

## Customizing Any Such Automated Verbiage as May be Presented to the Consumer

Between ServiceDesk itself, SD-CyberOffice and SD-Mobile, there are a great variety of automated and semi-automated communications that may be sent from your office (and/or your technicians) to the consumer for whom you are providing service. There is also a significant variety of available methods (in particular, communications may be via email, RoboCall and/or SMS-based text-messaging).

For each context of automated communication, we at Rossware have developed what you might call “canned” scripts. Basically, we have composed default language that we believe is generally optimized for best effectiveness. Regardless, it’s possible that in one or more contexts you’d prefer different scripting. Accordingly, we have provided mechanisms via which you may create your own and customized scripting for most of these contexts. If indeed you wish for such customization, believe it or not, it’s easy.

The basic procedure, for *most*<sup>1</sup> any automated-communication situation that you wish to customize, is as follows:

1. Create the text you want for that scenario (you may use any text editor for this purpose, but Notepad is likely ideal);
2. Within the text, include FieldNames for where particular text (specific to the circumstance that’s involved in any particular instance) will be inserted; and
3. Save as a raw text file, using the required Filename, and *within the lsd\inetdata folder* on your ServiceDesk server drive.

To give you specific guidance as needed for each particular scenario, we provide the following tables. Please notice there are three columns in each. The left-most column shows what is the default script. The middle column indicates the filename you must use when saving whatever such custom script as you wish to have used in replacement of the default script. The right-most column lists each of field headers you may use for that context (i.e., blanks to be filled-in when the script is used in real operation).

If you are not clear, a field header (aka FieldName) is a placeholder that goes in your text to indicate the variable element that should inserted in live application, depending on circumstances. The FieldName must always be spelled precisely as indicated, and enclosed in brackets just as indicated. What happens in operation is the applicable program code sees any such particular string of text and knows to replace it with the real element that is applicable to the circumstance. It’s sort of like a form letter in that your name, address and so on gets filled in, each element at just the right place.

Please bear in mind that while we have made this customization easy, most of our users feel no need for it. If you do not, please feel free to simply ignore such flexibility as is here described.<sup>2</sup>

Also, please keep in mind in ServiceDesk you may create your own set of a rather different animal than is involved here. In particular, you may create [User-Defined Scripts](#). Those are for the purpose, basically, of creating semi-automated communication where you not only may customize the text (indeed, there *is* no “canned” text in that arena). More fully, when using that set of tools you define the contexts themselves.

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<sup>1</sup> An exception from the methods here described involves the RoboCall scripts that are used to confirm appointments (in particular, when RoboCalling is the particular method that you specify for use in that context). Those scripts are customized via an online interface that is specifically dedicated to the purpose. See the last page of this document for more guidance, in such regard.

<sup>2</sup> You will likely notice the salutation in some of the standard-text emails is a simple “*Dear Sir or Madam*” — as opposed to what would certainly be a more personable-sounding “*Dear Mrs. Jones*.” There *is* reason for this. Outside of AccountsReceivable data, ServiceDesk does not maintain any dedicated “Salutation” field (we also think it would be burdensome to make you manually end an appropriately personal salutation for every job). Given this absence, our automated mechanisms cannot know whether the appropriate personal salutation would be “*Dear Mr.*,” “*Dear Mrs.*,” “*Dear Ms.*,” “*Dear Miss.*,” “*Dear Mr. and Mrs.*” or what the case might be. We *could* formulate to use a salutation such as “*Dear Jane Smith*,” but we feel the generic salutation serves better.

**For emails sent by ServiceDesk**

**Scenario 2, Request to Initially-Schedule.**

Standard Text	Filename to use for custom text	FieldNames you may use
<p><i>We have received a request from [ThirdPartyName] to perform service as follows:</i></p> <p><i>    Job # [InvNmbr], [UnitMake] [UnitType]     [Name]     [Address]     [CityState]     [TelNmbr]</i></p> <p><i>We need to make an appointment to perform this service. If you'll simply click on the following link:</i></p> <p><i>    [Hyperlink]</i></p> <p><i>It will take you to a page on our website, where you can schedule this visit.</i></p> <p><i>If unable to schedule via that link, please call us at [CompanyTelNmbr].</i></p>	<p><i>MyTextToRequestFirstAppmnt.TXT</i></p>	<p><i>[InvNmbr] [ThirdPartyName] [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr] [Hyperlink] [CompanyName] [CompanyTelNmbr] [SenderName]</i></p>

