Create a Telephone Case

FamilySearch Support System

Family history missionaries receive telephone calls from patrons with family history problems. The goal of FamilySearch is to give answers to family history questions. Each time a patron calls FamilySearch, a case is created to track both the question asked, and the answer given to solve the problem. The FamilySearch Support system keeps track of each case for each contact.

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1. When you answer the telephone, you are representing the Family History Department of The Church of Jesus Christ of Latter-day Saints. As far as the people calling are concerned, you represent the Church, and if you treat them well, the Church has treated them well. Therefore, we suggest the following telephone guidelines.
   a. Answer the telephone within three rings.
   b. Have a pleasant voice. Smile, it makes a difference in your voice.
   c. Speak distinctly.
   d. Answer the call: "Thank you for calling FamilySearch. My name is Elder/Sister _________. I'm happy to help you with your **[choose one**: **FHC** | **Indexing** | **new FamilySearch** | **OFO** | **Research** | **Wiki]** question, but first may I have your name and phone number?"
   e. Obtain and update other contact information as necessary.

2. Be a good listener.
   a. Refer to the caller by name.
   b. Ask questions to understand the problem, but don't interrupt the caller.
   c. If a caller is angry or rude, listen and try to understand the problem. Empathize with the caller. Apologize and acknowledge the problem. Do everything you can to make sure the problem is resolved. Please do not respond in an unkind way, even if the caller is rude to you.
   d. Listen with the Spirit. Remember, you are representing The Church of Jesus Christ of Latter-day Saints.

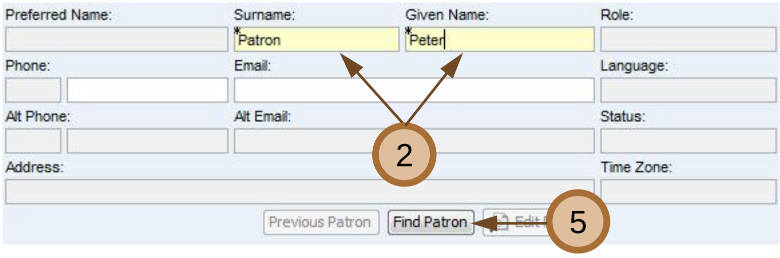
3. Provide as much help as you can.
   a. Keep the caller aware of the progress of the call. If it will take a few minutes for you to find an answer, ask if he or she would like to hold, have you call back, or have you send an answer by e-mail. If you put the caller on hold, thank the caller for waiting.

4. If you are teaching the patron how to solve the problem:
   a. Ask the patron to stay with you as you teach him or her the steps.
   b. Check often with the patron to make sure you are both on the same screen.
   c. Let the patron know they can call back anytime.

5. Before closing a call:
   a. Make sure the answer met the caller's need.
   b. Ask the caller if he or she has anything else you can help with.
   c. Ask the caller if he or she would like you to e-mail the answer to him or her.
   d. Close the call by saying, "Thank you for calling."

Step 1:
Answer the call: "Thank you for calling FamilySearch. My name is Elder/Sister __________. I'm happy to help you with your **[FHC, Indexing, etc.]** question, but first may I have your name and phone number?"

Step 2:
In the upper right, enter the first few letters of the **Surname** and then the **Given Name**.

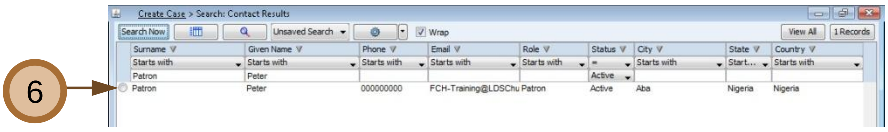


Step 3:
Write down the caller's phone number in case you are disconnected.

Step 4:
Tell the caller, "Please give me a minute to find you in our system."

