Capstone Project: Task 5 Solution

Enhance Task Assignment and Communication

Instructions: Set up automatic assignment of incidents to the Strawberry Support group for Strawberry sFone issues. You will do this using the baseline assignment feature for Services and Service Offerings.

Then, develop an email notification related to new critical sFone incidents assigned to the Strawberry Support group. Afterwards, test to ensure the email sends correctly.

> **Note:** *Refer to Module 6: Enable Productivity*

A. Enable Auto-assignment using Services and Service Offerings

1. Navigate to **All > Configuration > Services**.

2. Select **New**.

3. Populate the form as follows:
   - Name: **Telephone Services**
   - Support Group: **Service Desk**

4. Right-click on the form header, then select **Save**.

> **Note:** *For incidents where the Service is set to Telephone Services, the Assignment group will be automatically assigned to Service Desk.*

5. Scroll down and select **Offerings** tab.

6. Select **New**.

7. Populate the form as follows:
   - Name: **Strawberry sFone**
   - Support Group: **Strawberry Support**

8. Select **Submit**.

> **Note:** *For incidents where the Service offering is set to Strawberry sFone, the Assignment group will be automatically assigned to Strawberry support. The assignment logic first looks for a support group at the Service offering level. If there is no support group on the offering, the assignment group on the Service will be used for the assignment.*

B. Create an sFone Priority 1 Incident Notification

1. Navigate to **All > System Notification > Email > Notifications**.

2. Select **New**.

3. Populate the properties for your new notification:
   - Name: **P1 sFone Incident**
   - Table: **Incident [incident]**
   - Active is **[checked]**

4. From the **When to send** tab, populate the following properties:
   a. Send when: **Record inserted or updated**
   b. Inserted is **[checked]**
   c. Updated is **[unchecked**]

   Conditions:
   d. **Category | is | sFone AND**
   e. **Priority | is | 1 – Critical AND**
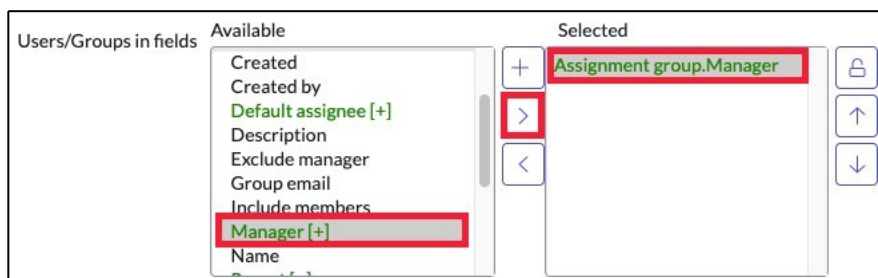   f. **Assignment group | is | Strawberry Support**

5. From the **Who will receive** tab, select the **Unlock** (lock) icon next to **Users/Groups in fields**.

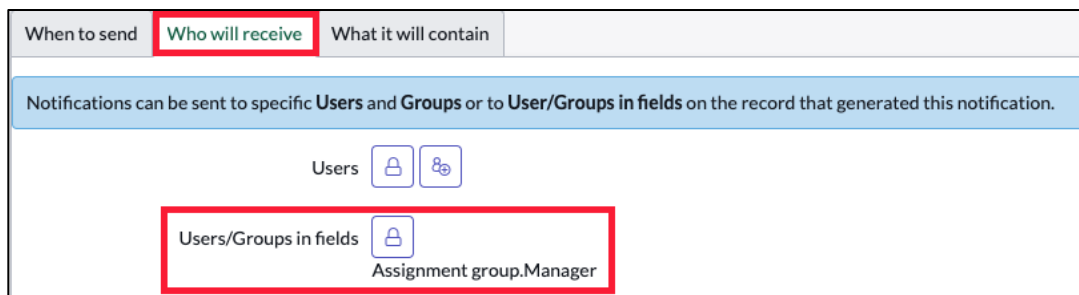6. Scroll down in the Available list, then select **Assignment group [+].**

7. With **Assignment group (+)** selected, select the **Expand Item (+)** icon.
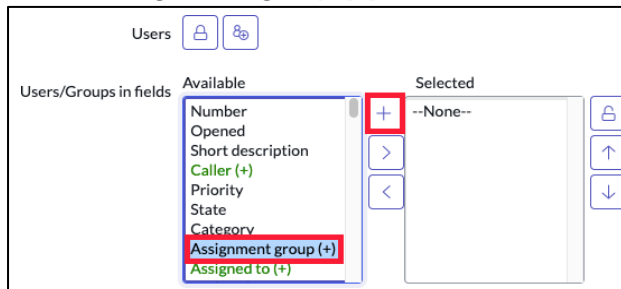
8. From the Available list, scroll down and select **Manager [+]**, then add it to the Selected list.

9. Select the opened lock to **Lock Users/Groups in fields**. Verify your selection.

10. From the **What it will contain** tab, populate the following properties:

11. Subject: **A new P1 sFone Incident has opened: ${number}**

Message HTML:
- **Opened: ${opened_at}**
- **Opened by: ${opened_by}**
- **Short description: ${short_description}**

Note: *The values to the right of each label represent variables which dynamically populate with information directly from the active record. These variables could also have been selected by locating them in the Selected Variables area to the right of the message.*

12. Select **Submit**.

C. Test the Notification

1. Navigate to **All > Incident > Create New**.

2. Fill out the form as follows:
   a. Caller: **Kara Prince**
   b. Category: **sFone**
   c. Service offering: **Strawberry sFone**
   d. Short description: **My sFone is still broken!**
   e. Impact: **1 – High**
   f. Urgency: **1 – High**

3. **Save** the form.

Note: *NOTE: The value for the Assignment group field automatically populated to display Strawberry Support because of the Service offering and the associated support group defined at the beginning*

TASK VERIFICATION

Confirm the email notification was sent by navigating to **All > System Mailboxes > Outbound > Outbox**.

Note: *If you do not see the email, refresh the list (Additional Actions menu > Refresh List). The notification is being sent to Fred Luddy as he is the Manager of the Strawberry Support group, and we dot-walked here when we created the Email Notification.*