**Scenario 3-A, Request to Re-Schedule After Parts Have Arrived**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dear Sir or Madam:</i></p> <p><i>We have received parts as needed for the following repair:</i></p> <p><i>    Job # [InvNmbr], [UnitMake] [UnitType]     [Name]     [Address]     [CityState]     [TelNmbr]</i></p> <p><i>We need to make an appointment with you, so our technician can complete this repair. If you'll simply click on the following link:</i></p> <p><i>    [Hyperlink]</i></p> <p><i>It will take you to a page on our website, where you can schedule this visit.</i></p> <p><i>If unable to schedule via that link, please call us at [CompanyTelNmbr].</i></p>	<p><i>MyTextToInformPartsArrived-SchdlByWeb.TXT</i></p>	<p><i>[InvNmbr] [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr] [Hyperlink] [CompanyName] [CompanyTelNmbr] [SenderName]</i></p>

**For emails sent by ServiceDesk (Continued)**

**Scenario 3-B, Request to Re-Schedule After Parts have Arrived**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Good News:</i></p> <p><i>The parts have arrived for repair on your [UnitType].</i></p> <p><i>If you'd please call us to schedule a return visit (so we can complete the repair), we'd appreciate it very much.</i></p> <p><i>The number is [CompanyTelNمبر].</i></p> <p><i>Sincerely,</i></p> <p><i>[SenderName]</i></p>	<p><i>MyTextToInformPartsArrived-SchdlByCall.TXT</i></p>	<p><i>[InvNمبر]</i>  <i>[UnitType]</i>  <i>[UnitMake]</i>  <i>[CompanyTelNمبر]</i>  <i>[SenderName]</i></p>

**Scenario 3-C, Request to Come in And Pickup Parts As Prior Ordered Via POS**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Good News:</i></p> <p><i>Parts as ordered in connection with Ticket # [InvNمبر] have arrived.</i></p> <p><i>Please come to our shop and pickup your order.</i></p> <p><i>Sincerely,</i></p> <p><i>[SenderName]</i></p>	<p><i>MyTextToInformPartsArrived-POS.TXT</i></p>	<p><i>[InvNمبر]</i>  <i>[SenderName]</i></p>

**For emails sent by ServiceDesk (Continued)**

**Scenario 4-A, Request to Confirm Appointment Online**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dear Sir or Madam:</i></p> <p><i>This email is to remind you of your appointment for [AppmntDate] -- and to request your confirmation.</i></p> <p><i>Absent confirmation, we may have difficulty holding this appointment open (it's tough to send a tech to your home without knowing for sure you'll be there).</i></p> <p><i>Please initiate confirmation by clicking on this link (if link does not appear, please enable content):</i></p> <p align="center"><i>[HyperLink]</i></p> <p><i>So that you know, your appointment is presently configured as [PosInSequence] on the roster for technician [TechReference]We estimate [TechRef1stNmOnly] will arrive within the following time frame:</i></p> <p align="center"><i>[EstimatedTimeFrame]</i></p> <p><i>[TechRef1stNmOnly] is expecting to work on the following:</i></p> <p><i>[JobDescription]</i></p> <p><i>If you are unable to connect and confirm via the provided link, please call us at [CompanyTelNmbr].</i></p>	<p><i>MyTextForAppmntCnfrmtn-Automated.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[PosInSequence]</i>  <i>[TechReference]</i>  <i>[TechRef1stNmOnly]</i>  <i>[TechCode]</i>  <i>[EstimatedTimeFrame]</i>  <i>[JobDescription]</i>  <i>[CompanyTelNmbr]</i>  <i>[HyperLink]</i>  <i>[UnitType]</i>  <i>[UnitMake]</i></p>

**Scenario 4-B, Request to Confirm Appointment Via Direct Reply**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dear Sir or Madam:</i></p> <p><i>This email is to remind you of your appointment for [AppmntDate] -- and to request your confirmation.</i></p> <p><i>Absent confirmation, we may have difficulty holding this appointment open (it's tough to send a tech to your home without knowing for sure you'll be there).</i></p> <p><i>You may make the confirmation by replying to this email (please just include a note saying you WILL be there), or by calling us at [CompanyTelNmbr].</i></p> <p><i>So that you know, your appointment is presently configured as [PosInSequence] on the roster for technician [TechReference]We estimate [TechRef1stNmOnly] will arrive within the following time frame:</i></p> <p align="center"><i>[EstimatedTimeFrame]</i></p> <p><i>[TechRef1stNmOnly] is expecting to work on the following:</i></p> <p><i>[JobDescription]</i></p> <p><i>Thank you. We look forward to receiving your confirmation.</i></p>	<p><i>MyTextForAppmntCnfrmtn-MethodManual.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[PosInSequence]</i>  <i>[TechReference]</i>  <i>[TechRef1stNmOnly]</i>  <i>[EstimatedTimeFrame]</i>  <i>[JobDescription]</i>  <i>[CompanyTelNmbr]</i>  <i>[UnitType]</i>  <i>[UnitMake]</i></p>