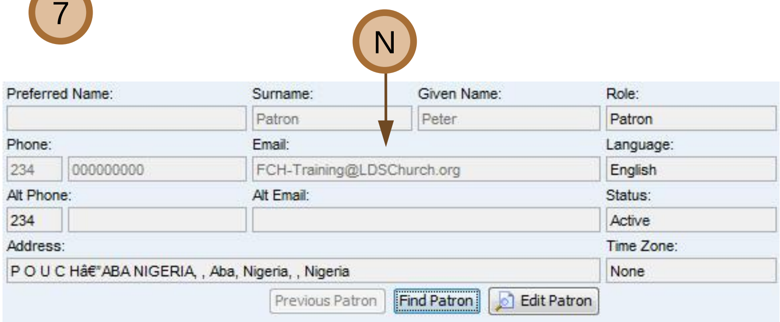
Step 5:
Click **Find Patron**.

Step 6:
If the patron is in the search results list, click the button before his or her name.



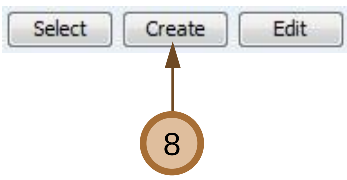
Step 7:
In the lower left, click **Select**.

Note: The contact information will automatically be entered in the patron information fields (upper right).



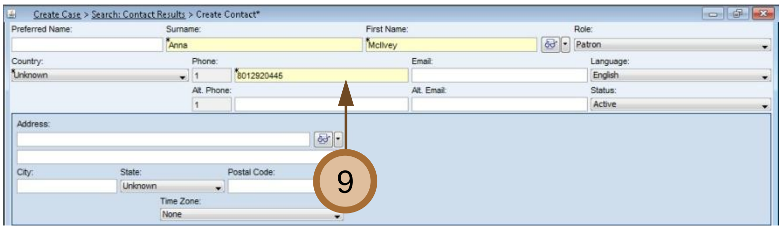
Other cases with the patron as the contact will be displayed (if any).

Step 8:
If the patron is not listed in the search results, click **Create**.



Step 9:
Type information in the patron fields.
Note: The yellow fields are required.

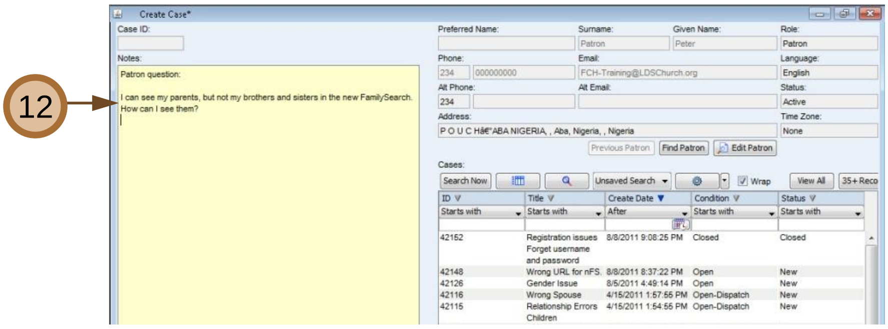
Important: Do not require the patron to give you information he or she does not want to give.



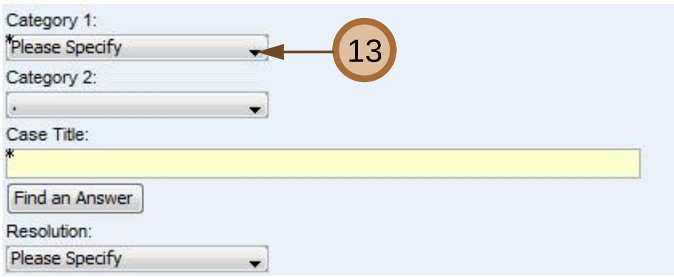
Step 10:
In the lower right, click **Save** to save the new patron information.

Step 11:
Ask the patron, "How may I help you today."

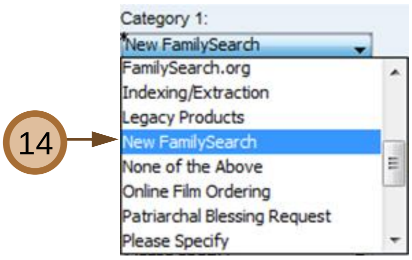
Step 12:
Click in the **Notes** field. Type notes as the patron explains his or her family history problem.



