

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.

					Call SLA	Management -	BPO: Version 2.	5.1.4 - v2514 Exampl	le Company						8
Home	Equipment / Loca	tions Cont	tract Finance / HR Inve	ntory Mair	ntenance / Projects	Manufacturing	Procurement	Sales Service	Reporting	Utilities				- 1	2
eminder	Complete Hold		Durban	Save La Workspa	ter Assign R	eports									
												Call Contacts			4
	CalDate	CalTime	Description	CalType	CallTypeDesc	SerialNo	ErrorCode	ErrorCodeDesc	Priority	Action	DateRequired	- Customer Contacts	s		_
·0:	-	(D)	 O 	(D)	0	-O-	·0:	<d<< td=""><td>-</td><td><d:< td=""><td>-</td><td>Contact Name</td><td>Accounts Contact</td><td></td><td></td></d:<></td></d<<>	-	<d:< td=""><td>-</td><td>Contact Name</td><td>Accounts Contact</td><td></td><td></td></d:<>	-	Contact Name	Accounts Contact		
E CN0001034	12/12/2023	10:29:04	Full set of toners required	TON	Toner Required	AT500-102				2	12/12/2023	Home Number	031 123 4567		
E CN0001035	12/12/2023	10:38:38	Paper keeps jamming.	REP	Repair	20-857485				1	12/12/2023	Mobile Number			
CN0001036	12/12/2023	10:40:51	Copier service required.	SERV	Service	20-857485				3	12/12/2023		Accounts@exampledom	in coza	
E CN0001037	12/12/2023	10:41:17	Copies are very streaky.	REP	Repair	AT500-103				2	12/12/2023	Cindi Address	Account geven prevent		
Cal Hours Service	- is exabled 10100	mins.													



EMAIL REMINDER

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

0 v							t - BPO: Version 2.									
Home	Equipment / Loca	itions Co	ntract Finance / HR Inve			Manufacturing	Procurement	Sales Se	rvice Reporting	Utilities						- 8 >
		6	Durban 🔹 🕢	🔣 Save Lay												
	Complete Hold	Pending	New - Refresh	Workspan		Reports										
Reminder				🐐 Save Filte		*										
									Call Contacts							# ×
CalReference	CalDate	CallTime	Description	CallType	CallTypeDesc	SerialNo	ErrorCode	ErrorCodeD	- Customer Contact	5						
Y 10:		1 0 0	1 0 0	4 0 0	(I)	×0:	* 0 :	1 0 0	Contact Name	Accounts Con	tact					
	12/12/2023	10:41:17	Copies are very streaky.	REP	Repair	AT500-103			Home Number	031 123 4567						
	12/12/2023	10:40:51	Copier service required.	SERV	Service	20-857485			Mobile Number							
	12/12/2023	10:38:38	Paper keeps jamming.	REP	Repair	20-857485			Email Address	Accounts@ex	ampledomain.c	za				
▶	12/12/2023	10:29:04	Full set of toners required	TON	Toner Require	AT500-102		_								
à I																
									AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status
									 Bianca Du Toit 	Bianca Du Toit	12/12/2023	10:51:47	Full set of to	0.00	0.0	0 N
د در المعالم ا المعالم المعالم																

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

à v					Calls	A Management -	BBO: Version 2	5 1 4 - 1/25141	Example Company						- 8
			ract Finance / HR Inve												- 2
Email Reminder	Complete Hold		Durban • 🕢 New • Refresh	Save Lay	sut 🎿	Reports			a model inception unity						
									Call Contacts						7
CalReference	CalDate	CallTime	Description	CalType	CallTypeDesc	SerialNo	ErrorCode	ErrorCodeD	-Customer Contacts	s					
10c		••••••••••••••••••••••••••••••••••••	l∎c.	×0:	0	NDC	<u>ا</u> ت:	* 0 ¢	Contact Name	Accounts Contact					
	12/12/2023	10:41:17	Copies are very streaky.	REP	Repair	AT500-103			Home Number	031 123 4567					
E CN0001036	12/12/2023	10:40:51	Copier service required.	SERV	Service	20-857485			Mobile Number						
	12/12/2023	10:38:38	Paper keeps jamming.	REP	Repair	20-857485			Email Address	Accounts@exampledomain	.coza				
	12/12/2023	10:29:04	Full set of toners required	TON	Toner Required	AT500-102									
									AssigneeName	AssignorName AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status
									 Bianca Du Toit 	Bianca Du Toit 12/12/2023	10:51:47	Full set of to	0.00	0.00	N
Call Hours Service	is disabled.														
pen Windows 🔻											User : I	Bianca 13/12/20	23 Version : 2.	5.1.4 v2514E	Example Comp



