5.3 Cases and Email Tutorials

Bright Pattern Documentation

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Table of Contents

How to Accept an Email

When an email interaction is delivered to your desktop via the push method, you will see an alert pop-up window titled **Email / incoming**.

The alert pop-up window will display the following items:

- Name of the service requested by the customer
- Customer’s display name (if available)
- Customer's email address
- Subject line content

To accept the email for immediate processing, click the **Reply** button. The *Active Communications List* will display the email icon indicating that you now have an active email on your desktop.

For subsequent email handling steps, see How to Review an Incoming Email.

When you click **Reply**, the accepted email becomes your in-focus interaction (i.e., the interaction that you intend to handle right away). If you are busy with another task when an email arrives and do not want to shift your focus immediately to this new email, you can click **Postpone**. The new email will be placed in your *Active Communications List*, but it will be out of focus until you manually select it from that list for processing.

Note: If you do not accept an incoming email within a predefined amount of time by clicking either **Reply** or **Postpone**, the email will be returned to the service queue for distribution to another agent, and you will be automatically switched to the *Not Ready* state. You will need to make yourself manually *Ready* when you are ready to receive another email. Unaccepted emails will appear in your performance and activity reports.

How to Create New Cases

Cases are automatically created from emails inbound to your contact center. But what do you do if you need to reach out to a contact and need a record of it, or want to create a case from another type of interaction?

New cases can be created from either existing cases or contacts saved in your contact center or during non-email interactions. For more information, see Additional Ways to Initiate Interactions.

During Interactions

New cases can be created during active voice or chat interactions by clicking the **Add new case** button. After clicking this button, a case tab will open a draft note; you may also send an email at this time. Additionally, you can apply various case states to the case.

How a created case looks from a chat

From Existing Cases

Personal Queue

New cases can be created from your Personal Queue by clicking the **Compose email** button. After clicking this button, a new draft email opens with the option to create a note. Note that creating an email this way will place you in a Busy state.

The compose email button located in Personal Queue

Team Queue and Pinned Cases

It is also possible to create new cases from the Team Queue and Pinned Cases sections; however, the contact information must already be saved in your contact center. To create a new case from these sections, hover your cursor over a contact; this will pop a contact card with clickable interaction icons. Clicking the **email** icon will create a new case in a draft email state wth the option to create a note. Note that creating an email this way will place you in a Busy state.

From Existing Contacts

From the Cases Tab

In section Search & Preview records, Cases tab, the **Add new case** button allows you to create a case for a saved contact. Note that this option is available for existing contacts only.

Create a new case from the Cases tab

Adding a new case in this way gives you several options:

- You may choose to create a note for the contact only.
- You can send the contact an email.
- You can create a note and send an email.
- You can apply various case states to the case.

Note that when a case is created in this way, you will be placed in a Busy state in preview mode.

When adding a new case, you can leave a note, send an email, and assign a case state

From a Contact's Saved Email Address

New cases can be created from email addresses saved to a contact's record. To create a new case, click the**email** icon that appears when you hover your cursor over the contact's email address; this will open a new draft email. You may also create a note for the case at this time.

Note that creating an email this way will place you in a Busy state. For more information, seeAdditional Ways to Initiate Interactions.

A new case can be initiated from a contact's email address

How to Use Pinned 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. Such follow-up emails are placed in *Pinned Cases*.

Pinned Cases is a section of *My Cases* that contains cases that have been marked for follow-up. A case is marked for follow-up when the agent sets a non-final disposition and when the agent clicks the pin button within the email preview or the opened email.

Pinned Cases tab as seen from *My Cases*

Because the pin button is available in both Preview mode and Opened Email mode, it is possible to pin cases without taking the email item from a queue. **Note:** Only emails that do not have a final disposition can be pinned. For more information on dispositions, see section Dispositions and Notes.

Viewing Pinned Cases

All cases marked for follow-up are listed in *My Cases* > *Pinned Cases*, which is located at the top of Agent Desktop.

Pinned cases appear in Pinned Cases

Enabling Pinned Cases

To view the *Pinned Cases* section in the *Active Conversations List* as well as to view the pin button, the **Enable Email Follow-up section** personal setting must be checked in *Settings*. From the *Settings* menu, select **Preferences**.

Settings > Preferences

In Preferences, select the checkbox for **Enable Email Follow-up section**.