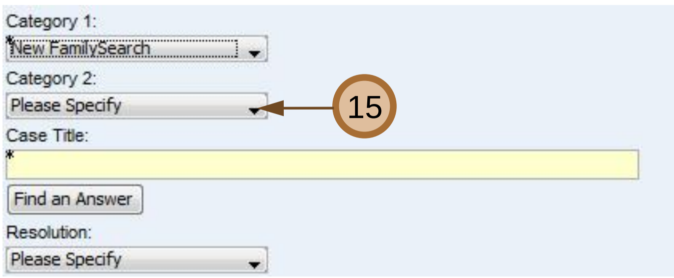
Step 13:
Below the notes field, click the **Category 1** drop-down arrow.



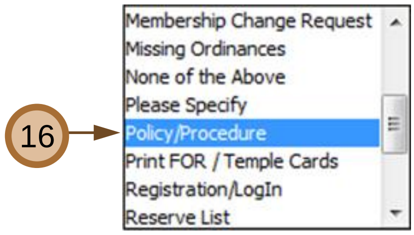
Step 14:
Click a category in the drop-down list.



Step 15:
Click the **Category 2** drop-down arrow.

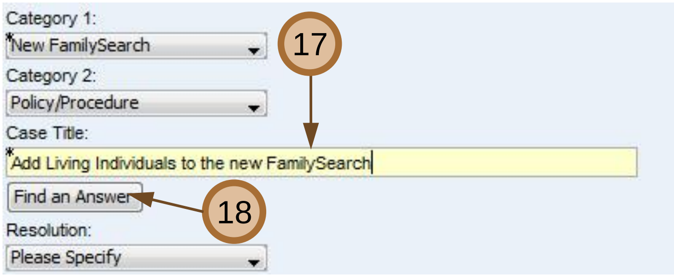


Step 16:
Click a category in the drop-down list.



Step 17:
In the **Case Title** field, type a title for the case (80 characters maximum).

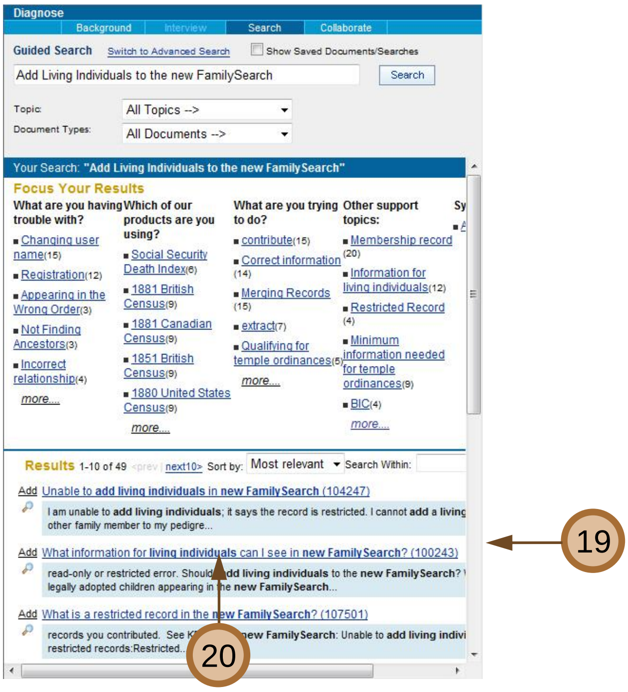
Note: Type a descriptive title. The title will be used as the search words in **Find an Answer**.



Step 18:
Click **Find an Answer**.

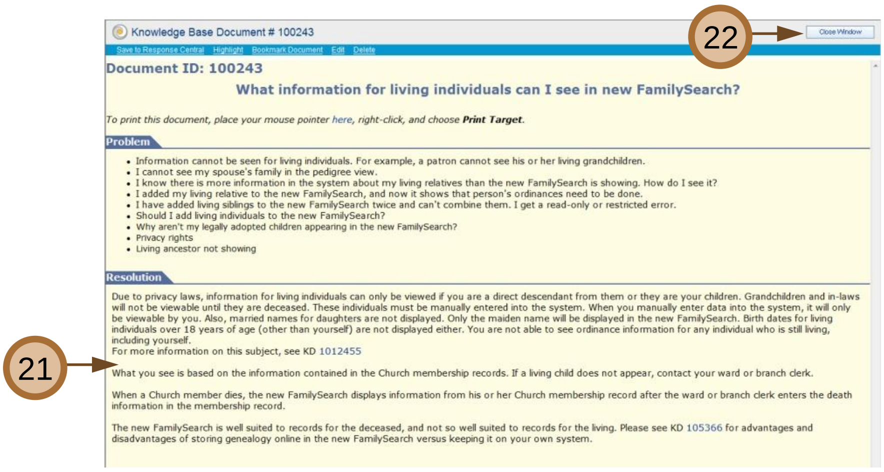
Step 19:
On the left, scroll to review the knowledge documents in the search results list.