**For emails sent by ServiceDesk (Continued)**

**Scenario 12-A, Notice of Cancellation, With Request to Re-schedule Online Via Provided Hyperlink**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dear Sir or Madam:</i></p> <p><i>This email concerns your appointment for [AppmntDate], on our Job # [InvNmbr], for repair of your [UnitType].</i></p> <p><i>In the effort to better serve you, we have pre-screened the symptoms, and determined a particular part is likely to be needed. We have ordered this part, but do not expect it to arrive by the appointment date.</i></p> <p><i>For this reason, we are CANCELLING the appointment, and ask you to please reschedule for a date on or after [SoonestNewAppmntDate].</i></p> <p><i>You may do such rescheduling by clicking on this link:</i></p> <p align="center"><i>[Hyperlink]</i></p> <p><i>Sincerely,</i></p> <p><i>[SenderName]</i></p>	<p><i>MyTextToCancelAppmnt-RqustCstmrMkNew.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[InvNmbr]</i>  <i>[UnitType]</i>  <i>[UnitMake]</i>  <i>[SengerName]</i>  <i>[CompanyName]</i>  <i>[CompanyTelNmbr]</i>  <i>[SoonestNewAppmntDate]</i>  <i>]</i>  <i>[Hyperlink]</i></p>

**Scenario 12-B, Notice of Cancellation, With Promise Contact Again for Re-scheduling**

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dear Sir or Madam:</i></p> <p><i>This email concerns your appointment for [AppmntDate], on our Job # [InvNmbr], for repair of your [UnitType].</i></p> <p><i>In the effort to better serve you, we have pre-screened the symptoms, and determined a particular part is likely needed. We have ordered this part, but do not expect it to arrive by the appointment date.</i></p> <p><i>For this reason, we are CANCELLING the appointment, and will contact you to re-schedule when the part arrives.</i></p> <p><i>Sincerely,</i></p> <p><i>[SenderName]</i></p>	<p><i>MyTextToCancelAppmnt-WillContactForNew.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[InvNmbr]</i>  <i>[UnitType]</i>  <i>[UnitMake]</i>  <i>[CompanyName]</i>  <i>[CompanyTelNmbr]</i>  <i>[SengerName]</i></p>

**For emails sent by SD-MobileLink**

Invitation to Complete a Survey		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Dearest Customer:</i></p> <p><i>Thank you for giving us the opportunity to serve you. We do not take it for granted, and hope you'll extend us the privilege again when you next have a need.</i></p> <p><i>In our ongoing quest to merit your loyalty, we need to measure present performance. If you'd be willing to assist, we'll be most grateful. Following is a link to a tiny online survey. We're not kidding: it's likely the tiniest you ever saw. Just four simple questions.</i></p> <p><a href="#">[UrlForHyperlink]</a></p> <p><i>Your answers will assist us in our continuing quest to improve, and we thank you.</i></p>	<p><i>MyTextForSurveyInvite-Mobile.TXT</i></p>	<p><i>[UrlForHyperlink]</i> <i>[UnitType]</i> <i>[UnitMake]</i></p>
Apology for Non-Completion and Invitation to Online-Review JobStatus		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p>We are sorry our technician was unable to complete your repair today. Please be assured, here at the office, we'll be doing all we can to expedite a fast turnaround.</p> <p>In this regard, we invite you to use an on-line tool we've developed that allows you to check on the status of your job at any time and any place. You can do so for any job that you've booked through us by going direct to our website ([UrlForWebsite]), or (for a faster path on this particular job) just click on this link:</p> <p><a href="#">[UrlForHyperlink]</a></p> <p>Sincerely,</p> <p>The staff at [CompanyName].</p>	<p><i>MyTextForNonCompletion-Mobile.TXT</i></p>	<p><i>[UrlForJobStatus]</i> <i>[UrlForWebsite]</i> <i>[CompanyName]</i></p>
Submission of a Mobile Ticket		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p>It was a pleasure serving you.</p> <p>Thank you very much for your business.</p> <p>Your [WrdForDoc] (# [InvNmbr]) is attached.</p>	<p><i>MyTextForTicketSend-Mobile.TXT</i></p>	<p><i>[WrdForDoc]<sup>3</sup></i> <i>[InvNmbr]</i> <i>[UnitType]</i> <i>[UnitMake]</i></p>

<sup>3</sup> The actual text as substituted for this field will be "invoice", "receipt" or "estimate", as applicable to the circumstance.

