We are currently updating our site; thank you for your patience.

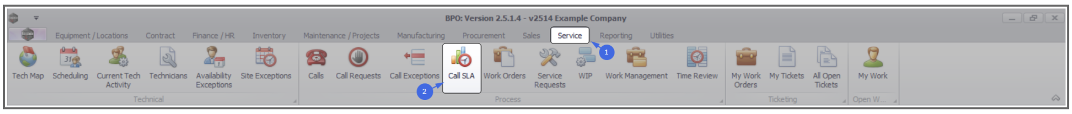
SERVICE

CALL SLA MANAGEMENT – EMAIL REMINDER

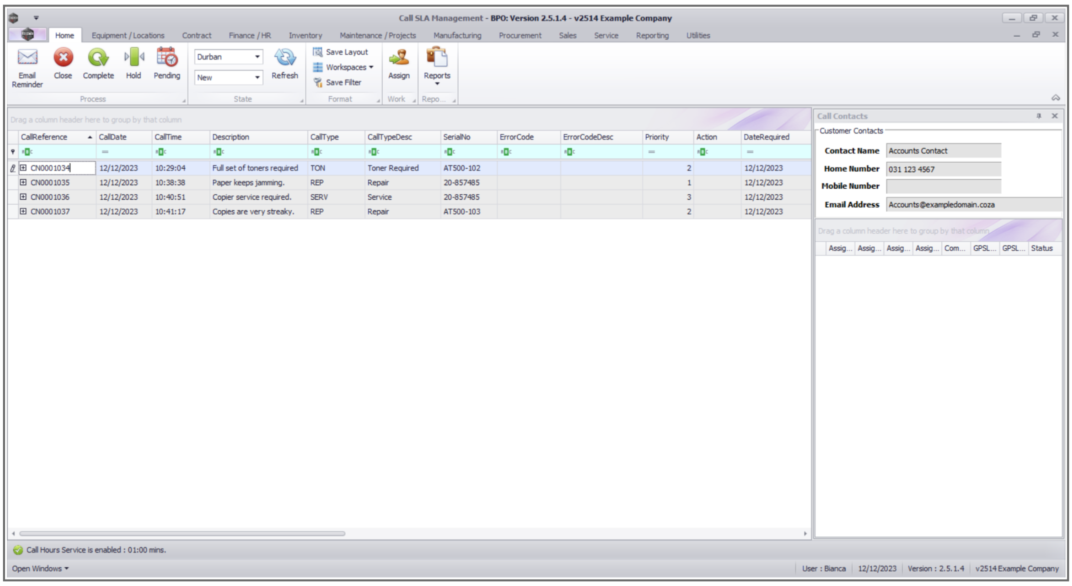
Whilst managing Call SLA, you have the ability to send Email Reminders directly from the SLA Management screen to prompt the assigned technician or keep the customer up to date.

