5.3 Cases, Email, and Threads

Bright Pattern Documentation

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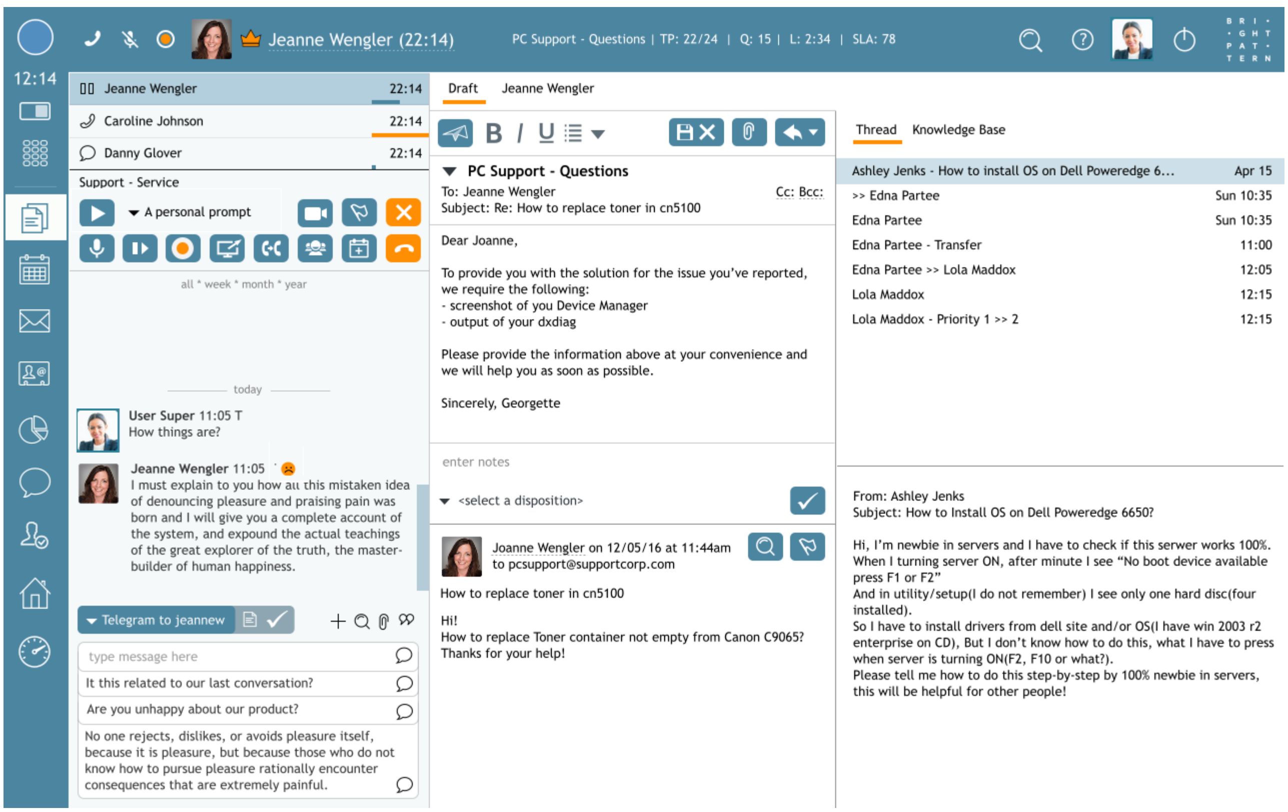
What is Agent Desktop?

Agent Desktop is a cloud software application that helps businesses provide effortless customer service on the channels that customers prefer. A powerful communications platform, Agent Desktop helps contact center agents, supervisors, and back office employees build customer relationships and fulfill requests efficiently on the phone, in chat, in email, via text messaging, and more.

Made for facilitating interactions, Agent Desktop allows you to correspond with people in any locale, from any web browser—to talk and message, all you need is a high-speed Internet connection and a headset. It's through these interactions that you will manage customer cases, resolve problems, and maintain meaningful relationships with customers.

The *Agent Guide* explains in detail the types of interactions you can have with customers, referred to as*contacts*, and all the different ways that cases can be managed.