Select this checkbox to enable email to appear in Pinned Cases

When checked, both the *Pinned Cases* section and pin button are shown. If you do not wish to view *Pinned Cases*, uncheck the box.

Using Pinned Cases

The *Pinned Cases* queue shows the properties (i.e., name, subject line, etc.) of the first received email. To view the email message body, select/click an email item in the queue. The email message will appear for viewing only.

To reply to a pinned email, either double-click the email item or click the **Open** button at the bottom. The email message will appear as a draft. Note that the pin button is visible only if the email has been marked with a non-final disposition. For more information on sending replies, refer to section [How to Compose a Reply](#).

Drafting a reply

If multiple agents pin the same email, it will appear in the *Pinned Cases* section of all the agents who pinned it. When a final disposition is selected by one agent, the email becomes unpinned and disappears from the *Pinned Cases* section of all agents who pinned it.

Note: Pinned emails can also be sent by navigating to **Cases** in the *Active Conversations List*. For more information, see section How to Use Cases to Send a Follow-up Outbound 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. Follow-up emails can be created for both open and closed cases.

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

From an Open Case

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 the 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.

From a Closed Case

While it is not possible to reopen closed cases, you can use the *Create a follow-up case* button to continue the interaction with the customer. Note that creating a follow-up case from a closed case will create a new case number.

Create a follow-up case on a closed case

Step 1: Find the Case

- Go to [Search & Preview Records, Cases tab](#).

OR

- Using the search bar, enter the case number, contact, or other relevant information, and find the closed case.

Step 2: Create and Send a Follow-Up Case

- Click the button **Create a follow-up case**
- From here, you can compose an email to send to your customer. Note that creating a follow-up email will create a new case number.

Draft your follow-up email

Additional Information

- After sending the email, you will see in Case history that a follow-up case was created, as well as a link containing the new case number. Additionally, when a follow-up case is created:
  - An activity history note with a link to the original case is automatically inserted in the new case reading, "Case created as follow up from case XXX" (i.e., XXX is the case number). The note is written on behalf of the agent who clicked the **Create a follow-up case** button.
  - An activity history note is automatically inserted in the original case reading, "Follow up case XXX is created". When the follow-up case is created by an agent, the note is marked as coming from that agent.

A record of the follow-up case will be added to the case

How to Change Default Email Font

Agents may set their personal font style for email replies and drafts. Settings for font face, size, and text color can be changed in Agent Desktop *Settings*.

Step 1: Update your Settings

To customize your email font, navigate to *Settings* and select **Default email font**.

Settings > Default email font

Step 2: Select desired font style

The following dialog box will pop up, offering a selection of font face, size and face color. Select and preview the desired font face, size, and color. Then click **Ok** to save your changes. Your default email font settings will be saved and applied to all new drafts and replies.

Select font face, size, and color

Step 3: View new font settings in email drafts and replies

To check that your new email font settings have been applied, open a new draft or a reply to a message. When a new draft is opened or when a reply is started, the font in draft is automatically set to your default font.

If you remove font formatting from a selection of pasted text, the font will return to the user default as specified in *Settings*. When you receive an email as a transfer from queue with the existing draft in place, the font in the draft does not change unless you remove font formatting manually.

Example of default font settings applied to an email

How to Close an Email without Replying

Some emails that you receive may not require any follow-up from your contact center. Some examples of such messages are customer emails confirming successful fulfillment of their requests, messages sent by accident (wrong address), and mass email containing some advertising (spam). If an email you are reviewing does not require a response, you can close it without replying.

When you close the email, you should first select a disposition explaining the reason for closure without replying. The disposition selector is located in the lower left corner of the *Reply Editor*. In addition to dispositions, you can also enter free-form text notes to provide more information about closure of the interaction.

After selecting a disposition, click the **Complete** button . The email and the associated case will be closed. You are likely to receive a new interaction for processing shortly.

Disposition selector and Close without reply button

How to Change an Assigned Email Service

Any incoming email will be automatically associated with one of the email services configured in your system. Email services play the same role as phone call services. They are used, in particular, to make sure that emails are delivered to the agents who know how to handle them. In order to identify the requested service, the system analyzes the subject and body of the email to match some predefined keywords that would be typically associated a given service. This process is called *categorization*. For example, in order to associate an email with a technical support service, the system may check emails for presence of words *problem*, *issue*, *help, support*, etc. If the system cannot find any keywords in the incoming email, the email will be associated with a general (default) service.

