

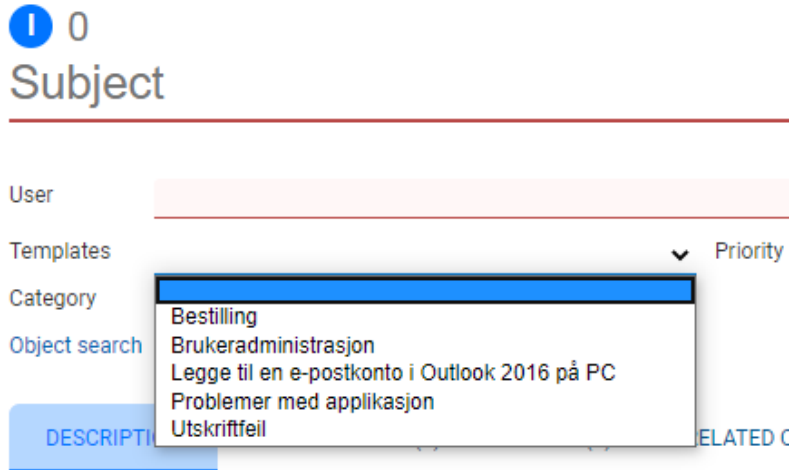
More Service Tips & Trix - Templates

Templates

Templates are used to automatically fill in fields in one case or in quick registration. This way you can save time by creating templates for often repeated Service / cases.

It may be useful to write the pre-defined status of the case in the name of the template.

Templates are available from a drop down menu when registering a new case or working on an existing case

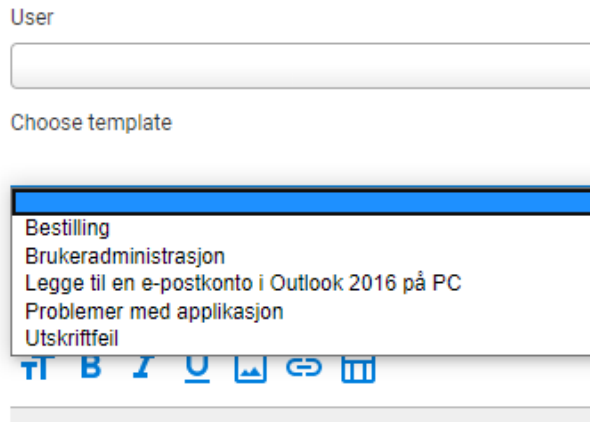


The screenshot shows a web interface for case registration. At the top, there is a blue circle with a white 'I' and a '0' next to it. Below this is the word 'Subject' in a large, bold, grey font. A red horizontal line separates the header from the form fields. The form includes a 'User' field, a 'Templates' dropdown menu, a 'Category' field, and an 'Object search' field. A blue button labeled 'DESCRIPTION' is visible. A dropdown menu is open, showing a list of templates: 'Bestilling', 'Brukeradministrasjon', 'Legge til en e-postkonto i Outlook 2016 på PC', 'Problemer med applikasjon', and 'Utskriftfeil'. To the right of the dropdown menu, the word 'Priority' is visible.

Using Quick Registration, templates can be used from the drop down menu.

When choosing a template, the template will only add text, and does not overwrite what is already in the description field.

Quick Create



The screenshot shows the 'Quick Create' form. It includes a 'User' field, a 'Choose template' dropdown menu, and a text area for the description. A dropdown menu is open, showing a list of templates: 'Bestilling', 'Brukeradministrasjon', 'Legge til en e-postkonto i Outlook 2016 på PC', 'Problemer med applikasjon', and 'Utskriftfeil'. Below the dropdown menu, there are several icons: a blue 'T' icon, a blue 'B' icon, a blue 'I' icon, a blue 'U' icon, a blue 'A' icon, a blue 'G' icon, and a blue 'M' icon.

Create templates

The templates are created / edited under Settings menu Case templates.

Settings

User accounts and roles

Agent

Users

Roles

Groups

Default setup

Team

Customer

Food deliveries

Team

Category

Customers

Appraisers

More Service Portal

Service messages

Object types

Forms

System map

Default setup

Forms

Service Desk

Setup

Categories

Priority

Case flow

Status

Service level

Case templates

FAQ

Download

Template tree structure

Inbox

Returned mail: see transcript for details

Undelivered Mail Returned to Sender

Service messages

Email

Email

Last opened

1 - [Bestilling]

Planned tasks

Admin Admin

John Smith

Agent Status

Admin Admin

Fill in the fields you want the template to contain. You can also leave the descriptions field in the template to be a reminder list for agents of what details are needed in the case.

Register / change templates

Name	Print error
Subject	Can't print
Description	The customer can't print from: Mobil Pc Tynnklient
Log	Check if others have the same problem. Check if print server is ok. Re-add printer. Test print
Solution	
Time consumption	Hours 10 Minutes
Object type / object	Tjeneste ▼ Nettverksskriver ▼
Type	Hendelse ▼
Category	Utskrift ▼
Affects	Bruker ▼
Priority	Medium ▼
Status	Not started ▼
Email user	
Standard Change	☐
Applies to all operating units	☐

NEW

SAVE

DELETE