



Email Response and Customer Interaction Solution

Agent Quick Start Guide

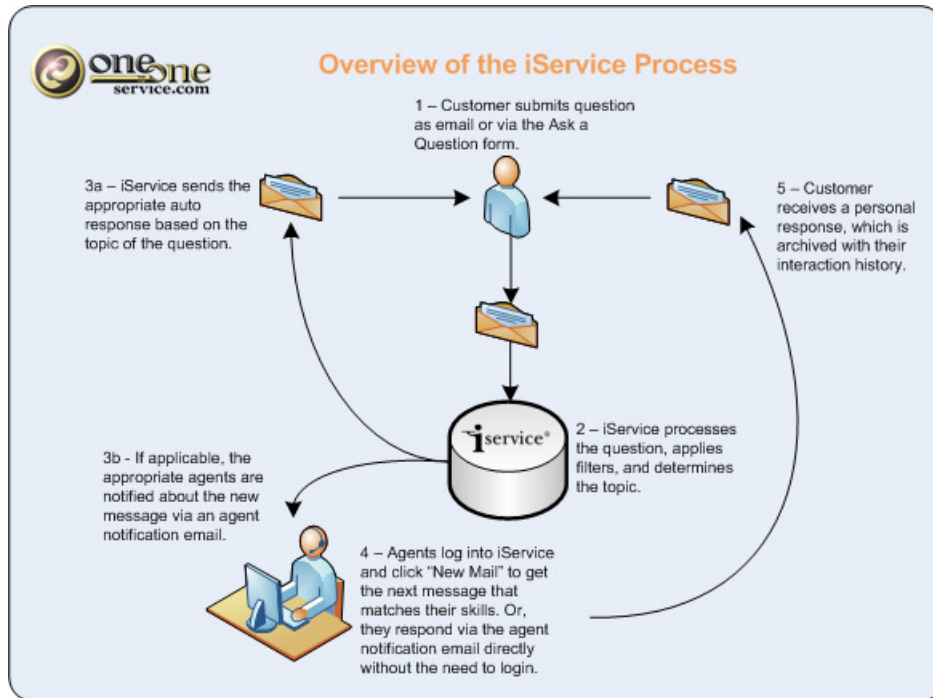
Table of Contents

<i>Step 1 Familiarize yourself with the iService process flow.....</i>	<i>3</i>
<i>Step 2 Understand the Agent Notification auto response</i>	<i>4</i>
<i>Step 3 Understand the three options for responding.....</i>	<i>5</i>
Option 1 - Use the Forward to External Page.	5
Option 2 – Reply to the Email.	6
Option 3 – Log into iService and use the Message Queue page.....	7

Step 1 Familiarize yourself with the iService process flow

iService is a web-based customer interaction solution that helps your customers find answer, submit questions, and manage their overall interaction with your organization. Before we review the various options for responding to customer inquiries, it is helpful to understand the overall flow of messages in the system.

The following five-step diagram illustrates how customers generally interact with iService and company service representatives (CSRs) as they receive answers to their questions.



Agents have several options for responding to these incoming questions. If you are a full-time support representative that manages email response, you will answer questions from within the iService web interface. The web interface provides a variety of features that are explained in more detail within a separate and more detailed iService User Guide.

This document is designed to provide a quick overview for agents that respond to a small number of messages and are notified of new mail via the Agent Notification auto response.

Step 2 Understand the Agent Notification auto response

As shown in the diagram above, when new questions arrive iService can send an automated notification to all agents that have the skills and access rights to provide the answer. This notification message is customized for each installation, but might look similar to the message below. This notification provides three options for responding, and each option will be illustrated in the section titled Step 3 below.

----- **New Message Arrived** -----

A new message has been submitted through the YourSite website, and you are the person designated to provide the response. You can answer this in one of three ways.