### For Tech “Call-Ahead” Communications as Sent by SD-Mobile

#### For RoboCall Without Specification of How Many Approximate Minutes Before Arrival

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Hello. This is a call from [CompanyName]. We are calling in regard to the service scheduled for today on your [UnitMake] [UnitType]. We are happy to inform that our technician, [Tech], &lt;has finished needed preparation, and will be on [GenderRef] way to your location momentarily is just finishing [GenderRef] prior job, and then will be on [GenderRef] way to your location&gt;. If there are any issues in regard to you being there, and ready to allow access for this service, please call us immediately at [CompanyTelNمبر]. Otherwise, please have the machine accessible and ready to be serviced. Thank you.</i></p>	<p><i>MyTextForTechRoboCallAheadOnHisWay.TXT</i></p>	<p><i>[InvNمبر] [UnitType] [UnitMake] [CompanyName] [CompanyTelNمبر] [GenderRef] [Tech] [Minutes]</i></p>

#### For RoboCall With Specification of How Many Approximate Minutes Before Arrival

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Hello. This is a call from [CompanyName]. We are calling in regard to the service scheduled for today on your [UnitMake] [UnitType]. We are happy to inform that our technician, [Tech], &lt;will be departing for your location shortly, and expects to arrive in about [Minutes] minutes is just finishing [GenderRef] prior job, and expects to arrive at your location in about [Minutes] minutes&gt;. If there are any issues in regard to you being there, and ready to allow access for this service, please call us immediately at [CompanyTelNمبر]. Otherwise, please have the machine accessible and ready to be serviced. Thank you.</i></p>	<p><i>MyTextForTechRoboCallAheadXMinutes.TXT</i></p>	<p><i>[InvNمبر] [UnitType] [UnitMake] [CompanyName] [CompanyTelNمبر] [GenderRef] [Tech] [Minutes]</i></p>

Please take particular note of the text sections above that are rendered in blue. We show those sections in blue to highlight a particular trick we are using in the default script, and which you may likewise use in your custom script. The situation we are seeking to address is where you may want the script to be a little different, depending on whether it's the tech's first visit of the day, versus otherwise (this can be particularly important if you've promised a customer their appointment will be first; in such a circumstance you'd not want language that says the tech has just finished his prior job). If you want to have text that varies depending on whether it's the first visit or not, simply enclose both alternatives within “less-than” and “greater-than” signs (e.g., < and >), and separate the two alternates with pipe symbol. In other words, do it like this <text-that-I-want-for-use-if-the-call-ahead-is-the-for-the-first-visit-by-the-tech-for-the-day|text-that-I-want-to-use-otherwise>.

Please also note where you use the field header [GenderRef], that text will be replaced with the word “his” if in SD-Mobile it is indicated the tech is male. It will be replaced with “her” if in SD-Mobile it is indicated the tech is female.

If you want to assure that your custom script uploads immediately (i.e., rather than waiting for the timed update cycle), after saving the file click on the “Other” button in the *Occasional Uploads* section of SD-MobileLink. If you want to be sure it downloads immediately into SD-Mobile, do a right-click on its “Log-In / Check Status” button (this forces a complete refresh).

**For Tech “Call-Ahead” Communications as Sent by SD-Mobile (Continued)**

**For SMS Text-Message Without Specification of How Many Approximate Minutes Before Arrival**

Standard Text	Filename to use for custom text	Fieldnames you may use
<i>From [CompanyName]: our technician, [Tech], is on [GenderRef] way to perform repair work on your [UnitMake] [UnitType].</i>	<i>MyTextForTechSmsTextAheadOnHisWay.TXT</i>	<i>[InvNmbr] [UnitType] [UnitMake] [CompanyName] [CompanyTelNmbr] [GenderRef] [Tech] [Minutes]</i>

**For SMS Text-Message With Specification of How Many Approximate Minutes Before Arrival**

Standard Text	Filename to use for custom text	Fieldnames you may use
<i>From [CompanyName]: our technician, [Tech], expects to arrive within about [Minutes] minutes to perform repair work on your [UnitMake] [UnitType].</i>	<i>MyTextForTechSmsTextAheadXMinutes.TXT</i>	<i>[InvNmbr] [UnitType] [UnitMake] [CompanyName] [CompanyTelNmbr] [GenderRef] [Tech] [Minutes]</i>

