

## 5.2 How to Retrieve an Email from the Team Queue

### 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.

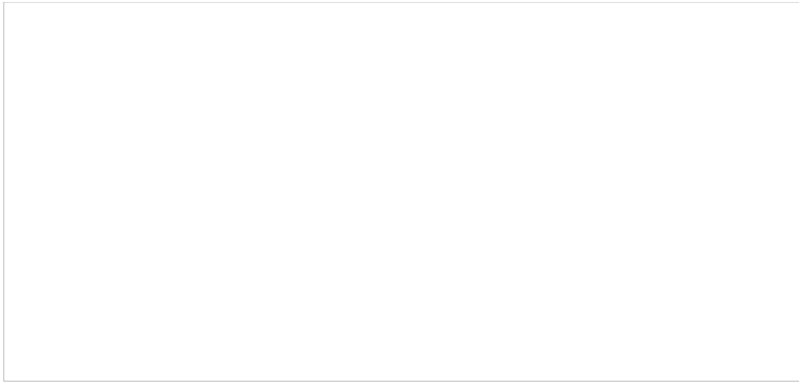
## Step 2: If there is an email thread identifier, review the case history

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.

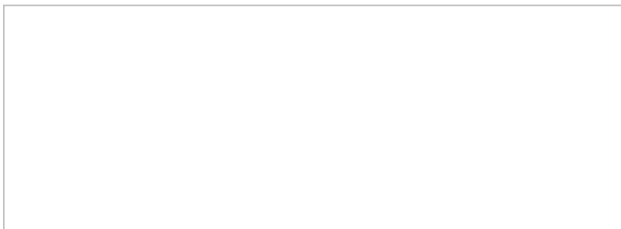


Attachments

## 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

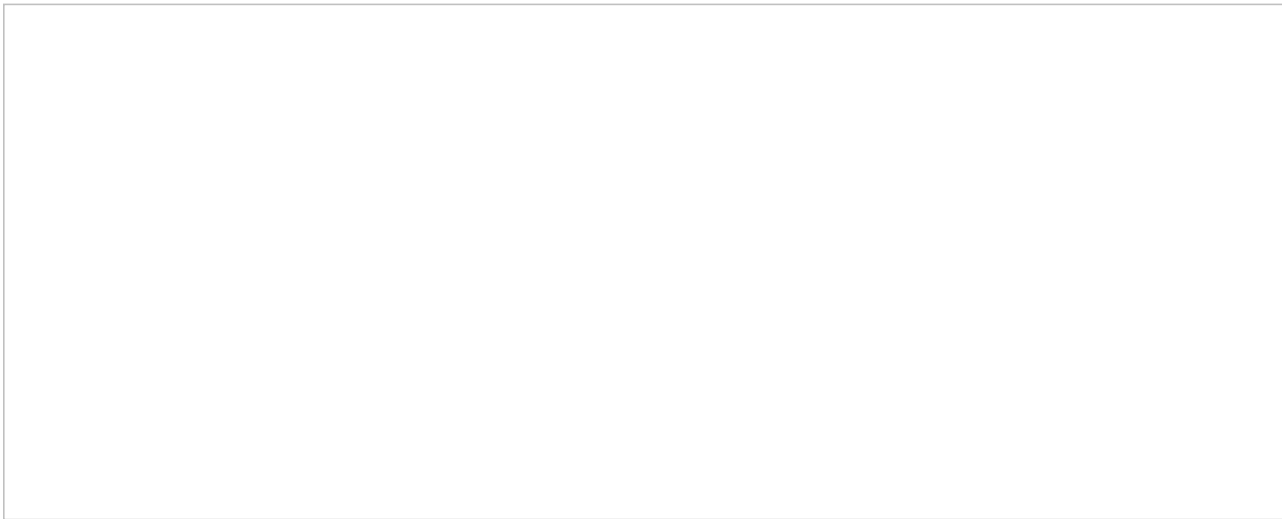
A case can be categorized according to its content. After reviewing the email content, you may wish to select a category (e.g., "Miscellaneous" or "Damaged Product") for this case, which will help you to sort cases of differing categories later. The category selector is found underneath the case number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



Case Category selector

## Step 6: Review other included information

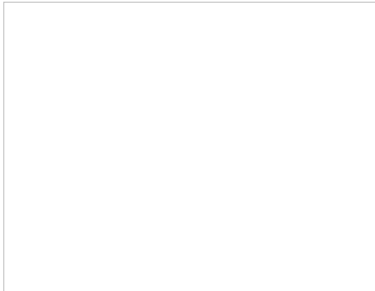
You can also look for information related to the content of the incoming email in the *Knowledge Base*. In the *Reading Pane*, select a fragment of the original email that is likely to be found in some articles of the Knowledge Base (e.g., a product name or model number). Click the  button. The Knowledge 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

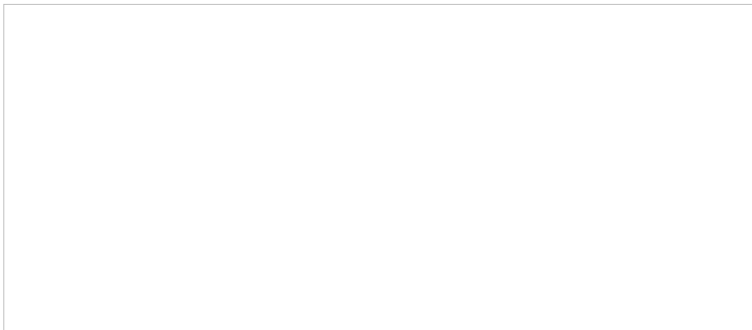
# How to Forward an Email

Unlike transfer, email forwarding is used to send an email to an external email address. To forward an email to an external address, open the menu next to the **Reply** button  and select **Forward**.



Forward option

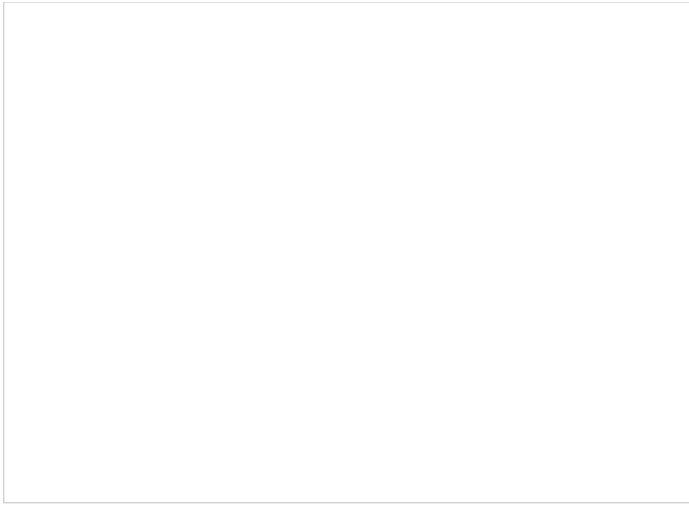
An email draft will open with the original subject preceded by *Fwd:* and an empty *To* field. Specify the email address of the party you are forwarding the email to in the *To* field. If necessary, add **cc** and/or **bcc** recipients. Consider adding some text in the email message body explaining the reason for email forwarding.



Email forwarding

When the mail is ready to be sent, click the **Send email** button . The email will be sent to the specified external address. 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.

Click the disposition selector and choose an appropriate disposition. If necessary, enter free-form text comments in the *Notes Editor*.



Disposition selector and Complete email interaction button

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.