

CyberOffice Handbook

Providing the first and only modern, quasi-automated communicative link between a service-performing office and the service consumer.

What percent of work time in your office is spent on the telephone with customers? Half? Perhaps more? Certainly, it's a lot. Consider how much you'd save if that time was cut in half, while even better managing the same work flow. We believe, with systems described here, you can do that, and much more.

How much time does a consumer spend, on average, in arranging for a needed repair, calling to inquire on status, working to re-schedule, etc.? Is it five accumulated minutes per repair, ten, twenty? How much time is lost playing telephone tag? How great is the frustration when the customer can't take care of business unless they manage to call during business hours? How much more would it mean, to them, if they could manage all such matters instantly, and at any hour wanted?

This "handbook" is provided to help you understand how to fully harness the system we've created to achieve these purposes.

Organizationally, there are but three chapters here. The first describes general concepts. Among other matters, it provides a simple, itemized listing of the 11 scenarios SD-CyberOffice is programmed to manage. The second is a how-to. It sequentially describes basics of setup and use for each of those 11 scenarios. The third describes ways you can augment and customize, including creation of your own preferred text as applicable in several of the contexts, inclusion of techs' pictures in confirmation emails, and so on.

If you follow the prescriptions here, we don't think you can help but reap rich rewards.

Chapter 1

General Concepts

Our main objective in the CyberOffice system is to move from a person-to-person and voice-based mode of communication, when working with customers, to one based instead on such modes of automation as can be achieved via email, web interfaces and automated calling. It is to save time (enormous amounts), enhance efficiency and convenience, and wow your customers via a vivid demonstration of how truly hi-tech your company is.

It further serves to convince your customer the significant bill he or she has paid is more than justified. This is because — with so a pungent demonstration of infrastructure — it becomes more than obvious a great deal more goes into the provision of world-class service than just sending out a grease monkey (the common consumer's perception).

For a highly practical overview in which you can actually see and work in at least some of the interfaces, go to our website <http://rossware.net>. In the left-hand column, click on 'CyberOffice', then follow the prompts.

Outline of Scenarios

1. Initial job creation and scheduling (via interface provided on your website).
2. Initial scheduling on an existing order -- where the order is received from a third-party, such as a home warranty company, landlord/tenant situation, or similar (ServiceDesk emails the consumer a request to schedule via a '*click here*' hyperlink, which takes them to a venue on your website).
3. Re-scheduling on an existing job after parts arrive (again, ServiceDesk emails the consumer with a request to schedule via a '*click here*' hyperlink, which again takes them to a perfectly-designed interface on your website).

4. Reminding/Confirming on tomorrow's appointments (ServiceDesk emails customers, reminding them of the appointment, providing the tech's ETA, and providing a '*click here*' hyperlink, via which they are again taken to a perfect interface on your website, this one allowing them either to confirm or to reschedule if required).
5. Checking on job status (customers can go on-line to see the status of their jobs).
6. Technician tracking (a variation of "tracking a shipment," our version allows the consumer to see when the tech left the office, how many jobs are on his roster, where the consumer fits on his list, and where he is on his way working through it).
7. Integrated online surveys (requires simultaneous use of SD-Mobile; when job is done, customer receives an email with link asking him/her to complete a truly short, 30-second, 4-questions-only survey; employs the "net-promoter-score" methodology).
8. ER (Emergency Rescue) Service (your website can offer non-normal-working hours service to customers willing to advance pay a "disturb-from-my-off-time" fee; only after such fee is paid does a text message or similar go off to designated techs).
9. RoboCalling as an optional/supplemental method (versus emailing, for accomplishing Scenarios 3 and 4).
10. RoboCalling for "tech-is-on-his-way" messages (tech is using SD-Mobile and finishes a job, dialog asks "do you want an automated call to inform the next customer you are on your way).
11. RoboCalling post-completion messages (after the job is done, a call goes to the customer with a tailored message).
12. An embedded "Kudos" page for your website.

The Foundational Scheme

The primary operative elements in this system are: (1) your own website; (2) a set of specialized web-interfaces that are "plugged into" your website; (3) ServiceDesk; (4) a compact utility that runs in the background at one station in your office (called SD-CyberLink, it provides communication between ServiceDesk and the online interfaces); (5) email; and (6) for some functions, SD-Mobile.

Your website is, in general, your responsibility (if you do not have one, we can provide both design and hosting; if interested, ask for details). It's general role (at least so far as CyberOffice is concerned), is to provide a context for the various interfaces via which your customer will conduct his/her relevant online activity. Those interfaces consist of elements that are essentially plugged-in to your website.

As for the "plug-ins" themselves, the actual interfaces are in fact "hosted" on a Rossware server. Thus, it only "appears" to your customer that, when within these interfaces, they are directly "in" your website. Technically, they're in interfaces provided by Rossware (though fit into windows within yours). This strategy eliminates any need for you to install, host and manage the machinery yourself, and overall makes the setup much easier.

The compact management utility is called "*SD-CyberLink*" (CyberLink for short). It's a tiny program whose job is to periodically upload information to that remote server. This information allows the various interfaces (as provided there) to interact appropriately with your customer. In particular, it will initially upload information about your company and setup (contact telephone number, email address, etc). On a periodic basis (typically once per 10 minutes, though you are free to change the interval), it uploads live data that indicates the days on which you have vacancies for scheduling, and other relevant info.

In addition to *uploading* information, the CyberLink also *downloads* information from the remote server whenever relevant information appears there. When a customer books a new job via Scenario 1, for

example, CyberLink grabs the info and plugs it into a ServiceDesk Callsheet. When a customer schedules in response to a Scenario 2 or 3 emailed request, the info is likewise grabbed by CyberLink and plugged into ServiceDesk. Similarly, when a customer confirms, cancels or reschedules in response to a confirmation request (whether the request was via email or RoboCall), CyberLink again downloads the response, and plugs the resulting info perfectly into ServiceDesk.

Besides being the recipient of on-line job-creation, scheduling and confirmation activity (as downloaded by CyberLink), ServiceDesk is also the entity via which you'll generate and send the email requests that initiate Scenario 2, 3 and 4 activities. For each such Scenario, there are contexts within ServiceDesk for initiating these emails, as will be discussed more fully in Chapter 2.

As for entities that send emails, it's not just ServiceDesk that's involved. Two other applications also get in on the emailing act.

CyberLink itself is configured to send emails in some contexts. As an example, it immediately sends a confirmation email when a customer first books a job online. Similarly (and if this option is enabled), it sends a follow-up when a customer confirms an appointment (this one invites your customer to use the tech-tracking feature, and provides a hot-link to make it easy).

SD-MobileLink (which more *generally* provides information shuttling for the SD-Mobile system) also gets in on the act. If optionally set, for example, it will send an email whenever a tech has a completed a visit but not completed the repair (this one mildly apologizes for the fact the repair could not be completed, promises strong efforts to expedite progress, and provides a hot-link on which the customer can click to monitor continuing progress). As another option, it can be set to send an email post-completion that thanks the customer for their business, and invites them to complete a very brief online survey.

To summarize, the CyberOffice system consists of outward communication and inward.

Outward communication consists, within applicable web-interfaces, of such things as availability for particular days scheduling as applicable to particular zips, job status and technician tracking. It is also provided via a series of different emails as generated by ServiceDesk, CyberLink and MobileLink.

Inward communication consists of info generated by your customer when she interacts via the online interfaces, including her acts when: (a) initially scheduling; (b) re-scheduling after parts have arrived; (c) confirming (or re-booking) her appointment; (d) completing surveys; and (e) miscellaneous other.

All functions from your end are either automated or -- at least -- semi-automated.

Setting up the SD-CyberLink Utility

The CyberLink installer may be downloaded from the CyberOffice downloads page on our website (<http://rossware.net/downloads/SDCO>). It runs like most any other Windows installer. We do not update the installer often, which means more than likely it will be installing an older copy of the program. For such reason, we suggest you perform an update immediately after doing the install.

We also want to emphasize the importance of one detail. Please be sure to follow the advice (as provided in your introductory email) to setup Windows so it will auto-start CyberLink (at the computer where you've determined to run it) when Windows itself boots.

Otherwise, humans being what we are, there is every likelihood you'll forget to re-start CyberLink after some Windows rebooting event, and for some indeterminate period you'll have customers going on-line to schedule themselves, with no prompt acknowledgement being sent (not a good impression to give your consumer), no information popping into ServiceDesk in response, and so on.

For obvious reasons, it's important for that utility to run 24/7.

Setting up the ServiceDesk ZoneScheduler

If you've previously setup for reception of automated dispatches via ServiceBench, ServicePower, Samsung or LG (using any of the applicable *DispatchLink* utilities), it follows you already know about (and have implemented) the ZoneScheduler system within ServiceDesk. In such a case, there is likely no need to read further in this section.¹ CyberLink uses the very same mechanisms to determine your availability status for uploading to the remote server (which allows it, then, to present available scheduling dates to your on-line customers).

If you have not (by reason of such prior use) already had occasion to acquaint yourself with ServiceDesk's ZoneScheduler system, it's time to do so now.

The basic concept is to provide a venue in which you can indicate what your job capacity is for given days. Based on this, programs such as those DispatchLink utilities and CyberLink can make a comparison, for any given day, between programmed capacity and what's actually scheduled—in order to determine if vacancies remain.

An added twist is that, if beneficial to overall strategy, you are permitted to divide your territory into as many "zones" as wanted, each being defined via a list of zipcodes. This is particularly helpful if there are areas you wish to service only on particular days of the week (in which case you could make their allocations zero on other days), or if your territory is so large that it's impractical, say, to have techs that normally work in one region cross-over and help out in another region on days when their area is light and the other heavy.

