Helpful Tools for Customer Service Teams

Customer service teams can use SAP Digital CRM to manage inquiries and respond quickly with integrated e-mail ticket management. Your team can share data and communicate seamlessly, so you can always give your customers the best possible experience.

Set up an e-mail channel.
To enable routing of service tickets based on your inbound e-mail addresses, you'll need to enter those addresses into the system. Click **"Settings," "Support E-mail,"** and then on the **"Email Channel"** tab, enter the e-mail address along with a name that will be used in the **"From"** field on replies from that address. The e-mail address will then be added as a channel in the system and can be used when defining ticket routing.

Create an e-mail template.
You can create a branding template for your e-mails directly in the system or from an uploaded HTML file. This will set the look and feel of customer service e-mails sent from the system. To create a new template, click **"Settings," "Support E-mail,"** and then select the **"Template"** tab. From there, click **"New"** at the top right to get started.

Create a service ticket.
To create a new service ticket, click **"Service"** at the top of the screen. You'll see a screen with your existing tickets, which can be filtered or sorted using the controls above the list. To add a new ticket, click **"New"** at the top right of the page.

Manage service tickets.
There are numerous actions you can take while working with service tickets. Select a ticket from your list by clicking on it (taking care not to click on any of the links in the ticket). You can select multiple tickets by holding down the control or command key. After selecting a ticket, click the gear icon to the top right of the list to see your available actions. These include changing the status or priority of the ticket, escalating or assigning the ticket to a team member, and adding notes to the ticket.

Add activities to a ticket or create follow-up items.
To add activities to a ticket, open the selected ticket, click the **"Activities"** tab, and then click **"New"** on the right-hand side to add a new task or phone call to the ticket.

To add follow-up tasks to a ticket, open the ticket and click **"Follow Up"** at the bottom right of the page. This will allow you to create a ticket, create an opportunity, or create a lead as a follow-up. Enter the necessary information and save your changes.