



SP Marketplace User Correspondence Reference Guide

Version 15.2

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Introduction

This guide will provide a reference guide for how User Correspondence works across all the SPMP Products where it is available such as SPMP IT Portal, SPMP Facilities and SPMP Departments.

Audience

Staff members using SPMP IT Portal, SPMP Facilities, etc

Detail Description

Sending User Correspondence

Once a case, workorder or Service Request is created and typically Assigned to someone, the Assigned To person may want to communicate thru Email to the person who submitted the Case. The example used in this document is for an IT Support Case submitted by a user (Test User) with an issue opening an Item in the CRM.

The case has been assigned to the Staff User and that person decides there is not enough information in the case to do problem determination and therefore decides to send the submitter an email requesting more information.

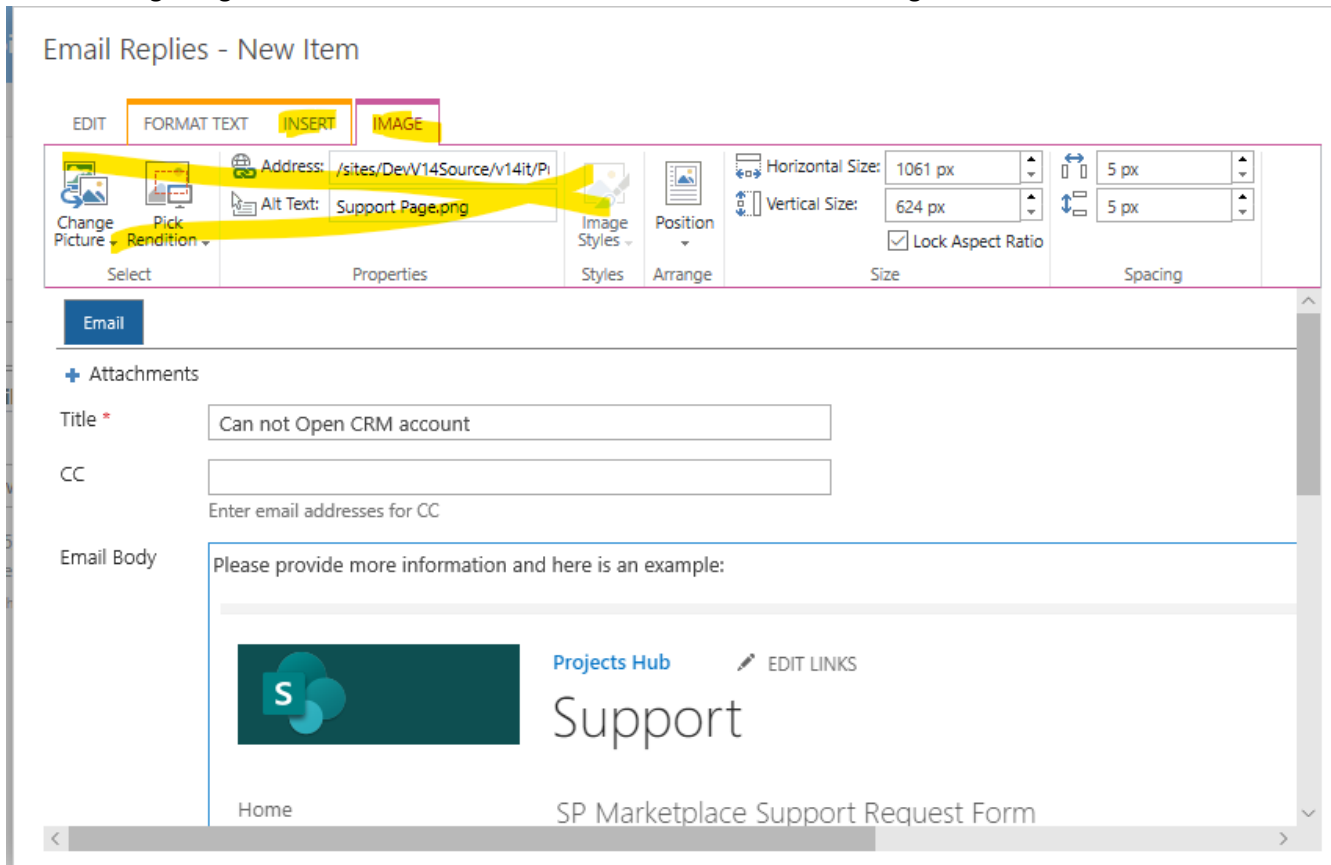
Open the case and go to the User Correspondence tab and click on Send New Email Correspondence and fill out the “form” as shown below

