5.3 Cases and Email

Bright Pattern Documentation

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Cases and Email Overview

In addition to calls and chats, you may be assigned to process customer requests made via email. Depending on your contact center practices, customer emails can either be delivered directly to your desktop (i.e., the *Push* method) or appear in the team queue from which you will be expected to retrieve them manually (i.e., the *Pull* method).

Emails can also be assigned to you by a supervisor. In this case, they will appear in your personal queue from which you will also be expected to retrieve them manually. Finally, emails can be transferred to you by other agents. Once you have accepted an incoming email or retrieved one from a queue, all subsequent steps of its processing will be the same.

In the simplest email processing scenario, a single reply to the customer's inquiry will be sufficient to finish the interaction. More complex scenarios may involve some follow-up messages from your contact center to the customer and/or additional communications from the customer.

To support these scenarios, each email is associated with a *case* and a *thread*. See the Cases, Email, and Threads section for more information about these entities.

Depending on your contact center configuration, you may be expected to handle multiple emails simultaneously. Your system administrator will advise you about the maximum number of emails that you may have active on your desktop at any given time.

Regardless of how many active emails you have, only one of them will be in focus at any given moment. The in-focus email is the one that is currently selected in the *Active Communications List*. The email working area will be entirely dedicated to the in-focus email and all of its controls will take effect for that email only. You can place another email in focus by selecting it from the *Active Communications List*. You can switch between your various active emails in this manner at any time.

Articles

The following is a list of articles in this section:

- Cases, Email, and Threads
- My Cases Interface
- Case State

Tutorials

For a list of tutorials for cases and email, see Cases and Email Tutorials.

Agent Desktop with My Queue and Team Queue in Contact Info Panel

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.

When you reply to an email, a thread ID is added to the email subject

My Cases Interface

In order for you to better understand all the things you can do in My Cases, you will need to get familiar with all the working parts and pieces, how cases are displayed, and so forth. The following describes what you will see in this section of Agent Desktop.

My Cases as seen by a supervisor

Header

Disposition Buttons

The optional *disposition buttons* can be found at the top of your team queue and personal queue toolbars. These buttons allow you to quickly disposition emails and remove them from the queue without having to open them. Note that the dispositions these buttons correspond with, as well as the icons displayed, are set by your system administrator (i.e., these buttons will look different for every contact center).

To use disposition buttons, click the checkbox to the left of the selected email(s); the available buttons will appear in the toolbar and can be selected. Buttons corresponding to either a Final disposition or Spam disposition apply the Resolved state to all selected emails. Buttons mapped to the Nonfinal disposition type do not apply a different state to the selected emails (i.e., all selected emails will retain the New state).

How disposition buttons look in a team queue toolbar

SLA Icons

If a particular queue contains emails with SLA over 90%, a half-grey dot is displayed on the queue tab; if a queue has contains emails with SLA breached, a filled orange dot is displayed on the queue tab.

Queue icons

Team Queue

The *Team Queue* is your team's email inbox. Note that if your contact center distributes email through the push method, emails will route directly to your Personal Queue.

Assign button

The **assign** button allows supervisors to assign an email to an agent on their team.

Grab button

If pull queue is enabled, the **Grab** button allows you to take a case from the team queue; when grabbed, the case will appear in your Personal Queue.

Spam button

The **spam** button removes selected cases from your Team Queue. 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 from your Team Queue.

Case Filters

Case filters allow you to quickly organize and sort through your Team Queue's emails. The following filters are available.

Service

If you have access to more than one service, the service filter allows you to sort emails per service. Additionally, supervisors have the ability to filter per email distribution type (i.e., push or pull).

Service filter

Languages

The languages filter allows you to sort your emails by the languages recognized by your contact center.

Languages 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 . Case details filters include the following:

Create time

Create time is the time the case first arrived in your contact center or was created.

Update time

Update time is the time the case was last updated.

Last customer update

Last customer update is the time a customer last interacted with your contact center through a given case.

SLA Age %

The *SLA Age %* filter displays cases by age according to your contact center's SLA percentage. SLA, which stands for "service level agreement", is the percentage of emails associated with a service that must be replied to within the specified amount of time (i.e., hours or days); this percentage is relative to all replied emails.

From

From displays cases in alphabetical order based on the name field.

Subject

Subject displays cases in alphabetical order based on the subject line.

Flag

The *Flag* filter allows those cases that have been flagged to be displayed at the top of the queue.