Please notice these SMS scripts are tiny. If you create your own custom SMS scripts, you should likewise endeavor to keep yours tiny. Short texting is usually best regardless. However, aside from that, the actual underlying SMS unit has a maximum length of just 164 characters. Yes, in the current age you can do longer texts, but that’s accomplished by magic behind the scenes where your above-164 text is split into multiple sub-164-size units, each sent individually, then they are re-combined at the other end. The thing is, each sub-unit is billed as a text in itself. So, if you want to make your text fee 8 cents instead of 4 cents on these “call-aheads,” make your text somewhere between 165 and 328 characters. If you want to make your fee 12 cents, make your text length somewhere between 329 character and 492 characters, etc. (See what we mean?)

You may, BTW, wonder why there are alternate scripts depending on whether there is a specification of approximate minutes before arrival. The reason is, when the tech chooses to do a “call-ahead,” he is given an option whether to simply indicate he is “on his way” versus providing a time specification. Our thinking behind this design strategy is, if he’s guessing his arrival is somewhere between 5 and 15 minutes way, it’s a little easier to use a non-predicted-quantity-of-minutes method. If, however, it’s likely to be significantly longer, the consumer likely be happier where he provides an estimated of quantity of minutes.

If, incidentally, you want to test any of these Tech “Call-Ahead” scripts (default or custom) to see how they look or sound, you can make a fake job and appointment in ServiceDesk (with your own number provided), assign the appointment to a tech whose identity/login you can momentarily use for testing, assure SD-MobileLink has uploaded the appointment (click on its button to upload dispatches immediately if you do not want to wait for its timed cycle), then, in an instance of SD-Mobile, login as the tech, select the fake appointment, go to its JobDetails page, and choose the “Call-Ahead” scenario you wish to test.

**For emails sent by CyberLink**

Scenarios 1 and 2, Acknowledgement of initial appointment as made online by the consumer (in Scenario 1 the consumer has also initiated the service request; in Scenario 2 it's the consumer scheduling in result of an email request as made in response to service requested by a third-party payer).

Standard Text	Filename to use for custom text	FieldNames you may use
<p><i>Thank you very much.</i></p> <p><i>We have calendared your appointment for [AppmntDate], name and location as follows:</i></p> <p><i>[Name]</i>  <i>[Address]</i>  <i>[CityState]</i></p> <p><i>We look forward to serving you.</i></p> <p><i>We'll contact you by on or before the evening prior to that date to inform you of the technician's estimated time of arrival.</i></p> <p><i>[CompanyName]</i>  <i>[CompanyTelNmbr]</i></p>	<p><i>MyTextForConfirmingEmail.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[Name]</i>  <i>[Address]</i>  <i>[CityState]</i>  <i>[CompanyName]</i>  <i>[CompanyTelNmbr]</i></p>

Scenarios 3, Acknowledgement of a new appointment (e.g., parts having arrived) in response to emailed request from ServiceDesk

Standard Text	Filename to use for custom text	Fieldnames you may use
<p><i>Thank you very much.</i></p> <p><i>We have calendared your appointment for [AppmntDate], name and location as follows:</i></p> <p><i>[Name]</i>  <i>[Address]</i>  <i>[CityState]</i></p> <p><i>We'll contact you by on or before the evening prior to that date to inform you of the technician's estimated time of arrival.</i></p> <p><i>[CompanyName].</i>  <i>[CompanyTelNmbr]</i></p>	<p><i>MyTextForConfirmingEmail-AfrFrstAppmnt.TXT</i></p>	<p><i>[AppmntDate]</i>  <i>[Name]</i>  <i>[Address]</i>  <i>[CityState]</i>  <i>[CompanyName]</i>  <i>[CompanyTelNmbr]</i></p>

## **Customizing Appointment-Confirmation RoboCalls**

Beyond the scenarios for which customization is described in the above tables, there is a whole other set of script customizations. These concern appointment-confirmation RoboCalls.

For these, we have provided a different method of customization.

In particular, rather than having you create a local file for each such customization as may be wanted, we have provided an interface in your [my.rossware](#) dashboard.

Just go to there, login, and follow the menu. Customization is easy and straightforward. There is also provision via which you may test your scripts (and/or the default scripts too) to see how they sound.