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.

- 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 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.

Respond		- 15T	
	Case Notes	Response To	Customer
To:			
FCH-Training@LDSChur	ch.org		
Bcc:			
Subject:			
Reference: I want my nan	ies back (Casell		
Greeting:		Select>	-
Dear Brother Patro	on,		~
			-
Body:		Select>	•
Thank you for con-	acting Family	Search about temple	
ordinances "In pro	ogress" that y	ou would like to ge	tE
back.			-
Closing:		Select>	•
Sincerely,			
FamilySearch			
support@familysea:	ccn.org		-
Linked Knowledge Docur	nent(s):		
do2	irdinances aπer i na	ve released them for others	10
<u>uo:</u>			
	Spel	ling View Email Se	nd

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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.

2: 141453 Tosed By: gent_2 Tosed	Title: I want my names back Close Date: 24 PM	Resolutor	
llosed	•	Please Specify 34	
	-	NO ACION Needed	
		Other Prostodyplication Order Please Specify •	
Cate 36		Other Protockylication Order Please Specify -	
Calc 36	nptured: Case Actual: Total Capture	Orber Protockylication Order Pieses Specify Recallulate g Total Actual:	
Cate 36 Phone Log (dhin): 000 000	pplured: Case Actual: Total Capture 00000 00:00000 00:00	Ofer Please Specify	
Cate C3 Phone Log (dhin): 000 000 Research Time (dhin): 000 000	exturnet: Cases Actual: Total Capiture 00 300 00:00 (a) 000 00:00 00 300 00:00 (b) 000 00:00	Other Protectude/cation Order Plases Specify - 4 Total Actual (000 00 00 -	
Calc 36 Phone Log (ahm): 0000 Research Time (ahim): 0000	aptured: Case Actual: Total Capture 00 200 00:00 (a) (000 00:00 200 00:00 (b) (000 00:00	Offer Please Specify Total Actual	