Solving E-mail Cases

FamilySearch Support System

Family history missionaries receive e-mails from patrons with family history problems. The goal of FamilySearch is to give answers to family history questions. Each time a patron e-mails FamilySearch, a case is created to track both the question asked, and the answer given to solve the problem.

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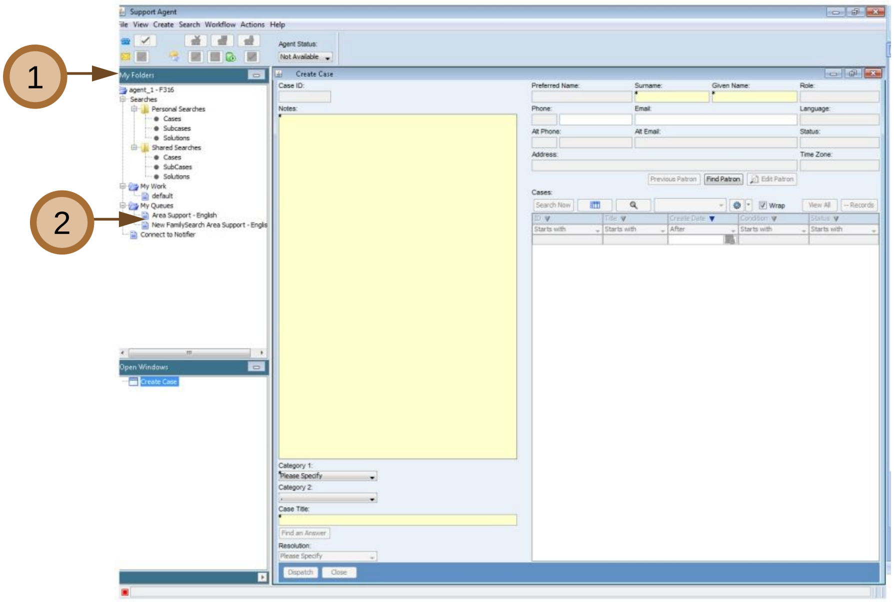
1. In some areas, you may be assigned e-mail cases. These cases will appear in your default work folder.

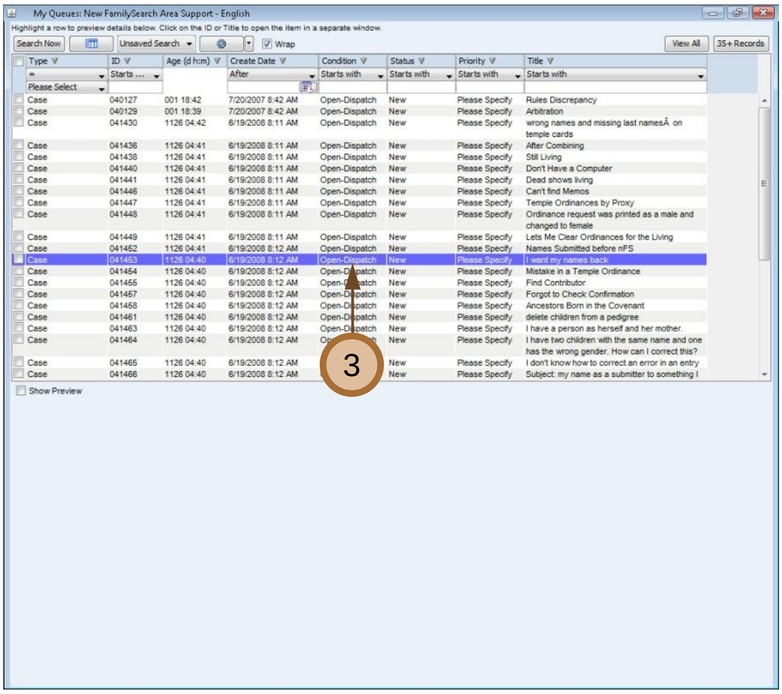
2. When you send an e-mail to a patron, you are representing the Family History Department of The Church of Jesus Christ of Latter-day Saints. As far as the patron is concerned, you represent the Church, and if you treat him or her well, the Church has treated him or her well. Therefore, we suggest using the following guidelines:
    a. Use upper and lowercase letters as you would in writing a letter.
    Wrong: WE HOPE THIS INFORMATION WILL HELP YOU SOLVE YOUR PROBLEM.
    Right: We hope this information will help you solve your problem.
    b. Proofread your e-mail before you send it.
    c. Use a subject line that describes the content of the e-mail and lets the patron know what question you are answering.
    d. Begin with "Dear" and include a title (such as Mr., Mrs., Brother, or Sister), the patron's last name, and a colon or comma.