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

					Call SI	A Management							B X
Home	Equipment / Loca	tions Co	intract Finance / HR Inve	ntory Maint	enance / Projects	Manufacturing	Procurement	Sales Se	ervice Reporting	Utilities			. 8 ×
Email Close Co Reminder	mplete Hold	Pending	Durban	Workspace	es 🕶	Reports							
													\diamond
Dense is only may be adapt by													# X
CalReference	CalDate		Description	Callbara	Callfornio	CasiaNa	En andre des	EnerCadeD	- Customer Contacts				
v ID:	=									Accounts Contact			
E CN0001037													
E CN0001036				SERV						031 123 4367			
E CN0001035	12/12/2023	10:38:38	Paper keeps jamming.	REP	Repair	20-857485							
▶ 🗄 CN0001034	12/12/2023	10:29:04		TON	Toner Required	AT500-102			Email Address	Accounts@exampledomain.c	coza		
			_					-					
				Select the o	ption as desired				AssigneeName	AssignorName AssignDate	AssignTime Comments	GPSLongitude GPSLatitude Stat	us
				Home									
				Accept Cancel									
				Processing			\$						
				(Email Customer								
				(Email Technician								
) Email Both								
							1.						
		andra Carbat Parch 16 Parch 176 Parc											
		Image: Second											
Call Hours Service is	disabled.												
Open Windows 👻											User : Bianca 13/12	2/2023 Version : 2.5.1.4 v2514 Examp	le Company

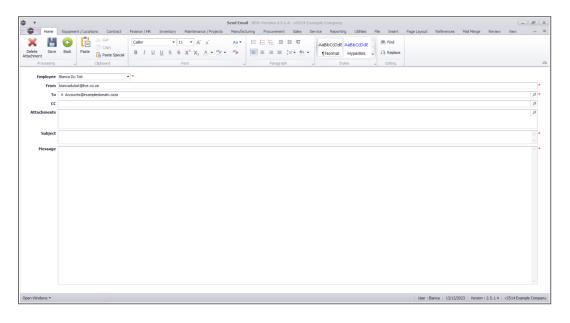
- Select the radio button for the required option.
- Click on Ok.

¢ ب					Call SU	A Management -								8 X
Home	Equipment / Loca	tions C	ontract Finance / HR Inve	entory Mainte	nance / Projects	Manufacturing	Procurement	Sales Se	ervice Reporting	Utilities				₽×
Reminder	mplete Hold	Pending	Durban	Image: Save Layo Image: Workspace Image: Save Filter	ts ▼ ⁴⁶ Assign 8	Reports								
														~
									Call Contacts					# X
CalReference	CallDate	CallTime	Description	CallType	CallTypeDesc	SerialNo	ErrorCode	ErrorCodeD						
Y 10:		∎C.	a⊡c	* D ¢	1 0 0	1 0 0	10:	* 0 ¢		Accounts Contact				
E CN0001037	12/12/2023	10:41:17		REP	Repair	AT500-103			Home Number	031 123 4567				
	12/12/2023	10:40:51 10:38:38		SERV	Service	20-857485 20-857485			Mobile Number					
► E CN0001035	12/12/2023 12/12/2023	10:38:38			Repair Toner Required	20-857485 AT500-102			Email Address	Accounts@exampledomain.r	coza			
- La crossian	1011010000	20122101	T di occor tancio regal ca	1011	Torrer recigarica	11000 101								
			ſ	🗣 Select the o	ption as desired		_ • ×	1						
			1	Home						AssignorName AssignDate Bianca Du Toit 12/12/2023			GPSLatitude Status	
									 bianca Du Toit 	bianca DU Toit 12/12/2023	10:51:47 Full set of	0.00	0.00 N	
				V										
				Accept Cancel										
				Processing			\sim							
				0	Email Customer									
				C) Email Technician									
				0) Email Both									
			L					ļ						
Call Hours Service is														
-	unsured.													
Open Windows *											User : Bianca 13/1	2/2023 Version : 2	.5.1.4 v2514 Example	Company



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.



То

• 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.

