Workspace Desktop Edition Help

QA Review of Email

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QA Review of Email

> **Tip**
>
> Are you looking for **tutorials** to help you learn how to use this feature? Check out the Related Resources section at the bottom of this article.

Your system administrator defines the review process in your contact center. Agents might be set up for mandatory review or they might have to request review. There are many ways that an administrator might define the routing of reviewed email interactions; for example, email interactions for review might be routed directly to a reviewer, team lead, or supervisor, or they might be routed to a workbin.

Your might be set up to review outbound email interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound emails are directed to you prior to being sent to a contact.

As a reviewer, you might receive email interactions for review by an interaction preview or you might retrieve outbound email interactions from a workbin.

When an email interaction for review is directed to you, an interaction preview is displayed on your desktop. Click **Accept** to display the interaction; Click **Reject** to return the interaction to the queue.

The Interaction Preview window displays the **Case Information** view. The **Origin** field specifies the sender of the interaction and indicates that it is for review. You might access and edit the **QA Review Status** field. It contains attached data that specifies the status of the review. When you first receive it, the status might be **Unknown** or **For Review**, depending on how your administrator has set up your system. There might be other information about the priority of the interaction or the business area to which it belongs.

If you accept the email interaction for review, the interaction window is displayed on your desktop. The **Case Information** view is displayed in the Interaction window. The **Origin** field specifies the sender of the interaction and indicates that it is for review. The **QA Review Status** field is editable. It contains attached data that specifies the status of the review. The **Party Status** area displays the email monitoring icon () to indicate that the agent is under review. The **Interim Send** button is not available for review email interactions.

You can review the interaction and provide feedback to the agent who originated the outbound email interaction. Depending on the policy of your organization, you might provide feedback by directly editing the content of the email interaction, or you might add notes for the agent in the Note view, or you might discuss the content with the agent verbally. In the Review E-mail Interaction window, you can do the following:

- Update the **Review Status** in the **Case Information** view (if you are configured to do so by your administrator)
- Edit the content of the email interaction

- Set a Disposition
- Add text to the **Note** tab
- Use other standard E-mail Interaction window functions

If your account is set up to set the status of the review, your **Send** button might contain a drop-down menu that enables you to select an action to occur when the interaction is sent. You can send the message as Approved to the contact, or return it to the agent as Rejected. Your administrator might have configured different "rejection reasons" from which you can choose.

Otherwise, when your review is complete, set the status in the **Case Information** area to one of the states that are configured by your administrator. For example, the following states might be available:

- **Accepted**: The email interaction is sent to the contact when you click **Send**.
- **Rejected**: The email interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click **Send**.
- **Unknown**: The email interaction is sent back to the review queue or to a review workbin when you click **Send**.

If you specified **Rejected**, the QA Review Status in the **Case Information** is updated to **Rejected** and the interaction is returned to the originating agent.

Related Resources

The *Workspace Desktop Edition User's Guide* (English only) provides detailed lessons for using all the features of Workspace. You might find the following lessons useful:

- Handle An Email Interaction
- Blend Different Media Into A Single Conversation
- Main Window Basics
- Workspace Windows and Views
- Basic Use-Case Summary

Related topics

- Inbound Email
- Outbound Email

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