If your customers normally use web forms to compose their email service requests, the above process will guarantee reliable service identification for almost every email. When customers use a general-purpose email application to contact your company, there is a greater chance that an email may be categorized insufficiently (i.e., associated with a default service) or incorrectly (i.e., associated with a wrong service).

Therefore, the first step in processing of a new email is to verify the associated service, and if necessary, change such automatic association. Note that this step can be skipped for emails that are part of the existing cases; see section How to Review an Incoming Email for more information.

When you review an incoming email, the currently assigned service is displayed in the *Reply Editor*.

Currently assigned service

Note: For emails distributed via the Push method, you will also see the service name in the alert pop-up window. For emails distributed via the Pull method, you may be able to see abbreviated service names in the team queue.

If the service association is correct, you can proceed to composing a reply. If the service is assigned incorrectly, there are several possibilities:

- You know what the correct service is, and you are qualified to handle it.
- You know what the correct service is, but you are not qualified to handle it.
- You do not know what the correct service is.

If you know the correct service and you are qualified to handle it, you should normally change the assigned service and keep this email at your desktop for further processing. To change the service, click the drop down icon next to the currently assigned service name. The menu will show the services that you are qualified to handle. Select the correct service and proceed to composing a reply.

Service change

If you know what the correct service is, but you are not qualified to handle it, you should transfer the email to the correct service. If you are not sure what the correct service is, you can transfer the email to your supervisor or another agent. For more information, see section How to Transfer an 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.

Note that for cases with a Closed state, it is not possible to send a reply; you will need to create a *Follow-up case*. For more information, see How to Send a Follow-up Outbound Email.

Step 1: Begin writing your draft

1. To compose a reply, select the **Reply** and **Forward** buttons located at the top (on cursor hover) and bottom of the message.
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.
6. If you would like to include links in your draft, enter or paste the URL into the body, highlight the text, then select the **insert link** button. The highlighted text will turn blue and will be shown underlined to indicate it is a link.

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.
3. Starting from version 5.3.0, note the following email attachment limits:
    1. Single email attachment size: 10MB
    2. Single email with attachments size: 25 MB

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 messages 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 Transfer an Email

A transfer is sending an email to another resource within your contact center for further processing. As mentioned in the How to Change an Assigned Email Service section, the most likely reason you may need to transfer an email is when you are not sure how to process it. In this case, you can either transfer the email to another service queue, or to another agent, or to your supervisor.

When You Know the Correct Service

If you receive an email that you are not qualified to handle, but you know what the correct service is, you can transfer this email to the correct service.

To transfer the email, follow these steps:

1. In the Category selection menu, select the service category to which the email should be transferred.
2. Click the **Transfer** button .
3. In the dialog window that appears, select the desired service, person, or team.
4. If you do not see the desired selection on the screen but you know its name, you can enter it in the **Search** field.
5. Click **Transfer** to confirm the assignment.

The email will be removed from your desktop and will appear in the queue of the team that is qualified to handle the service that you selected.

Email category selection menu

When You Do Not Know the Correct Service

If you do not know what the correct service is, you can transfer this email to your supervisor or another agent who may have this knowledge.

To transfer the email to a supervisor or another agent, follow these steps:

1. Click the **Transfer** button (see the previous instructions).
2. In the dialog window that appears, select the desired person.
3. Click **Transfer** to confirm the assignment. The email will be removed from your desktop and appear on the desktop of the supervisor or agent to which you have transferred this email.

When you transfer emails to other agents, consider providing some explanation using the notes editor. If you enter any notes, the other agents will see them and understand the reason the email is transferred to them.

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.

How to Send a New Outbound Email

While follow-up emails are associated with existing cases, new outbound emails are emails that you send to your customers regarding matters unrelated to any existing cases. When you compose and send a new email, a new case is created automatically.

To send a new outbound email, select any email message listed in your *Personal Queue* and **Open** the message. Then click the **Email draft** button located at the bottom of the Reply Editor pane.

Composing a new email draft

A new email draft 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.

