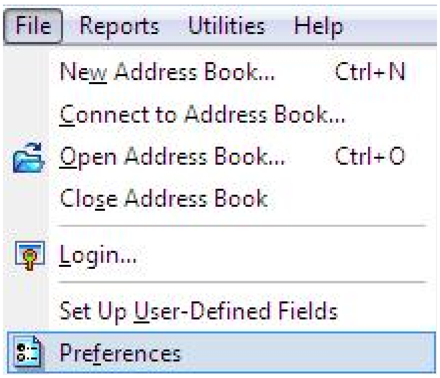
Case Notification and Monitoring

When using Maximizer to handle Customer Service Cases it is often **a good idea to configure the options for monitoring and notification so that customers and staff are kept in the loop about case progress**.

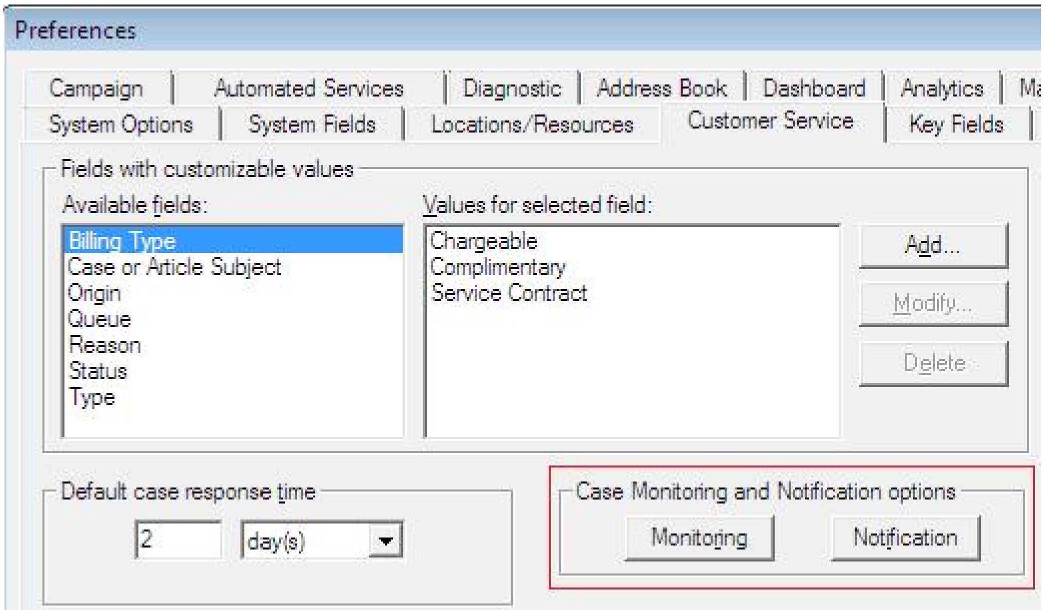
Within Maximizer the key differences between case monitoring and case notification are who the alerts go to. **Case Monitors are internal Maximizer users** who will receive updates on all cases and case actions where are the **Case Notifications go only to the customer** the case was created for. All alerts are sent out as e-mail.

Before configuring the alerts you should take a moment to create an e-mail template you are happy within the Maximizer Editor (this template can contain merge codes to allow it to be personalised as needed). Once complete you should export these templates as plain .txt files and keep them handy for use later on.

To setup the case monitoring/notification you will need to start the Maximizer Administrator and click File>>Preferences