(1) You can answer this by clicking the link below, or copying it into your browser:
<https://yoursite.iServiceCRM.com/forward.aspx?id=29ee80adsfsd-478wege-asd784>

(2) You can log into iService using your email address as your login and enter your answer in the Message Queue page <https://yoursite.iServiceCRM.com>

(3) You can provide your response by simply replying to this message. However, **you must type your response between the Begin Answer and Answer End markers below.**

[Notify#: 1503]

==== Begin Answer ==== 9bc1f84-bdf9-424c-87dc-0d6bfae9b7a1

On 4/17/2009 2:10:23 PM, Customer One <customer1@1to1service.com> wrote:

*** Contact Information ***
 First Name: Customer
 Last Name: One
 Email: customer1@1to1service.com
 Phone: 217-398-6245
 Company: One-to-One Service
 Position / Title:
 Address 1: PO Box 2231
 Address 2:
 City: champaign
 State / Province: IL
 Zip / Postal Code: 61825
 Country: United States

*** Customer Question ***
 This is a test message.

==== Answer End ==== 9bc1f84-bdf9-424c-87dc-0d6bfae9b7a1

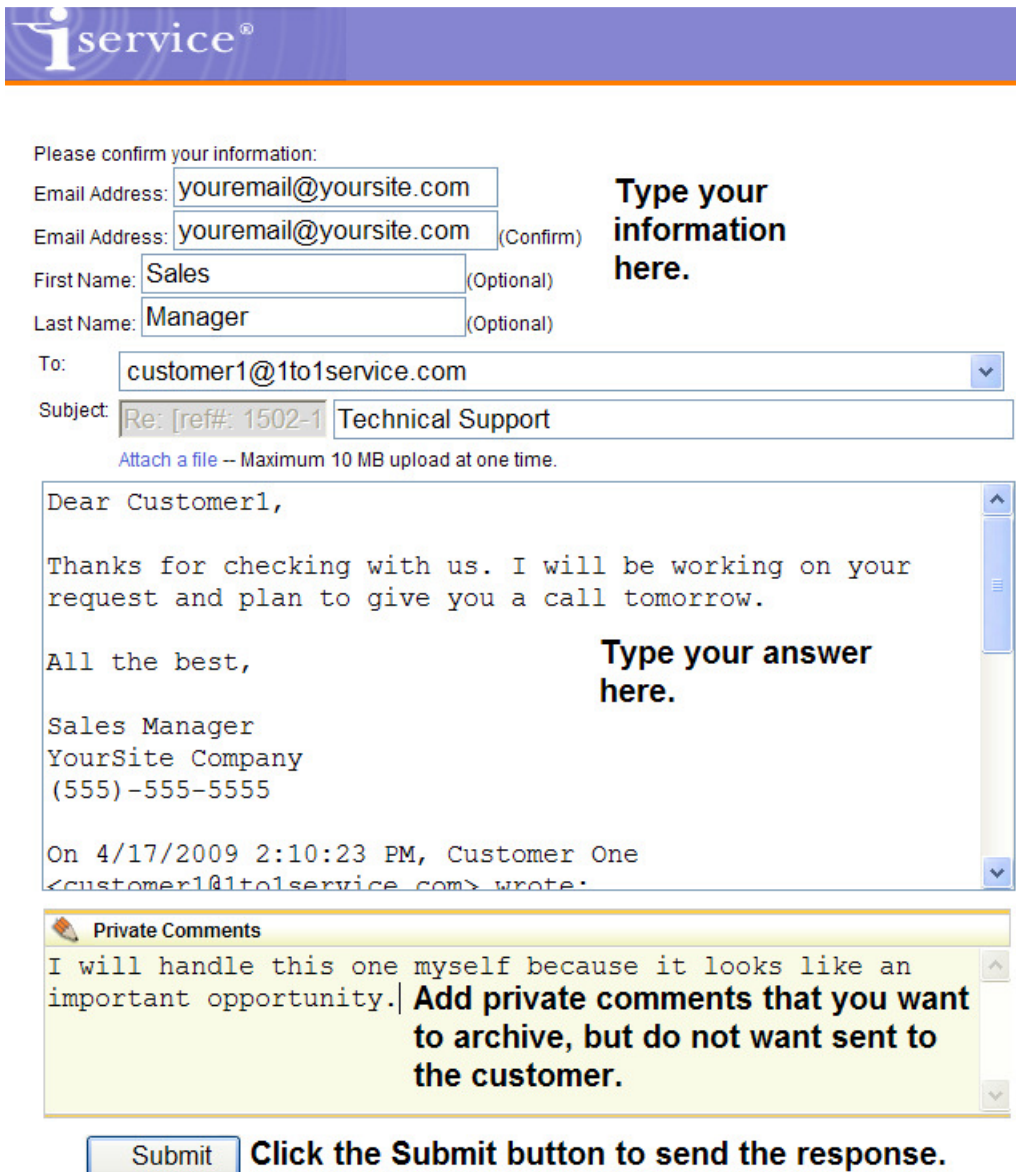
Step 3 Understand the three options for responding

When you receive an Agent Notification auto response indicating a new message has arrived, there are typically three ways to provide the answer.