THE CALL SLA MANAGEMENT LISTING SCREEN

Ribbon Select **Service > Call SLA**

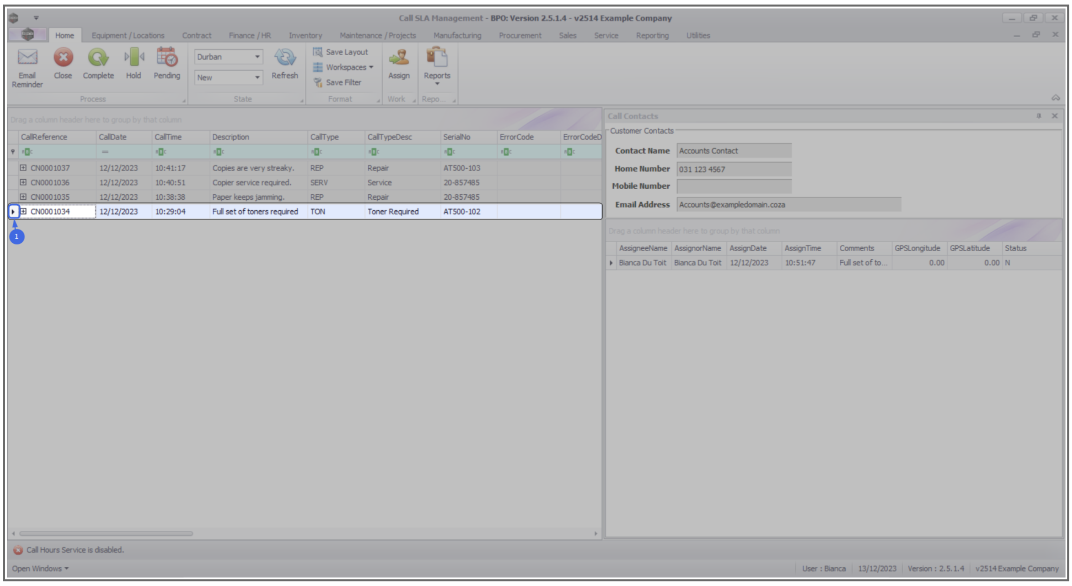


- The **Call SLA Management** Listing screen will display.

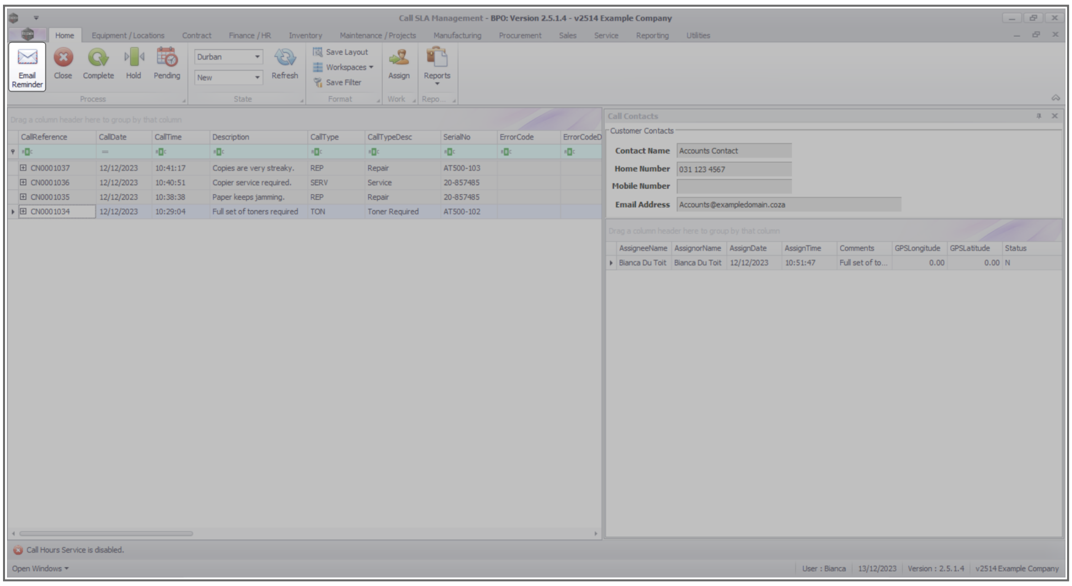


EMAIL REMINDER

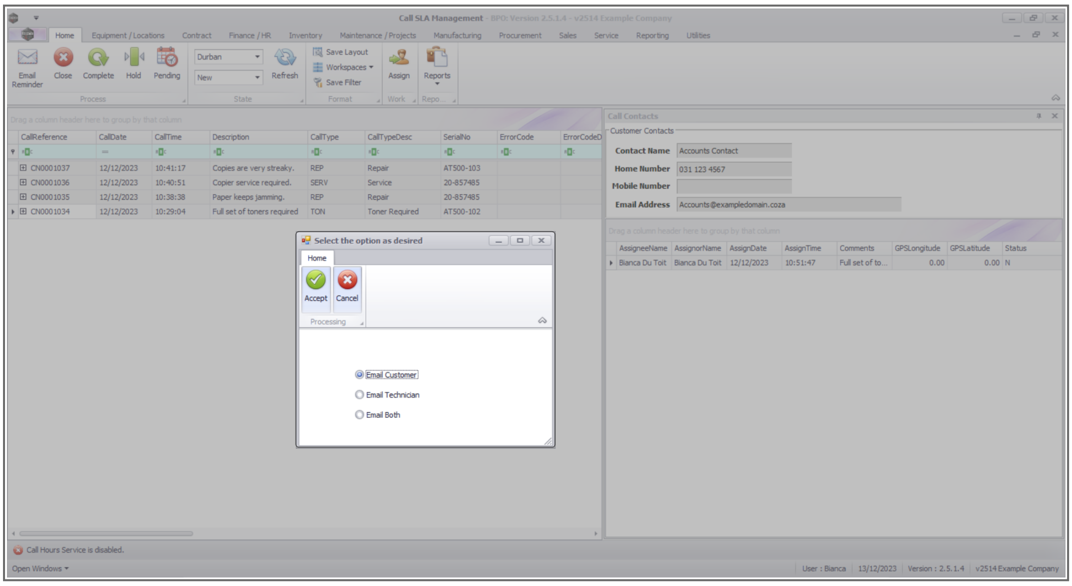
- Click on the row selector in front of the Call.



