5.2 How to Use My Follow-ups to Send a Follow-up Outbound Email

Bright Pattern Documentation

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Dispositions and Notes

Dispositions are custom interaction results defined by your contact center management. When handling a service interaction, you may be required to select one of the dispositions that define the outcome of the interaction. If dispositions are defined for the services that you provide, the *Contact Info Panel* of your Agent Desktop will display the *Disposition Selector* for every associated service interaction.

If you are required to set dispositions, you will receive detailed instructions for their use from your system administrator. Learn more about dispositions and how they are managed in the *Contact Center Administrator Guide*.

In addition to dispositions, you can also enter free-form text notes to provide more information about the outcome of the interaction.

Disposition selector

How to Enter Dispositions and Notes

To enter a disposition for an interaction and/or related notes, follow these steps:

1. At any time during the interaction with the customer or while in the *After Call Work* state, click the *Disposition selector*.
2. From the drop-down menu, select the disposition that corresponds to the result of the interaction. Some dispositions specific to outbound campaigns may require additional parameters, such as scheduling of

another call attempt. If such parameters are required, they will be displayed in the *Contact Info Panel*.

3. If necessary, enter free-form notes in the text field.
4. Continue to process the interaction normally. For more information about finishing interactions, see How to Release a Call and How to Wrap Up After-call Work.

Selected disposition and free-form notes

Note: If you use a custom form in the *Context Information Area* for processing data related to a specific call, both the *Disposition Selector* and the *Notes* field may appear in that form instead of the *Contact Info Panel*.

Other Uses for Dispositions

If configured for your contact center, a disposition can be used to trigger a *workflow*, an automated series of events that are initiated when an interaction is completed.

Workflows automate what happens after the conversation is done and will handle any necessary follow-ups, depending on the interaction's disposition type. Such follow-up actions include setting context variables, sending an email, sending a text message, scheduling an event, clearing a scheduled event, and making a request. Workflows help to reduce your workload by following up with customers and gathering data in a consistent way.

For example, setting a particular disposition for an interaction could trigger the following series of events to happen:

1. Send a survey to the customer
2. Wait a specified amount of time (e.g., 30 minutes, 1 day, 1 week, etc.)
3. Send a follow-up email to the customer.

Using Dispositions to Request That Content Be Erased

Starting with Bright Pattern Contact Center version 5.2, you can use a disposition to request that content from a specific interaction be erased. This capability was added to meet PCI DSS 3.2 and GDPR requirements, which specify that sensitive data (e.g., credit card information) may not be stored in your contact center, even if it is encrypted. As such, Bright Pattern allows for the manual deleting of data that is stored in voice recordings, voice recording transcripts, chat transcripts, email messages, screen recordings, and so forth.

You can request that such data be erased, but only your system administrator can erase it.

What to Do

1. If such a disposition is enabled for your contact center, you can disposition an interaction with a request to erase content, provided that you give a reason. Note that the name of the disposition is determined by your contact center. If you do not know which disposition to select, contact your supervisor or system administrator.

   Disposition "Erase content" selected

2. In the *Notes* field, provide the reason for the request and enter additional details about the interaction. Then complete the interaction.

   Use Notes to provide a reason for erasing content

3. The disposition will initiate a workflow that sends your system administrator an internal message with the request. The unique identifier tells the administrator which interaction is affected, and he or she can review the interaction and the request.

Example message delivered to the system administrator

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 Use Cases to Send a Follow-up Outbound Email

Depending on the type of service you provide, a single reply may not always be sufficient to fulfill the customer request. For example, the initial reply may simply inform the customer that the request has been received and advise the customer of the estimated processing time, while the actual request fulfillment will be communicated via one or more follow-up emails.

To support requests that require multiple communications, each email is associated with a *case* and a *thread*. For more information, see Understanding Email Cases and Threads.

Note: If you wish to follow up on a reply that you sent recently, it may be easier to select it from the *Recent* tab.

Step 1: Find the case associated with the request

When you have all the information required to compose a follow-up email for a particular customer request, you will first have to find the case associated with this request. Either the case number or the customer name can be used to find the case.

To view cases, select **My Cases** from the menu beside the *Active Communications List*.

My Cases selected

Step 2: Search for the case

If the desired case is not shown in the *Context Information Area*, select **Contacts** from the main menu beside the Active Communications List. Then click **Cases** to display all cases.

Alternatively, you can search for cases by typing:

- The word "Case"
- Case number
- The customer’s name
- A fragment of the subject
- First name
- Last name

If you know the case number, enter it in the search field. Because case numbers are unique, only one case will be displayed in the list below.

Searching by case number

Step 3: Browse, sort, and select the case

For each case, its number, the creation date, and the original email subject line will be displayed. Depending on their length, subjects may be shown truncated in the list view. Hover over truncated subjects to see the full content. Cases matching search criteria will be listed.

Depending on your permissions, you will be able to see either the cases that you have previously worked on, or all cases for the services that you are qualified to handle.

Case search

You can sort listed cases by case number, creation date, and alphabetically by subject.

When you select a case in the list, all incoming, transferred, and outgoing email messages related to this case will be listed in the *History* tab in chronological order. Any notes that you or other agents provided with respect to this case will also be listed with the **Notes** icon . When you select any particular message, its content will be displayed in the message body area.

Note: As mentioned, case structure reflects business processes of your organization and services that you handle. You will receive specific instructions about handling cases and composing follow-up messages from your system administrator. As a general recommendation, remember that it is usually important to study the entire case history, including all the notes and dispositions that were entered previously for this case, before sending any new emails related to it.

Step 4: Email the customer

To send a follow-up email, double-click the customer email that this follow-up message will directly relate to or click the **Reply** button.

This email will appear in your *Active Communications List*. The *Context Information Area* will display the familiar email processing views and controls. For more information, see Overview of the Email Working Area.

From this moment, composing your follow-up email will be no different from composing the first reply. For more information, see How to Compose a Reply.

If you do not see the **Open** button for the email you wish to follow up on, this means that another agent is working on this email already.