Option 1 - Use the Forward to External Page.

iService provides agents the ability to forward messages to other people so they can provide the answer. A web page is presented where the designated person can type the answer.

A link to this page can be incorporated into the Agent Notification auto response, which allows the agent to click the link and type the response. This also allows the agent to forward the new message notification to another person and ask them to provide the response. An example of this External Answer page is shown below.

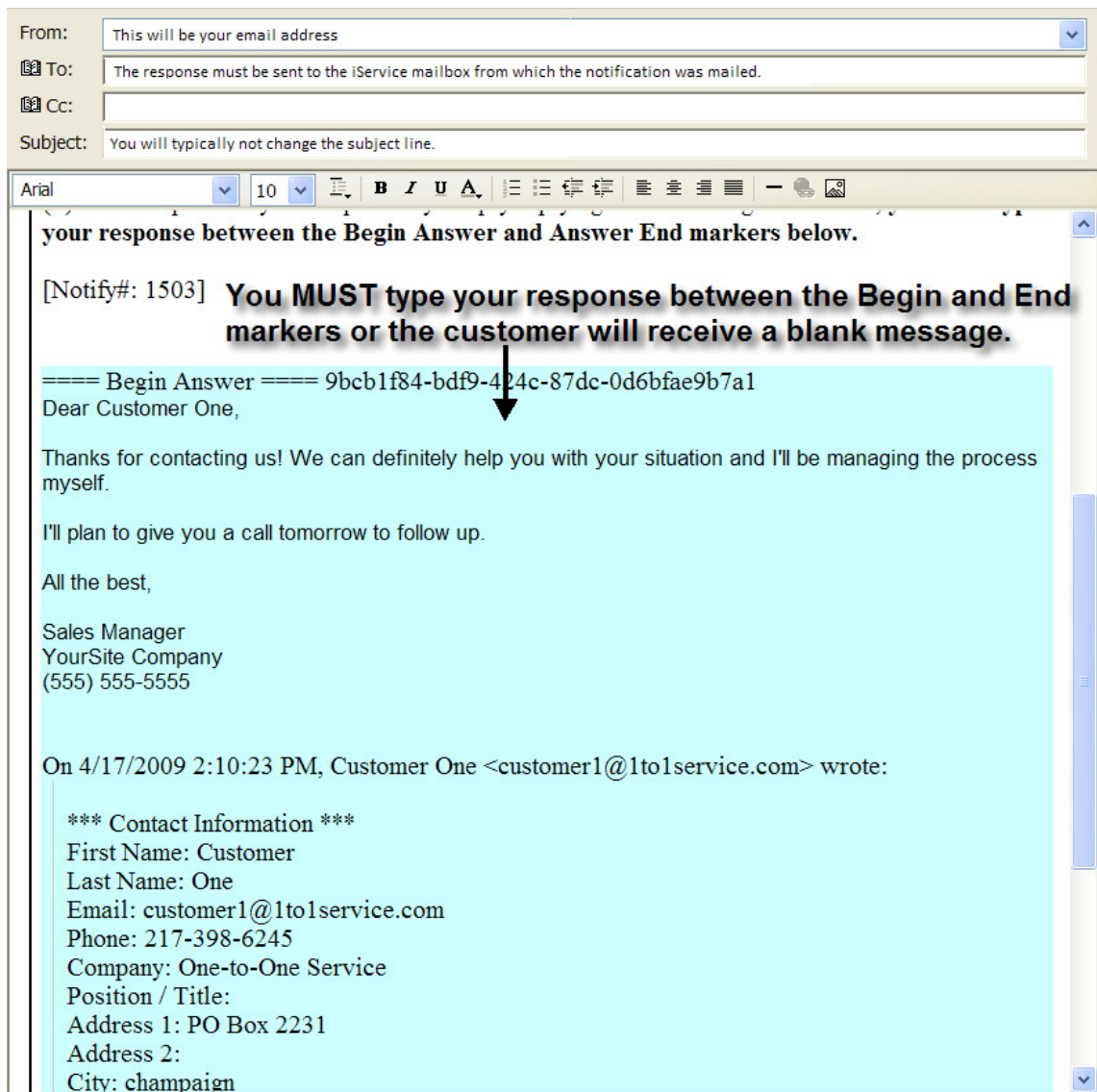


The screenshot shows a web form for providing an external answer. At the top, the iService logo is displayed. Below it, a message asks the user to confirm their information. The form includes several input fields: Email Address (youremail@yoursite.com), Email Address (youremail@yoursite.com) (Confirm), First Name (Sales) (Optional), and Last Name (Manager) (Optional). To the right of these fields, a text prompt says "Type your information here." Below the name fields is a "To:" dropdown menu with "customer1@1to1service.com" selected. The "Subject:" field contains "Re: [ref#: 1502-1] Technical Support". Below the subject field is a link: "Attach a file -- Maximum 10 MB upload at one time." The main body of the form is a large text area containing the following text: "Dear Customer1, Thanks for checking with us. I will be working on your request and plan to give you a call tomorrow. All the best, Sales Manager YourSite Company (555)-555-5555 On 4/17/2009 2:10:23 PM, Customer One <customer1@1to1service.com> wrote:". To the right of this text area, a text prompt says "Type your answer here." Below the text area is a "Private Comments" section with a text area containing "I will handle this one myself because it looks like an important opportunity." To the right of this text area, a text prompt says "Add private comments that you want to archive, but do not want sent to the customer." At the bottom of the form is a "Submit" button and a text prompt: "Click the Submit button to send the response."