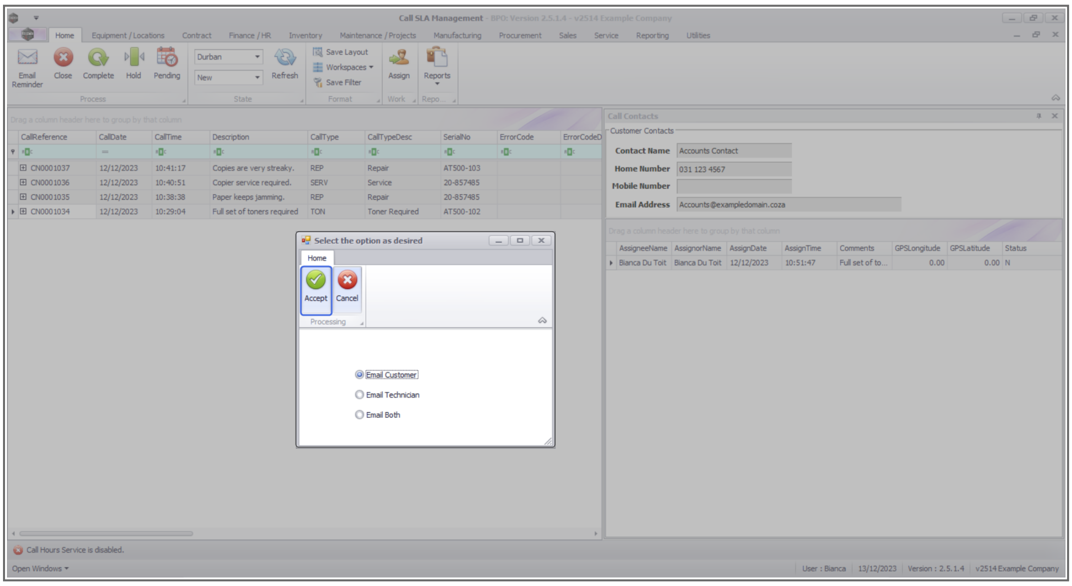
- Click on the **Email Reminder** button.



- A message box will come up with three options for Emailing:
  - **Email Customer**
  - **Email Technician**
  - **Email Both**