An agent processes a call from her customer Jeanne

Supported Channels

Agent Desktop facilitates all of the interactions you may have with customers on any media channel. A*channel* is the type of media used by customers to contact your business (e.g., voice call, chat, email, etc.). Because of the nature of customer service, most customers will reach out to your contact center on any available channel for problem resolution and/or issue requests. As the primary focus of Agent Desktop is based on interactions and cases, the *Agent Guide* focuses on how to have interactions through the supported media channels.

Agent Desktop recognizes the following channels:

- Phone calls
- Chat
- SMS
- Social messengers[1]
- Email

By incorporating so many channels, Agent Desktop enhances your ability to fulfill customer needs. Each interaction can be catered to the customer's channel preference, allowing you to provide the best experience possible.

For example, a customer who reaches out to you on the phone can ask to continue the interaction via text/SMS instead. Or, a customer who starts chatting with you on your company's website can be switched to Facebook Messenger or another social messenger. This flexibility helps you to provide consistent customer service across a variety of channels.

Omnichannel

The ability to handle multiple interactions of different types is called *omnichannel*. Not to be confused with *multichannel*, where your contact center is simply able to provide customer service over multiple media channels, true *omnichannel* is when your contact center offers customer service over multiple channels *and* agents can handle more than one active interaction, of different types, at the same time.

For example, let's say you are helping Customer A to schedule an appointment via web chat and you see an incoming call request from Customer B. You accept the call, start talking to Customer B, and while talking, you're able to wrap up the web chat with Customer A. This ability to handle these different types of interactions simultaneously is *omnichannel*.

Bright Pattern's omnichannel routing system intelligently calculates your capacity to handle various interactions, and routes incoming interactions to you automatically based on your skills and availability. The system ensures that you will only receive the interactions that you are able to handle.

Personalize Interactions with Agent Desktop

Bright Pattern builds in automatic identification and activity history (called activities), ensuring that when a call comes in, you already know who the customer is and why they are calling. Known contact and case data can be screen-popped to your Agent Desktop, helping you to review the customer's previous interactions and personalize the call you're having.

Driven by integrated AI, sentiment analysis across channels allows both agents and supervisors to zoom in on problematic interactions on the fly, as well as understand a customer's overall case. During any interaction, a happy, neutral, sad, or angry face icon provides an instant snapshot of customer satisfaction.

All phone calls, chats, emails, texts, messenger messages, video chats, case notes, call recordings, chat transcripts, and more, are wrapped up in a customer's activities, making it easy to know your customer, at a glance. You spend less time looking for information when you can see all customer activities on Agent Desktop.

Campaigns

So far, we've discussed the inbound calls, chats, and other interactions that you'll likely have on Agent Desktop. If enabled for your contact center, the outbound interactions you have with customers will be initiated through campaigns.

Campaigns are preconfigured call lists that allow your contact center to reach out to customers. Crucial to many contact centers, campaigns are usually centered on a specific topic (e.g., surveys, sales, etc.).

Agent Desktop allows your contact center to conduct different types of campaigns, including predictive, progressive, and preview.

Intuitive UI

Designed to improve agent productivity, the Agent Desktop user interface places all tools and functions at your fingertips in a single window. From one screen, it's easy to send and receive calls and messages from your team and customer service queue.

Talk and chat using the your choice of phone (e.g., built-in softphone, hardphone, etc.) and take advantage of robust messaging capabilities, while viewing customer cases, managing contacts, handling emails, scheduling follow-ups, and much more.

Deliver consistent customer service across multiple channels using AI-assisted suggestions from integrated chatbots, along with company-approved replies, templates, and training articles in the knowledge base.

The dashboard displays at-a-glance metrics for yourself and your team, helping you to meet team goals faster.

Automated quality management features help your supervisor to monitor team calls and interactions, provide help during conversations, and review transcripts and recordings to evaluate and boost agent performance. Whenever you need help, just flag the interaction to get your supervisor's attention.

Thanks to advanced tools and tech, everything is presented in plain view, in the same browser window, so you can keep active interactions and important details in focus without having to Alt+Tab to another window.

Be sure to explore the *Agent Guide* to learn more about Agent Desktop's features and user interface.

