5.2 How to Use Cases to Send a Follow-up Outbound Email

Bright Pattern Documentation

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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

Overview of the Email Working Area

When you have an active email interaction selected for processing in the*Active Communications List*, the entire *Context Information Area* of your Agent Desktop application will be dedicated to processing of that email. Your email working area is divided into three main parts: *Reading Pane*, *Reply Editor*, and *Notes Editor*.

- The *Reading Pane* displays the content of the current email that you need to process. The number of the case that this email is part of is displayed above. The *Reading Pane* can also show you the history of all previous communications related to this case.
- The *Reply Editor* is used to compose a reply to the message displayed in the*Reading Pane*. This area is also used to look for an article in the Knowledge Base that can be used as a template for your email, and to view the notes related to the current email thread.
- The *Notes Editor* is used to enter some internal comments regarding the email interaction you are working on that may be of help to other agents who may be working on this case in the future. When you use the *Reply Editor* to look for a Knowledge Article, the*Notes Editor* will display the content of the articles that you select for

preview.

The email working area

Note: When you look for cases, the *Context Information Area* will look different. For more information, see section How to Send a Follow-up Email.

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.