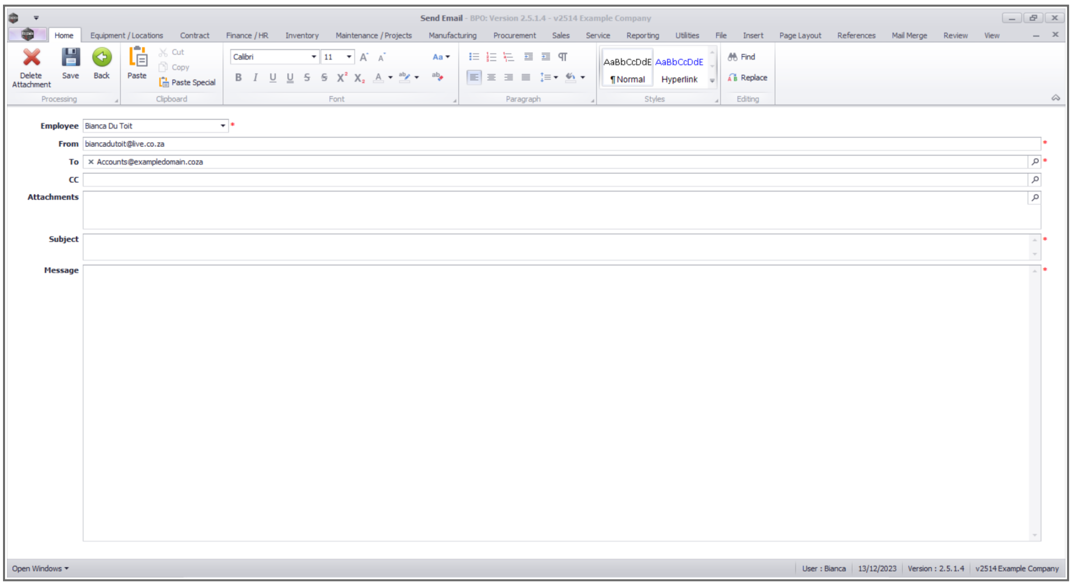


- Select the radio button for the required option.
- Click on **Ok**.



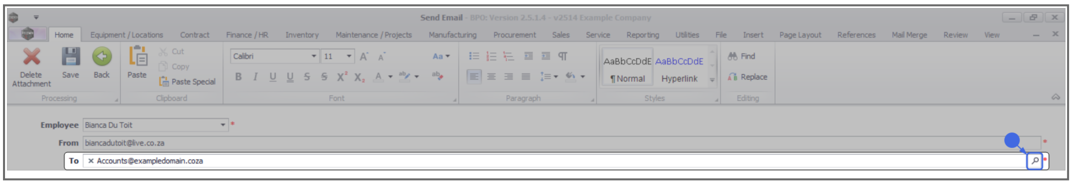
EMAIL CUSTOMER

- The **Send Email** maintain screen will come up with the following fields populated:
  - **Employee:** The name of the employee logged in and sending the Email Reminder.
  - **From:** Email address of the employee sending the Email Reminder.
  - **To:** The email address of the customer contact linked to the call.

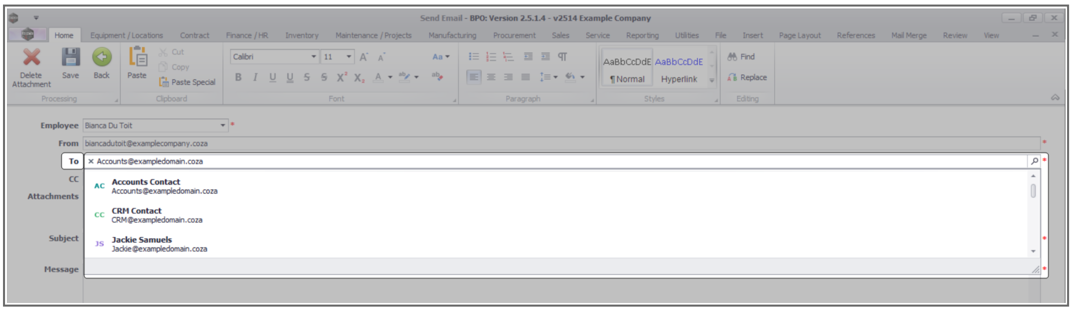


To

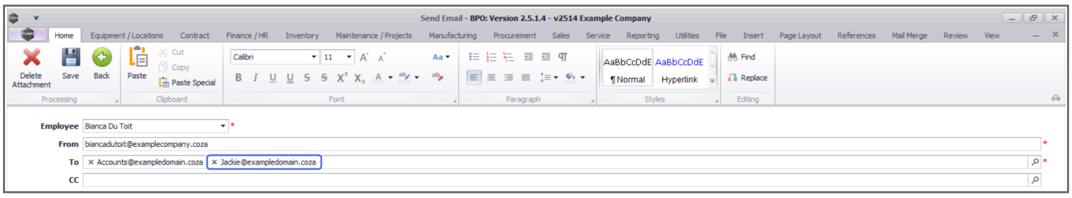
- You can include additional **Customer Contacts** to the **To** field by clicking on the **Search** button.



