Workspace Desktop Edition Help

Outbound E-Mail

4/2/2025

Outbound E-Mail

Outbound e-mail interactions can be generated in several different ways:

- From an Inbound E-mail Interaction window, by clicking:
  - **Reply** () or
  - **Reply All** ().
- By using the Team Communicator to find a contact and selecting **New E-Mail**.
- By selecting **Create a New E-Mail** from the Contact Directory.
- By replying to an inbound e-mail from the Workbins view.
- By replying to an inbound e-mail from the Contact History.
- During a voice, chat, or workitem interaction, by clicking the **Action** menu on the left-hand side of the name of a connected party and selecting **New E-mail**.

You might be configured to have the contents of the original e-mail included in the body of the reply e-mail.

The Outbound E-mail Interaction window enables you to handle many e-mail-related tasks, including the following:

- Save the e-mail in a workbin for later handling.
- Attach one or more selected files to the e-mail.
- Delete the e-mail without sending it.
- Start a Voice Consultation with an internal target or with a contact
- Start an IM Consultation with an internal target
- Select the sender from the **From** drop-down list of addresses from which you are configured to send e-mail.
- Select an alternate e-mail address for the recipient.
- Add one or more Carbon Copy (CC) recipients.
- Add one or more Blind Carbon Copy (BCC) recipients.
- Call the recipient if there is a phone number in the contact database.
- Send the recipient an Instant Message (IM) if the recipient is an internal target.
- Set a disposition code.
- Use the Notepad to attach a note to the interaction history.
- View Case Data (attached data) for the current interaction.
- View and manage contact history. Open e-mail interactions from the contact history and put them back.
- View and manage contact information. You might also be configured to assign an unknown interaction

to a contact in the contact database by using the Manual Contact Assignment feature.

- Hide or display the controls and information about the current interaction by clicking the collapse/expand Interaction View button:

Collapse	
Expand	

- View the standard response library, and insert a response in the e-mail.
- Print the current e-mail interaction.
- Specify or change the e-mail subject.
- Write a reply or new e-mail.
- Switch between text-only and HTML-formatted e-mail.
- Specify fonts, text styles, and paragraph formats for an HTML-formatted e-mail.
- Choose which language is used for the spelling-check function.
- Send the e-mail to the recipient. **Note:** You might be configured to have your e-mail interactions reviewed before they are sent to your contacts; or, you might be configured to review the outbound e-mail interactions of other agents.
- Send an interim reply e-mail by clicking the **Send** button, and select **Interim Send** from the drop-down menu.

Note: You might be configured to have signatures inserted automatically into new e-mail interactions.

Sending an Outbound E-Mail

Outbound e-mail messages can be composed as either text-only or HTML-formatted. An HTML-formatted e-mail enables you to specify the appearance of the content and add HTML-formatted responses from the Standard Response Library. Text only e-mail does not support HTML-formatted standard responses; however, some HTML-formatted standard responses contain text-only components that can be inserted.

To create an outbound e-mail:

1. First confirm that you have specified one or more recipients by typing a recipient's e-mail address in the **To** field, or by selecting a recipient from the Team Communicator. You can add additional recipients by using the **Add Cc** menu.
2. Next, enter the subject of the e-mail in the **Subject** field.
3. Verify that your Spelling Check language is correct.
4. If you are sending an HTML-formatted e-mail, choose a font, font size, and style for the main body of your e-mail. You can set different fonts, font sizes, and colors by selecting individual characters, words, or blocks of text and specifying different options for the selected text.

Format individual paragraphs by selecting them and then using the paragraph format buttons to specify the Numbered, Bulleted, Indented, Right-aligned, Centered, Left-aligned, or Block paragraph format.

1. Compose your e-mail by typing in the composition area, or by clicking an insertion point in the composition area and inserting a response from the Standard Response Library. Right-click in the composition area to use the Cut, Copy, and Paste editing tools.
2. A red wavy line appears below each word that is not in the spelling-check dictionary that you have specified. Right-click the misspelled word to correct it or to add the word to your personal dictionary. You can also choose to ignore once (**Ignore**) or always ignore (**Ignore All**) the spelling.
3. Specify a disposition code, if required.
4. When your e-mail is complete, you can perform any of the following actions:

- Click **Save in Draft Workbin** () to store it in a workbin for further processing or review.
- Click **Send** () to send your e-mail to the specified recipient(s). The E-mail Interaction window is closed and the inbound e-mail is marked done.
- Click the **Send** button, and select **Interim Send** from the drop-down menu, if you want to send an interim reply e-mail. The E-mail Interaction window remains open and the inbound e-mail is not marked done.
- If you do not want to save or send the e-mail, click **Delete** ().

E-Mail Quality Assurance (QA) Review

You might be configured to have your outbound e-mail interactions sent to your team lead or supervisor for a QA review before the e-mail interaction is sent to your contact. If you are configured to be a QA reviewer, the review process is described here.

Your QA reviewer might return the e-mail interaction to you to be updated, or the reviewer might accept the e-mail and allow it to be sent. The review process might require more than one iteration.

E-mail interactions that are sent for review might be directed to the reviewer or stored in a workbin that is specifically for reviews. The reviewed e-mail interaction might be returned to you directly or stored in a workbin that is specifically for e-mail interactions that are to be updated or reworked.

If your administrator has configured the status of the review to be displayed, it is displayed in the Case Information for the interaction, so that you know whether you have to update the e-mail interaction content. If the status is **Rejected** (or some other disposition that is defined by your system administrator), the e-mail interaction was not sent to the contact.

The reviewer might update the content of the e-mail, or the reviewer might add instructions for you in the Notepad view.

After you have completed the updates to the e-mail interaction, click **Send** to deliver the e-mail interaction back to the reviewer for approval or rejection.