



## 5.3 How to Use Cases to Send a Follow-up Outbound Email

### Bright Pattern Documentation

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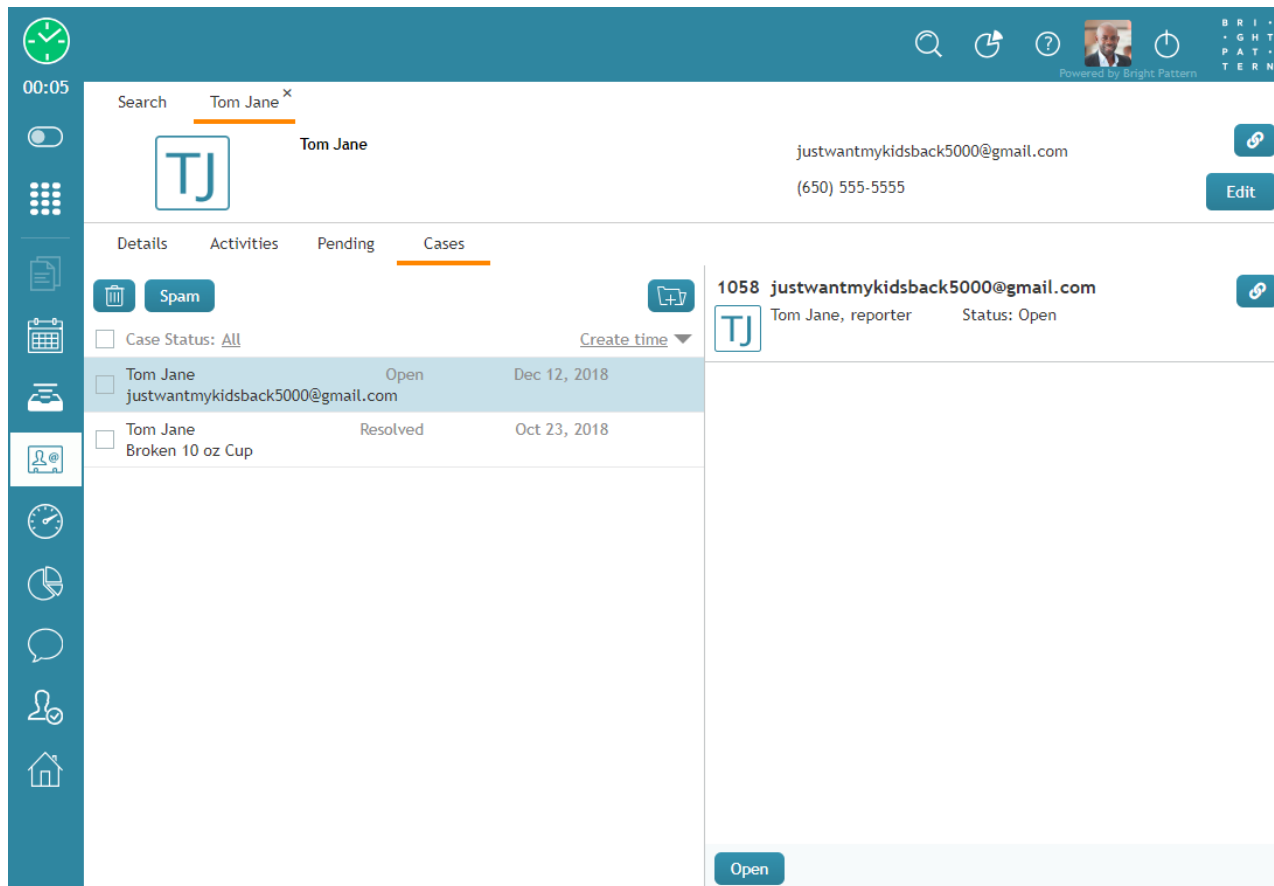
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# Cases, Email, and Threads

In Agent Desktop, [interactions](#) can be associated with a *case*, be an *email*, and be associated with a *thread*. But what are the differences between these things? In this article, we explain the differences between cases, email, and threads.



A history of cases associated with a saved contact in section Search & Preview Records

## Cases and Email

A case is an instance of customer service that is created to track all communications related to a specific customer request. Cases can be [created manually](#) in your contact center or automatically if they arrive there as email. By contrast, email is a specific type of [channel](#) customers use to interact with your contact center. In short, all emails are cases but not all cases are emails.