The screenshot shows a web-based form for sending email replies. The form is titled "Email Replies - New Item" and is displayed over a background of a CRM interface. The CRM interface has tabs for "General", "Details-Status", and "User Correspondence". The "User Correspondence" tab is active, showing a "Send New Email Correspondence" button and some metadata: "Created at 5/31/2020 2:23 PM by Test User", "Last modified at 5/31/2020 2:29 PM by Flow Admin", and "Enhanced with DFFS". The email form itself has a ribbon with "EDIT", "FORMAT TEXT", and "INSERT" tabs. The "EDIT" tab is active, showing icons for "Save", "Cancel", "Paste", "Copy", "Attach File", and "Spelling". The form fields are: "Attachments" (C:\SkyDrive\Pictures\serviceRequest.PNG), "Title" (Can not Open CRM account), "CC" (empty), and "Email Body" (Please provide more information on this issue and include a snapshot of the particular CRM item that you can not open. I have attached an example of what I am looking for. THanks). There are "Save" and "Cancel" buttons at the bottom right.

There are several things to note above.

1. There is no way to specify the recipient of this email – its defaulted to the Requester or if the case was submitted by an external person who has no Sharpeoint ID then it will be sent to the email address in the Email-From field in the case. But you can specify additional email addresses to include on the CC of the email.
2. I used the Attach File to add the attached image as shown below:

3. YOU CANNOT use the embedded image – thru the Insert Picture option as there is a Microsoft Technology limitation that prevents us from supporting this option. So if you create a something like the following using Insert Picture the Email will be sent but **without** the image.



4. The email will sent with the From Address being the Shared Mailbox (so that replies will work) and NOT the person filling out this form so you may want to include you name at the bottom like the following:

Email Replies - New Item

EDIT | **FORMAT TEXT** | INSERT

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

Email

+ Attachments C:\SkyDrive\Pictures\serviceRequest.PNG [Delete](#)

Title * Can not Open CRM account

CC

Enter email addresses for CC

Email Body

Please provide more information on this issue and include a snapshot of the particular CRM item that you can not open. I have attached an example of what I am looking for.

Thanks

Test Staff

Save Cancel

Enhanced with DFFS

5. When you click Save you will see the following result – note that there are no details in the Email Details column. The Microsoft technology used to process this email correspondence is Power Automate which is not immediate and may take up to 5 minutes before the actual email is sent and the formatting changed. Here is what you will see immediately after clicking on Save.

General Details-Status **User Correspondence** Worklog Tasks IT Docs Change ...

Email Details

Send New Email Correspondence

Created at 5/31/2020 2:23 PM by Test User


Last modified at 5/31/2020 2:29 PM by Flow Admin


Save Cancel

Enhanced with DFFS

6. After around 5 minutes of elapsed time if you refresh the above page you will see this which indicates that the email has been sent.

[General](#)
[Details-Status](#)
[User Correspondence](#)
[Worklog](#)
[Tasks](#)
[IT Docs](#)
[Change](#)
...

 **Email Details**

 Can not Open CRM account
 Sent By Test Staff on 5/31/2020 2:49 PM

Please provide more information on this issue and include a snapshot of the particular CRM item that you can not open. I have attached an example of what I am looking for.