At any rate, if you've not done so previously, you'll need to setup the ZoneScheduler system. We've long had an instruction document for the purpose. It's called *ZoneSchedulerInstructions.pdf*, and can be found in the c:\sd folder at any station where ServiceDesk has been installed (look in the root \sd folder of the server drive if you're setup in thin-client mode).

Dealing with your Types, Makes and Dealers Lists

When you examine the CyberLink utility's interface, you'll see it has a button labeled '*Upload Core Values.*' That button's function is to upload, to the remote server, several details about your company, including the zipcodes you service. Importantly, it also uploads from the ServiceDesk UnitInfo system its lists of machine Types, Makes and Selling Dealers.

The web-scheduling interface needs these lists so it can present them as dropdowns, to your customer, when she schedules on-line.

Given that such lists will be presented to your on-line customers, it's a good idea to make sure you've got them cleaned up and optimized, within ServiceDesk, so your customers will see exactly what you want them to see.

And then there's option 2.

¹ The exception would be if your ZoneScheduler setup is configured to use *just one zone*, and is also using the option that allows you to forego creation of a ZoneList.txt file (with this option, all related functions assume every job fits within your one [default] zone). CyberOffice cannot directly rely on this mode, because it needs an actual list of zips, to upload to the CyberOffice server (in turn, this allows the on-line scheduling interface to know if a consumer with a given zip is a legitimate candidate for scheduling).

Given this need, you must at minimum provide CyberLink with a list of zips. To state it otherwise, even if you've otherwise setup the ZoneScheduler system, but have chosen the "*no-ZoneList-file, -default-zone-only*" mode, you'll in fact have some zone-setup work to do for CyberLink.

If, in particular, you want to stick with that mode (whether already setup that way for other purposes, or setting up presently), you can satisfy CyberLink's need for a list of zips by making a different file.

Specifically, please make and save to your server's \sd\netdata folder a file called **ZipsForCyber.txt**. For contents, simply place in the file one line of text for each zip you want to offer for service within CyberOffice. Each such line should consist simply of said zip, and nothing else.

Again, if you've setup ZoneScheduling in ServiceDesk for other purposes (and without relying on the "*no-ZoneList-file*" mode), there is no need to even be concerned with this. The simple bottom line is that the CyberLink program needs a list of zips, one way or the other.

We've ran into a couple of users who wanted to maintain very extensive lists within ServiceDesk, while presenting more limited lists to the on-line customer. If you'd like to do this, simply make a new copy of the *UnitInfo.mdb* file (as found in the *\sd\netdata* folder on your server). Name this new file *UnitInfo-ForWeb.mdb*, and place it in the very same folder. Open this new file in Microsoft Access,² remove all the tables except the three of concern (*DealerList*, *MakesList* and *TypesList*). Then edit the lists to preference.

As for how the CyberLink utility reacts, it simply looks (in all cases) to see if you've provided this alternative UnitInfo file (i.e., the one named *UnitInfo-ForWeb.mdb*). If it sees that you have one, it pulls the lists (for uploading to the remote server) from there. If not, it pulls from your standard UnitInfo file.

Using the [My.Rossware.Net](http://my.rossware.net) Interface

Though this was not part of our original CyberOffice scheme, it has nevertheless become almost central to it. Quite simply, my.rossware.net provides you with an online interface where you can manage several elements that are pertinent to use of SD-CyberOffice, and review others (it also has some relevance to use of SD-Mobile).

To use the interface, simply go there by clicking on one of the links here provided, or type "my.rossware.net" into your web browser. Once there, login using the same credentials (UserID and password) as otherwise assigned to you by Rossware for use in SD-CyberOffice (in almost all cases these will be the same credentials as assigned to your company for use in SD-Mobile).

Chapter 2

Base-Level Instructions for Each of Twelve Scenarios

As its title implies, this chapter has a section for each scenario of CyberOffice operation. Each section has base-level instructions. To emphasize, these are *base-level* instructions only. You must turn to Chapter 3 to learn about setting up for customized text, and similar.

Base Instructions for Scenario 1 (Initial Booking of Service)

Aside from the main setup elements as discussed in Chapter 1, you must do two things:

1. Add an appropriate *hyperlink* to your website.

Basically, you'll have a button (or something similar, even just an area of text, if preferred) that advertises the ability to schedule on-line. It will be configured so that it's apparent to the user they should click on the object to fulfill the purpose. The object, in turn, is configured with what's called a "hyperlink," which is simply a particularly-configured reference to another webpage.

² If you don't possess Microsoft's *Access* program, there's an easy workaround. When you make that copy of the existing *UnitInfo.mdb* file, save it (and this is prior to re-naming it) to the *\sd\netdata* folder at a station in your network (but not the server itself) that's operating in Thick-Client mode (i.e., it has its own set of *\sd* folders). Then, at that station and from within ServiceDesk's *Settings* form, momentarily set it to use its own *c:* drive as the server. At this point, ServiceDesk (at such station) should be using other than its normal operating files (i.e., what you've placed into its local *c:\sd\netdata* folder, including your to-be-edited copy of the *UnitInfo.mdb* file). From this instance of ServiceDesk, go into the UnitInfo form and use its mechanisms to edit the lists as desired for website presentation. Don't worry about otherwise messing up your UnitInfo data here, for this is only a *copy* you're working with. After you've edited the lists as desired, re-set ServiceDesk to use the proper/intended drive as server (i.e., so you're back to the proper operational setup, looking at real operating data). Now, go to the copy you made and edited (i.e., via ServiceDesk in temporary/not-true-server mode). Re-name it (per above instructions), then copy it into your true server's *\sd\netdata* folder (note that *you're not replacing the operating file*; you're simply moving in a new one under different name).

If you don't have any stations operating in Thick-Client mode (i.e., all are setup as Thin), another workaround (this would need to be done during non-business hours, when others -- including techs in the field via SD-Mobile -- are not otherwise accessing the data) would be to make a copy of *UnitInfo.mdb* that's intended as your "this-is-my-real-copy-for-true-operation" instance. Save it elsewhere (i.e., a place that's safe from editing, outside the *\sd\netdata* folder). Then use the UnitInfo form from within ServiceDesk to edit the lists as wanted for web-presentation purposes (again, don't worry about what you're otherwise doing to the data). After you've finished, go into your server's *\sd\netdata* folder and do the above-specified re-naming on what was formerly the operating *UnitInfo.mdb* file. Then, go back to the copy you made at the beginning (i.e., your "this-was-my-real-copy-for-operation" instance) and copy it back into your server's *\sd\netdata* folder.

You are, in short, doing a simple dosie-doe, and it's easy if you simply think it through. Be sure if using the second method, though, that you *don't fail to copy your operating copy of the file back into the server's \sd\netdata folder*. That last step is **critical!**

When Rossware sets you up, they'll provide the exact hyperlink that's needed for your company. It will be a variation of the following:

<http://sched.rossware.net/?id=1001>

In fact, it will be precisely³ the above except for the final number (i.e., the "1001"). That portion tells the on-line server which company the consumer is connecting for. It allows the remote server and interface to know it's working for you, and to interact with the consumer on that basis.

Whenever a webpage object is setup with a hyperlink, there are options as to how it's configured. Specifically, it can be configured so that when the referenced page opens, it does so as: (a) a new page in your browser (i.e., the old page stays and is not replaced); (b) a replacement to the existing page; or (c) a new display *within a designated frame or page*.

You obviously may configure your setup according to whatever most pleases you, but our recommendation is to go with option C. This creates the definite impression, for your customer, she is doing everything right *on your site*. Plus she'll continue, as she works, to see your carefully-designed logo and graphics in areas surrounding, so on and etc.—making for an altogether better marketing effect.

2. Configure the station where CyberLink is running for successful emailing.

Since Cyberlink will be conducting a lot of business for you via email, it's imperative that the computer where it's running be properly setup for emailing purposes. In principle, this is very easy. In practice, it can also be very easy. However, there are potential pitfalls, and it's an area where, if you're equipped with a somewhat larger understanding, you'll be much more comfortable and competent to assure your setup is as it needs to be.

This area of concern is sufficiently large to merit a few pages of explanation (enough to assure you really understand the concept). For that reason, we have a separate document to assist you:

[Rossware Users Email Integration Handbook](#)

If you don't already have a clear understanding of how email integration needs to work (between programs running in your computer and the email system itself), please open and read the above. It is simple, non-technical, and the understanding it conveys will make you better equipped to handle a variety of future situations.

With each of the above elements setup (and CyberLink properly configured, running, and with its 'Core Data' having been uploaded), you're now ready, cocked and primed to begin seeing new, scheduled service requests pop right into ServiceDesk—wondrously, without any office personnel having expended a moment speaking with your customer.

Base Instructions for Scenario 2 (Email-Link-Initiated Scheduling of First Appointment After Separate Service Request)

Suppose a property management company calls, seeking service at one of their rentals. Or perhaps it's a home warranty company seeking service for a policy holder. Regardless, they provide all the order information, and you now need to contact the ultimate consumer, for scheduling.

³That is, your url will be exactly like the example (aside from employing your own unique ID indication) assuming yours is a U.S. business. If yours is instead a Canadian business, your url will need to have a simple added string to indicate this fact. The added string is "/canada/", and should be inserted as follows:

<http://sched.rossware.net/canada/?id=1001>

By including this string, your url tells the online machinery to expect your customers to insert a Canadian Postal Code, as opposed to a U.S. ZipCode.

If not using on-line scheduling, you might very well keep the order information in a ServiceDesk Callsheet, pending success in reaching the consumer and creating the first appointment (at which point you'd then do the Job/Sale process).