- This will bring up a list of **Customer Contacts** linked to the Customer for the selected call.

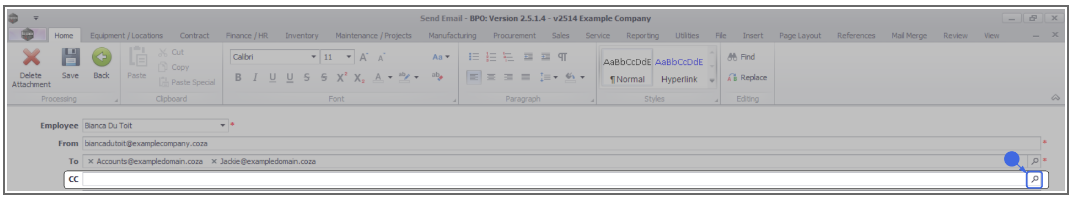


- Select a **Customer Contact** to include, and this Contact will be appended in the **To** field.

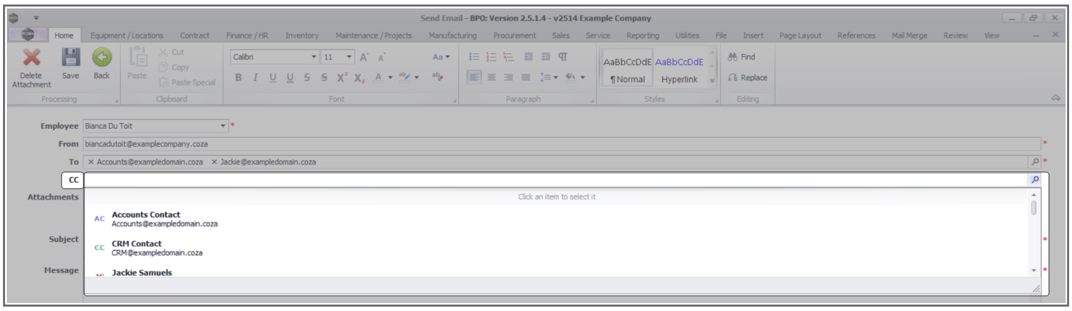


CC

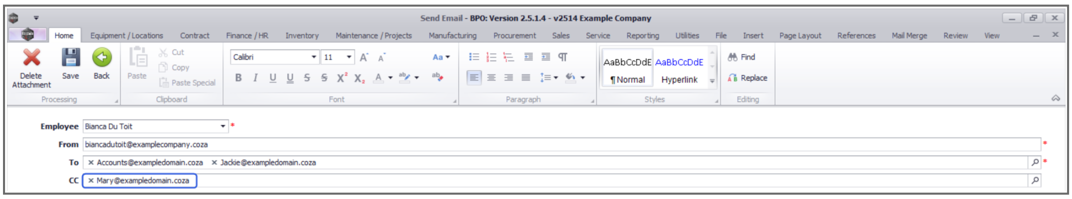
- You can include **Customer Contacts** to **CC** by clicking on the **Search** button.



- This will bring up a list of **Customer Contacts** linked to the Customer for the selected call.

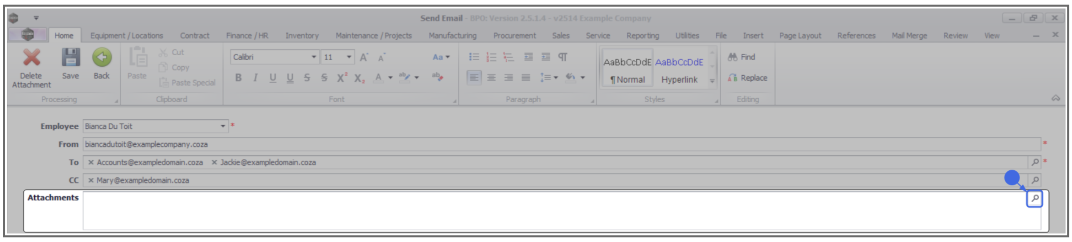


- Select a **Customer Contact** to include, and this Contact will be appended in the **CC** field.