Step 20:
Click a document name that seems to answer the question.



Step 21:
Carefully read the document to make sure it answers the patron's question.

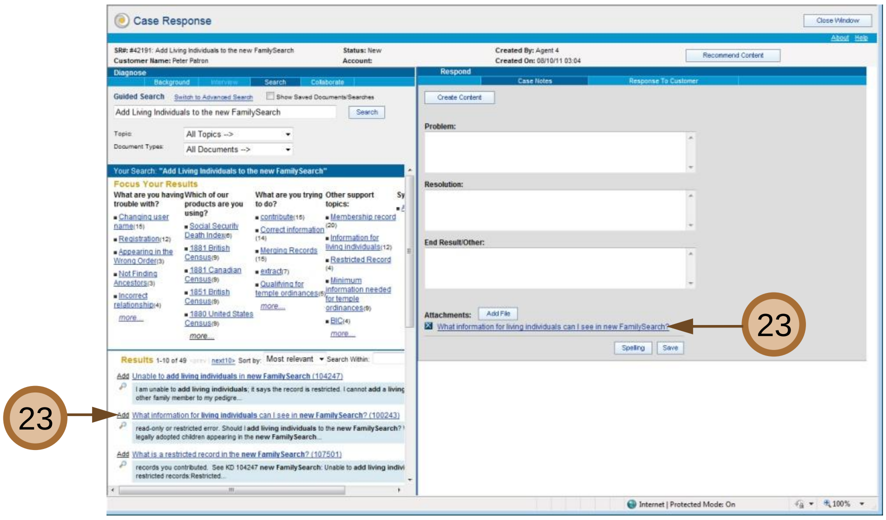
Step 22:
Click **Close Window** to close the document.



Step 23:
Click **Add** at the beginning of the document name to link the knowledge document to the case.
Note: You can choose more than one.

Step 24:
Tell the patron: "Thank you for your patience. I have found an answer for you."

Step 25:
Use the knowledge document to assist the patron. Explain each step. Make sure he or she is able to follow each step.



Step 26:
Ask the patron: "Would you like me to e-mail this information to you?"

Step 27:
If the patron says "Yes," click **Response To Customer**.

Step 28:
Close the call with the patron.

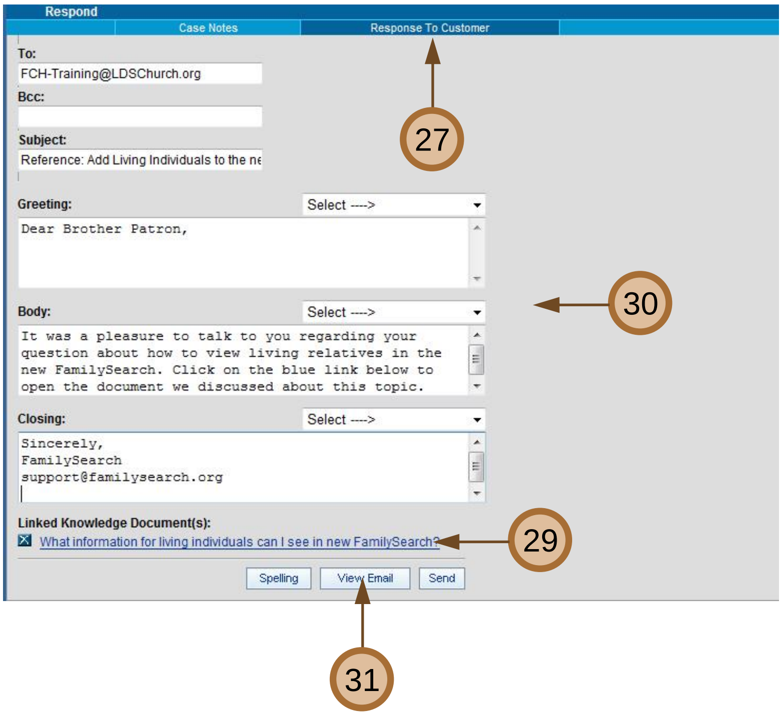
Step 29:
Click **Add** at the beginning of the document name to link the knowledge document to the e-mail.