Step 1:
Locate the My Folders pane in the upper left.

Step 2:
Under My Queues, double-click a queue name.

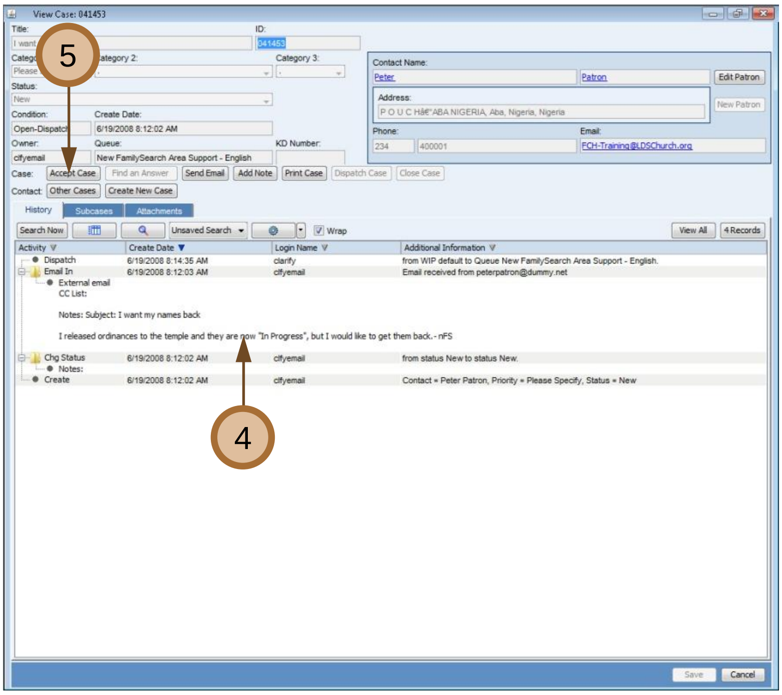


Step 3:
To open a case, double-click anywhere on the case information line.



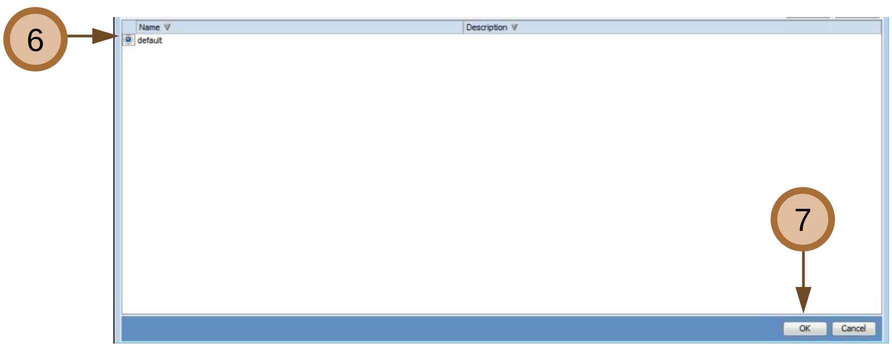
Step 4:
Read the e-mail message that describes the patron's question.

Step 5:
Click **Accept Case**.



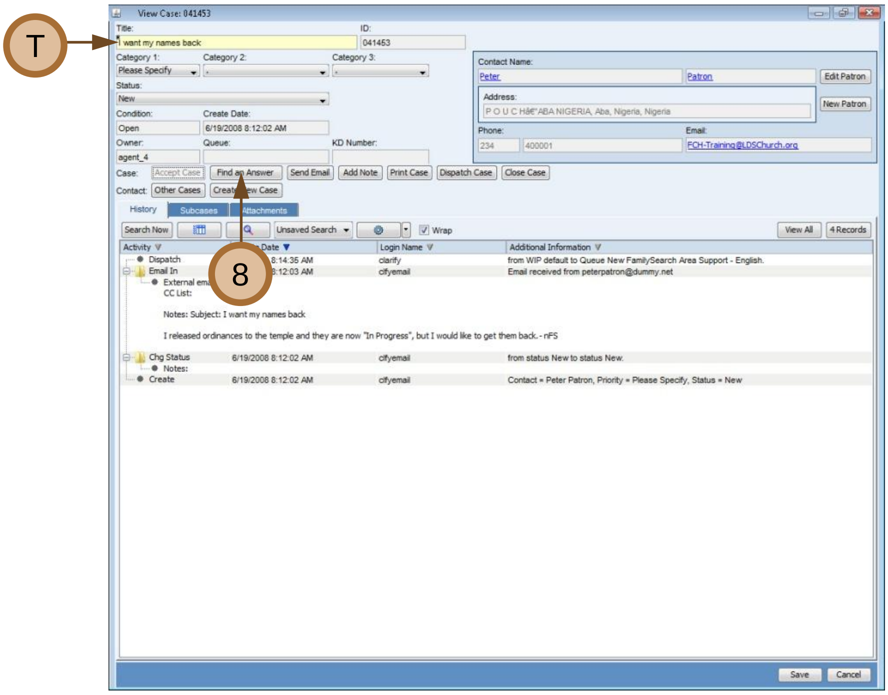
Step 6:
To save the case in your default queue, click the **Default** button.