When cases are created or emails arrive, the system automatically assigns a number to the case/email that is unique within your contact center (e.g., 14355); it is maintained as an active entity while the request is being worked on, and closed when the request is fulfilled. When email arrives at your contact center, it is directed to section [My Cases](#); cases, on the other hand, can be created and found in [various sections](#) of Agent Desktop.

Cases and emails can be assigned a [case state](#), which indicates what the state of completion the interaction is in. Additionally, cases and emails can be assigned [dispositions](#). Dispositions are interaction results defined by your contact center management are used to indicate how the interaction was completed; your system administrator will explain how to use dispositions.

For more information, see [How to Create New Cases](#), [My Cases Interface](#), and [Search & Preview Records Interface](#).

## Threads


A group of emails related to the same case is called an email thread. When you reply to a customer's request for the first time, the system will generate a unique thread identifier. Depending on your system configuration, this identifier may be either attached to the email subject or hidden in an email header. 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 look for a thread ID and check if it matches any of the existing cases. If a thread ID is found and recognized, the system will automatically assign that email to the corresponding case. Depending on your service configuration, the system also may attempt to deliver that email to you if you have previously worked on this case.


1341


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**1341 Customer Service** Status: Active

 Unidentified, [reporter](#)  
[on copy](#)  
▼ Support

---

 **Customer Service**


 Sunny Side Hotel and Spa reported on May 21, 2018 at 1:18 PM

Does this email address work?

Thanks!

EmailService

---

 **Re: Customer Service JXEEMRYQZQGBLA92WA**

Christy Borden sent on May 21, 2018 at 1:19 PM

Good afternoon! Thanks for reaching out to us today.

To answer your question, yes, this email works; it is for customer service purposes.

Thanks!  
2018-05-21 13:17:19 Sunny Side Hotel and Spa sunnysidehotellandspa@gmail.com  
Does this email address work?

Thanks!

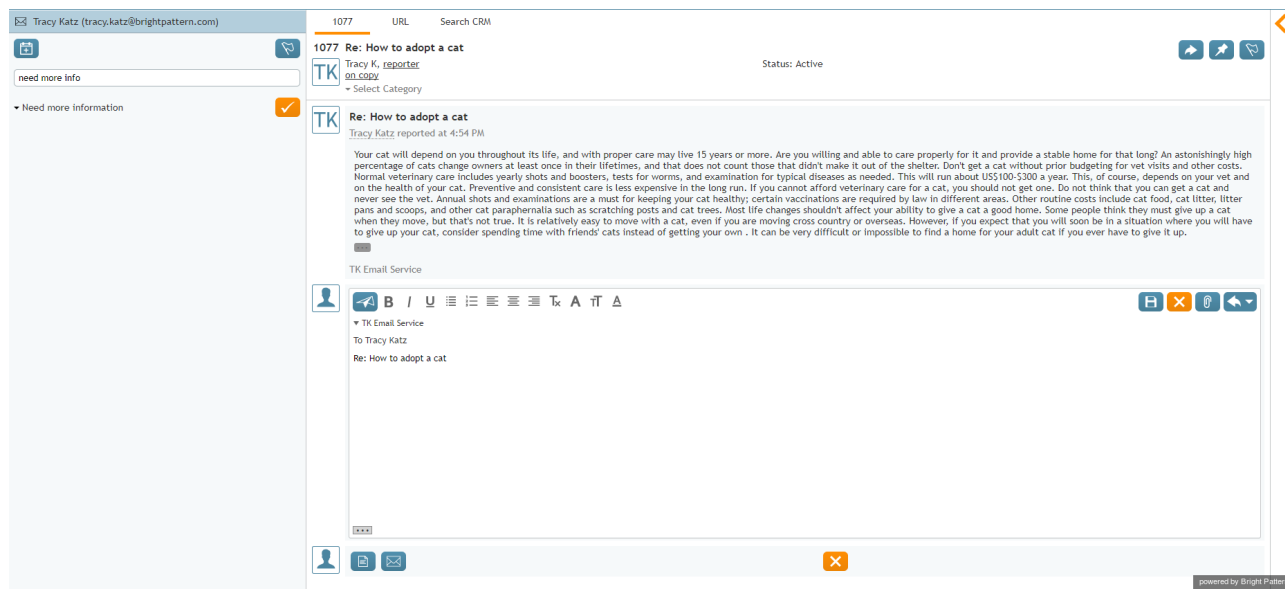
EmailService

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](#).