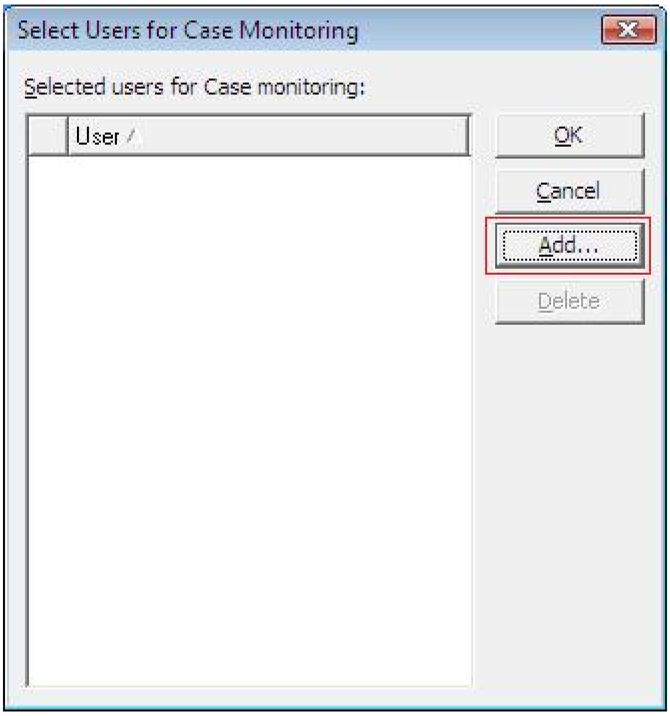


Once in the preferences screen click the Customer Service Tab.

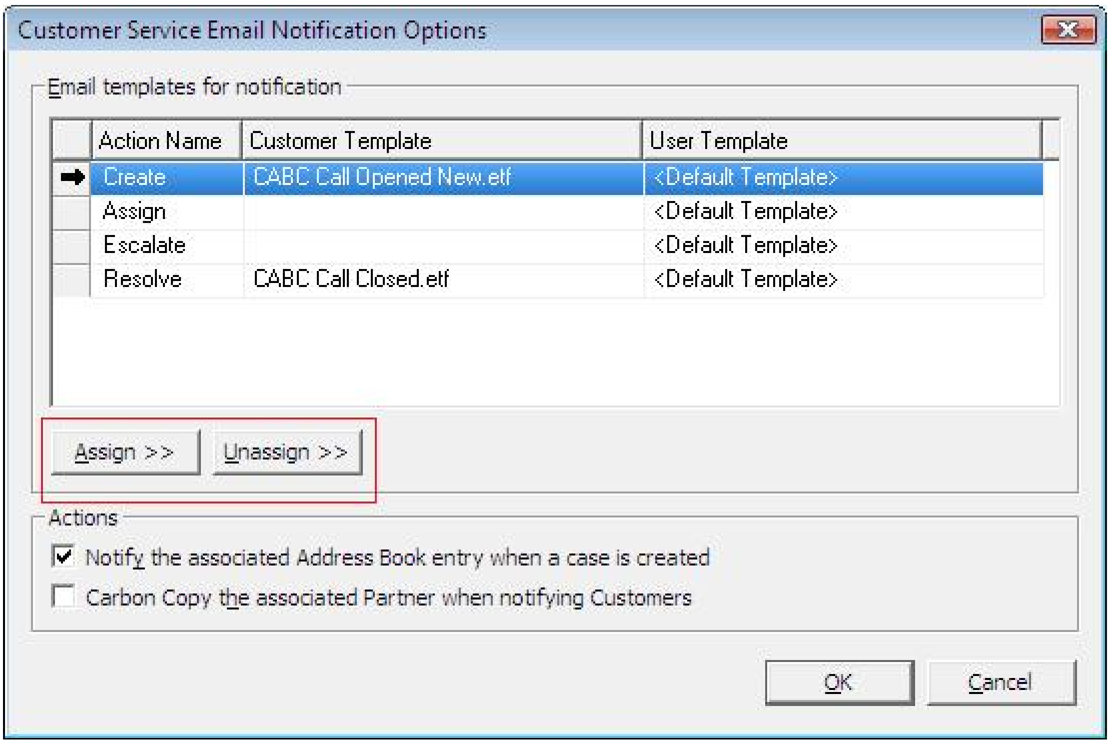


Now you can use the Monitoring & Notification buttons to configure the options.

The Monitoring screen allows you to add Maximizer users to the list of monitors (they will be alerted to all case activity for all cases).



The notification screen allows you to setup the templates you want to use for e-mailing out details of the actions undertaken. It is from here you assign the templates you created earlier to the actions you want them to trigger off. You do this simply by clicking the Assign button and importing the template.



Further information on case monitoring and notification is available in the manual under the Customer Service Section.