5.2 Overview of the Email Working Area

Bright Pattern Documentation

Generated: 12/03/2021 10:19 am

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General Information About Knowledge Base

Knowledge Base is a repository of articles that help you quickly find answers to customer inquiries and improve response times by providing predefined/approved text for your replies to the customers. Depending on your service configuration, some articles may be offered to you as templates, which you only need to review and, if necessary, customize slightly before sending them as replies to customers. Other articles may provide more general knowledge that you may need when handling typical customer inquiries within a given service.

Articles can be arranged in multi-level folders that will usually correspond to the different categories of knowledge within your organization. You can browse the Knowledge Base content using the folder and article names. You can also search for articles relevant to your task using some keywords (e.g., the name and model of the product that the customer has questions about).

For more information on how to use Knowledge Base articles in your replies, see section How to a Use Knowledge Base Article

As an agent, you may provide some comments about any article that may be used to improve its content and make it more helpful to you and other users. Depending on your qualification, you may also be able to create new articles in the Knowledge Base and edit the existing ones. For more information, see section Contributing Content to the Knowledge Base.

Note that the Knowledge Base content itself is fully customizable and specific to your organization. If the Knowledge Base is used in your contact center, you will receive a description of its content and detailed usage guidelines from your system administrator.

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.