Step 7:
Click **OK**.



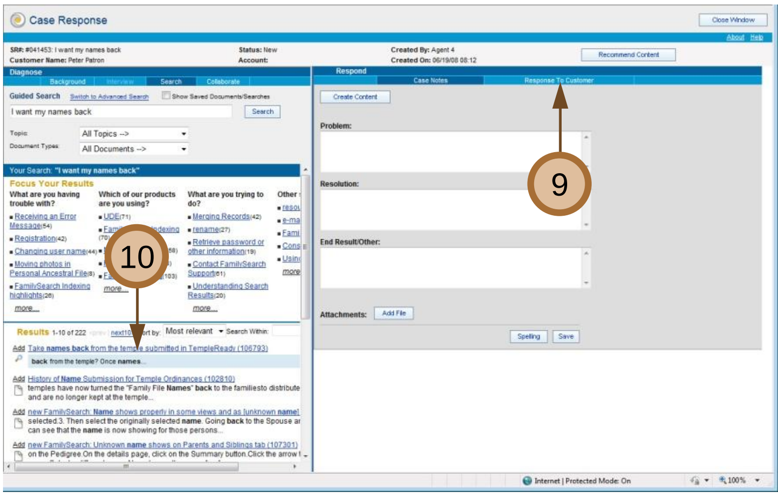
Tip: The FamilySearch Support System will search for a knowledge document based on the title of the case. The title is created from the e-mail subject line. The title can be edited.

Step 8:
Click **Find an Answer.**



Step 9:
Click **Response To Customer.**

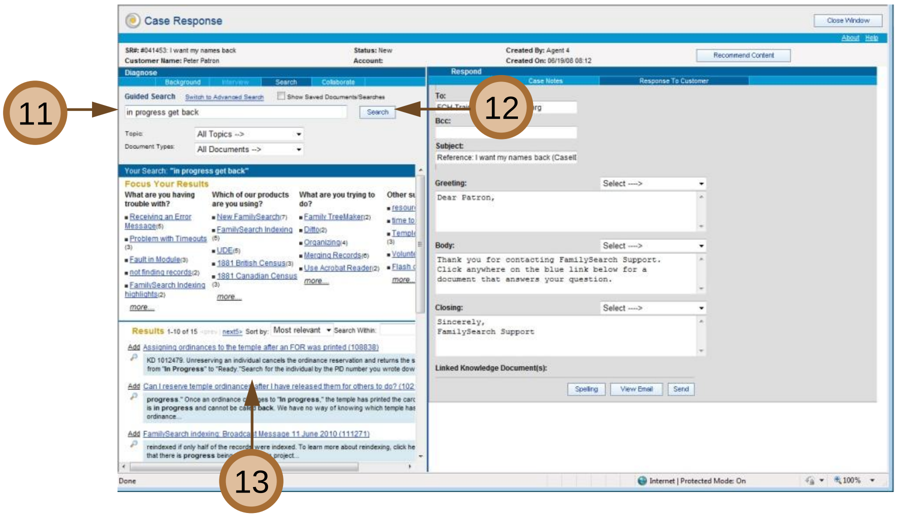
Step 10:
Scroll to review the documents in the search results list.



Step 11: (optional)
If you don't find a document, edit the words in the Search box.