1. ↑ If configured for your contact center, these include Facebook Messenger, LINE, Telegram, and Viber.

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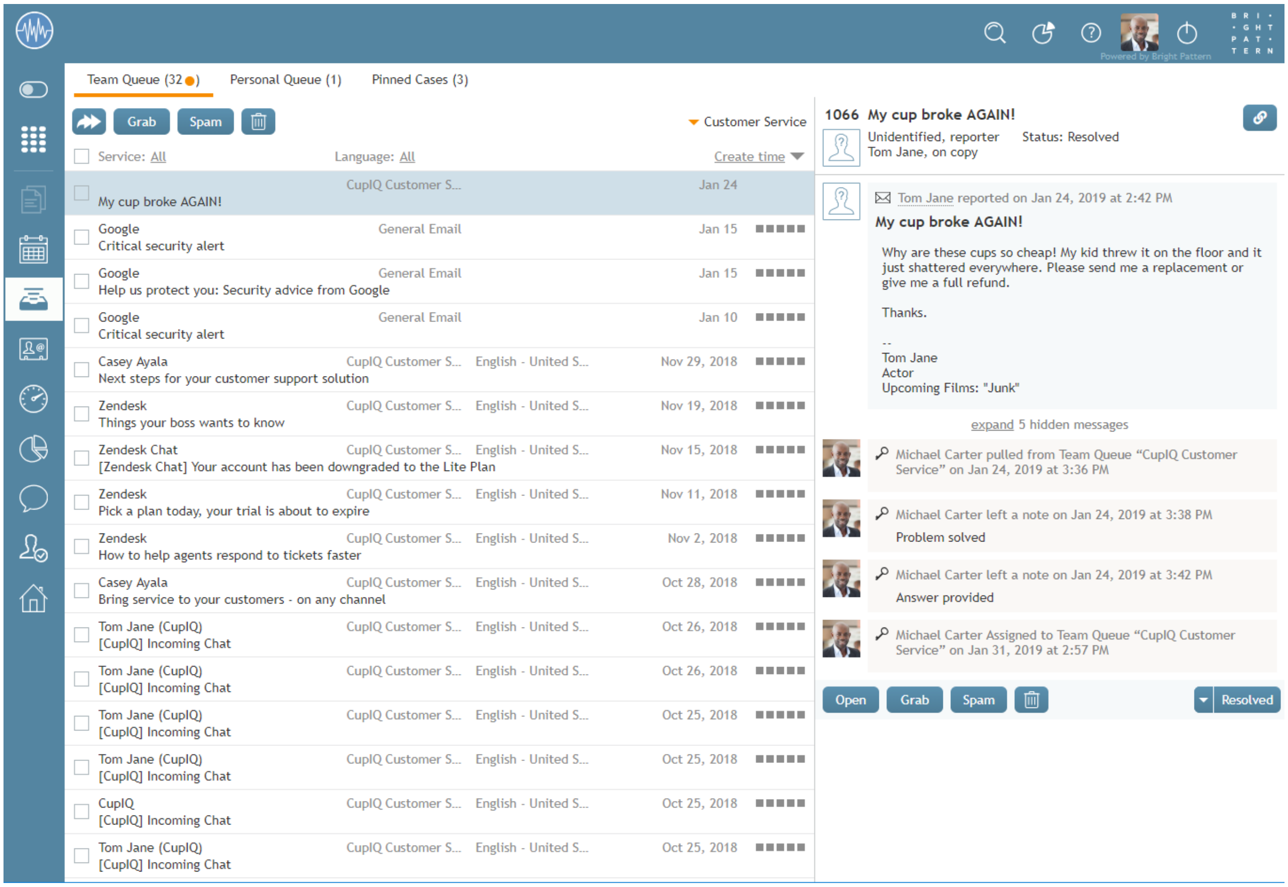
My Cases Interface

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.



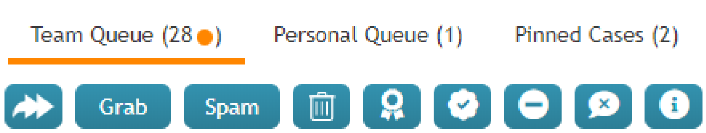
My Cases as seen by a supervisor

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 thepush method, emails will route directly to your Personal Queue.