For the purpose of using Scenario 2, you're going to change the sequence. The reason is, the on-line scheduling interface needs a JobRecord with which to connect the consumer's on-line work (the associated JobRecord/Invoice Number provides a unique connecting key).

So, don't wait. Go ahead. Right away, when you get the order, do a Job/Sale operation from the Callsheet. Then, go to the resulting JobRecord, and there invoke the process to email a scheduling request to the consumer (this presupposes, of course, that you've been provided an email address; otherwise you'll be stuck with conventional methods).

The JobsCurrent form in ServiceDesk suffers a problem. There are more things that can be done there than there is space for unique buttons. For that reason, we're increasingly making single buttons do double-duty. That is now the case with the '*Scheduling*' button. Formerly, it had one function: you could left-click on it (or strike Alt-S on your keyboard) to initiate the standard scheduling options.

Those functions are still exactly the same, but now there is a second option. It's invoked by either right-clicking on the button (as opposed to left-clicking) or striking Ctrl-S on your keyboard (as opposed to Alt-S).

Specifically, this alternative invokes the process where ServiceDesk sends an email to the consumer, asking her to click on a hyperlink (i.e., within the body of the email) to schedule herself. ServiceDesk simultaneously uploads applicable data to the remote server, so that when your consumer connects via the email-provided hyperlink, it will have the means with which to intelligently interact. Naturally, the event (of you having emailed the scheduling request) is auto-recorded in the applicable JobHistory, and the whole process consumes perhaps a second.

When the consumer receives the email and proceeds as directed, she's taken to a very nice interface where the scheduling task is performed. Within moments, the resulting information will pop perfectly into ServiceDesk (via action of the CyberLink). In short, you'll see the appointment appear in the ScheduleList and DispatchMap, and the narrative JobHistory will be appended to explain who went on-line (and when) to schedule the appointment.

Base Instructions for Scenario 3 (Email-Link-Initiated Scheduling of New Appointment after Parts Arrive)

This is much like Scenario 2, except the intent is for use on jobs where the tech has already been there, ordered parts, the parts have arrived, and re-scheduling is now needed.

The emailed re-scheduling requests can be invoked from either of two contexts:

- (a) When you check-in the last of any/all parts as ordered on a job, ServiceDesk will automatically ask if you want it to email the request; and
- (b) You can *volitionally* initiate the request, from the JobRecord, using exactly the same method as described for Scenario 2 (i.e., from the JobRecord, either right-click on the '*Scheduling*' button or strike Ctrl-S on your keyboard).

In this last context, incidentally, ServiceDesk detects (based on information in the JobHistory) that you're in a Scenario 3 as opposed to Scenario 2 context, and behaves accordingly.

Everything else, from the perspective of what you're doing within ServiceDesk, is exactly the same as in Scenario 2 (ServiceDesk itself configures the emails appropriately to the circumstance, uploads applicable data to the remote server, etc.).

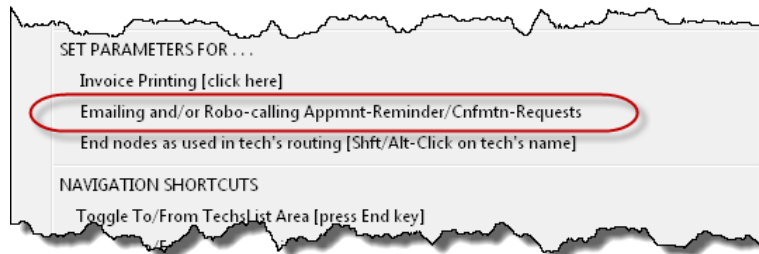
One more note: For any element of CyberOffice where ServiceDesk is sending emails (such as this Scenario, Scenario 2 as just described, and Scenario 4 as about-to-be described), it needs to have its own email-mechanisms appropriately setup, just as does the CyberLink program for the sake of sending its emails. While there would be some potential logic in having both use the same email-settings setup, it's not how we've done it (the reason is to enable such flexibility as some users might want in having different setups for different contexts). In fact, SD-MobileLink (as a third application) also needs its email setup done independently for those emails it sends. Each has its own setup window (and, in fact, each setup configuration is particular to the Windows user login under which it is done). Be sure realize this, and setup each as needed accordingly (instructions on how to navigate to the email setup window as applicable to each context are contained in that [Rossware Users Email Integration Handbook](#)).

Base Instructions for Scenario 4 (Confirming Appointments)

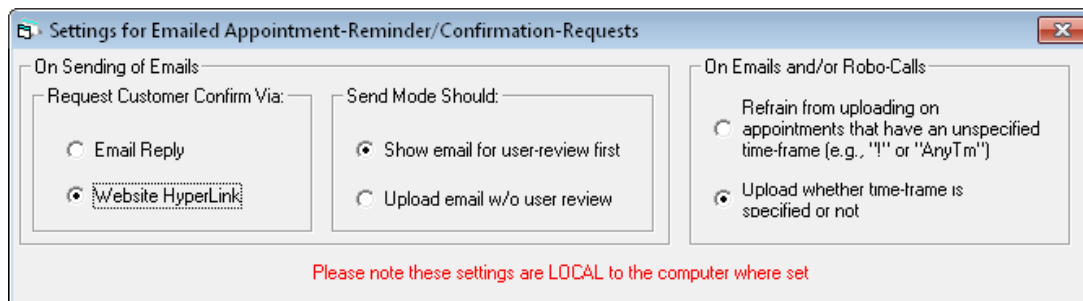
The notion here is, sometime in the afternoon or evening of each day, you've worked out the assignments and sequence of jobs for tomorrow's work (if you're not using the auto-time-frame-estimator for this purpose, we highly recommend it). Now you need to: (a) remind the customers of their appointments; (b) inform them of the time frame within which you're expecting the tech to arrive; and (c) confirm they'll actually be there.

Obviously, if done via manual means, the above is a very time-consuming and laborious task.

To automate the process, you first need to set some preferences (this should be done from each/any Windows user login that will be sending confirmation requests). To do so, open your DispatchMap in ServiceDesk (F5). Right-click to show the contextual cheat-sheet. Look downward and locate the option shown here:



When that option is picked, you'll see this interface:



As you can see, there are three settings.

The first allows email confirmation requests to be made in a mode that's entirely independent of the CyberOffice system (if the non-default first option is selected, the emailed request will ask the user to confirm via email or telephone reply, which of course would mean an office person has to also react manually). If left in its default mode, this setting uses the much more automated CyberOffice mechanisms.

The second setting area (middle of form) allows you to decide whether the confirmation-request emails should simply go out (i.e., you don't see them first; this is the second and default option), or are first shown to you (means you have to click "Send" after the presentation; not many will want this).

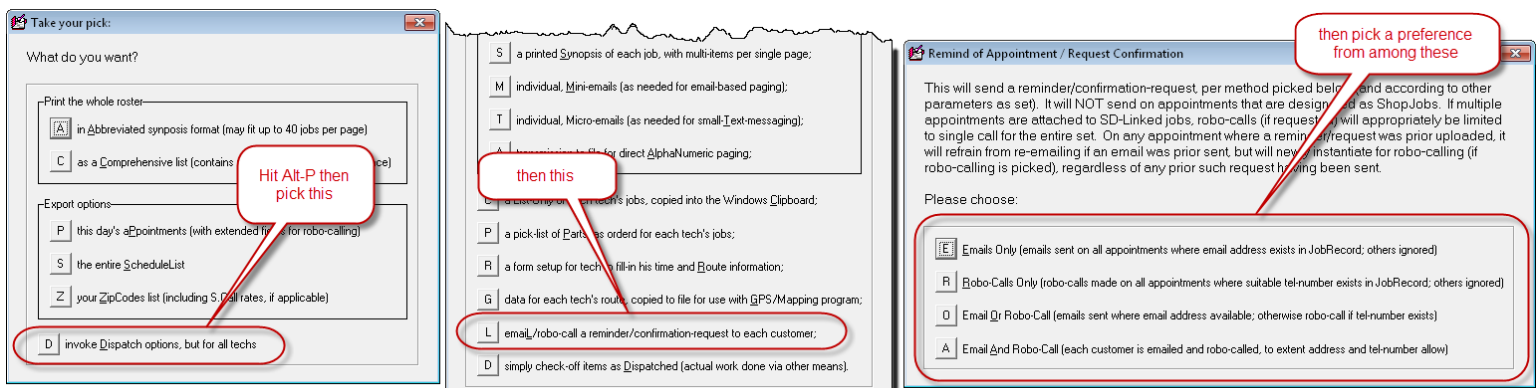
The final setting area allows you to delineate whether confirmation requests go out in regard to all otherwise-applicable appointments, or if appointments that have no time-frame (i.e., "AnyTm" appointments) are omitted.

Once you've assured those various parameters are as desired (and of course assured SD's email setup is ready to go), you're ready. The next step is, at a moment in the afternoon where you have the layout of tomorrow's jobs reasonably finalized, proceed.

Much as with other "Dispatch-Option" methods, you can request confirmation requests on: (a) a particular appointment (do a Ctrl-Alt/Rt-Click on its list reference); (b) all appointments assigned to a given tech (click on his name at the top of his list); or (c) all appointments (regardless of assigned tech) as applicable to the date displayed. In fact, requesting a confirmation request is listed as simply another among the overall list of Dispatch-Options, so the methods to pick what's applicable are exactly the same as for any other such option.

For confirmation requests, it's likely that in most instances you'll want to request for all appointments as applicable for tomorrow, so we'll specifically describe that now.