Option 2 – Reply to the Email.

Your Agent Notification message can be configured to allow you to respond to the customer by replying directly to the notification message. This is especially useful if you are on the go and using a Smartphone with limited or no web browser capability.

When responding via email, be sure to type between the Begin and End markers of the message. iService will only send the portion of your response that is typed within this area to the customer.



The screenshot shows an email composition window with the following fields:

- From:** This will be your email address
- To:** The response must be sent to the iService mailbox from which the notification was mailed.
- Cc:**
- Subject:** You will typically not change the subject line.

The email body contains the following text:

your response between the Begin Answer and Answer End markers below.

[Notify#: 1503] **You MUST type your response between the Begin and End markers or the customer will receive a blank message.**

==== Begin Answer ===== 9bc1f84-bdf9-424c-87dc-0d6bfae9b7a1

Dear Customer One,

Thanks for contacting us! We can definitely help you with your situation and I'll be managing the process myself.

I'll plan to give you a call tomorrow to follow up.

All the best,

Sales Manager
YourSite Company
(555) 555-5555

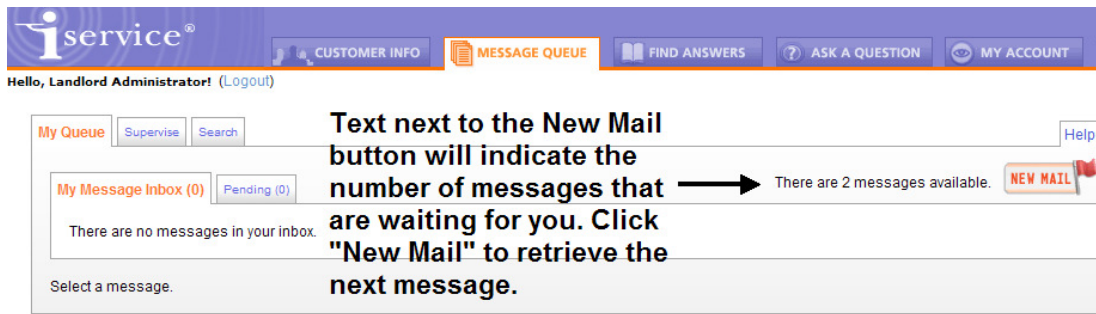
On 4/17/2009 2:10:23 PM, Customer One <customer1@1to1service.com> wrote:

*** Contact Information ***
First Name: Customer
Last Name: One
Email: customer1@1to1service.com
Phone: 217-398-6245
Company: One-to-One Service
Position / Title:
Address 1: PO Box 2231
Address 2:
City: champaign

Option 3 – Log into iService and use the Message Queue page.