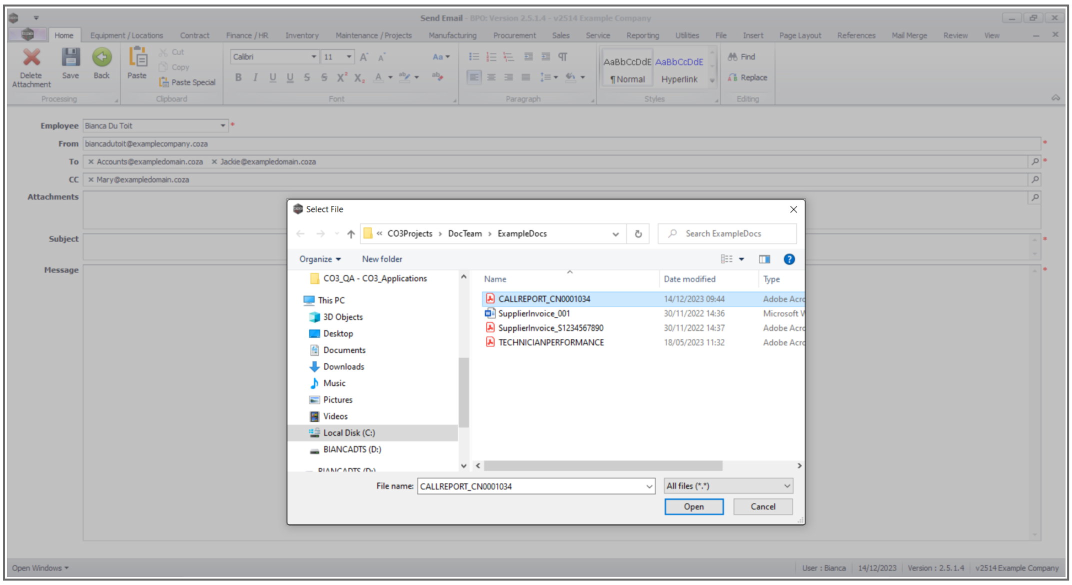


Attachments

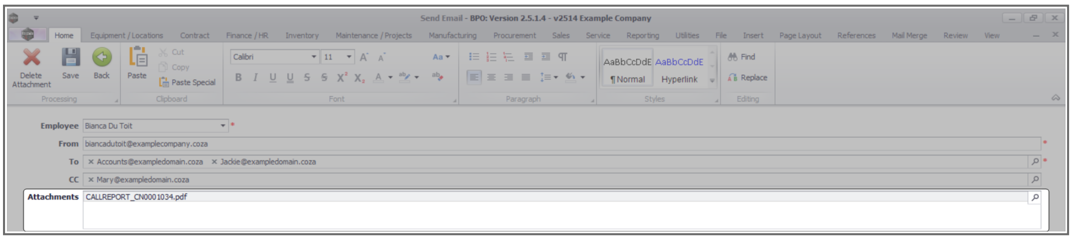
- You can include **Attachments** by clicking on the **Search** button.



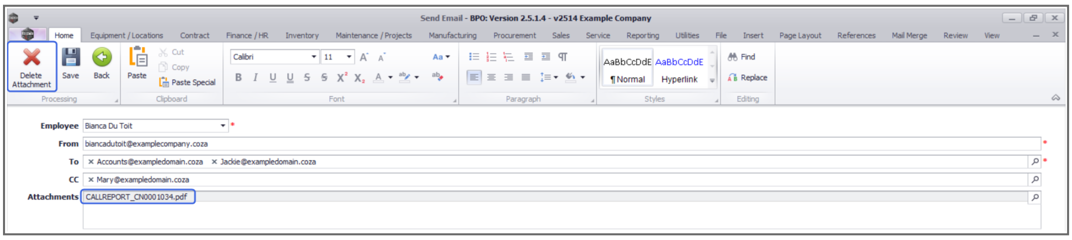
- This will open the **Windows Select File** dialogue box where you can browse for the document(s) you would like to attach.



- The selected file(s) will be appended in the **Attachments** field.

