



5.3 Case State

Bright Pattern Documentation

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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.

The screenshot displays the 'My Cases' interface. At the top, there are tabs for 'Team Queue (32)', 'Personal Queue (1)', and 'Pinned Cases (3)'. Below these are buttons for 'Grab', 'Spam', and a trash icon. A search bar and a 'Create time' dropdown are also visible. The main list of cases includes columns for checkboxes, subject lines, sender information, and dates. The selected case, '1066 My cup broke AGAIN!', is shown in detail on the right, including the reporter's name, status, and the full text of the message. At the bottom of the case view, there are buttons for 'Open', 'Grab', 'Spam', a trash icon, and a 'Resolved' button.

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).

Team Queue (28 ●) Personal Queue (1) Pinned Cases (2)



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.


Team Queue (25) Personal Queue (5 ●) Follow-ups (55 ●) Search

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.

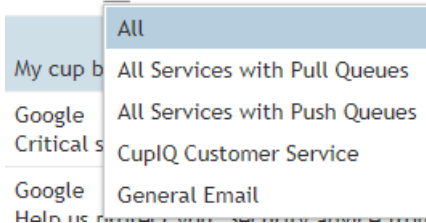
Case Filters

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: All

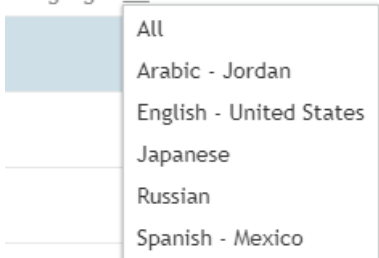


Service filter

Languages

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

Language: All



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

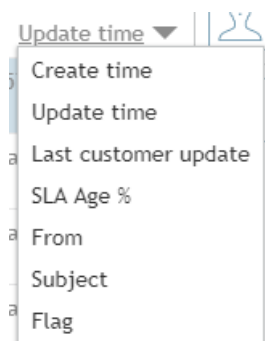
From displays cases in alphabetical order based on the name field.

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 of [SLA](#). 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.

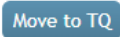


Target
time


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](#).

Team Queue (30 ●) Personal Queue (3 ●) Pinned Cases (3)

 Move to TQ ▼ Michael Carter 

[Create time](#) ▼

<input type="checkbox"/>	CupIQ Custo...	Jan 24
<input type="checkbox"/> My cup broke AGAIN!	General Email	Jan 15 ■■■■■■
<input type="checkbox"/> Google Critical security alert		Dec 10, 2018
<input type="checkbox"/> RE: Account test (Follow-Up)		



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.

Team Queue (30 ●) Personal Queue (3 ●) Pinned Cases (3)

▼ Michael Carter
[Create time](#) ▲

Tom Jane Broken 10 oz Cup		Oct 23, 2018
Sunny Side Hotel and Spa New Case		Dec 20, 2018
Tom Jane New Replacement Cup		Jan 9


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.

1359 test today 

 Alex Green, reporter Status: Closed

Assigned to:
[Agent Nicely](#)

Pinned by:
[Agent Nicely](#)

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

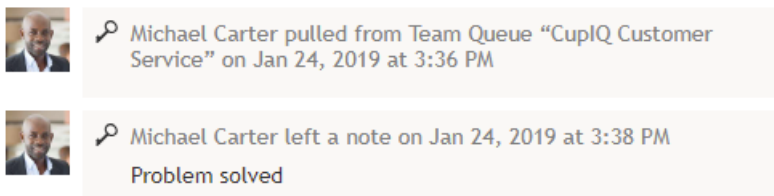
Pinned by

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** Open button, which opens the case, and the [case state](#) button, which will display the current case state.



An example case footer