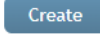

1. REDIRECT [5.3:Agent-guide/Tutorials/Cases/HowtoComposeaReply](#)

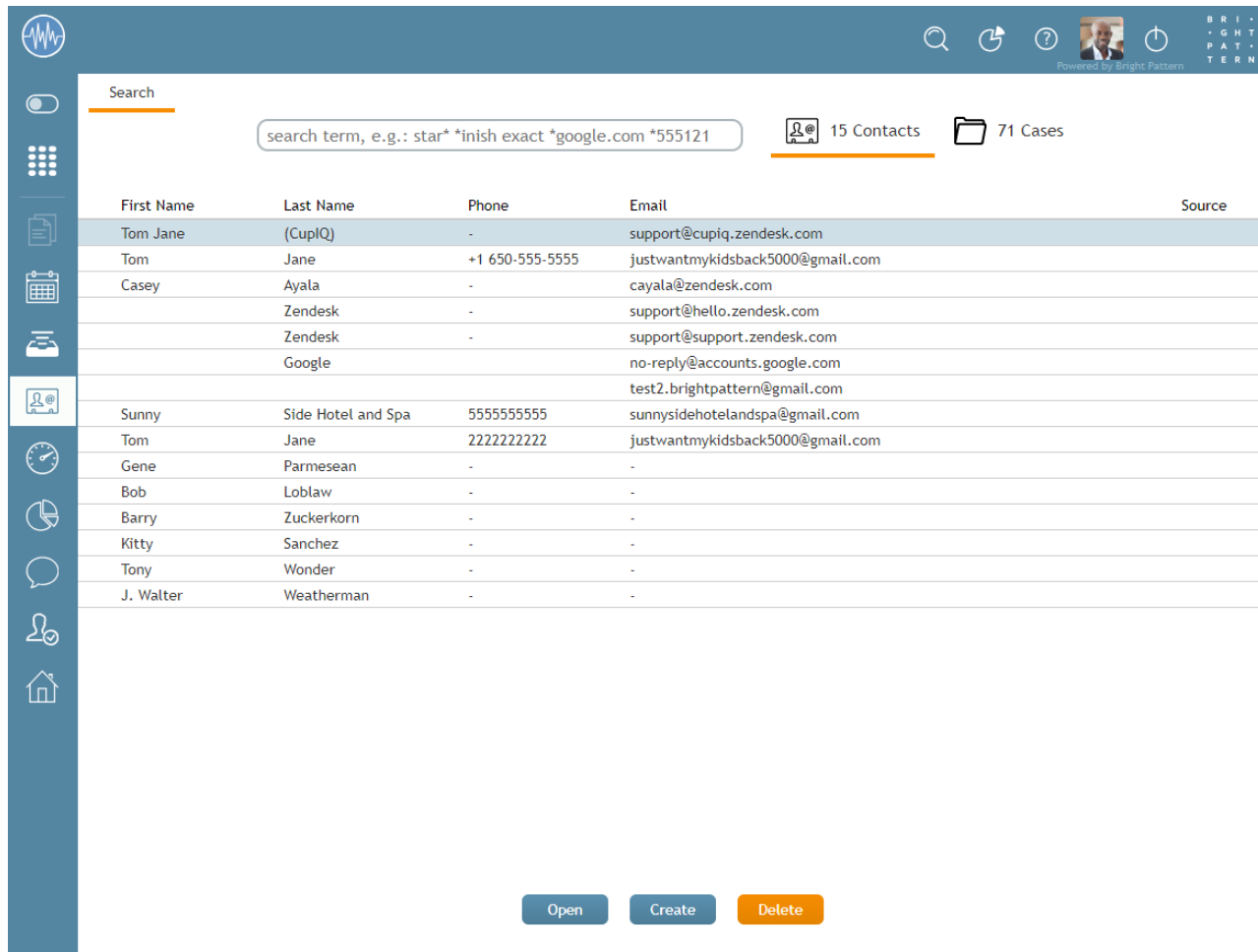
## Search & Preview Records Interface

*Search & Preview Records* (formerly known as Contacts) is where cases and contact records are located, as well as a search bar that allows you sort through them quickly and easily. The following is an overview of what you will see in this section of Agent Desktop.

