3. If necessary, add *cc* and/or *bcc* recipients.
4. Type your reply directly in the text field of the *Reply Editor*. The editor has some text editing tools that allow you to enhance the appearance of your email. These include various font styles and sizes, font and background colors, bulleted and numbered lists, and paragraph alignment.
5. You can remove any previously applied formatting by clicking the **Remove formatting** icon.

Note: Depending on the amount of information in your reply, you may consider enlarging the editor window by dragging its splitters down and/or left.

Reply editor with text editing tools, Add attachment and Send email buttons

Step 2: Attach files if needed

You can attach files to your email.

1. To attach a file, click the **Add attachment** button and select the desired file. Repeat this step to attach more files. Names of the attached files will be displayed below the address field of the message that you compose.
2. To remove a previously attached file, click the **X** icon next to it.

Message header with attached file

Depending on your contact center configuration, you may see some standard messages pre-inserted into the text field for each reply you are composing. These message may appear above (the header) and/or below (the footer) the area of the main text of your reply. Some examples of such messages are references to case numbers, legal disclaimers, and company's contact information. These messages are editable.

Step 3: Review and send

1. When the reply is ready to be sent, click the **Send email** button . The email will be sent to the customer. You will no longer be able to edit the email, and, depending on your service configuration, you may be placed in the *After Call Work* state. You can use this mode to complete the interaction processing. For example, you may be expected to select a disposition for this interaction.
2. Click the disposition selector and choose an appropriate disposition.
3. If necessary, enter free-form text comments in the *Notes Editor*.

Step 4: Complete the interaction

Click the **Complete** button. The interaction processing will be finished. You are likely to receive a new interaction for processing shortly.

Note: You can also select disposition and/or enter notes before sending the email.

How to Transfer an Email

A transfer is sending an email to another resource within your contact center for further processing. As mentioned in the How to Change an Assigned Email Service section, the most likely reason you may need to transfer an email is when you are not sure how to process it. In this case, you can either transfer the email to another service queue, or to another agent, or to your supervisor.

When You Know the Correct Service

If you receive an email that you are not qualified to handle, but you know what the correct service is, you can transfer this email to the correct service.

To transfer the email, follow these steps:

1. In the Category selection menu, select the service category to which the email should be transferred.
2. Click the **Transfer** button .
3. In the dialog window that appears, select the desired service, person, or team.
4. If you do not see the desired selection on the screen but you know its name, you can enter it in the **Search** field.
5. Click **Transfer** to confirm the assignment.

The email will be removed from your desktop and will appear in the queue of the team that is qualified to handle the service that you selected.

Email category selection menu

When You Do Not Know the Correct Service

If you do not know what the correct service is, you can transfer this email to your supervisor or another agent who may have this knowledge.

To transfer the email to a supervisor or another agent, follow these steps:

1. Click the **Transfer** button (see the previous instructions).
2. In the dialog window that appears, select the desired person.

3. Click **Transfer** to confirm the assignment. The email will be removed from your desktop and appear on the desktop of the supervisor or agent to which you have transferred this email.

When you transfer emails to other agents, consider providing some explanation using the notes editor. If you enter any notes, the other agents will see them and understand the reason the email is transferred to them.

Transfer Email dialog