ф т.		Send Email - BPO: Version 2.5.1.4 - v2514 Example Company	8 X
	ome	Equipment / Locations Contract Pnance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities File Insert Page Layout References Mail Merge Review View	_ ×
Delete Attachment	Save	e Back Parte © cory Parte © Parte Special B / U U 5 5 X ³ X, A + ¹ / ₂ + ¹ / ₂ → ¹ / ₂ E Ξ Ξ [:=+ 6.+ ¶Normal Hyperink ↓ // Replace	
Proce			
		e Renca Du Toit • •	•
	To	o x Accounts@exampledomain.coza	• ۹
Attachm	CC	AC Accurate devices and a second seco	Ô
		CC CRH Contact CSM/Becompletomin.coza	
Sul	bject	t 33 Jackie Samuels Jackie Benampledonain.coza	-
Mes	sage	e	1.

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

View _ ×
\diamond
•
۹ م
م

СС

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

ф т.		5	iend Email - BPO: Version 2.5.1.4 - v2514 Exam	aple Company		_ @ X
Home	Equipment / Locations Contract F	Finance / HR Inventory Maintenance / Projects	Manufacturing Procurement Sales Ser	vice Reporting Utilities File Insert Page	Layout References Mail Merge Review	View — ×
	Coov	[Calibri ▼ 11 ▼ A' A'		AaBbCcDdE AaBbCcDdE		
Delete Save Attachment	Back Paste En Paste Special	B I <u>U</u> <u>U</u> 5 5 X ² X ₂ <u>A</u> ▼ ^{ab} Z ▼	**	¶Normal Hyperlink = K Replace		
						\sim
Employee	Bianca Du Toit 👻	•				
From	biancadutoit@examplecompany.coza					•
То	× Accounts@exampledomain.coza × Ja	dvie @exampledomain.coza				Q P *
						P

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



a .		Send Email - BPO: Version 2.5.1.4 - v2514 Example Company	8 X
	lome	Equipment / Locations Contract Finance /HR Inventory Maintenance /Projects Manufacturing Procurement Sales Service Reporting Utilities File Insert Page Layout References Mail Merge Review View	_ ×
	Save	Image: Comparison Comparison <th< th=""><th></th></th<>	
Proce			\Diamond
	From	Ranca Du Toit A Accounts @exampledomain.com X Judie @exampledomain.com	• • م
	00	c	2
Attachm Sul Mes	bject	AC Accounts Contact CE CEM Control de sampledoman.com CC CEM Contact. CEM Contact. CEM Contact.	Î .
Mes	sage	c Jackie Samuels	1.

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

\$ •							Send Em	ail - BPO: V	ersion 2.5	.1.4 - v25	14 Exan	nple Compan	y								(9 X
	Home	Equipment / Locations Contract	Finance / HR	Inventory	Maintenar	nce / Projects	Manufa	cturing	Procuremen	it Sales	Ser	vice Repor	ting Utilitie	es F	File	Insert	Page Layout	References	Mail Merge	Review	View	_ ×
×	H	Copy	Calibri		11 • A				₩.E			AaBbCcDd	E AaBbCcD	dE Ĵ	A	Find						
Delete Attachment	Save	Back Paste	BIU	<u>U</u> 5 6	X' X,	<u>A</u> • ^{ab}	ab _e]≡ • 3	ň •	¶ Normal	Hyperlini	k Ψ	1	Replace						
Pro	cessing	" Clipboard			Font				Paragra	ph			Styles			Editing						\sim
Em		Bianca Du Toit biancadutoit@examplecompany.coza	- •																			-
		× Accounts@exampledomain.coza ×	Jackie@exampled	domain.coza																		م
	cc	× Mary@exampledomain.coza																				Q

Attachments

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

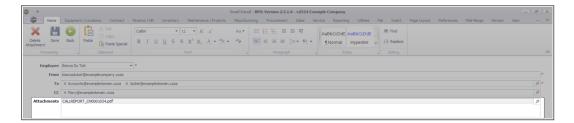
ð -															Ser	nd Ema	ii - BPC	: Ven	sion 2	.5.1.4	- v25	514 Exa	ample	e Compa	iny											- 2	x
	Home	Equipr	nent / Loc	ations	Contra	ct	Financ	e / HR	In	ventory		Mainten	iance /	Projects	s N	1anufac	turing	Pro	curem	ent	Sale	is S	ervice	e Rep	orting	; U	Itilities	File	Ins	ert	Page Layou	ut R	teferences	Mail Merge	Review		
×	Н	0					Cali	bri		*	11		A' A			Aa 🔻	I			-	≡ ¶		A	aBbCcD	dE A	AaBbo	CcDdE		용 Fina	ł							
Delete Attachment	Save	Back					В	ΙĽ	μŪ	S	9	X [°] X	2 A	• *	*	ab y		*	31 1	= 3	= •	<u>61</u> +		¶ Norma	al	Нуре	erlink	Ψ	Rep Rep	lace							
Proc																																					\diamond
		Bianca D biancadi	lu Toit utoit@exa	mplecor	npany.co	* 13]•																														•
	То	× Acco	unts@exi	mpledo	main.coza	× Ja	ckie @	example	edomai	n.coza																										Q	•
	CC	× Mary	@exampl	edomair	.coza																																
Attach	ments																																			٩	