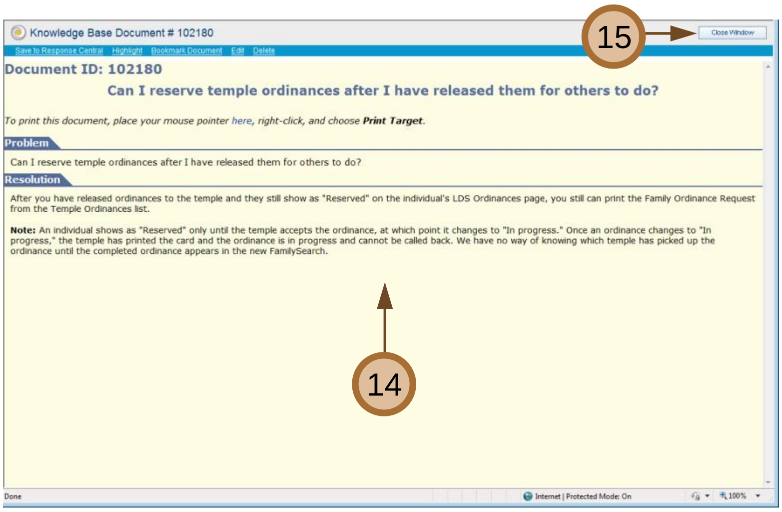
Step 12: (optional)
Click **Search.**

Step 13:
Click the document name to open the knowledge document.

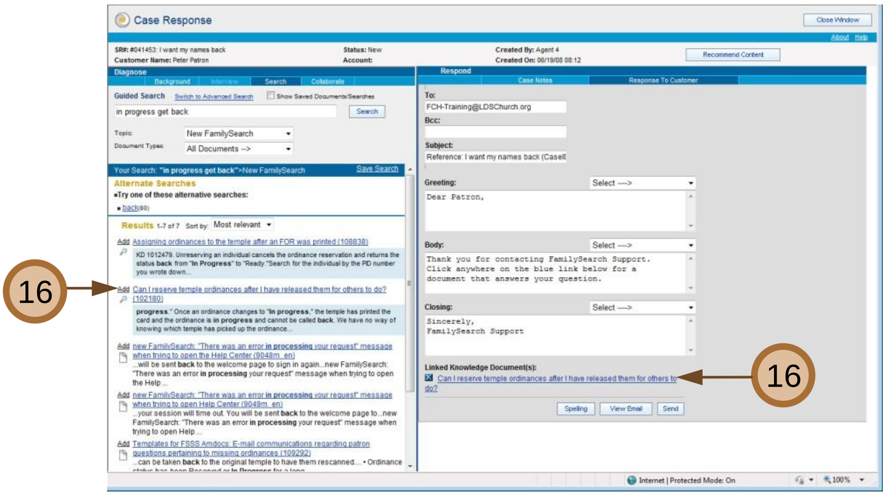


Step 14:
Read the document to make sure it answers the patron’s question.

Step 15:
Click **Close Window** to close the document.



Step 16:
Click **Add** at the beginning of a document name to link the knowledge document to the e-mail response.

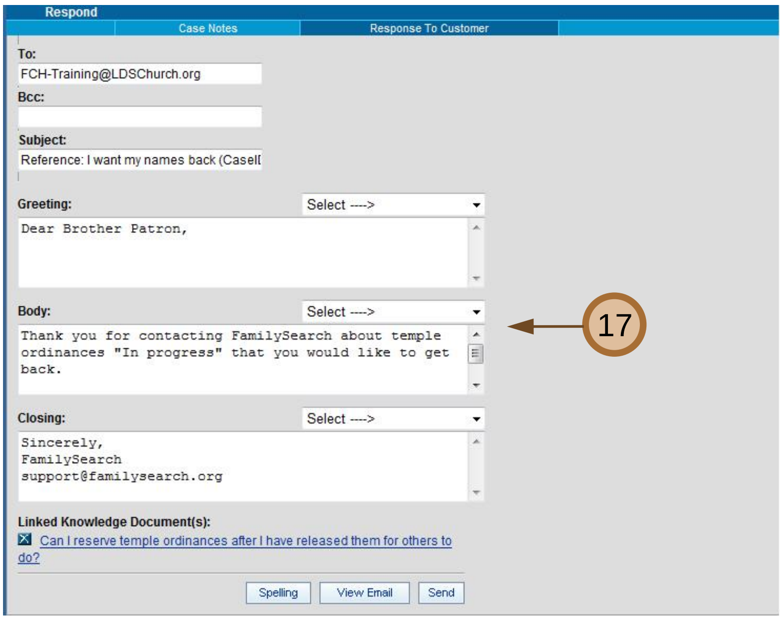


Step 17:
Customize the following sections of the response to customer e-mail message:

- Greeting
- Body
- Closing

Tip: Type the body of the e-mail in a word processing document. Spell check the message. Select the text. Press **Ctrl+C** to copy the message.