Begin with your ServiceDesk DispatchMap displayed with tomorrow's roster, then strike Alt-P on your keyboard (this is the command that has traditionally provided general print options, hence the 'P'). Select the option labeled 'invoke Dispatch options, but for all techs,' then (in the next display) pick the option labeled 'email/Lrobo-call a reminder/confirmation-request to each customer.' Finally (and in the next display), pick the method you wish to use:



That's it. You're done. Underlying systems do the rest. .

In this manner, you can send out scores or even hundreds of confirmation requests, with a time investment on your end of mere seconds.

Don't worry about whether underlying intelligence has been built in (it has). If your requested solely emailing, for example, and there are jobs on which you lack an email, no worry, the system is smart enough to refrain from even attempting in such instances (it will also give you a list of those for whom this was the case, thereby prompting you to use more old-fashioned means in their regard). In addition, symbols in the DispatchMap will change to distinguish those for whom requests have gone out as compared to those for whom they have not.

The expectation is that most of your customers will receive the reminder/confirmation requests, respond by clicking on the included links, go on-line thereby, and confirm their appointments. Via downloading by CyberLink, that info will then pop right into the DispatchMap (where symbols will change to show the

appointment was confirmed), and into the narrative Job Histories (which will indicate when the appointment was confirmed and by whom). Or it may be done otherwise via RoboCalling.

If any of your customers elect to change their appointments, that fact will be correctly noted in all appropriate contexts as well, plus CyberLink will create a Callsheet, further calling to your attention the unusual circumstance.

The next morning, a mere glance at your DispatchMap will rapidly divulge any holdouts (i.e., folks who still have not confirmed). It's then a simple matter (with that remaining small minority) to call and see if you can confirm via old-fashioned means.

Base Instructions for Scenario 5 (Job-Status Checking)

To let the consumer check online to review job status is a capability we had many years prior to introducing CyberOffice. It was done via a stand-alone utility called the *WebPageUpdater*, combined with a bit of PHP code we provided for your website. That was, however, a *first-generation* capability. Via CyberOffice, we've re-introduced essentially the same function, but packaged it in a fully modern context.

Your first step in implementing this feature is to setup your website to accommodate the status-checking interface. To do so, create a page to hold it. You can make the page plain or fancy, whatever you like. You can also name it anything you want (we'd suggest something like "StatusChecker.htm").

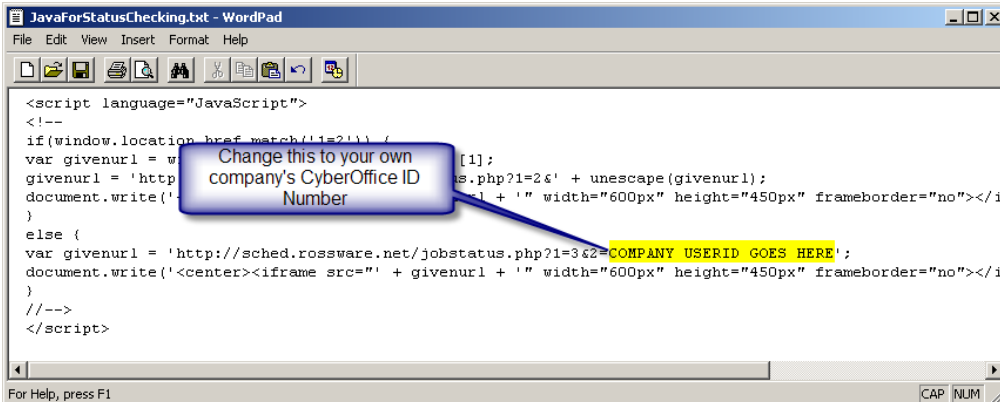
How do you make your status-checking page hold our interface?

It's done by pasting some simple JavaScript (just simple text) into its html code. We provide the text for you. It's contained within a text document called 'JavaForStatusChecking.txt.' You may find this document via the *JavaScripts* link on our CyberOffice downloads page at:

<http://rossware.net/downloads/SDCO/>

There is one little element of editing you must do within the provided text. There's a place where it must have your own company's CyberOffice UserID (a 4-digit number) – in replacement for some dummy text that's otherwise there.

Here is an illustration showing, in general, what the simple text looks like, and where you need to substitute with our own company's ID Number:



```
<script language="JavaScript">
<!--
if(window.location.href.match(/1=2/)) {
var givenurl = window.location.href;
givenurl = 'http://sched.rossware.net/jobstatus.php?1=2&' + unescape(givenurl);
document.write('<center><iframe src="' + givenurl + '" width="600px" height="450px" frameborder="no"></i
}
else {
var givenurl = 'http://sched.rossware.net/jobstatus.php?1=3&2=COMPANY USERID GOES HERE';
document.write('<center><iframe src="' + givenurl + '" width="600px" height="450px" frameborder="no"></i
//-->
</script>
```

So, get the text from the above-described source, modify as instructed, and place it within your status-checking page's html. Once you've done that, your status-checking page (as such, and aside from being equipped with data) should be fully operational.

Of course, a page by itself is none too handy if people don't have a way to get to it. Addressing that is our next step.

Just as with Scenario 1 (up-front on-line booking), it's a good idea to have one or more buttons (or menu options) on your site, where people can click to go your status-checking page. Create such buttons where you want them, label as wanted, and simply make them hyperlink to your status-checking page, using its direct url (this is in contrast to Scenario 1, where you must use a url that points directly to a Rossware resource). The JavaScript, as embedded within the page, will take care of everything else.

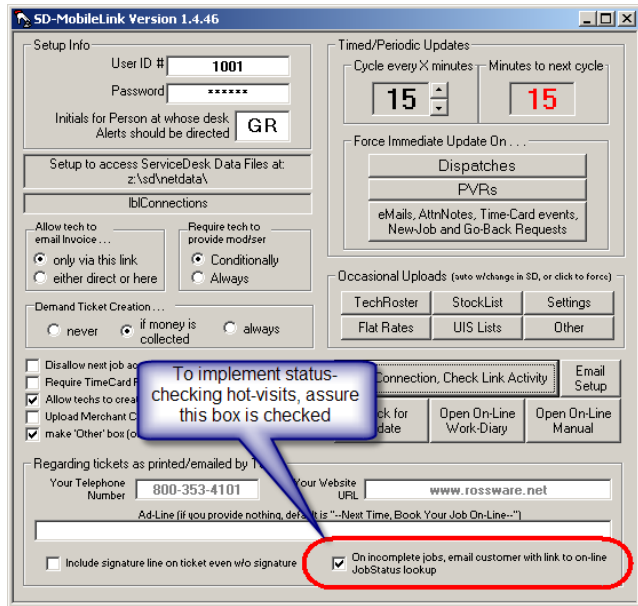
The above-described buttons (or menu options) will nicely accommodate what you might think of as the "cold-visit" situation – where your customer has independently browsed to your website and gets to your status-checking page by clicking on your buttons. In that situation, the interface will demand that the customer provide elements of information sufficiently to verify who they are, and to identify the particular job on which they are seeking to know the status.

We believe a very important aspect of status-checking is to also accommodate "hot-visits." In this situation, by contrast, you (or automated CyberOffice systems) will be emailing your customer with specific notice they can check on their job via your website, and the email will contain a link on which your customer can click to go direct to the status-checker as applicable to their particular job (i.e., without having to enter any information for the purpose).

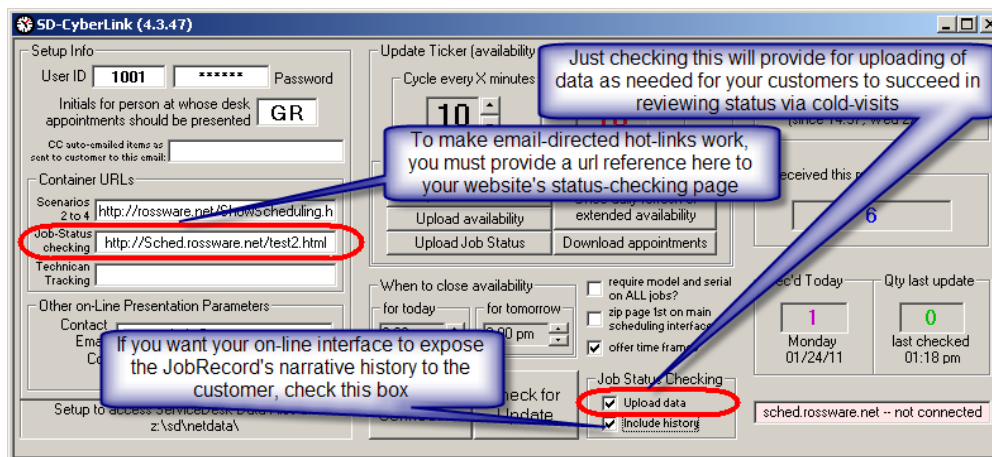
At this time, we have programmed for creation of one such hot-visit, direct-link scenario (we will offer for other contexts if and when requested). It's via SD-Mobile. The basic concept is, if your tech does his PVR via Mobile, and if as part of his report indicates the job is not complete, the MobileLink program will automatically email the customer, express regret the job could not be completed, and provide a hyperlink upon which the customer can click to review progress on the job (and that's all it will take for your customer, just that one click).

To make the above feature work, you must pay attention to settings in both the SD-MobileLink and SD-CyberLink programs.

In MobileLink, look for a checkbox at the very bottom-right, and assure it is checked:



In CyberLink, look for the following:



It should be that easy (please note that, as features are added, the above interfaces are subject to change, and what you see in a current version may have a different arrangement than as shown above).

As intimated, on the basis of demand we'll plan to make other auto-email-with-hot-link actions – such as, for example, possibly when the job is first created. Please watch for such developments.