**Note:** The *Bulk Export/Import Contacts* feature available in this section prior to release 5.3.2 was removed and added to the Contact Center Administrator application, section [Contact Import & Export](#).

## Main Page

The main page of Search & Preview Records comprises the three features of the section: the [search bar](#), [contacts](#), and [cases](#). Below these features, you will see your saved contacts, which can be accessed by highlighting a record and clicking the **Open**  button or double-clicking on the record. Additionally, you may add a contact by clicking the **Create**  button or remove a contact by clicking the **Delete**  button.



First Name	Last Name	Phone	Email	Source
Tom	Jane	-	support@cupiq.zendesk.com	
Tom	Jane	+1 650-555-5555	justwantmykidsback5000@gmail.com	
Casey	Ayala	-	cayala@zendesk.com	
	Zendesk	-	support@hello.zendesk.com	
	Zendesk	-	support@support.zendesk.com	
	Google	-	no-reply@accounts.google.com	
			test2.brightpattern@gmail.com	
Sunny	Side Hotel and Spa	5555555555	sunnysidehotellandspa@gmail.com	
Tom	Jane	2222222222	justwantmykidsback5000@gmail.com	
Gene	Parmesean	-	-	
Bob	Loblaw	-	-	
Barry	Zuckerhorn	-	-	
Kitty	Sanchez	-	-	
Tony	Wonder	-	-	
J. Walter	Weatherman	-	-	

Search & Preview Records main screen

## Search Bar

Located at the top of the section, the search bar allows you to search through cases and contact records; it is accessible whether you are on the [main page](#), looking in a [contact record](#), or at [cases](#). For more information about the types of searches you can conduct, see [Advanced Search](#).



search term, e.g.: star\* \*inish exact \*google.com \*55512

Search bar

## Contacts


The *Contacts* section is where *contact records* are located. Contact records are the entries in your contact center's database containing customer information. When you open a contact record, you can view the contact's interaction history with your contact center as well as any saved personal data. This information is organized and separated by tabs.

Contact records contain the following buttons, which are accessible from any contact record tab:

- The **link**  button copies a shareable link of the contact to the clipboard, allowing you to paste the link elsewhere; this makes it possible for you to share the contact with other agents or supervisors in your contact center. Note that links may be pasted into your web browser's search bar or into the [search bar](#) to access the case. When a contact link is pasted, it will be presented in the format **<domain>/agentdesktop/contact/id/<id number>/<tab within case>** (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/contact/id/5c6dad9d04fd75a777bdcfa/details`). For more information regarding how to manually alter this link, see [Using URL Variations To Access Case and Contact Information](#).
- The **Edit**  button allows you to edit the [details](#) of the contact record.

### Details Tab

When a contact record is opened, the *Details* tab is the default view; it is where the contact's personal information is stored. Note that the types of information stored here will vary per contact center.

If your contact center is integrated with an external database (e.g., NextCaller), it is possible to merge matching customer contact information by clicking the **Augment**  button. Note the setting that allows augmentation must be configured by your administrator in order to work. For more information, see [How to Add to an Existing Contact](#).

The screenshot shows a CRM interface with a dark blue header and a vertical sidebar on the left. The header contains a search bar with 'Tom Jane' and a close icon, a profile picture, and the text 'Powered by Insight Pattern'. The sidebar has icons for home, contact, calendar, and other functions. The main content area shows contact details for 'Tom Jane' with a 'TJ' avatar. The 'Details' tab is selected, showing fields for First name (Tom), Last name (Jane), Mobile (+1 650-555-5555), Primary email (justwantmykidsback5000@gmail.com), Primary address (123 Fake Street, Springfield, AK 01234), and Date of Birth. Other tabs include 'Activities', 'Pending', and 'Cases'. There are buttons for 'Edit' and 'Augment'.

Search Tom Jane ×

Tom Jane

justwantmykidsback5000@gmail.com

+1 650-555-5555

Details Activities Pending Cases

First name: Tom

Last name: Jane

Mobile: +1 650-555-5555

Primary email: justwantmykidsback5000@gmail.com

Primary address: 123 Fake Street  
Springfield  
AK 01234

Date of Birth:

Segment:

Summary:

Augment

Edit

Details tab

## Activities Tab

The *Activities* tab displays all activities that happened in your contact center related to a given contact; logged activities display information such as the time an activity occurred, what agent was involved, any [disposition](#), as well as subject and/or notes. For more information, see [Activities](#).