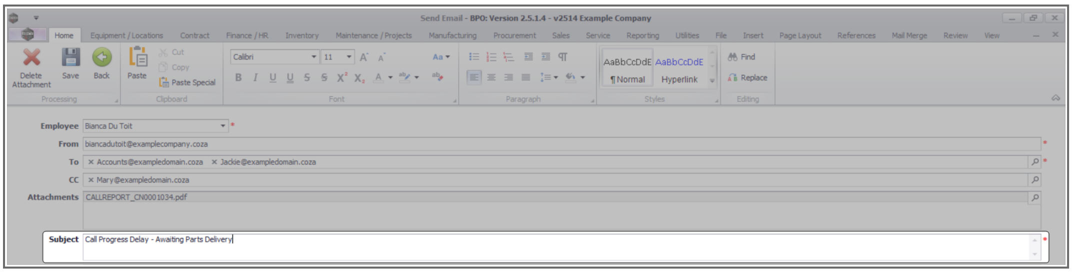


- You can delete an attachment by selecting it and clicking on the **Delete Attachments** button.

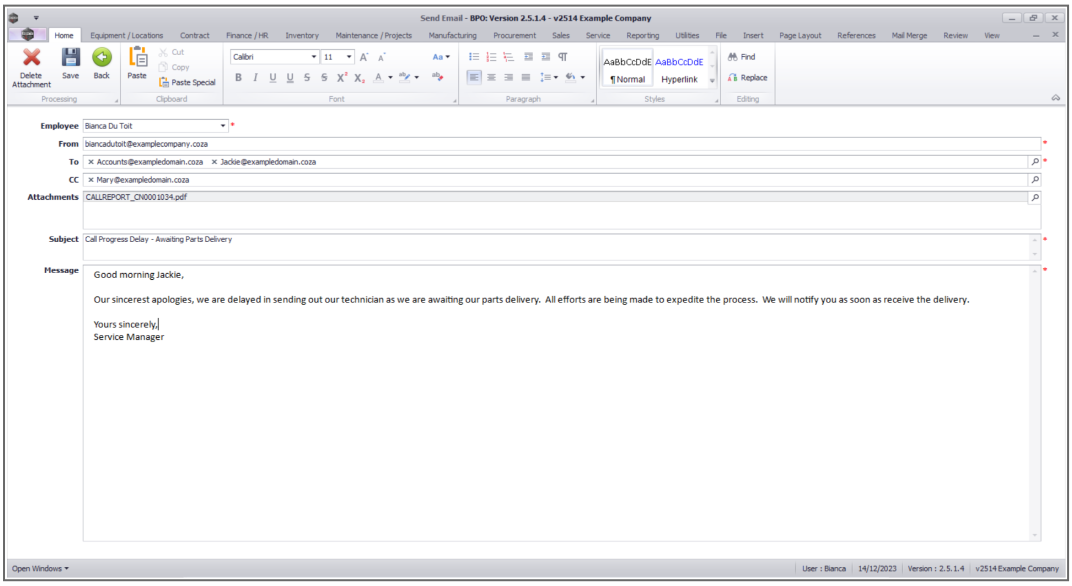


Subject

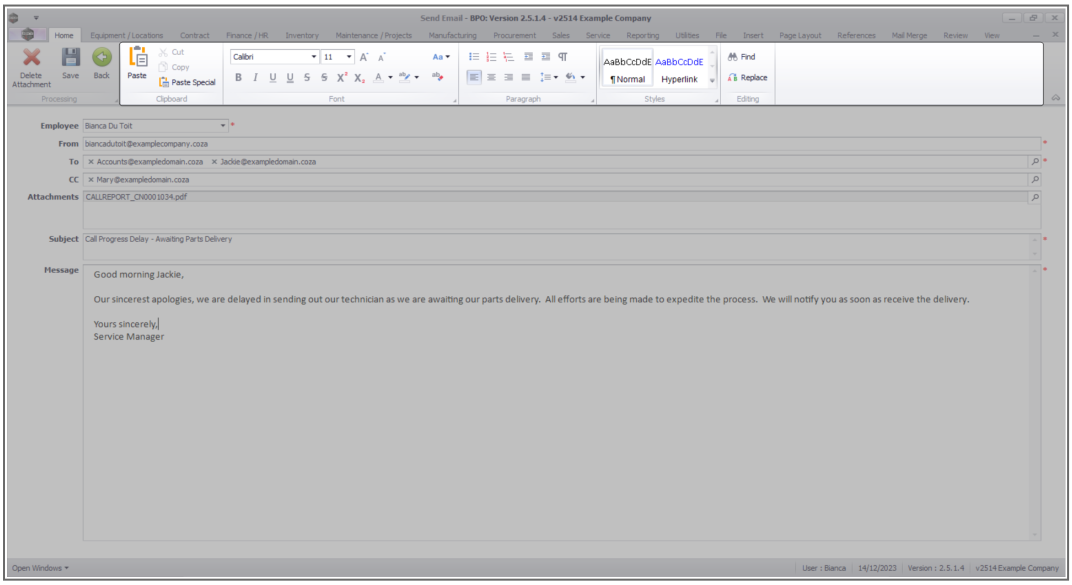
- Type in the **Subject** of the email.