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



h								Canal Canal		Version 2.5.1												. 8
			ons Contract	Ensare / UD		Maintenan																
Delete Save	0	Paste	Cut Cut Copy	Calibri	*	11 • A	A [*]	Aa 🕶	10		≡ 91	AaBbi	CcDdE	AaBbCcDdE Hyperlink) A	Find Replace	raye Layou		es Mai Mergi			
Employee				•																		
			ecompany.coza																			'
			pledomain.coza ×	Jackie@example	domain.coza																	2
cc	× Mary(Bexampled	omain.coza																			٩
Attachments					Sele								_				×					Q
Subject					← −		« CO3Proje	ects → Doc	:Team	 ExampleDo 	JCS	~	õ	,⊃ Sear		eDocs	0					
Message							3_Application	15 [°]	^ •	Name	^			Date modi		Ту	-					
						This PC 3D Objects Desktop Documents				CALLREPO SupplierIm SupplierIm SupplierIm TECHNICI	voice_001 voice_S123456	57890		14/12/2023 30/11/2022 30/11/2022 18/05/2023	14:36 14:37	Mi Ad	obe Acro crosoft V obe Acro obe Acro					
) ==	Downloads Music Pictures Videos																
					-	Local Disk (C BIANCADTS (D:)		~ <													
						NAMCADTS (D	File name:						×	All files (*. Open		Cance	~ 					
toen Windows *																		: Bianca 14	12/2023 Versi	m : 2.5.1.4	v2514 Evan	vole Com

• 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.

ت چ		Send Email - BPO: Version 2.5.1.4 - v2514 Example Company														_ 8	×																
-	Home	Equipment	/Locatio	ons Co	ontract	Financ	ce / HR	In	ventory	r N	laintena	nce / P	rojects	Manufa	cturing	Pro	curemer	nt s	Sales :	Servio	ce Repo	rting	Utilities	Fil	e In	sert	Page Layout	References	Mail Merge	Review	View	-	×
×	H	\bigcirc	LE	% Cut		Calit					• A						-						aBbCcDdE	4	∂8 Fir								
Delete Attachment	Save	Back	Paste	Past	e Special	В	ΙĽ	<u>u</u> <u>u</u>	5	5)	с [*] Х,	<u>A</u> .	· **	ab _y	E	Ξ		t≡ ·			¶Norma		Hyperlink	Ŧ	🔏 Re	place							
Proc	essing	4		Clipboard						For	it						Paragra	ph		4		Styles	s	4	Edit	ing							\diamond
	From	Bianca Du Ti biancadutoit	@examp		y.coza	•																											
	То	× Accounts@exampledomain.coza × Jadvie@exampledomain.coza													Q	÷ .																	
	cc	× Mary@exampledomain.coza												م																			
Attach	ments	CALLREPORT_CRV0001034.pdf												Q																			

Subject

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



	Send Email - BPO: Version 2.5.1.4 - v2514 Example Company – 🖉													
Home	Equipment / Locations Contract Finance / Hr. Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities File Insert Page Layout References Mail Merge Review View	_ ×												
	Image: Second Back Speed Image: Second B													
Processing		\diamond												
From To	Banca bu Tot	• م												
	CALIFERRY T, DIROD IS Hedf	م												
Subject	Call Progress Delay - Awaiting Parts Delwery	÷ •												