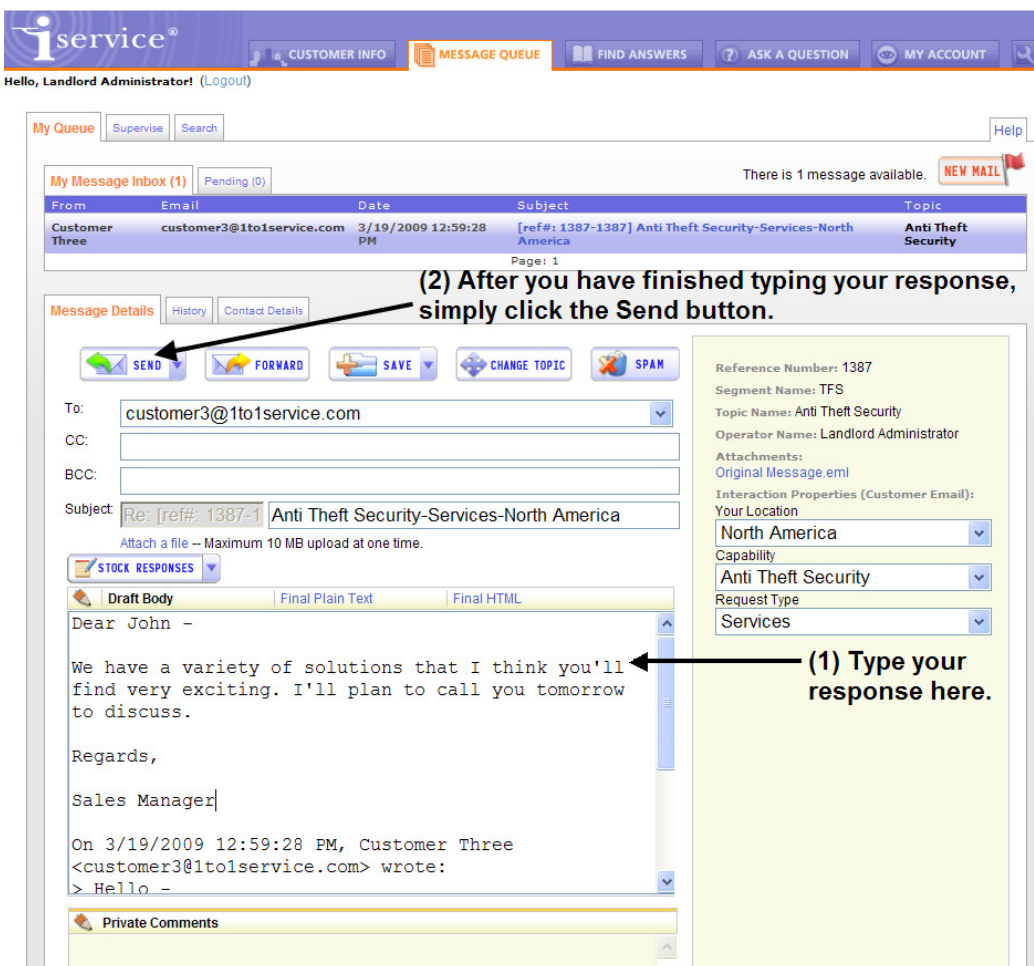
Your Agent Notification should include the URL for your iService website. You can log into iService using your email address, and the password that was provided by your administrator. If you don't know the password you can request that it be reset by clicking on the "Forgot Password" link.

After you log into iService, the default page will be the Message Queue > My Queue page. This page will look similar to the page below. Simply click the New Mail button to retrieve your message.



Text next to the New Mail button will indicate the number of messages that are waiting for you. Click "New Mail" to retrieve the next message.

To provide an answer to the message, type your response in the Draft Body area and then simply click the Send button.



(2) After you have finished typing your response, simply click the Send button.

(1) Type your response here.