

Sending Service Report to Client

Once a Service Call is completed, a PDF copy of it is to be sent to Client via email/fax.

1. On the "Service Call" page, click on "Service Report Form" to view printable format.

Save this report in PDF format.

The image shows a two-step process. The first step is a screenshot of the Salesforce 'Service Call' page for SC - 037950. The page has a top navigation bar with links like 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. Below this is a 'Service Call Detail' section with tabs for 'Information', 'Appointment Details', 'Team Assigned', 'Fault Summary', and 'Service Report'. The 'Information' tab is active, showing fields for SC No, Site Name, Site Contact, Site Contact Phone, Address, Zone, Customer Type, and Remarks. A red arrow points from the 'Service Report Form' tab to the second screenshot.

The second screenshot shows the 'SERVICE REPORT' form. It is a printable format with a header section and a table for details.

SERVICE REPORT			
CLIENT	TEST SITE	REF No.	SC - 037950
ADDRESS	629844		
CSID		TIME IN	11/02/2010 14:00:00
TYPE OF VISIT	Fault	TIME OUT	11/02/2010 17:47:00
FAULT REPORTED / SERVICE REQUEST	FAULT ON IDS REF BLOCK A L3 / TROUBLESHOOTING OF IDS		
FINDINGS / ACTION TAKEN	-CHECKED CONTROL PANEL -CHECKED POWER SUPPLY -CHECKED WIRING AND TAMPERS -CHECKED AND CHANGED BACK THE KABA KEYSWITCH -TESTED KABA KEYSWITCH TO PANEL -SYSTEM NORMAL -OLD KEY NUMBER: SN 126054645 (1 KEY) -NEW KEY NUMBER: SN 126057882 (2 KEYS) -TOOK BACK 3 KEYS		
FOLLOW UP WORK REQUIRED			
SYSTEM(S) CHECKED	Intrusion Detection	TRANSMISSION TYPE	
TESTED WITH CMS		TESTING TIME	
SYSTEM NORMAL?	Yes	IF NO, EXPLAIN	
PAYMENT DETAILS			

2. On the "Service Call" page, scroll down to "Activity History" section, and click "Send An Email".

Service Call: SC - 037950 ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/a0920000006K1Qh

File Edit View Favorites Tools Help

Service Call: SC - 037950... Account: TEST PAYING ACCT...

Office Use Only

System Information

Edit Delete Clone Sharing Customer Signature Service Report Form Create Quotation

Opportunities New Opportunity Opportunities Help

No records to display

Customer Satisfaction Survey New Customer Satisfaction Survey Customer Satisfaction Survey Help

No records to display

Open Activities New Task New Event Open Activities Help

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Cls	SC Complete		<input checked="" type="checkbox"/>	12/02/2010	Not Started	High	Dexine Hu

Activity History Log A Call Mail Merge Send An Email View All Activity History Help

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Tech On-Site Visit		<input type="checkbox"/>	11/02/2010 14:00	Dexine Hu	10/02/2010 17:46

Notes & Attachments New Note Attach File Notes & Attachments Help

No records to display

[^ Back To Top](#)

Always show me [fewer](#) / [more](#) records per related list

start 2 Microsoft Office ... Service Call: SC - 03... DEX -works! Windows Media Player Microsoft Excel EN 3:05 PM

3. Click "Select Template".

Under "Customer Service" folder, select template named "Send Service Report w CSS link to Client".

The image shows two overlapping browser windows from an older version of Windows Internet Explorer. The background window is titled 'Task: Send an Email ~ salesforce.com - Enterprise Edition' and shows the 'Send an Email' task interface. A red arrow labeled '1' points to the 'Select Template' button in the top right of the task area. The foreground window is titled 'Select a Template - Windows Internet Explorer' and shows a list of email templates. A red arrow labeled '2' points to the 'Folder' dropdown menu, which is currently set to 'Customer Service'. A red arrow labeled '3' points to the template 'Send Service Report w CSS link to Client' in the list.