THanks

Test Staff

Created at 5/31/2020 2:23 PM by Test User
 Last modified at 5/31/2020 2:29 PM by Flow Admin
Enhanced with DFFS

- 7.
8. Note that while the exact details of the message you composed to send is shown the attachments are not shown. You must use the magnifying glass image to see the attachments.

Responding to User Correspondence

1. The submitter of the case (in this example Test User) will receive an Email like the following. Note that the Subject has Case {31} – when the submitter replies to this email it is critical that he does not modify the subject line as the {31} is used to locate the specific case he is responding to.

Case {31} Can not Open CRM account

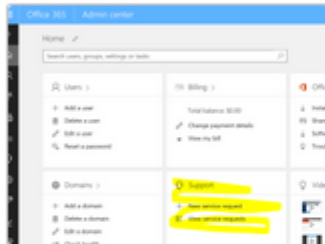
① This message was sent with Low importance



v14 Email Correspondence

Sun 5/31/2020 2:50 PM

To: Test User



Please provide more information on this issue and include a snapshot of the particular CRM item that you can not open. I have attached an example of what I am looking for.

Thanks

Test Staff

2. Now the Test user replies and in that reply he can include both attachments and imbedded images. In this example an imbedded image will be used. So here is his reply with a snapshot of the Account view (but as an imbedded image in the email not as an Attachment).

Case {31} Can not Open CRM account

1



To: v14 Email Correspondence



The CRM item that will not open is the Account and is the first Cedarville Shopping Center as highlighted below:

The screenshot shows the CRM interface with a table of accounts. The first row, 'Cedarville Shopping Center', is highlighted in yellow. The table has columns for Account, Business Phone, Contact E-mail Address, and City.

Account	Business Phone	Contact E-mail Address	City
Cedarville Shopping Center	555 555 1234		Cedarville
Cedarville Shopping Center	555-111-2345		123 Smith St



Send

Discard



Draft saved at 3:14 PM



This message was sent with Low importance



v14 Email Correspondence

Sun 5/31/2020 2:50 PM

To: Test User




Processing User Replies

When the email containing the user reply is processed and the case updated the Assigned to person will be notified:

1. The assigned to person received email notification that the user has replied – here is a snapshot of the email that the assigned to person (Test Staff) in this case will receive:

User Correspondence for Case: 31 Can not Open CRM account

 This message was sent with Low importance



Flow Admin

Sun 5/31/2020 3:20 PM

To: Test Staff



A user correspondence has been received for
Case Id: 31
Case Title: Can not Open CRM account


Please go to the link below to view the response.

[Click Here](#)

What does this mean?


Did you get this?


Here's the password.

 Are the suggestions above helpful? [Yes](#) [No](#)

- The Test Staff user can then go directly to the case by using the Click Here link in the email or can find the case thru the My Assigned cases view and when he opens the case and goes to the User Correspondence tab, he will see the following:


General Details-Status **User Correspondence** Worklog Tasks IT Docs Change ...


 **Email Details**

 Re: Case (31) Can not Open CRM account
Received From TestUser@spmarketplace.com on 5/31/2020 3:16 PM

Use the magnifying glass icon to review view any attachments

The CRM item that will not open is the Account and is the first Cedarville Shopping Center as highlighted below:



 Can not Open CRM account
Sent By Test Staff on 5/31/2020 2:49 PM

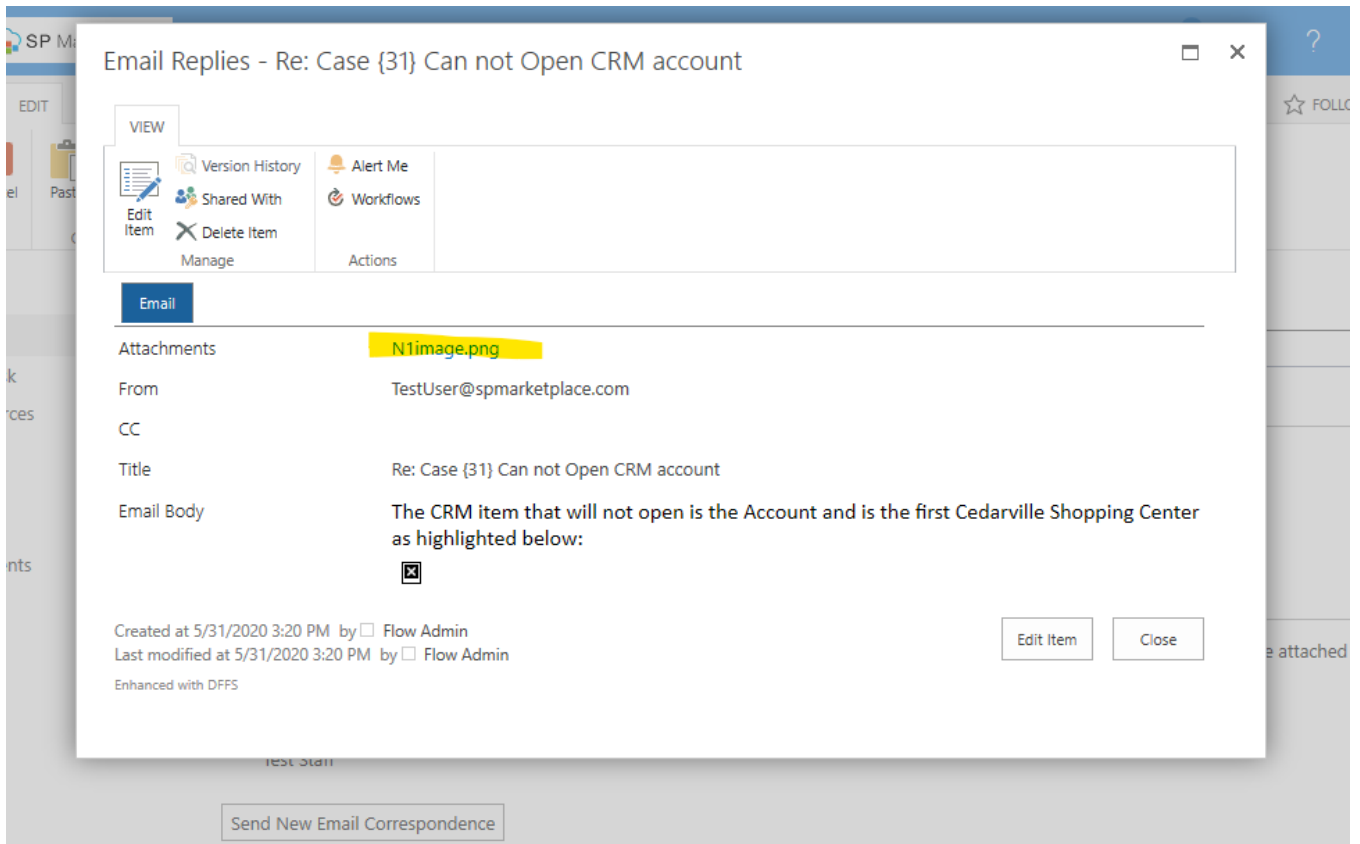
Please provide more information on this issue and include a snapshot of the particular CRM item that you can not open. I have attached an example of what I am looking for.

THanks

Test Staff

Created at 5/31/2020 2:23 PM by Test User
Last modified at 5/31/2020 2:29 PM by Flow Admin
Enhanced with DFFS

- Note that the text in the email reply is shown but the imbedded image in the email shows only as an X . Due to Microsoft technology limitations when imbedded images in emails are processed they are changed to Attachments and Attachments can ONLY be seen by using the Magnifying glass. When you use the magnifying glass you will get a popup window which will contain the full text and all attachments as shown below:



4. Clicking on the N1Image.png will render the imbedded image that was included in the reply email above. Note that right clicking on the link and opening in a new tab will provide better navigation because it leaves the above window open which is particularly helpful when there are multiple attachments.