Draft your email as follows:

- Select the service with which this email is associated.
- Specify the recipient email address. Note that if you begin typing an email address that you have manually typed previously, the system will automatically complete the rest of the email address field for you.
- Add **cc** and/or **bcc** if necessary.
- Type the **subject**.
- Compose the email itself.
- Starting from version 5.3.0, note the following email attachment limits:
    - Single email attachment size: 10MB
    - Single email with attachments size: 25 MB
- Click **Send**.

Your email will be sent and a new case will be created. If the customer replies to your email, his reply will be automatically associated with that new case. Subsequent processing of the customer reply will be no different from the processing of incoming emails.

How to Save an Email as a Draft

If you have started working on a reply or an outbound email, but you unable to finish it at the moment for any reason, you can save such an unfinished email as a draft in your personal queue. To save an email as a draft, click the **Save draft and complete interaction** button .

Note: If you are saving a draft because your working shift is about to end, consider making yourself Not Ready before saving the draft. Otherwise you may get a new interaction right away. This note is only essential if the emails are delivered to you via the Push method.

Save draft and complete interaction button

The email draft will be removed from your *Active Communications List* and saved in *Personal Queue*. You will be able to retrieve it and continue its processing at any time. For more information, see section How to Retrieve an Email from Your Personal Queue.

Note: If you have any unfinished emails on your desktop when you log out of the system, all those emails will be saved as drafts in your personal queue automatically. You will have to retrieve them manually in order to finish their processing the next time you log in.

How to Copy and Paste Images into Email

When replying to or forwarding emails, images can be inserted directly into the body of messages using your computer's **copy image** and **paste** commands; print screen and snipping tools may be used to do this. Inserting images into the body of email messages may allow you to improve your email response time.

To insert an image, first, copy it using your preferred copy image method (e.g., in Windows, right-click on the image and select "copy image"). Next, insert your cursor within the body of the message and use your computer's paste command; the image will appear inside the email body.

An example of an image pasted into the body of an email

If you prefer, files still may be attached to emails using the **Add attachment** button .

How to Mask Sensitive Data

Depending on the type of services that you contact center provides, incoming emails may contain some sensitive data that people not familiar with Internet security risks can include in their messages. Examples of such data include payment card numbers, access codes, and clients’ personal health information.

Handling of such data may be governed by various laws, industry security standards, as well as internal policies of your organization. Thus, while reviewing incoming mail, you may be expected to identify such data and make sure it is masked before the email is further processed and stored. (*Data masking* is the process of hiding original data by replacing it with random characters.)

Note that masking data requires a privilege; for more information, contact your system administrator.

An email containing content needing masking

Process

To mask a fragment of an email, highlight the sensitive data/text with your cursor. A gray pop-up window will appear with the word **Mask**.

Selecting **Mask** opens a new window, which allows you to highlight the content you wish to mask. When you are finished highlighting the sensitive data/text, select the **Ok** button to accept the mask and close the window. If you wish to cancel the action, select the **Cancel** button.

Masking content will convert numbers to asterisks

From here, when you are returned to the normal email view, the content will be converted from numbers/text to asterisks.

Masked text

How to Print an Email

A single-click control allows you to open, view, and print original email content in a pop-out tab or window of your web browser. The original email content can be printed using the "Print" option of the web browser itself. Note that the original email content includes CC and BCC fields from outgoing emails.

To print email content, follow these steps:

1. In either your Team Queue or Personal Queue, open the desired email by selecting it or double-clicking it in the list.

   Select the desired email to print

2. Mouse over the subject line of the email message. Doing so causes additional email control options appear.

   Mouse over the email's subject line

3. Click the **Show original email content** button. The email message will open in a new browser tab or window, depending on your browser settings.

Email content in a separate browser window

4. Hit **Ctrl + P** (Windows) or **Command + P** (Mac) to print the page.

Print from your web browser

How to Retrieve an Email from the Team Queue

If emails are distributed via the Pull method, they will appear in your team queue. You can immediately see if there are any emails in the queue by checking entry **My Cases** in your *Active Communications List*. The entry will show how many emails you currently have in *Personal Queue* and in *Team Queue*.

Viewing Team Queue Content

To view the content of the *Team Queue*, select the **My Cases** entry. Both *Personal Queue* and the *Team Queue* will be displayed in the *Contact Info Panel* area. Click on *Team Queue* to view all emails in the team queue.

For each queued email, customer’s display name, arrival date/time, subject line, and attachment indicator (if there are attachments) will be shown. Depending on your system configuration, an abbreviated service name may also be displayed next to the arrival date/time. If such short names are used, you will receive their descriptions from your system administrator.