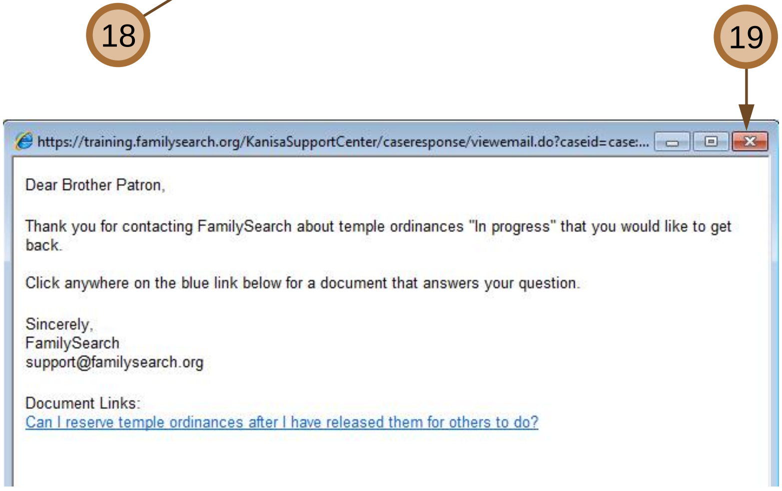
Return to the e-mail template. Click in the **Body** field. Press **Ctrl+V** to paste the message in the template.



Step 18:
At the bottom of the template, click **View Email** to display the entire message in a separate window.

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

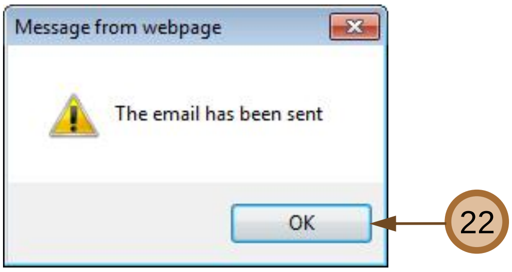
Step 19:
At the top of the view email window, click the **Close** button.



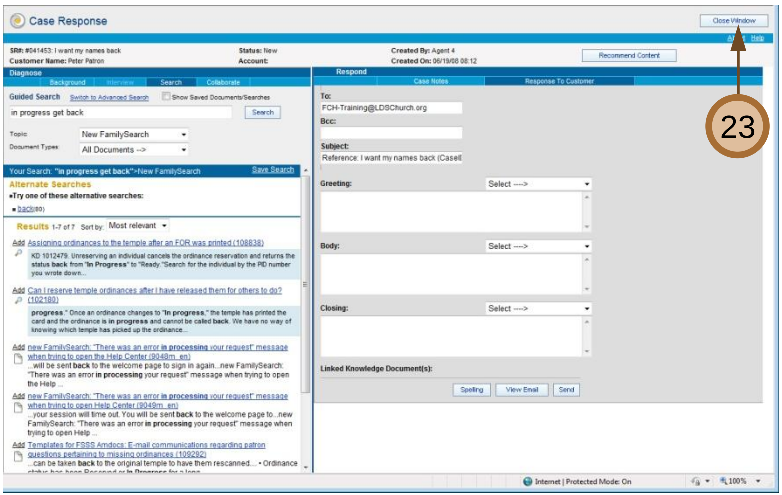
Step 20:
Make any corrections in the message.

Step 21:
Click **Send**.

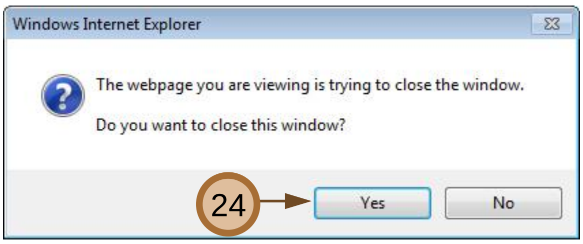
Step 22:
Click **OK** in response to the message: "The email has been sent."



Step 23:
Click **Close Window**.