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

÷								9	Send Ema	il - BPO: Version	2.5.1.4 - v2514	Example Compan	Y							_	
Home 🗧	Equipmen		ns Contr	ect Fin	ance / HR	Inventory	Maintenanc	e / Projects	Manufact	turing Procure	ment Sales	Service Repor	ting Utilities	File	Insert	Page Layout	References	Mail Merge	Review	View	_
× 💾			X Cut		Calibri	•	11 • A'	A	Aa -	目目相	TP 🗉 🗉	AaBbCcDd	E AaBbCcDdB	^ #	ind						
Delete Save	Back	Dente	🖹 Copy	ecial	BIU	<u>U</u> 5 5	X ² X ₂	A • 🖄 •	ab	E = =	= <u>1</u> =• <u>≪</u>		Hyperlink	·	Replace						
Processing			Clipboard				Font			Par	igraph		Styles	B	liting						
Employee				•																	
	biancaduto																				•
	× Accourt			× 3804	e@exampleu	omain.coza															2
Attachments																					0
																					-
Subject	t Call Progre	ess Delay -	Awaiting Part	Delivery																	÷.
Message	Our sir	sincerely	pologies,	ve are de	elayed in s	ending out	our technici	an as we are	e awaitin	ig our parts del	very. All effor	ts are being mac	le to expedite	e the proc	ess. We	will notify yo	u as soon as	receive the o	delivery.		
Message	Our sir	ncerest a	pologies,	ve are di	elayed in s	ending out	our technici	an as we are	e awaitin	ıg our parts del	very. All effor	ts are being mac	le to expedite	e the proc	ess. We	will notify yo	u as soon as	receive the o	delivery.		
Hessage	Our sir	ncerest a sincerely	pologies,	ve are de	elayed in s	ending out a	our technici	an as we are	e awaitin	ıg our parts del	very. All effor	ts are being mac	ie to expedité	e the proc	ess. We	will notify yc	u as soon as	receive the o	delivery.		A 1

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



	Send Email - BPO: Version 2.5.1.4 - v2514 Example Company	N P
Home	Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities File Insert Page Layout References Mail Merge Review View	_ ×
Delete Save	Bot Cory Cory Cory Bot U U 5 5 X X A ** IE IE	
Processing	, Clipboard Font , Paragraph , Styles , Editing	\sim
	Banca Du Tott +	
	bancadutot@examplecompany.coza	
	X Accounts@exampledomain.coza X Jadie@exampledomain.coza	* م
	X Mary@exampledomain.coza	2
Attachments	CALLREPORT_CN0001034.pdf	9
Subject	Call Progress Delay - Awaiting Parts Delivery	
Message	Good morning Jackie,	* *
	Our sincerest apologies, we are delayed in sending out our technician as we are awaiting our parts delivery. All efforts are being made to expedite the process. We will notify you as soon as receive the delivery.	
	Yours sincerely, Service Manager	
	Jerrike manager	
Open Windows *	User: Banca 14/12/2023 Version: 2.5.1.4 V2514 Example	e Company

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

ф v								Send Ema	il - BPO: Vers	ion 2.5.1.	.4 - v2514 E	xample Compar	iy .							_ B X
Home	Equipm	ent / Location	is Contract	Finance / HR	Inventory	Maintena	nce / Projects	Manufact	turing Pro	curement	Sales	Service Repo	rting Utilitie	s Fi	e Insert	Page Layout	References	Mail Merge	Review	View _ ×
Delete Attachment	Back		∑ Cut ͡) Copy <mark>Î</mark> Paste Special	Calibri B I		11 ▼ A 5 X ² X ₂	A • * *	Aa 🕶			≡ 9ा !≡• ≝•		E AaBbCcDo Hyperlink		용 Find					
Processing			Clipboard			Font		4		Paragraph		4	Styles	4	Editing					~
Employee	Bianca Di	Toit		• •																
From	biancadu	toit@example	company.coza																	•
Тс	× Accounts@exampledomain.coza × Jadole@exampledomain.coza															• م				
	× Mary	Bexampledor	nain.coza																	Q.
Attachments	CALLREP	ORT_CN000	1034.pdf																	Q.
Subject	Call Prog	ess Delay - A	waiting Parts Deliv	erv																
		, -		-,																-
Message	6000	morning	lackie																	× •
	Ours	incerest a	pologies, we an	e delayed in	sending ou	t our techn	ician as we ar	e awaitin	g our parts	delivery.	All effort	are being mad	de to expedi	te the	process. W	e will notify y	ou as soon as i	eceive the d	lelivery.	
		sincerely,																		
	Servi	ce Manage	er																	
																				w
Open Windows 🕶																User : E	lianca 14/12/20	023 Version :	2.5.1.4 v	2514 Example Company

• The **Send Email** screen will close and the email will be added to the email queue to be emailed out by the <u>Mail Service</u>.



EMAIL EMPLOYEE

- The same process applies as noted for <u>Email Customer</u>, 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 <u>Email Customer</u>, 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

MNU.127.001