

5.2 How to Create a Case from a Chat Session

Bright Pattern Documentation

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Cases

The *Cases* tab is where you may search for cases associated with a selected interaction. Cases are useful as they keep track of not only the interactions, but also related notes from multiple agents, and any subsequent follow-up activities, all the while keeping the content available to anyone on your team.

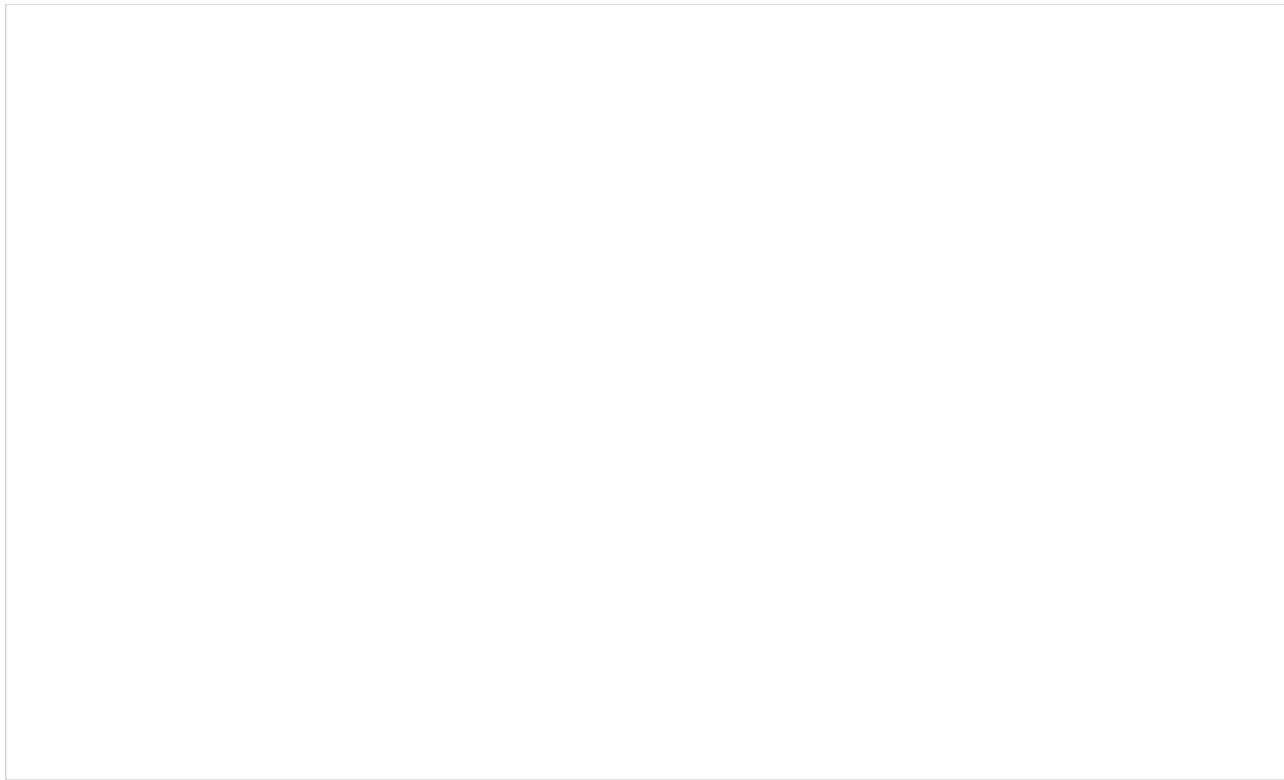
By default, cases are emails; however, cases also may be created from chats or calls. Cases can be filtered by status (active or closed) or by additional filters; these filters are:

- Relevance
- Create time
- Update time
- Last customer update
- SLA Age %
- From
- Subject
- Flag

For additional information about creating cases, see the sections [Understanding Email Cases and Threads](#) and [How to Create a Case from a Chat Session](#).

Searching for a Case

To search for cases, use the search bar at the top of the contacts section; searching may take place while on active calls or chats. You may search for cases by name, case number, or case title. The results of the search will appear under the *Cases* tab of the [Contacts](#) section. Additionally, cases may appear as a tab in the *Selected Conversation's Documents* section if you are having an active conversation. If you have not sent an email from the case, it will be listed as *Active*; cases where a follow-up email was sent will be listed as *Closed*.



Search for cases in Contacts

Sending Follow-Up Emails from Cases

When selected, the case with the chat transcript will appear in the right panel; click the **Open** button at the bottom of the panel. From here, you will have the option to send the customer a follow-up email, flag it, or transfer the case to another agent. To transfer the case, click the **transfer** button. When an email is sent, it will be included in the case record.



Opening a case allows you to email the customer