Base Instructions for Scenario 6 (Technician Tracking)

Setup for this scenario closely parallels what's done for Scenario 5. In fact, it parallels so closely you may use the same instructions as found in the 2nd through 8th paragraphs of the preceding section, and simply adapt, as obviously applicable, for this scenario.

Where a substantive difference arises between is in the method used to provide your customer with an email hyperlink that enables “hot-visits” to the web page in question (here, it's your tech-tracking page, as opposed to your job-status-checking page) — in particular, in providing an email that gives your customer a hyperlink to open the page as *pre-setup* for a particular job, as opposed to merely having “cold-link” buttons provided on your website.

You may recall from the prior section that we are presently configured to have the *SD-MobileLink* program optionally send emails after any visit where the tech did not finish. These emails express regret the job was not completed, and provide a link the customer may click on to monitor the job's progress (i.e., Job-Status Checking).

The parallel for that here is simply in a different place and operation. Specifically, it's provided via the *CyberLink* utility itself (i.e., is not “farmed out” to *MobileLink*), and, instead of being paired to the tech's non-completion after a visit, it's paired to the Scenario 4 Confirmation process.

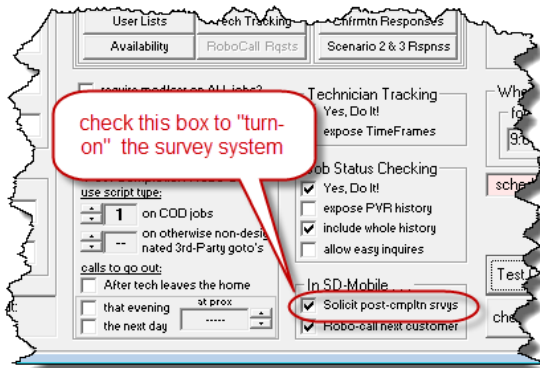
Specifically, after *ServiceDesk* emails the customer to request confirmation of a next-day's appointment, and after the customer then proceeds to your website's online interface to make that confirmation, the *CyberLink* program immediately follows with an email that says, essentially, “*Hey, thanks for the confirmation, and . . . incidentally . . . if tomorrow you happen to be wondering how your tech is running, click on this link.*”

Presently, the *CyberLink* program will do this automatically any time it downloads an email-triggered appointment confirmation — assuming, at least, you've otherwise set it up to accommodate technician tracking. In other words, we have not presently given you an option to NOT have such emails sent, *if you're otherwise using the online confirmation feature, and if you've otherwise setup your system to offer technician tracking.* If you happen to *need* an “off” feature for this, you'll have to let us know.

Base Instructions for Scenario 7 (Integrated Online Surveys)

This is a system we added in 2011 for the sake of giving you supremely-valuable metrics via which to measure customer impressions, and the effectiveness of both office and technical staff in creating robust customer goodwill. It uses the NetPromotorScore system, which employs just four simple (rate-on-a-scale-of-one-to-ten) questions. These questions are so cleverly engineered that it enables targeted measuring of specific employees, and positively DOES NOT impose an unwanted burden on your customers.

To implement the survey system is simplicity itself. Simple “turn it on” via a provided checkbox in the SD-CyberLink interface:



With the box checked, the SD-MobileLink program, as it downloads any PVR on which the job is complete, will email the customer a polite little request asking if he/she will complete an extremely quick survey. If the customer consents by clicking on a provided link, he/she is taken to the following (except it will have your company's name on top):

A screenshot of a customer survey form. The form has a blue header with the text "Survey For John Doe Service, Inc". Below the header, it says "Please complete this brief survey to let us know how we're doing!". There is a progress bar with a sad face on the left and a happy face on the right. The survey consists of four questions, each with a radio button scale from 1 to 10: "The person who took your call?", "The technician who serviced your equipment?", "The overall value of services provided?", and "How likely you are to recommend us, or use us in the future?". Below the questions is a text box labeled "Comments?". At the bottom of the form is a "Submit" button.

Your customer completes the survey, and the information auto-compiles for you. To review and analyze results, just login to your my.rossware.net page. The survey-related interface there provides a series pages where you can look at individual surveys (along with customer comments), overall statistics, and metrics as applicable to each of your personnel (the system knows behind-the-scenes who took each call, which tech did the work, and so on). There's even a page to compare your company's score with the average of companies using the system, and to customize text as presented to your customer.

Base Instructions for Scenario 8 (ER [Emergency Rescue] Service)

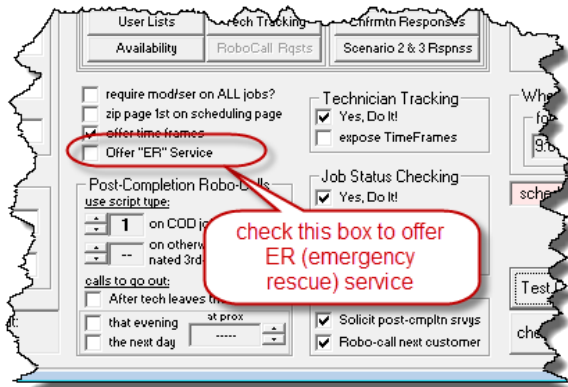
We first made this feature solely for Rossware-direct use (i.e., to facilitate our clients requesting emergency/after-hours service from us). Having made it for our own use (as provider of service to you), we realized some of you might like to use the same mechanisms to offer emergency/after-hours service to your customers.

The underlying concern, when structuring something like this, is you do not want to have your personnel woken in the middle of the night (or interrupted while in the middle of a holiday celebration) on the basis of mere customer whim. If a customer or client is going to create this kind of imposition, they must be willing to pay a commensurately large sum in exchange (getting someone out of bed or similar is a pretty big deal, after all).

So, we've structured a system that will allow your customers, via an interface on your website, to pay whatever large sum you determine is required, and once that amount is actually transacted (via online bankcard), mechanisms then pop into place to text or telephone a succession of personnel you configure, to assure the customer receives the emergency response he/she bargained for.

The beauty, in other words, is you can set a significantly large sum (say \$300) and no one is awakened until and unless the customer first pays it. The customer ends up happy, because (even if expensive) he/she was ultimately able to get the emergency response needed. And you and/or your personnel are happy, because, though it's not nice to have to respond in the middle of the night, if you've made the fee sufficiently high, it winds up being rather well worth it (depending on where you set your fee, it's also likely to be a relatively infrequent event).

To setup for provision of this option you simply must navigate to the "Emergency Rescue" setup page within your my.rossware.net login, configure there as needed, and "turn-on" the feature within your SD-CyberLink interface:



Then of course, stand ready to exceptionally please the occasional customer in desperate need, and to somewhat enlarge your revenue.

Base Instructions for Scenario 9 (RoboCalling as an optional/supplemental method for accomplishing Scenarios 3 and 4)

We began adding RoboCalling functions in early 2012, and have found them to be a tremendous hit. If you do not know, RoboCalling means a machine makes a telephone call for you, and uses a synthesized voice (following a programmed script) to speak with your customer.

Again, basic setup is done via your my.rossware.net login (select "RoboCalling" from the menu there).

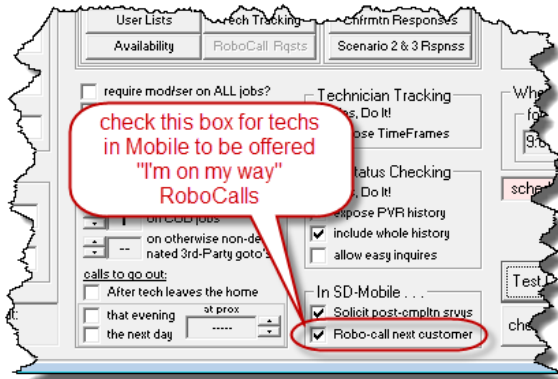
Once you've done the underlying setup, use of RoboCalling depends on the particular context. For Scenario 3 (to request scheduling from the customer when parts arrive) and for Scenario 4 (to request confirmation on

an appointment), when you're in the applicable context within ServiceDesk itself, you'll be presented with an option whether to email or RoboCall, and can proceed per preference. In fact, you'll see there are sub-options, such as to prefer email if an email for the customer exists, and otherwise to RoboCall instead.

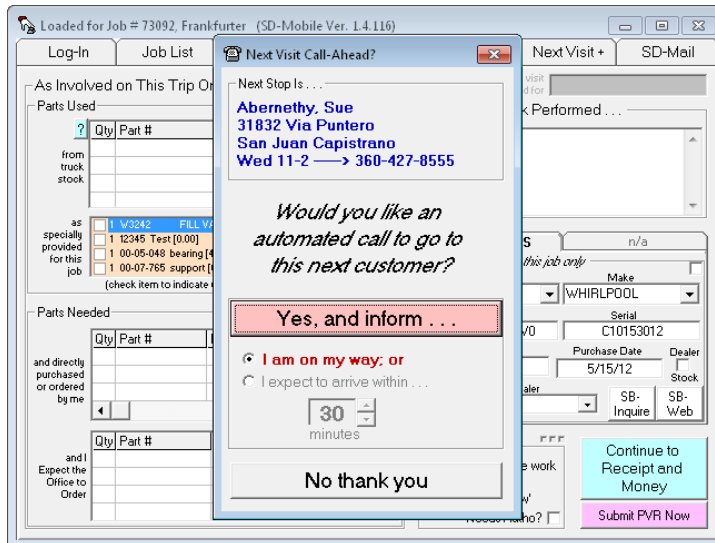
In regard to appointment confirmations, the RoboCall script is configured to request the customer press one telephone key to confirm, another to cancel, etc. The result pipes automatically right back into ServiceDesk. It's a little less powerful in regard to options offered than is the email-triggered online interface (no ability for the customer to actually reschedule without talking to a person), but is reasonably effective, regardless.