Search Tom Jane x

Tom Jane

justwantmykidsback5000@gmail.com

+1 650-555-5555

Details Activities Pending Cases

Time	Agent	Disposition	Subject, Notes
Jan 31	Liza Smith		justwantmykidsback5000@...
Jan 28	Michael Carter	Question answered	05:09
Jan 25	Michael Carter	Replacement sent	05:41
Jan 9	Michael Carter		RE: Replacement Cup JX3Z...
Oct 23, 2018	Michael Carter	Product sold	09:10

Tom Jane chatted on Jan 28, 2019, handled by Michael Carter

CupIQ Customer Service Chat

Monday, January 28, 2019

**Tom Jane** 10:36 am  
My replacement cups haven't arrived yet and I would like to know the status.

**Michael Carter** 10:36 am  
Hi, Tom! Thanks for reaching out to us again.

**Michael Carter** 10:36 am  
If you give us a moment, we'll look into this.

**Tom Jane** 10:36 am  
OK, thanks

**Michael Carter** 10:39 am  
Hi, Tom. Thanks for waiting. Your cups were shipped to you on Friday afternoon and should arrive in three to five business days. The tracking number is XP12348-GH14723.

**Tom Jane** 10:39 am  
Perfect. Thanks for your help!

**Michael Carter** 10:40 am  
You're welcome and thanks for contacting CupIQ!

Michael Carter

Global Interaction ID 43AD11B6-98F4-450C

Verified Yes

Product Yes

CupIQ Chat: Question answered

Activities tab

## Pending Tab

The *Pending* tab displays any cases that have not been assigned the [Resolved](#) or [Closed](#) states. Additionally, it is possible to select the [link button](#) in order to copy and paste a link to the case (i.e., in the Case area and not the Contact area). For more information about case states, see [Case State](#). For more information about the link button, see [Link button](#).

Search Tom Jane x

Tom Jane  
justwantmykidsback5000@gmail.com  
+1 650-555-5555

Details Activities **Pending** Cases

Time	Queue	Subject, Notes
Jan 24		#1060 New Replacement Cup
Dec 12, 2018		#1058 justwantmykidsback5000...

**1060 New Replacement Cup**

Tom Jane, reporter  
Status: Pending  
Reason: More customer info  
Pinned by: Michael Carter

about your replacement cup, please let us know if you're still interested. Thanks very much!

Michael  
Manager - CupIQ

Michael Carter

Subject RE: Replacement Cup  
From justwantmykidsback5  
Global Interaction ID 5AEC137F-2D14-4A74  
Verified Product  
CupIQ Customer Service

Michael Carter left a note on Jan 9, 2019 at 1:20 PM  
Need more information

reported on Jan 10, 2019 at 2:39 PM  
**UNDELIVERED: RE: Replacement Cup JX3ZB61142LR35BWN**  
Delivery failed permanently

Michael Carter left a note on Jan 24, 2019 at 3:39 PM  
Need more information

Pending tab

## Cases Tab

The *Cases* tab displays [cases](#) that have been created for the contact. Additionally, it is possible to select the [link button](#) in order to copy and paste a link to the case (i.e., in the Case area and not the Contact area). For more information about cases, see [Cases, Email, and Threads](#). For more information about the link button, see [Link button](#).

Search Tom Jane x

**TJ** Tom Jane justwantmykidsback5000@gmail.com +1 650-555-5555

Details Activities Pending **Cases**

Spam

Case Status: All Create time

<input type="checkbox"/>	Tom Jane justwantmykidsback5000@gmail.com	Resolved	Jan 31
<input type="checkbox"/>	Tom Jane New Replacement Cup	Pending	Jan 9
<input type="checkbox"/>	Tom Jane justwantmykidsback5000@gmail.com	Open	Dec 12, 2018
<input type="checkbox"/>	Tom Jane Broken 10 oz Cup	Resolved	Oct 23, 2018

**1078** justwantmykidsback5000@gmail.com Tom Jane, reporter Status: Resolved

**Product**  
General Email

Liza Smith left a note on Jan 31, 2019 at 2:16 PM  
Problem solved

Tom Jane reported on Jan 31, 2019 at 2:17 PM  
**Re: justwantmykidsback5000@gmail.com  
JXLEL7R4WYAJZV4FGF**  
hello  
On Thu, Jan 31, 2019 at 2:16 PM cs.brightpattern@gmail.com <cs.brightpattern@gmail.com> wrote:  
test  
--  
Tom Jane  
Actor  
Upcoming Films: "Junk"