Case details filter

Target time

The target time bar is located to the right side of all cases and is a visual indicator ofSLA. It comprises five squares, which are empty when a case arrives at your contact center; as time progresses, the squares gradually fill until the target time is exceeded and all are eventually greyed out.

Target time

Personal Queue

The *Personal Queue* is the destination for emails you have grabbed, have had assigned to you by a supervisor, or not immediately accepted (i.e., if your contact center uses push method of distribution). Like in Team Queue, you can use the case details filter to sort your cases, as well as see the target time. Additionally, if you are a supervisor, your Personal Queue will contain an assign button, allowing you to assign cases to agents on your team.

Move to TQ button

The **Move to TQ** button allows you to move a selected case from your Personal Queue back to the Team Queue.

Compose email button

The **Compose email** button allows you to create a new case. For more information, see How to Create New Cases.

Personal Queue view

Pinned Cases

Pinned cases are the cases you want quick access to for any number of reasons (e.g., historical reference, examples, etc.). When you pin a case, it acts as a shortcut. All cases that you pin will be kept in your personal Pinned Cases section. Additionally, you can use the case details filter to sort these cases.

Pinned Cases view

Case View Panel

Case Header

The *case header* area displays information related directly related to the case. The following is a list of the type of information you can see.

An example case header

Case number

Case number is the number assigned to an interaction in chronological order. All emails to your contact center are automatically assigned case numbers; manually created cases receive these numbers, too. To manually create cases from other types of interactions, see [How to Create New Cases].

Subject

This is the subject line of the email/case.

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 links may be pasted into your web browser's search bar or into the [search bar] 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). Note that it is possible manually enter a link to access the same case with the following formats:

- **<domain>/agentdesktop/case/number/<case number>** (e.g., http[s]://YourCompany.brightpattern.com/agentdesktop/case/number/1099)
- **<domain>/agentdesktop/case/<case number>** (e.g., http[s]://YourCompany.brightpattern.com/agentdesktop/case/1099)

If case links are pasted in internal chats, they may be displayed in the following formats for the most compact view:

- **case/id/<id>** (e.g., case/id/5ca2f3eed04fd756afcca6c6)
- **case/number/<case number>** (e.g., case/number/1099)
- **case/<case number>** (e.g., case/1099)

Current assignments

Current assignments are basic historical details related to the case. The following is a list of the types of information you can see in the case header.

Reporter

The *reporter* is the identified customer who contacted your contact center.

On copy

On copy is an unidentified customer who contacted your contact center.

State

State displays the current case state. Note that if the state is Pending, the pending reason will be displayed, also.

Assigned to

Assigned to displays the name of the agent the case is assigned to.

Pinned by

Pinned by displays the name of the agent or supervisor who pinned the case.

Case History

Case history is displayed in each case as records showing completed actions; additionally, the date and time the action was completed is displayed. The following is a list of what is considered a completed action:

- Agent Desktop pushing an email to an agent
- Transferring a case from one agent to another agent or to a different queue or service
- Agents pulling emails from the Team Queue
- Agents opening emails
- Supervisors assigning emails from a Team Queue
- Saving notes to a case

An example of how case history actions look

Case Footer

The case footer displays several of the same buttons seen at the top of the Team Queue (e.g., Grab, Spam, etc.). Additionally, the footer contains the **Open** button, which opens the case, and the case state button, which will display the current case state.

An example case footer

Case State

Agent Desktop allows you to assign *state* to cases, which may be used to organize and classify your case workload. For more information about cases, see My Cases Interface and Search & Preview Records Interface.

The following states can be applied to cases.

New

This state is for new, unopened cases.

The New case state

Open

This state is for cases that have been opened but are not yet processed.

The Open case state

Pending

This state is for cases that require further action. When a case is marked as Pending, you must select a corresponding Case Pending Reason. Case Pending Reasons are defined by your system administrator and allow you to provide additional information as to why a case is pending.

The Pending state with pending reason

Resolved

This state is for cases that are completed. Note that cases marked as Resolved can have changes made to them and will stay in the Resolved state for a period of time as configured by your administrator; after this point, the case will be Closed. Additionally, when marking a case as Resolved, you will have the opportunity to disposition it.

The Resolved case state

Closed

This state is for cases that have exceeded the period of Resolved days (as configured by your administrator). Changes cannot be made to closed cases; however, it is possible to create a follow-up case from a closed case.

The Closed state