Base Instructions for Scenario 10 (RoboCalling for "Tech-Is-On-His-Way" messages)

Much like the Survey option, this is another that pre-supposes you're using SD-Mobile (it would hardly be applicable if you were not). To setup (and assuming you've first done the RoboCalling base-setup via my.rossware.net), simply check the enabling box within your SD-CyberLink interface:



With that done, it will cause your techs in SD-Mobile to encounter a new experience. As they finish one job (and assuming it's not the last in their day's lineup), they'll get a prompt something like this:



All it takes is your tech's simple consent for the RoboCall to go forward to the customer (or a tiny bit of quick user interaction to provide an other-than-standard "I'm on my way"). People love this.

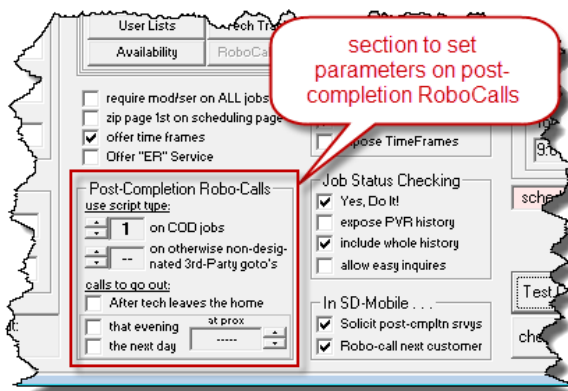
We are planning to add an email-customer-tech-is-on-his-way option (and configure the email to include the tech's picture), but this is one we've not gotten to yet.

Base Instructions for Scenario 11 (RoboCalling post-completion messages)

The idea here is you may want some kind of telephone call to go to your customers when the job is completed. Though you could make any kind of message as wanted, the users that particularly wanted this were envisioning something like this:

"This is a message from XYZ Appliance Service, and we want to thank you for granting us the privilege to service your machine. We hope everything went superbly, and, if not, that you will please let us know so we can amend. Please also know that in the next two or three weeks you will be contacted by Whirlpool to fulfill a survey on their behalf. We hope you can view us favorably at that time."

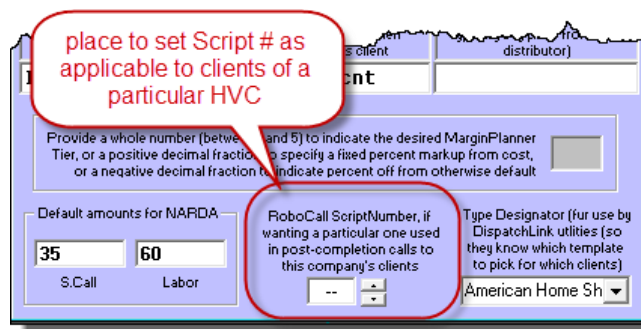
Given this basic concept, we realized folks wanting post-completion RoboCalls might want different scripts employed for different contexts (and might also prefer different timing in regard to when the calls go out). Given this, we've setup to allow such variation. Specifically, there's a dedicated section within the SD-CyberLink interface, as follows:



Focusing first on the bottom-half of this section (under the heading "calls to go out:"), the general idea is you may choose for these RoboCalls to be made within a few minutes of the tech leaving the home (with his repair completed); or that evening (at an approximate time you specify); or the next day (again, at an approximate time you specify). It's that simple.

We'll now move to examination of controls in the top-half of this section (those under the heading "use script type:"). Again, it's simple. If you want post-completion RoboCalls going out on your COD jobs, simply set the script number you want used for that context (otherwise leave blank in lieu of the number, and no calls such calls will go out on this variety of job). Ditto for calls as made to the consumer where the job involves a third-party-payer other than those for which you specifically designated a particular script.

Regarding that last sentence, you may notice it implies you can designate particular scripts for use with specific third-party payers (or, more properly, for use with the consumers associated with them). But, you may notice, there is no place in the above-shown section of controls for such specific-to-particular-payer script settings. That's because, if you want to pick a script for use in conjunction with any particular third-party payer, it's done from within ServiceDesk itself. Specifically, there is a setting for this purpose in the QuickEntryTemplate form, as applicable to any such payer:



The idea is simple. If you want a particular post-completion RoboCall script used in conjunction with consumers associated with a particular third-party-payer client, simply designate the script number, in that client's QuickEntryTemplate.

Okay, but what about all this regarding scripts and script numbers? Where do you get or make those?

This is another function to perform via your my.rossware.net interface. There is an interface there (under menu-selection "RoboCalling") via which you can create and manage up to five separate post-completion scripts, each identified via sequential number.

So, setup your scripts (or just a single one if that's all you want), and set to use those you want in the contexts you want. That's all there is to it.

Base Instructions for Scenario 12 (a "Kudos" page for embedding in your website)

It's a long-suffered conundrum: almost always, your customers are motivated to post ratings and comments in online review sites (like Yelp.com, for example) only in those comparatively rare instances when they are upset. So, you make 99 customers extremely happy, and nothing is posted. But something goes awry with the hundredth, and that's the person who posts. Then, of course, any prospective customer who's reviewing what's been posted gets a view of your company that is extremely and improperly skewed toward the negative. It's not fair.

This feature is a direct and wonderful solution to this long-suffered problem. It works in conjunction with our CyberOffice Survey system (see Scenario 7, as described above). A very happy side effect of that system, you will find, is it automatically collects a great many raving, praising and enthusiastically-endorsing comments from your customers. Certainly, it makes you feel personally good to read these comments (it warms your heart, so to speak), and this is obviously good, in and of itself.

But why limit your benefit to just that?

Why not use those superlatively-positive comments as a means to broadcast to the rest of the world (to your potential customers, in particular) how very pleased your existing customers have, in fact, been with you?

Obviously, this is a concept that makes way too much sense. It's a purpose that must be implemented.

The general concept is you need a section within your website (maybe even embedded within several different pages of your website) that bears a caption along the lines of "See what our customers are saying about us." Immediately under that heading, the system will display a set of glowing comments (and high scores) as generated by your CyberOffice automated surveys.

Better yet, these scores and praising comments will be forever fresh and changing, each bearing relatively recent dates so as to improve their persuasiveness. Every consumer knows, after all, that it's no great feat for even a lousy company to have generated a small sampling of praising comments over a long period of time (and to hold out such a small sampling indefinitely, even if all such praises were from years past). But,

to have a large batch of recent praises, showing actual and recent dates . . . most obviously, that is far more impressive.

So, the general idea is that prospective customers see this kind of presentation and figure, wow, yours must be an awesome company (then, of course, they'll online schedule with confidence in having made an optimum pick).

Here is an illustration of how your interface might look (though you may, of course, customize at will):

The screenshot shows a website for 'XYZ Appliance Repair'. The header includes the company name, contact information (office, fax, toll-free), and navigation links (Home, About, Schedule, Contact). The main content area is divided into sections: 'Humble Beginnings', 'XYZ Today', and 'Looking to the Future'. A red arrow points to the text 'How cool is this?' in the 'Humble Beginnings' section. On the right side, there is a 'See what they're saying about us!' section with five testimonials, each featuring a date, a star rating, and a customer comment.

XYZ Appliance Repair
office 360.222.3333
fax 360.222.3334
toll-free 800.222.3333

Home | About | Schedule | Contact

Humble Beginnings

XYZ Appliance Repair began in Hank Simpson's basement. Despite the challenges brought on by heavy competition, inexperienced staff, and limited advertising dollars. Hank proved to be dedicated to his work and XYZ quickly became known as *the* appliance repair shop in the greater Shelton area.

In a short 18 months, XYZ expanded beyond Hank's basement and into the industrial park. One tech quickly became 12. Inexperience was replaced with knowledge as factory repairs were brought in-house. Hands-on training.

Hank's real secret was the help of Glade Ross, owner of XYZ. Two accomplished technicians streamlined activities.

XYZ Today

Today XYZ is a respected authorized factory repair shop for Whirlpool, LG and Subzero. XYZ is also a member of the Better Business Bureau.

Looking to the Future

Hank is always looking ahead to the future. He hopes to expand XYZ to the Seattle-Metro area. If you are an honest, hardworking individual looking to work for a company that values its employees and the communities it serves, please send an application to Jobs@XYZ.

See what they're saying about us!

03-04-2015
★★★★★
Thanks for being available to our needs So promptly.

03-03-2015
★★★★★
Thank you! Professional from start to finish, reasonable costs too!m

01-12-2015
★★★★★
Thank You for your excellent service!

11-26-2014
★★★★★
Very happy with the explanation of the problem and the work. Thank you

10-14-2014
★★★★★
The services from start to finish were excellent quality. I have used your company in the past & plan to do so in the future. Thank You!

Home | About | Schedule | Contact |
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Setup for this particular plug-in is a bit more complex than for other CyberOffice plug-ins. In fact, we suspect that, even if you managed to setup the other plug-ins without assistance from an outside web-developer, you'll likely want to enlist such assistance for this one. Regardless, here is a link to specific instructions (assuming you're using an outside developer, simply provide this link to him or her; otherwise, you may use it on your own):

<http://rossware.net/MiniManuals/EmbeddedKudosInstruction.pdf>

Within the instruction, you'll see that one of the settings you may variably configure is what is the minimum threshold — as survey score — that you wish to have included within the displayed result? For example, you might choose to display only results where the total average score was 9 or higher. Maybe, even, you'll want to show only 10s. It's true, some might consider this cheating, but name one company that does not always want to show only its best!

Assuming you in fact choose to be selective, based on testing we've found that a threshold of 9 often results in responses where the customer was delighted with the service, but was unhappy with the price. It's possible you'll want to avoid showing that kind of commentary. If so, you likely should pick a threshold of 9.5 or 10.

