

iSupport[®] Training Course

CREATING AND USING CORRESPONDENCE TEMPLATES

DESCRIPTION:

Save technician time and eliminate unnecessary repetitive tasks by creating manual and automated correspondence templates. Create prepopulated content and include iSupport data. This course will give you a thorough understanding of how correspondence can be used to streamline activities. This course typically runs up to one hour.

TOPICS COVERED:

- Scenarios for Using Correspondence Templates
- Creating Correspondence Templates
- Restricting Availability
- Including Data from iSupport Values
- Including a Signature Block
- Using Correspondence Templates in iSupport
- Viewing Correspondence Documents
- Q&A as Needed

COST: \$200 per seat
LOCATION: Online
SCHEDULE: 2-5 days in advance

CREATING AND USING CORRESPONDENCE TEMPLATES

AGENDA:

Scenarios for using Correspondence Templates

- Identifying commonly-sent emails

Creating a template

- Defining the Basics
 - o Restrictions on sending correspondence
 - o How to prohibit editing a template
 - o Making the template active
 - o Previewing the correspondence
- Creating the correspondence message
 - o Including data from iSupport Values
 - + Incident
 - + Customer
 - + Problem (if enabled)
 - + Change (if enabled)
 - o Attachments

Using Correspondence Templates

- Selecting templates in:
 - o Incident
 - o Customer
 - o Problem (if enabled)
 - o Change (if enabled)

Viewing Correspondence Documents

Q & A as Needed