

ConnectWise Training – ESRM Team

How to communicate and link to service ticket

**Without sending it through the ticket from HBS Scheduling*

Background:

- There are many ways to communicate by email and link to a service ticket you are working on. This document will be using a method that does not send directly from the ticket which in turn is an email from the actual sender and NOT HBS scheduling.
- Reason for this process.... HBS Scheduling emails don't look as professional and get ignored by more people.
- Benefits: communication can happen internally or externally, and the thread of the conversation will be listed in the notes section of the ticket for easy update review and organization

Sending a Customer Email

Service Ticket used in Example: Service Ticket #1581922 - Email to Ticket Testing

- Create a new email from your outlook
- Address how you normally would when emailing a customer
- CC line: must include scheduling@hbs.net
 - I would suggest also including the AM team instead of only the AM, This should include the ISR working on that team as well.
- Subject Line: Company name / Subject of Email / Ticket #0000
- Type your message and send!

Send

From ▼ thoffman@hbs.net

To ● Trisha Hoffman;

Cc ○ Scheduling;

Subject Company name / Test Message to link to ticket / Ticket #1581922

- By having scheduling and an open ticket number, this will show up in the discussion of the ticket

New Note

Discussion 1 Internal 0 Resolution 0 All 1 Customer updated

...

Trisha Hoffman TH
11/16/2022 2:56 PM

This is a test email I am sending as if I were sending an email to a customer.

HEARTLAND
BUSINESS SYSTEMS

Trisha Hoffman - ESRM Coordinator
815 S. 24th Avenue, Suite 400, Wausau, WI 54401
C: (920) 687-4264 Email: thoffman@hbs.net www.hbs.net

✉ Company name Test Message to link to ticket Ticket #1581922.eml

- Fun facts about this:
 - At the bottom of this discussion entry is a link to the email. This will open the outlook email for easy responding for any follow up needed.
 - Updates can easily be found by any team when needed.