One other suggestion: though we do not show our sample configured this way, we think it's a good idea for your "Kudos" display to include a "Show More" button. The general idea is that a small sampling of kudos (just a few, as in our example) should be always and automatically shown. A "Show More" button allows the consumer to click and see a much larger quantity. The instruction document (linked above) includes information on how to achieve this.

Chapter 3

Enhancements, Customizations and Other/Supplementary Implementation

If you have read and implemented the descriptions as provided above, you should now be setup for basic and effective CyberOffice implementation. Regardless, things can always be made even better, and that is what this chapter is primarily about.

Making Email-Linked Interfaces Appear Within the Context of Your own Web Pages

You may recall that in our discussion on Scenario 1 we described how it's optimum to setup any "Book Your Repair Now" button, on your website, so that when it hyperlinks to the online scheduler it places that scheduler interface within a frame that's embedded within one of your own webpages. This maintains a fully professional and trademarked-to-your-business consumer experience, along with a comforting sense of continuity. In that context, such embedding is easy. It's a simple matter of how the link is structured from within your own web design.

To contrast with that easy situation, there are several CyberOffice interfaces that are consumer-accessed via hyperlinks as embedded within emails (these are emails that your system will be creating and sending to the consumer).⁴ Since these emailed hyperlinks directly reference Rossware machinery (and not elements that reside directly within your website), it is a somewhat more complex matter to make the interfaces appear within pages of your website.

Okay, it is slightly more complex, but is still readily doable. Basically, it involves creating the particular pages within which you want these interfaces to appear (i.e., "container pages"), and including within them (specifically, within such pages' underlying HTML code) a few little strings of java script. It is these little text strings (of java script) that will allow your designated pages to receive (and properly "play") the Rossware interfaces that your emailed hyperlinks call to.

We have a nice little document/tool that's designed to help you with these scripts, and in understanding how to insert them:

<http://rossware.net/MiniManuals/ScriptKit/>

⁴ In particular, Scenarios 2 through 4 involve emailing to request initial booking on a third-party-dispatched job, emailing to request re-scheduling after parts arrive, and emailing to request appointment confirmation. Scenario 5 involves sending an email that invites a consumer to click in order to track his/her technician on the day of the appointment. Scenario 6 involves sending an email that invites a consumer to click in order to check on job status, after a technician visit that failed to result in completion.

One other element is to inform CyberLink itself of the particular container pages you've setup for each involved purpose. The above-referenced document also instructs in that simple task.⁵

BTW, though our topic in this little sub-section has specifically concerned the objective of making system-created and email-linked interfaces appear within the context of your own webpages, there is another situation you may want to employ. Specifically, you may have occasion where wanting to embed the Scenario 1 (initial job-creation and booking) interface within one of your own webpages, but when called from a hyperlinked context *external from* your own website.

Suppose, for example, you have a property management company that uses its own custom software, and they want to have a button within which they may click on to instantly be in your scheduling interface. Or you have a dealer that similarly wants a button. Or you are in email correspondence with a potential customer, and you want to reply with something along the lines of: "Sure, we can do that; just go ahead and book your job by *clicking on this link*." In any such case, you could make a hyperlink that: (a) goes to your own webpage where there is a further button to click on for scheduling (in which case embedding the resulting interface within your webpage is simple); or (b) directs to the naked (not embedded within your webpage) initial booking interface.⁶ But, obviously, neither would be the desired, external-from-your-website, direct link to an *embedded* Scenario-1 interface.

To achieve that further purpose, employ the same webpage that you've otherwise designed to embed Scenarios 2 through 4, but in the inserted java script employ a single line of added text. The above-referenced ScriptKit has an option to add this line (labeled "Include line to enable external calls to Scenario-1"). Then, for an external hyperlink to access your embedded Scenario-1 interface, simply make a call directly to that Scenario-2-through-4 page (which is now a Scenario-1 page as well; that added line of script essentially makes this into its default presentation).

Customizing Text as Presented to the Consumer

In several contexts CyberOffice presents the consumer with communicative email text: sentences and paragraphs that are designed to convey important elements of meaning. We've done our best to pre-"can" this text for wide acceptance and optimum clarity.

However, we recognize you might want the text presented differently. Thus, we've configured the system to allow customization. To setup for such customization is quite easy.

For any situation where you wish to change from the standard/default text, do the following:

1. Create the text you want for that scenario (you may use NotePad, WordPad, Word or any other text editor for this purpose);
2. Within the text, include FieldNames for where particular text (specific to the circumstance as involved in any specific instance) will be inserted; and
3. Save as a raw text file, using the required Filename, and within the \sd\netdata folder on your ServiceDesk server drive.

To give you specific guidance as needed for each of the scenarios, we provide the following tables. Please notice that some emails are sent by the CyberLink utility, while others are sent by ServiceDesk itself.

⁵ Basically, it's as simple as filling-in boxes, as provides within the SD-CyberLink utility, with text that indicates the URLs for the particular pages you've made. And how it works (if you're curious) is, for each applicable context, when called via hyperlink, underlying Rossware machinery looks to see what container page (if any) you've specified within those provided boxes. It then knows to "call" that page, and to embed the CyberOffice operational interface, as then shown, within it. It's the java script within your page that enables the embedding.

⁶ A link such as <http://sched.rossware.net/?id=XXXX> (where "XXXX" is replaced with your own CyberOffice Business ID) would be fully sufficient for that.

Please bear in mind that while we have made the customization easy, most of our users feel no need for it. If you do not, please feel free to skip over the following tables.⁷

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>

⁷ 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 (based on service request from third-party payer).		
Standard Text	Filename to use for custom text	FieldNames you may use
<p>We have received a request from [ThirdPartyName] to perform service as follows:</p> <p>Job # [InvNmbr], [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr]</p> <p>We need to make an appointment to perform this service. If you'll simply click on the following link:</p> <p>[Hyperlink]</p> <p>It will take you to a page on our website, where you can schedule this visit.</p> <p>If unable to schedule via that link, please call us at [CompanyTelNmbr].</p>	MyTextToRequestFirstAppmnt.TXT	[InvNmbr] [ThirdPartyName] [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr] [Hyperlink] [CompanyName] [CompanyTelNmbr] [SenderName]
Scenario 3-A, Request to Re-Schedule After Parts Have Arrived (standard/modern method, requesting that customer do so via web-scheduling interface)		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p>Dear Sir or Madam:</p> <p>We have received parts as needed for the following repair:</p> <p>Job # [InvNmbr], [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr]</p> <p>We need to make an appointment with you, so our technician can complete this repair. If you'll simply click on the following link:</p> <p>[Hyperlink]</p> <p>It will take you to a page on our website, where you can schedule this visit.</p> <p>If unable to schedule via that link, please call us at [CompanyTelNmbr].</p>	MyTextToInformPartsArrived-SchdlByWeb.TXT	[InvNmbr] [UnitMake] [UnitType] [Name] [Address] [CityState] [TelNmbr] [Hyperlink] [CompanyName] [CompanyTelNmbr] [SenderName]

For emails sent by ServiceDesk (Continued)

Scenario 3-B, Request to Re-Schedule After Parts have Arrived (old-fashioned method, simply requesting customer to call [technically not part of CyberOffice])

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 (again, this is not technically a part of CyberOffice)

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 (i.e., modern method, via which the consumer will online confirm expectation for your technician tomorrow),		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p>Dear Sir or Madam:</p> <p>This email is to remind you of your appointment for [AppmntDate] -- and to request your confirmation.</p> <p>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).</p> <p>Please initiate confirmation by clicking on this link (if link does not appear, please enable content):</p> <p>[HyperLink]</p> <p>So that you know, your appointment is presently configured as [PosInSequence] on the roster for technician [TechReference]We estimate he'll be arriving within the following time frame:</p> <p>[EstimatedTimeFrame]</p> <p>He's scheduled for work on the following:</p> <p>[JobDescription]</p> <p>If you are unable to connect and confirm via the provided link, please call us at [CompanyTelNmbr].</p>	<p>MyTextForAppmntCnfrmtn-Automated.TXT</p>	<p>[AppmntDate] [PosInSequence] [TechReference] [TechCode] [EstimatedTimeFrame] [JobDescription] [CompanyTelNmbr] [HyperLink] [UnitType] [UnitMake]</p>
Scenario 4-B, Request to Confirm Appointment Via Direct Reply (i.e., old-fashioned method, technically not part of CyberOffice),		
Standard Text	Filename to use for custom text	Fieldnames you may use
<p>Dear Sir or Madam:</p> <p>This email is to remind you of your appointment for [AppmntDate] -- and to request your confirmation.</p> <p>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).</p> <p>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].</p> <p>So that you know, your appointment is presently configured as [PosInSequence] on the roster for technician [TechReference]We estimate he'll be arriving within the following time frame:</p> <p>[EstimatedTimeFrame]</p> <p>He's scheduled for work on the following:</p> <p>[JobDescription]</p> <p>Thank you. We look forward to receiving your confirmation.</p>	<p>MyTextForAppmntCnfrmtn-MethodManual.TXT</p>	<p>[AppmntDate] [PosInSequence] [TechReference] [EstimatedTimeFrame] [JobDescription] [CompanyTelNmbr] [UnitType] [UnitMake]</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 style="padding-left: 40px;"><i>[Hyperlink]</i></p> <p><i>Sincerely,</i></p> <p><i>[SenderName]</i></p>	<p><i>MyTextToCancelAppmnt-RqstCstmrMkNew.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>[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-Mobile		
Invitation to Complete a Survey (this is considered a CyberOffice function in spite of the fact it's the MobileLink program that does the actual send out)		
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>[UrlForHyperlink]</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>[UriForHyperlink]</i> <i>[UnitType]</i> <i>[UnitMake]</i></p>
Apology for Non-Completion and Invitation to Online-Review JobStatus (this is likewise considered to be primarily a CyberOffice function, in spite of the fact it's the MobileLink program that does the actual send)		
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 ([UriForWebsite]), or (for a faster path on this particular job) just click on this link:</p> <p>[UrlForHyperlink]</p> <p>Sincerely,</p> <p>The staff at [CompanyName].</p>	<p><i>MyTextForNonCompletion-Mobile.TXT</i></p>	<p><i>[UriForJobStatus]</i> <i>[UriForWebsite]</i> <i>[CompanyName]</i></p>

Submission of a Mobile Ticket (this is not really a CyberOffice function at all; however, we place the instruction here, anyway, because it fits best with other instructions regarding how to customize text as contained in auto-sent emails)		
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]⁸</i> <i>[InvNmbr]</i> <i>[UnitType]</i> <i>[UnitMake]</i></p>

When making your own text for any of these scenarios, be sure to keep your fieldname tags enclosed in square brackets, just as you see it done in the standard text.