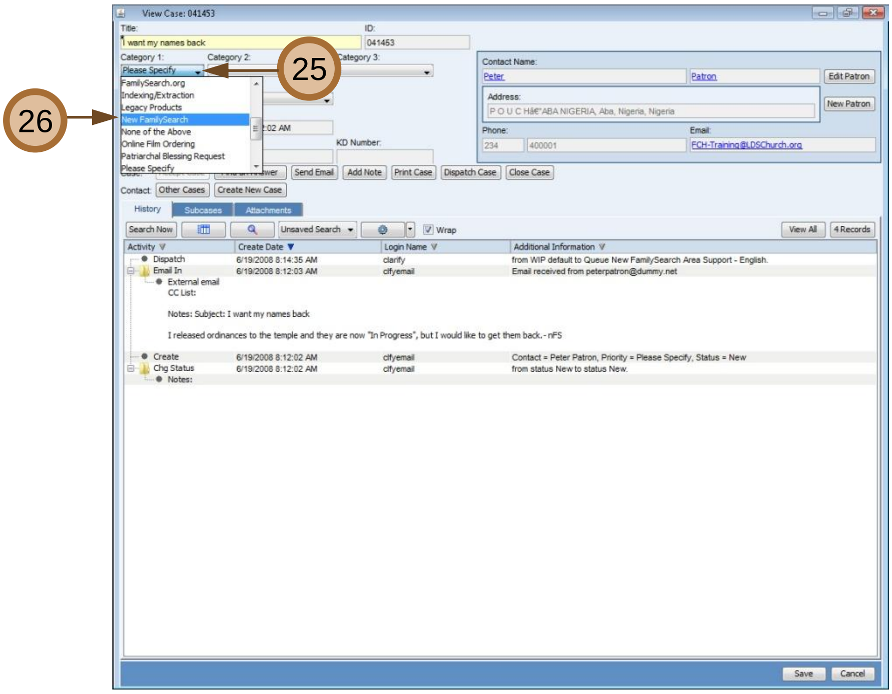


Step 24:
Click **Yes** in response to the message: "The webpage you are viewing is trying to close the window. Do you want to close this window?"



Step 25:
In the upper left, click the **Category 1** drop-down arrow.

Step 26:
Click a category in the drop-down list.

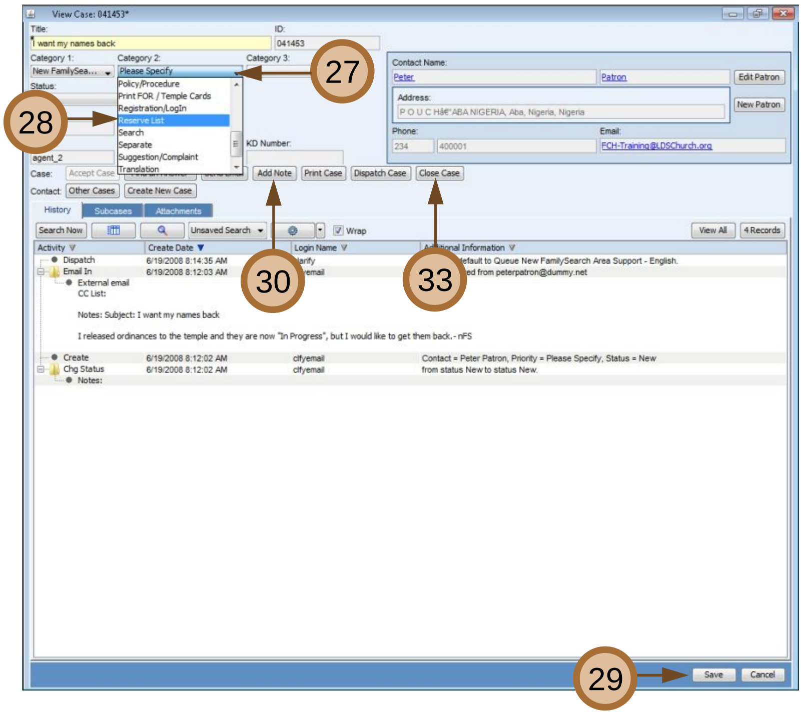


Step 27:
In the upper left, click the **Category 2** drop-down arrow.

Step 28:
Click a category in the drop-down list.

Step 29:
Click **Save**.

Step 30: (optional)
Click **Add Note** if you need to add internal notes with confidential information.



Step 31: (optional)
Type confidential notes in the **For Internal Use Only** box

Step 32: (optional)
Click **Log** in the lower right.

Step 33:
Click **Close Case**.

Step 34:
Click the **Resolution** drop-down arrow.

Step 35:
Click a resolution in the drop-down list. **Note**: Select Knowledge Base if you attached a knowledge document to the case response e-mail message.

Step 36:
Type any additional case notes. **Note**: These notes are public and will be seen by anyone who views the case, including the patron.

Step 37:
Click **Close Case**.