

User-Defined Email and SMS Templates, How to Create and Use

Rossware systems offer you a plethora of automated and semi-automated customer communications (whether by email, SMS or robo-calling), as specifically applicable to a large range of particular operational contexts.

In spite of how large is that range of defined contexts, it's possible you may have contexts you have personally defined, where you want a particular kind of communication to go out in repeated instances. That's what this capability is for.

The simple concept is you make your own templates (think of them as being kind of like form letters) for each particular context where you want to be able to use such a repeated-each-time-for-the-same-situation communication. You can make ones for use in emails and ones for use in SMS text messaging.

General Parameters of Template Creation

You may make and use as many different templates as you wish. Each template is based on its own individual document. You will create each such document and save to this folder:

`\\sd\EmailCustomElements\EmailTemplates`

Templates for SMS text-messaging must be in *plain-text* format and saved with a ".txt" extension. NotePad is likely to be the most convenient application for creating, editing and saving in this format (its default Save is, in fact, with a ".txt" extension).

Templates for emailing must be in *RichTextFormat* and saved with a ".rtf" extension. WordPad is likely to be the most convenient application for creating, editing and saving in this format (its default Save is, in fact, with a ".rtf" extension).

You should pick filenames, as you save, that are descriptive of the template you have created. It is these filenames that will be displayed to the user, to choose from, when they wish to use a template.

Additionally, you may want to include within the file name an acronym that will stand as a short-hand reference for the template in question. To designate this short-hand reference, simply append it at the end of the

filename, but with separation from the longer description via an underscore. For example:

IntroductionToHomeWarrantyAssignedCustomer_ITHWAC.rtf

would be a nicely descriptive file name, while simultaneously providing an acronym (in this case "ITHWAC") for abbreviated reference.

This abbreviated reference, in fact, has an operative purpose. If it is present, it provides a signal to the system that, when a text-message or email goes out via a template-file that bears such a short-hand reference, the system should automatically add a note to the underlying JobRecord's historical narrative. If, for example, an email was sent using a template based on the file name as shown above, the system would add a historical note similar to this:

6/27/17 7:37 GR: Emailed w/ ITHWAC template

Absent such a short-hand designation in the file name, the system will refrain from adding a historical entry.

So far as creating the templates themselves, simply type (using WordPad or NotePad, as appropriate) the text you want, and in the format you want.

Including Insertion Fields

As you create this text, you will likely want to use one or more "merge" fields. These are places in the text that, depending on what is the job setup and circumstance, will be filled-in with contextually appropriate text. To designate where you want your text replaced with contextually appropriate text, you must type the precise name of a field that we have advance-defined, and have it enclosed in brackets. Here is the list of fields we have defined for your potential use in this context:

[ThirdPartyName] (if there is a third-party payer, this text in your template will be replaced by that third-party's name)

[ThirdPartyPO] (if there is a P.O. Number, this text in your template will be replaced by that P.O. Number)

[ThirdPartyDeductible] (if there is a deductible amount, this text in your template will be replaced by that deductible amount)

[InvNmbr]" (this text, if in your template text, will be replaced by the applicable JobRecord's Invoice Number)

[UnitType] (this text, if in your template text, will be replaced by the machine type description)

[UnitMake] (this text, if in your template text, will be replaced by the machine type description)

[Name] (this text, if in your template text, will be replaced by the customer's name)

[Address] (this text, if in your template text, will be replaced by the customer's address)

[CityState] (this text, if in your template text, will be replaced by the customer's city/state description)

[TelNمبر] (this text, if in your template text, will be replaced by the customer's telephone number)

[CompanyName] (this text, if in your template text, will be replaced by your company's own name)

[CompanyTelNمبر] (this text, if in your template text, will be replaced by your company's telephone number)

[SenderName] (this text, if in your template text, will be replaced by the name of the person who is sending the item)

[AppmntDate] (this text, if in your template text, will be replaced by a conversational-sounding description of the appointment's day, e.g., "Saturday the 12th")

[EstimatedTimeFrame] (this text, if in your template text, will be replaced by a conversational-sounding description of the appointment's time frame)

[JobDescription] (this text, if in your template text, will be replaced by text that is nicely formatted to indicate the JobRecord number, type and make of machine being serviced, where the service is being performed, etc.):

Providing for an Email Subject Line

One more detail in regard to your template text concerns emailing (but not text-messaging). It concerns emailing because emails always need a subject line. Thus, your templates as setup for emailing must include a designation of what the subject line should be. To so designate is very easy. Just include some text that is enclosed between "less-than" and "greater-

than" signs (i.e., "<" and ">"). The system will know to separate out this text (from what you intend as body text) and use it as the subject line.¹

An Example:

Based on all the above, an operative template as setup for emailing might look something like this:

Dear [Name]:

We have received a request from [ThirdPartyName] to repair your [UnitMake] [UnitType]. We are scheduled to be at your home [EstimatedTimeFrame] on [AppmntDate]. We ask you to please be sure you are there, that the machine is accessible for service, and that you are prepared to pay the [ThirdPartyDeductible] deductible.

Sincerely,

[SenderName] <A Message from [CompanyName]>

In regard to setting up templates for text-messaging, please remember that particular context has a 160-character limit.

Use From Within ServiceDesk

To use these templates (once you have them setup) is a piece of cake. From any JobRecord (current or archived), do a **Ctrl/Rt-Click** on an email address or telephone number. If it's an email address, the system will present a list of the filenames you have created with a ".rtf" extension. If it's a telephone number, the system will present a list of the filenames you have created with a ".txt" extension. Simply pick the file/template you want, and the system will open a composition window where you may review the merged text (and edit if desired) before clicking to send.

It's that simple. Hope you enjoy.

¹ Please assure this subject-line text has no special formatting, such as bold, underlining, special character sizing, etc. Subject-line text needs to be plain text. The rest of your email template text may contain all the special formatting you wish to employ.

A Particular and Special Kind of Template

There is a particular context in ServiceDesk that will look for a particular kind of template, and this one does not depend on using the **Ctrl/Rt-Click** method as above described.

It's when you are creating a JobRecord from a Callsheet.

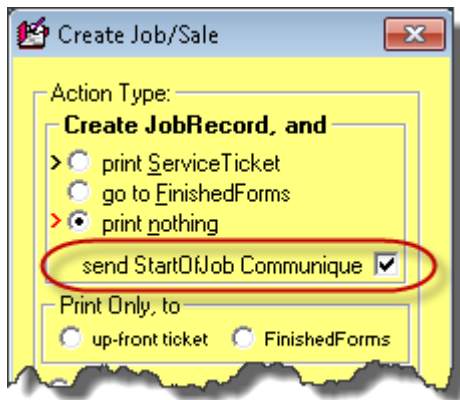
At that moment, if the underlying information is setup to describe a COD job (and if there is an email target in the information for the customer), the system look to see if you have created a user-defined email template with this particular filename:

StartOfJobCommunique_COD.rtf

If, on the other hand, the underlying information is setup to describe a 3rd Party-Payer job (and if there is an email target in the information for the go-to location) , the system look to see if you have created a user-defined email template with this particular filename:

StartOfJobCommunique_3rdParty.rtf

If, in either circumstance, the system sees the filename it is looking for, it will automatically activate and check this box in the *Create Job/Sale* form:



Thus, when your CSR consents to create the JobRecord (and assuming he/she does not un-check that box), the system will simultaneously open an email compose window, and populate it correctly using the template that's specified.