Liza Smith pulled from Team Queue "General Email" on Jan 31, 2019 at 2:17 PM

Liza Smith left a note on Jan 31, 2019 at 2:18 PM  
Problem solved

Open

Cases tab

Cases


The screenshot displays a customer service dashboard. At the top, there is a search bar with the placeholder text "search term, e.g.: star\* \*inish exact \*google.com \*555121". To the right of the search bar, it shows "15 Contacts" and "64 Cases". Below the search bar, there are several filter buttons: "Spam" (with a trash icon) and "Case Status: All". A table lists various cases with columns for status and create time. The selected case, "1083 Broken Product", is shown in detail on the right. The case details include the contact name "Sunny Side Hotel and Spa, reporter", status "Resolved", and a message from "Debbie Bardeaux, Manager" dated 2019-02-01. A response from "Beverly Crusher" is also visible, dated Feb 5, 2019.

Case	Status	Create time
Sunny Side Hotel and Spa Broken Product	Resolved	Feb 1
Tom Jane	Open	Jan 31
Tom Jane justwantmykidsback5000@gmail.com	Resolved	Jan 31
Sunny Side Hotel and Spa sunnysidehotelandspa@gmail.com	Open	Jan 30
Unidentified My cup is still broken!! :(	Pending	Jan 25
Unidentified My cup broke AGAIN!	Resolved	Jan 24
Google Your password changed	Resolved	Jan 24
Google Critical security alert	Open	Jan 15
Tom Jane New Replacement Cup	Pending	Jan 9
Sunny Side Hotel and Spa New Case	Open	Dec 20, 2018
Tom Jane justwantmykidsback5000@gmail.com	Open	Dec 12, 2018
Unidentified RE: Account test (Follow-Up)	Closed	Dec 6, 2018
Unidentified New Case	Resolved	Dec 4, 2018
Unidentified New Case	Open	Dec 4, 2018


## All cases

Cases are instances of customer service that are created to track all communications related to a specific customer request. Cases can be [created manually](#) in your contact center or automatically if they arrive there as email. Note that not all interactions that happen in your contact center will be considered cases; however, if an interaction has been made a case, it can be found here. For more information about cases, see [Cases, Email, and Threads](#). The Cases interface contains the following buttons and filters.


### Spam button


The **spam**  button removes the selected cases from this section. Note that this button does not function as a spam filter; spam filters are managed by your contact center's administrators.

### Trash button

The **trash**  button deletes cases. Note that this button is available for supervisors only.


### Link button

The **link**  button copies a shareable link of the case to the clipboard, allowing you to paste the link elsewhere; this makes it possible for you to share the case with other agents or supervisors in your contact center. Note that the case link button can be found in the Contact's [Pending tab](#) and [Cases tab](#).

Note that links may be pasted into your web browser's search bar, into the [search bar](#), or the Contact Search  shortcut found at the top of the screen to access the case.

When a case link is pasted, it will be presented in the format `<domain>/agentdesktop/case/id/<actual id number>` (e.g., `http[s]://YourCompany.brightpattern.com/agentdesktop/case/id/5ca2f3eed04fd756afcca6c6`). For more information regarding how to manually alter this link, see [Using URL Variations to Access Case and Contact Information](#).

## Create a follow-up case button

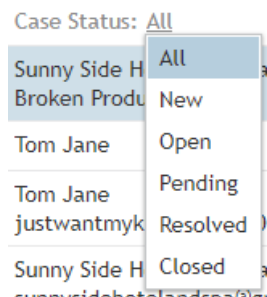
The **Create a follow-up case**  button is available for cases with a [Closed](#) state only. Clicking this button allows you to [create a new case](#). For more information, see [How to Send a Follow-Up Outbound Email](#).

## Case Filters

The following filters are available for cases.


### Case State

The Case State filter allows you to sort cases per assigned State. For more information, see For more information, see [Case State](#).



Case State filter

### Case details

The case details filter allows you to sort emails by pertinent details; this filter includes a further option to organize by **ascending/descending** order by clicking the grey triangle . For more information, see [My Cases Interface](#).