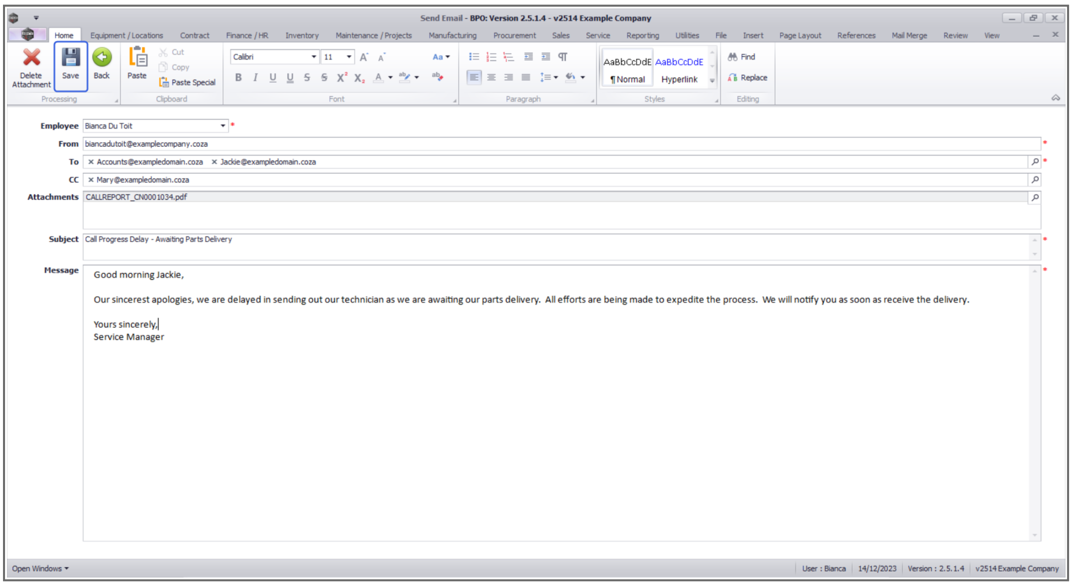
- Type in the **Description** of the email.



- You can apply **editing** to the email, as needed.



- Once done, click on the **Save** button to send the email.



- The **Send Email** screen will close and the email will be added to the email queue to be emailed out by the Mail Service.

EMAIL EMPLOYEE

- The same process applies as noted for Email Customer, other than the email address populated in the **To:** field is populated with the **assigned technician's email** address.
- Searching for additional email addresses to link will bring up a list of customer contacts.

EMAIL BOTH

- The same process applies as noted for Email Customer, other than the email address populated in the **To:** field is populated with the **assigned technician's email** address and the **customer contact** linked to the selected call.
- Searching for additional email addresses to link will bring up a list of customer contacts.

Related Topics

- Service - Introduction to Call SLA Management
- Service - Call SLA Management - Email Reminder
- Service - Call SLA Management - Close Call
- Service - Call SLA Management - Complete Call
- Service - Call SLA Management - Hold a Call
- Service - Call SLA Management - Pend a Call
- Service - Call SLA Management - Assign a Call
- Service - Call SLA Management - Call Hours Service Status
- Introduction to Call Hours Service

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