Assign button

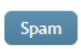
The **assign**  button allows supervisors to assign an email to an agent on their team.

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

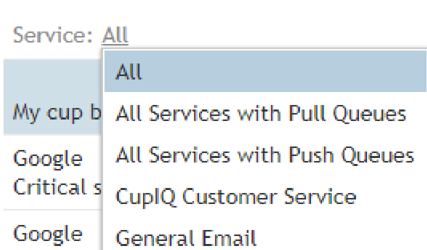
The **trash**  button deletes cases from your Team Queue.

Case Filters

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

Service

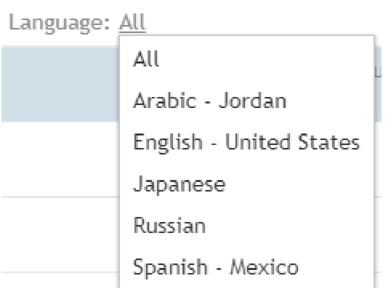
If you have access to more than one service, the service filter allows you to sort emails per service. Additionally, supervisors have the ability to filter per email distribution type (i.e., push or pull).



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

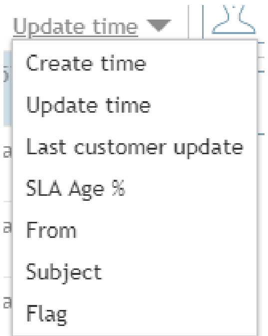
From displays cases in alphabetical order based on the name field.

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

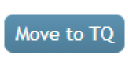
The target time bar is located to the right side of all cases and is a visual indicator of[SLA]. It comprises five squares, which are empty when a case arrives at your contact center; as time progresses, the squares gradually fill until the target time is exceeded and all are eventually greyed out.

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.

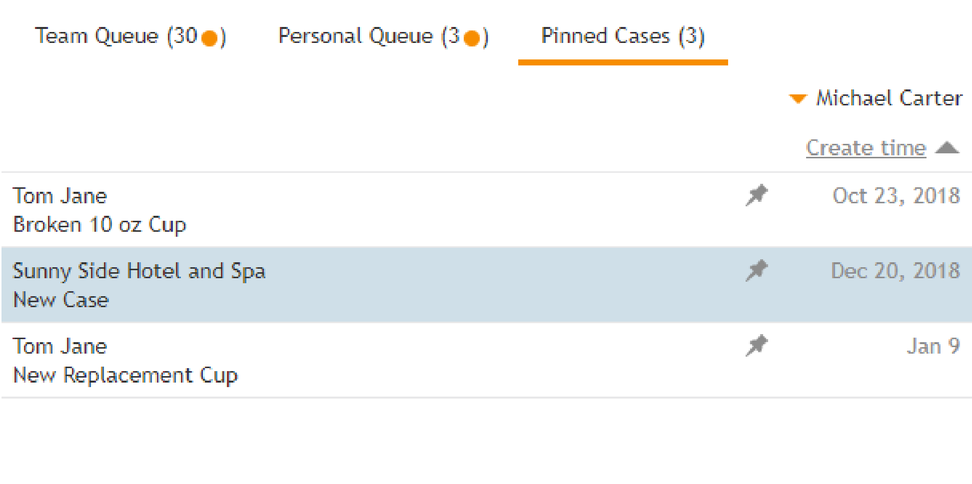
Compose email button

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

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.

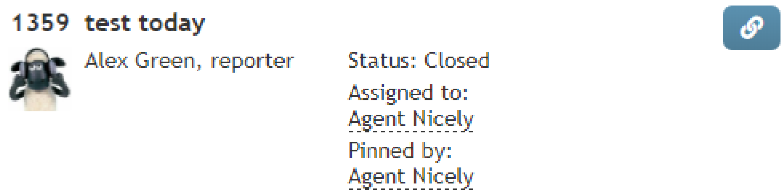


Pinned Cases view

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.