Adding Tech-Pictures to Appointment-Confirmation Emails

This is one Mrs. Consumer loves: having a picture of the technician before he arrives. It adds a safety element: she can look past her door and be confident it's really your guy, before opening, because she's already seen a picture of him. It also adds nicely to the aura of professionalism surrounding your company.

To setup for inclusion of tech pictures is very simple. At core, all you must do is place the desired picture (as appropriate to any particular tech) in the correct folder online. When you request sending of confirmation emails in ServiceDesk, it will look in this folder for a picture corresponding to the applicable tech. If it finds the picture, it will include it in the email. Otherwise, it will proceed per normal.

In regard to each tech picture, there are some caveats.

1. **Image Size:** Tech pictures will display within the email at a size of 240 x 360 pixels. You will have best results if providing pictures in exactly that size. (If your provided picture has less resolution, it is likely to look blurry in the email; if more, the greater resolution will be wasted; if your ratio of width-to-height is different, there will be proportional distortion.)
2. **Image Format:** Each picture must be in jpeg format (i.e., with a ".jpg" extension).
3. **Image FileName:** Each filename must consist of your company's CyberOffice UserID, then a hyphen, then the two-letter code as applicable to the tech whose picture it is. As an example, at Rossware our test account UserID is 1001, and my own two-letter tech code is "GR". Thus, a FileName for my image and as connected to the Rossware's test account must be named "1001-GR.jpg".
4. **Image FileSize:** Each image file should not consume more than 50 kilobytes. For so small an image, it will in all likelihood consume less.
5. **Image Placement:** Each image file must be placed in a particular location on the Rossware server. You needn't worry what this location is. Just use your My.Rossware.net login, where an interface is provided (just use the menu there) whereby you can upload files to this location, and/or delete or replace as wanted.⁹

⁸ The actual text as substituted for this field will be "invoice", "receipt" or "estimate", as applicable to the circumstance.

⁹ As of 5/29/14, this interface has not yet been created (it's possible it will have been created by the time you read this, so it's worth checking). Until that interface is created, there's an interim method to upload your pics. Each may be emailed to techimages@rossware.net. It does not matter what's in the text or the subject line of each email, but it must be one pic per email; the pic must be an attachment to the email, and the attached pic must be named to precisely fit the described naming convention (including match for upper or lower case, as indicated). If you send a new pic that bears the same name as one prior sent, your new pic will replace the prior one. If you wish to verify that a pic has been uploaded via this method, you may use this url format (you may copy from here and paste into your web browser, and replace all bracket-indicated text

That's really all you need to know about setup. Rossware machinery takes care of the rest.

To be more specific, when ServiceDesk is creating a confirmation email, and when it finds a picture exists for the assigned tech, it inserts that picture within the email just after the email's reference to the tech's name (inserting a double-line space both before and after the picture). This makes for a nice appearance, and will work with either the default confirmation text or your own customized text.

Enhancing Collection of Email Addresses

It's quite obvious that much of the automation, as here discussed, depends on having your customer's email address. For customers who've initiated their jobs online, that's not an issue (the email address comes, part and parcel, with the job).

For customers who order their service conventionally, by contrast (i.e., via telephone), your call-takers must ask for a new item of information. You'll have to overcome some inertia, in this regard, because your call-takers are not used to doing it, and we all know human nature. Certainly, you could institute some reward program to encourage call-takers to change their habits, but our thinking is that the most important factor is assuring they are trained to ask for the email address in a manner that keeps both they and the customer comfortable. Much of that effort, we believe, is teaching them how to use optimum dialog.

For example, one way of requesting the email address would be as follows:

“Just so you know, Mrs. Jones, our primary means of communicating with you during the course of this repair will be via email, so I'll need that address too, please.”

You should teach your call-takers that, with so simple a statement, the consumer is simultaneously assured you have a valid need for her email, and she's put on notice she should be checking it while the repair is pending.

An alternative dialog, after having asked for and received regular address and telephone numbers, could be:

“I also you need your email address. The reason is we'll use it to keep you apprised of what's going on with your repair. We'll even email to remind you of the appointment the night before.”

A little role-playing and rehearsal with your call-takers is likely all you'll need to get them going. Maybe even make a party of it, with refreshments, and so on.

You likely also should include a little practice as to how to react when a customer says they have no email. Our thinking is a simple reaction such as this should suffice:

“Very well then, we'll just have to communicate with you the old-fashioned way.”

Don't underestimate the effectiveness of role-playing, especially in a group setting. It may seem corny, but it works. On top of that, if you have some kind of special meeting for the purpose, it will imprint far more indelibly in your call-takers' minds that, henceforth, they really will be doing their jobs differently in this respect.

One more suggestion is that you role-play how to give assurances when a customer is worried that her email address might be used for marketing. Actually, you first need to decide what your policy will be in that regard. Most obviously, you'll never share the email address with others, and that can be one level of assurance for the customer. But an intermediate question is whether you'll allow yourself to use the email address for your own marketing. Our recommendation is no, for this allows your call-takers to assure the customer that the email will only be used for managing the job. But you need to decide (and inform your call-

[including brackets] with text as indicated): [http://sched.rossware.net/TechImages/?UserID=\[your-4-digit-user-ID\]&TechCode=\[your-techs-two-letter-abbreviation\]](http://sched.rossware.net/TechImages/?UserID=[your-4-digit-user-ID]&TechCode=[your-techs-two-letter-abbreviation])

takers), so they'll know just how much they can honestly promise. Be sure you rehearse with them, so they'll know how to do it optimally.

Our estimation is that, if you follow suggestions outlined here, you'll be able to acquire email addresses in at least 90 percent of cases where consumers phone in seeking service. That's now, in 2012. In a very few years, we figure, it should get extremely close to 100 percent.

Of course, today that is only one method of receiving job orders. In particular, you may have a significant percentage of orders coming from home warranty companies (hopefully, automated via our EmailedDispatchReceiver). You may have another percentage coming directly from manufacturers (hopefully, automated via our DispatchLink utilities).

Regardless of the method, it will obviously be strongly to your advantage if these third-party vendors of service provide the consumer's email address, as an added element in the information conveyed to you. For any that do not do so presently, our suggestion is that you beg, plead, kick and cajole—seeking to persuade them to do so.

Remember, yours is not the only voice. If you're pestering a particular entity (like, say, American Home Shield), and so are several of your compatriots, there's a hope (at least) that eventually such voices will be heard (if you're curious, at Rosswire we've long been on the campaign).

Suggestions for Enhanced Marketing

To the consumer, scheduling on-line can be a huge convenience and attraction. For that reason, we suggest promoting the concept broadly. Advertise the ability (with appropriate url) on your business cards and invoices, in your yellow pages ads, on stickers that are attached to the machine that's been repaired, on promo magnets, and so on.

On your website directly, we suggest making the ability to directly book *very prominent*. It's a big sales feature, after all. In fact, if you have one of the fancy websites with several different pages, it's likely a good idea to have a big prominent button on *every single page*.

We also suggest modifying your recorded voice greetings to inform consumers that instead of waiting for your return call or in the queue, they can go on-line *immediately* to schedule their repair. No doubt, a good many consumers will say "Yea, that's even better." They'll hang up and do it post haste—thus assuring you actually get the job (i.e., they won't call someone else after losing patience when waiting to communicate with you). Plus, your queue will be trimmed for others.

You might also train your techs to casually ask the consumer, as they're engaged in conversation, if the job was booked on-line. If the answer is no, that will lead (quite naturally) to discussion of the fact that it was an option.

All of this should further distinguish you, and give you a significant edge over the competition.

Beyond direct-to-the-consumer promotion, don't forget those who order service (or might *like* to do so) on behalf of consumers. Property managers are one strong possibility (how much more would they like to be able just to go on-line and order service?).

Most particularly, what about those local dealers that you'd like to have always send work your way, instead of to a competitor? Go there. Show the sales personnel how easily and immediately they can book a job for their customer. Sales people *want* to be heroes. Give them the means by which to do so, and they'll love you for it. More importantly, you can then all but count on the work being yours.

Other Surprising Uses:

One day Karie and I, here, were surprised to learn that an early adopter of on-line scheduling was using it for a purpose we'd not thought of. He employs a couple of gals that handle incoming calls from their homes.

Instead of bothering to network them into his office, he simply has them go on-line to his scheduling page, and book calls in that manner.

It's possible you could have a commercial answering service book calls similarly. We're not sure of all the potential variations, but we're betting that, with the imagination of all you clever folks out there, we'll hear of still more cool ideas. Please let us know.