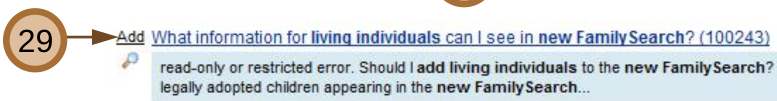
Step 30:
Customize the following sections of the response to customer e-mail message:

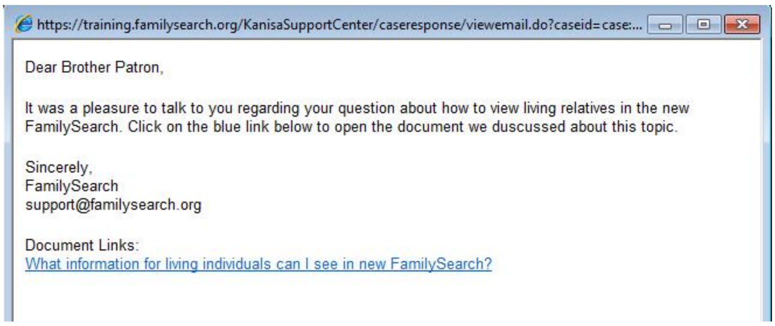
- Greeting
- Body
- Closing

Step 31:
Click **View Email** to display the entire message in a separate window.

Carefully proofread the e-mail message. You cannot edit in this window.



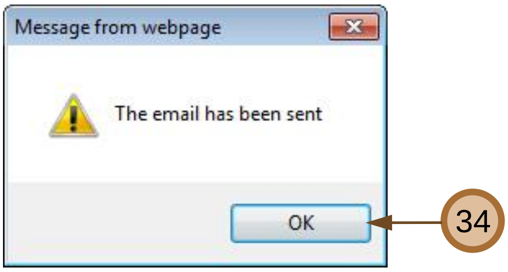




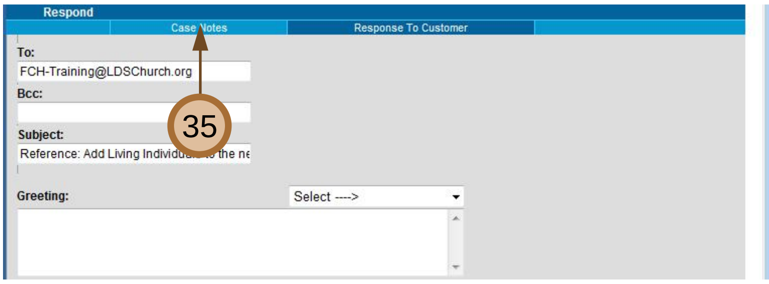
Step 32:
At the top of the view email window, click the **Close** button.

Step 33:
At the bottom of the response to customer window, click **Send**.

Step 34
Click **OK** in response to the message: “The email has been sent.”