Email in team queue with customer name, service name, arrival time, and subject

To see the full sender’s email address, hover over the customer’s display name.

To see the full service name, hover over the abbreviated service name.

The attachment indicator shows whether there are any attachments in the messages sent or received in the entire email thread. The indicator is displayed for each message in the thread at the end of the line in the queue.

A bar indicator next to each email will indicate how close the current wait time is to breaching the service level agreement (SLA). The SLA is your contact center's "standard" time for replying to customers’ emails. The unshaded portion of the SLA bar represents the time remaining to the SLA breach. This time also defines the default order in which emails appear in the queue.

SLA indicators

You can sort emails in the team queue by *Create Time*, *Update Time*, *Last customer update*, *SLA Age %*, *From*, *Subject*, and *Flag*. In addition, you may choose either ascending or descending order of email appearance in each case. This is done by clicking the up/down arrow icon.

Team queue with the service filter sorting controls

Adjusting Team Queue View

If your team is assigned to handling emails for multiple services, you can adjust your *Team Queue* view to display emails for any one of those services separately or for all assigned services at once. The name of the currently selected service will be displayed under the queue title. To view another service, click on the currently selected service name and select the desired service from the drop-down menu. To view queued emails for all assigned services, click **All**.

Note: The limited screen space allocated for the team queue on the screen only allows to see a few emails. You can use scrolling to see more emails.

Preview Email Content Without Retrieving It

You can preview content of an email in the *Team Queue* without retrieving it. To preview an email, click it once.

For more information about reviewing email content, see section How to Review an Incoming Email.

Retrieving Email

To retrieve an email for handling, double-click it. (Note that double-clicking the email moves the email to your *Personal Queue*. The *Active Communications List* will display the email icon, indicating that you now have an active email on your desktop. For subsequent email handling steps, see section How to Review an Incoming Email.

Note: If subsequent handling of a selected email involves replying or forwarding, you can also retrieve it for handling by selecting the corresponding action from the editing area. For more information, see sections How to Forward an Email and How to Compose a Reply.

Instead of retrieving an email for handling, you can move it to *Personal Queue* for processing at a later time. To move an email to *Personal Queue*, you can click the **Grab** button in the reading pane, drag the selected email from the team queue and drop it anywhere in *Personal Queue*, or double-click it.

You can use the drag-and-drop operation to move multiple emails to *Personal Queue* in one step. Click the desired emails while holding the **Ctrl** button. (If you select a range, you can click the first and last email in the range while holding the **Shift** button.) Drag selected emails and drop them anywhere in *Personal Queue*.

How to Retrieve an Email from Personal Queue

As mentioned in the How to Retrieve an Email from the Team Queue section, in addition to the Push and Pull distribution methods, an email can be assigned to you by a supervisor. Depending on your system configuration, if an incoming email is related to a case that you previously handled, such an email can also be delivered to you directly. These emails will appear in *Personal Queue*, from which you will be expected to retrieve them manually. *Personal Queue* looks very similar to the *Team Queue* described in the previous section. It is opened using the same control, displayed in the same area of your application, and provides the same information about each email.

For more information, see section How to Retrieve an Email for the Team Queue.

Personal Queue also contains emails that you may have worked on previously and saved as drafts. For more information, see section How to Save an Email as a Draft. Drafts are retrieved from *Personal Queue* for processing in the same way as new emails. Emails in *Personal Queue* are arranged by the service level agreement (SLA), with the ones closest to the SLA breach appearing on top of the list. Note that the limited space allocated for the personal queue on the desktop only allows you to see a few emails. You can scroll to see more emails.

The attachment indicator shows whether there are any attachments in the messages sent or received in the entire email thread. The indicator is displayed for each message in the thread at the end of the line in the queue.

To retrieve an email for handling, follow these steps:

1. Double-click the email or click the **Grab** button in the editing area.
2. The *Active Communications List* will display the email icon indicating that you now have an active email on your desktop.

For subsequent email handling steps, see section How to Review an Incoming Email.

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 (Optional): 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. The inclusion of the email thread identifier allows you to easily identify that the email is part of an existing thread in your contact center; however, your contact center might not use thread identifiers (i.e., an email may be part of a thread and not contain a thread identifier).

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