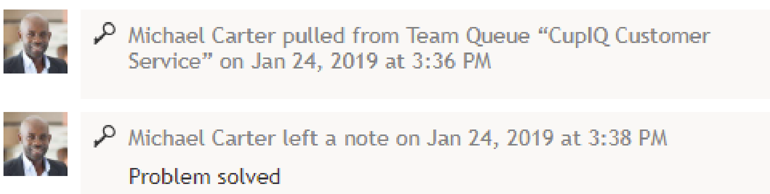
Pinned by

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

Case History

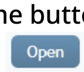
Case history is displayed in each case as records showing completed actions; additionally, the date and time the action was completed is displayed. The following is a list of what is considered a completed action:

- 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

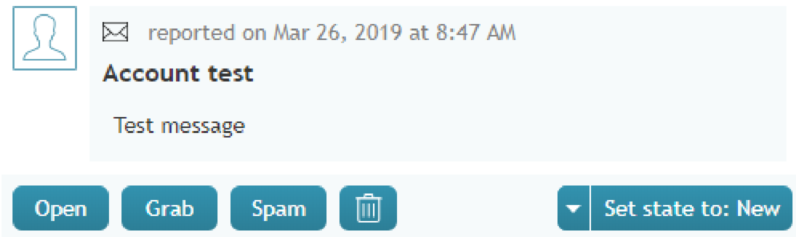
Case State

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

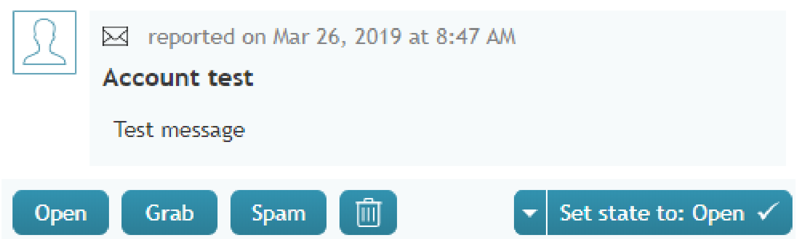
This state is for new, unopened cases.



The New case state

Open

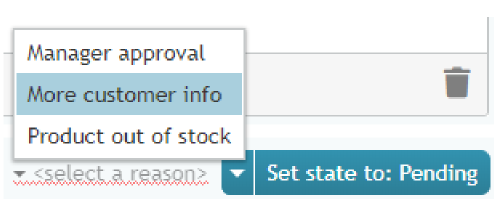
This state is for cases that have been opened but are not yet processed.



The Open case state

Pending

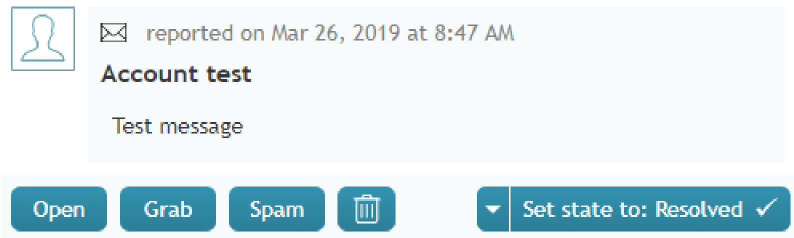
This state is for cases that require further action. When a case is marked as Pending, you must select a corresponding Case Pending Reason. Case Pending Reasons are defined by your system administrator and allow you to provide additional information as to why a case is pending.



The Pending state with pending reason

Resolved

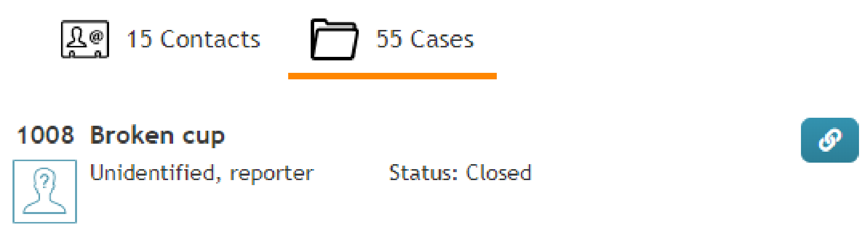
This state is for cases that are completed. Note that cases marked as Resolved can have changes made to them and will stay in the Resolved state for a period of time as configured by your administrator; after this point, the case will be Closed. Additionally, when marking a case as Resolved, you will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

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