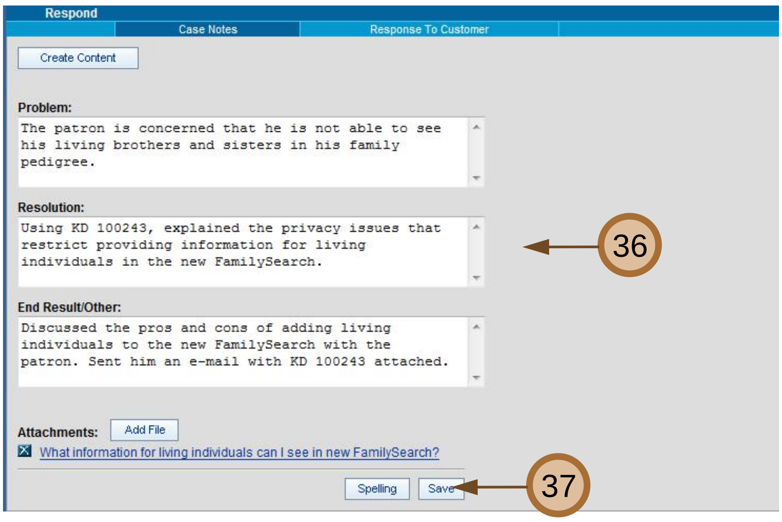
Step 35:
Click **Case Notes.**



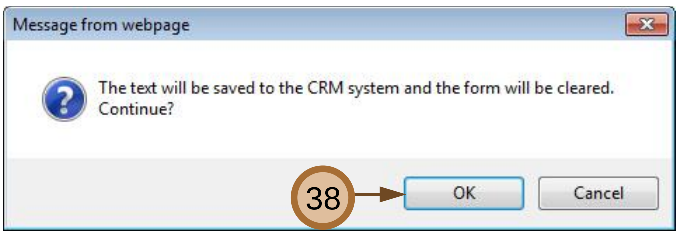
Step 36:
Type case notes in the following sections:

- Problem
- Resolution
- End Result/Other

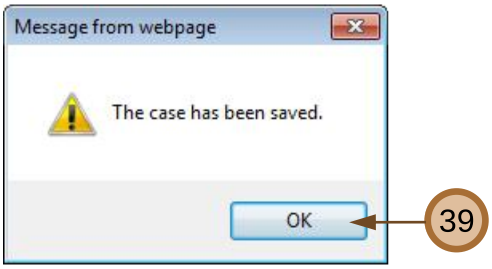
Step 37:
Click **Save.**



Step 38:
Click **OK** in response to the message: “The text will be saved to the CRM system and the form will be cleared. Continue?”

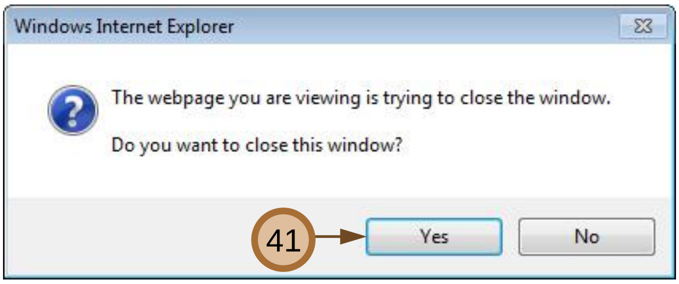


Step 39:
Click **OK** in response to the message: "The case has been saved."

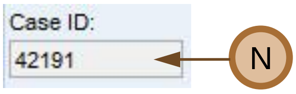


Step 40:
In the upper right, click **Close Window.**

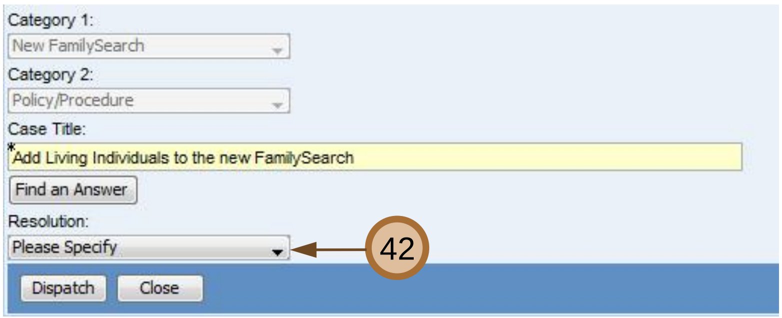
Step 41:
Click **Yes** in response to the message: "The webpage you are viewing is trying to close the window. Do you want to close this window?"



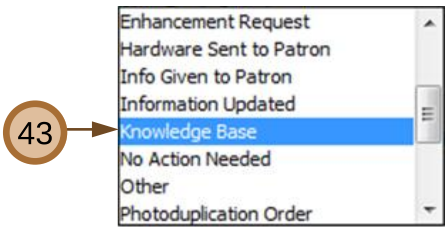
Note: A case ID number now appears in the upper left of the case window.



Step 42:
In the lower left, click the **Resolution** drop-down arrow.



Step 43:
Click a resolution in the drop-down list. **Note:** Select Knowledge Base if you used a knowledge document to help the patron.



Step 44:
Click **Close** to close the case.