

## Guidance – Service Escalation Email Functionality

**DOCUMENT CLASSIFICATION: CONFIDENTIAL**

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## Guidance – Service Escalation Email Functionality

|                 |                                                        |
|-----------------|--------------------------------------------------------|
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## 1. Amendment History

| Date       | Version | Author | Changes Made       |
|------------|---------|--------|--------------------|
| 10/09/2023 | 0.1     | SS     | Draft document     |
| 11/09/2023 | 0.2     | DP     | Business review    |
| 22/09/2023 | 1.0     | SS     | Document Baselined |
|            |         |        |                    |

## 2. Introduction

This document guides Whitespace users through Service Escalation Email functionality with the reintroduction of email output functionality which alerts specified email recipient(s) when a Worksheet Service event is reached.

We lost the ability to send out Service Escalation Emails due to necessary security restrictions as Whitespace was moved on to newer servers. These servers would not allow Whitespace to “talk directly to the internet” – which is what the DBMail function associated with Service Escalation Emails was doing.

We are pleased to confirm that we have now reintroduced this functionality in Whitespace V11.2+ by communicating with a trusted email server or Smarthost.

However, there are limitations that we’ve had to impose.

- For example, we log and retry if there is an error in connectivity between Whitespace and Smarthost, but we would have no way of knowing if an email has failed between Smarthost and the recipient.
- There are limits on how many emails can be sent with a single event. We’ve allowed for multiple recipients for an event but note that the field to enter email addresses is limited to 255 characters.
- Therefore, the recommendation is that you consolidate recipient emails to a shared email address. This also reduces the burden of managing recipients if someone leaves the target organisation.
- We only allow one Event per Worksheet Service. The functionality is predominantly for Escalation events; however, it can be configured for an alternative event.

Despite the limitations, we trust this will be welcome news for our existing customer base who have been using Service Escalation Emails previously.

And for new users who are interested in the functionality, this document should serve as a useful overview.

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### 3. How it works

Service Escalation Emails are managed in **Management > Services > Service Escalation Emails**.

**Service Escalation Emails**

This form displays service escalations. Service escalations define to whom a system generated email will be sent when defined worksheet types reach their escalation date. This form doesn't allow duplicates to be added; i.e. only one entry per worksheet service is allowed. If you are entering multiple email addresses please ensure that they are separated with a semicolon. There is a limit of 255 characters in the Email field so we recommend consolidating emails to a single group email address where possible.

| Worksheet Type                 | Deadline        | Email                                               |
|--------------------------------|-----------------|-----------------------------------------------------|
| Bulky Waste Collection (Items) | Escalation Date | council@organisation.co.uk;waste@organisation.co.uk |
| Missed Collection - Refuse     | Escalation Date | waste@organisation.co.uk;counil@organisation.com    |
| New Customer                   | Completed Date  | finance@organisation.com                            |

Entries can be created via the 'New' button, amended via the 'Edit' button (on selecting the record to edit where it turns blue), or deleted via the 'Delete' button (again upon selection of the entry to delete where it turns blue).

There is only one entry per Worksheet Service. Typically, this will be on Escalation Date, however, entries can also be created for:

- Completed Date
- Due By Date
- Expiry Date

**Service Escalation Emails**

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| Worksheet Type                 | Deadline        | Email                                               |
|--------------------------------|-----------------|-----------------------------------------------------|
| Bulky Waste Collection (Items) | Escalation Date | council@organisation.co.uk;waste@organisation.co.uk |
| Missed Collection - Refuse     | Escalation Date | waste@organisation.co.uk;counil@organisation.com    |
| New Customer                   | Completed Date  | finance@organisation.com                            |

Service:

Deadline:

Email:

One or more semi-colon separated email addresses can be entered to receive an alert email.

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There is a character limit of 255 characters in the email field, so it is recommended that group email addresses are configured to be the recipients of the alert emails.

The Service Escalation email will always come from [noreply@whitespacews.com](mailto:noreply@whitespacews.com). As it is governed by DBMail and the Smarthost server, it is not possible to specify an alternative domain (i.e., the email looks like it comes from your organisation). This is not the case for emails that come from Worksheet or Contract Workflows directly.

### 3.1. Troubleshooting

#### 3.1.1. Menu is missing

If your Whitespace system has been upgraded, you may well be missing this menu item. Raise a support ticket to add the menu to a system administrator level role.

#### 3.1.2. Supplied Email is Invalid

There is basic validation to ensure that supplied email addresses contain an '@' and period '.' in it.

It also checks that there are no commas. If you are entering more than one email address, ensure you use a **semi-colon** ';' to separate addresses.

**Service Escalation Emails**

The supplied email is invalid. Please update the email address
×

This form displays service escalations. Service escalations define to whom a system generated email will be sent when defined worksheet types reach their escalation date. This form doesn't allow duplicates to be added; i.e. only one entry per worksheet service is allowed. If you are entering multiple email addresses please ensure that they are separated with a semicolon. There is a limit of 255 characters in the Email field so we recommend consolidating emails to a single group email address where possible.

| Worksheet Type                 | Deadline        | Email                                               |
|--------------------------------|-----------------|-----------------------------------------------------|
| Bulky Waste Collection (Items) | Escalation Date | council@organisation.co.uk;waste@organisation.co.uk |

Service:

Deadline:

Email:

#### 3.1.3. Only one entry per Worksheet Service is allowed

Whitespace will only allow one entry per Worksheet Service record. The user is prompted via alert message to update or delete the existing entry.

**Service Escalation Emails**

This entry cannot be created because a record for this worksheet type already exists. Please update or delete the existing entry ✕

This form displays service escalations. Service escalations define to whom a system generated email will be sent when defined worksheet types reach their escalation date. This form doesn't allow duplicates to be added; i.e. only one entry per worksheet service is allowed. If you are entering multiple email addresses please ensure that they are separated with a semicolon. There is a limit of 255 characters in the Email field so we recommend consolidating emails to a single group email address where possible.

| Worksheet Type                 | Deadline        | Email                                               |
|--------------------------------|-----------------|-----------------------------------------------------|
| Bulky Waste Collection (Items) | Escalation Date | council@organisation.co.uk;waste@organisation.co.uk |

Service:

Deadline:

Email:

### 3.1.4. Recipient is not receiving the Alert Email

Check that the supplied email address is correct. There is no way for us to know if an email has failed after it has successfully been received by the Smarthost server.

If the email address is correct and you believe an email has not been sent, raise a support desk ticket with us. We may already be aware of the issue as we have logs and monitoring for if connectivity to the Smarthost server is impacted.

Any Smarthost outage is not expected to be more than an hour, and there is an automated retry process in place for when connectivity is restored.