Task: Send an Email

Edit Email

Email Format: Text-Only [[Switch to HTML](#)]

To: []

Related To: Service Call [v] SC - 037950 [v]

Additional To: []

CC: []

BCC: dexine.hu@ademcosecurity.com

Subject: []

Body: []

Select a Template

Name	Type	Description
Case closed notification to sales	HTML	
Case Opened Notification to Acct Owner	HTML	
Preventive Maint Notification - 2 days	HTML	To notify customer 2 days before preventive maintenance appointment date
Preventive Maint Notification - 2 days (AM/PM)	HTML	To notify customer 2 days before preventive maintenance appointment date (AM/PM session)
Preventive Maint Notification - 7 days	HTML	To notify customer 7 days before preventive maintenance appointment date
Preventive Maint Notification - 7 days AM/PM	HTML	To notify customer 7 days before preventive maintenance appointment date (AM/PM)
Send Service Report n Quotation to Client	HTML	
Send Service Report to Client	HTML	
Send Service Report w CSS link to Client	HTML	Email template has Service Report details and CSS link
Service Call Closed	HTML	Sent when Tech completes service report
Site Visit Complete	HTML	Email out when site visit is complete
Thank you for Survey Return	HTML	

4. Attach Service Call/Report in PDF format.

Select Contact Persons to send this email to.

The screenshot shows the 'Task: Send an Email' interface in a Windows Internet Explorer browser. The address bar shows the URL: https://emea.salesforce.com/_ui/core/email/author/EmailAuthor. The browser tabs include 'Task: Send an Email ~ sal...' and 'Account: TEST PAYING ACCT...'. The interface has a green header bar with the title 'Task Send an Email' and a 'Help for this Page' link. Below the header, there are three buttons: 'Send', 'Select Template', and 'Attach File'. A red arrow labeled '4' points to the 'Send' button. Below these buttons is the 'Edit Email' section. It contains fields for 'To' (Contact Test), 'Related To' (Service Call), and 'Additional To:'. A red arrow labeled '2' points to the 'To' field. The 'Related To' field has a dropdown menu showing 'Service Call' and a text field with 'SC - 037950'. Below these are fields for 'CC:' and 'BCC:'. A red arrow labeled '3' points to the 'Additional To:' field. The 'Subject' field contains 'Ademco Service Report - Visit Date : 11/02/2010'. A red box labeled '1. Attach PDF format of Service Call.' points to the 'Attach File' button. Another red box labeled '3. Other relevant external/internal parties could also be copied in this email.' points to the 'Additional To:' field. Below the 'Edit Email' section is a 'Formatting Controls' bar with options for Font, Size, Bold, Italic, Underline, and various text formatting icons. The main body of the email is a text area containing the following text: 'Dear Contact Test, Please refer to the attached Service Report for the visit by Ademco Technical Officer, , on 11/02/2010 to TEST SITE We would appreciate it if you could take 5 minutes to provide feedback on your experience during the visit. [Click here to access the form.](#) If you have require any clarification, please do not hesitate to contact our Customer Service Team at 6224 7377/6224 7379 or via email to service@ademcosecurity.com'. The Windows taskbar at the bottom shows the Start button, several open applications (Microsoft Office, Task: Send an Email, DEX -works!, Windows Media Player, Microsoft Excel), and the system clock showing 3:23 PM.

Task: Send an Email ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/_ui/core/email/author/EmailAuthor

File Edit View Favorites Tools Help

Task: Send an Email ~ sal... Account: TEST PAYING ACCT...

Task Send an Email Help for this Page

Send Select Template Attach File

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2 To Contact Test

Related To Service Call SC - 037950

Additional To:

CC:

BCC:

Subject Ademco Service Report - Visit Date : 11/02/2010

1. Attach PDF format of Service Call.

3. Other relevant external/internal parties could also be copied in this email.

Formatting Controls

Font Size Bold Italic Underline

Dear Contact Test,

Please refer to the attached Service Report for the visit by Ademco Technical Officer, , on 11/02/2010 to TEST SITE

We would appreciate it if you could take 5 minutes to provide feedback on your experience during the visit. [Click here to access the form.](#)

If you have require any clarification, please do not hesitate to contact our Customer Service Team at 6224 7377/6224 7379 or via email to service@ademcosecurity.com

start 2 Microsoft Office ... Task: Send an Email... DEX -works! Windows Media Player Microsoft Excel EN 3:23 PM

If Client has no email account:

a) Under "Notes & Attachments", click on "New Note".

b) Title: "SC sent by Fax"

c) Body: "To ["Names of Contact Persons] at [Fax number]"