

Support Log Ticket Menu

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Support Log Ticket Search

The Support Log Ticket is essential and serves as a centralised repository for all relevant support log queries

In the Debtor setup search, you will see two search tabs



Basic Search tab	If you know the log number or part of the support log number you can search here
Custom Search tab	If you have setup custom fields in support log tickets, you can search for the items in this area.

If you leave the basic search blank it will bring up all support log ticket codes

CRM Module> Activity> Support Log

Support Log Ticket

Search

Add

Edit

Cancel

Create Time Log

Workflow

Complete

Open Log

Email Self

Import

Print

Detailed

Custom Search

Contract

Log No:

Reference:

Debtor:

Debtor To:

Date Type:

Action Date

Status / Severity:

All

Date From:

2024-01-18

Date To:

2024-01-23

Employee Log:

All

Assign To:

Otsile Loate

Task:

All

Asset:

Subtask:

All

Root Cause:

Show Completed:

Show Open Items:

Priority:

All

Job Number:

Details

Graph

Due Date Schedule

Page 1 of 1

Remove Paging

Filter Sort

Due Today

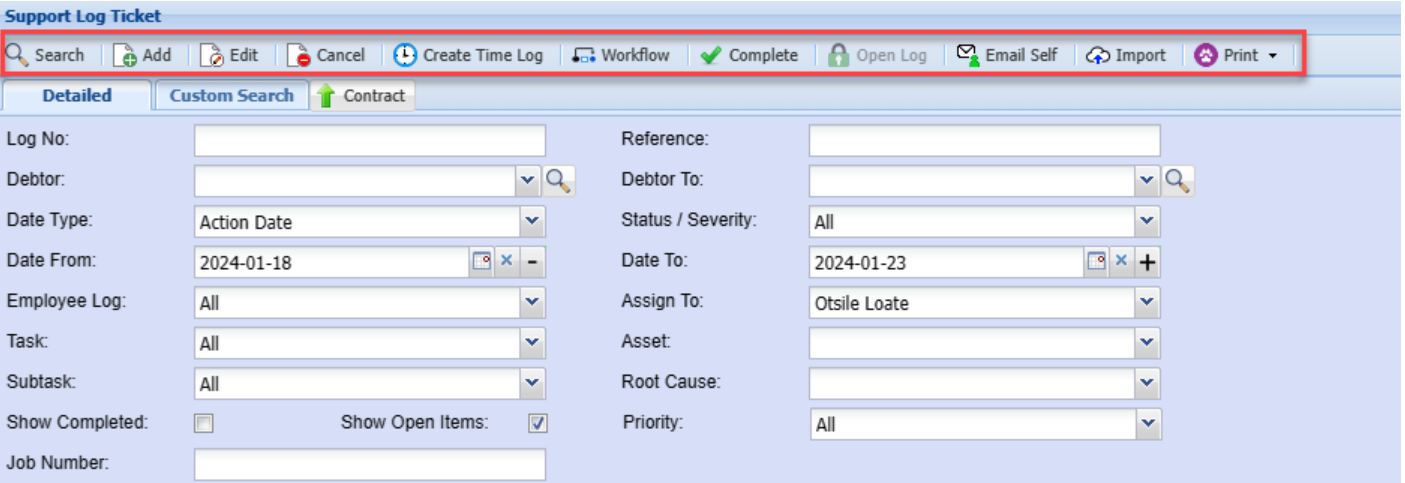
#	Due	Att	Memo	Update	Info	Log No	Progress	BookIn	Priority	Sub Prior	% Done	Estimated Month	Estimated Hours	Action Date
1						S27			1			September		2021-09-30
2						S16			1		20%	June		2021-06-08
3						S97			1			August		2022-09-01
4						S81			1			August		2022-09-01

Log No	search using a support log number

Date From	search by entering the from which the support log will run from
Date To	search by entering the date to, in order to limit to search run
Employee Log	search by selecting the employee from the drop down arrow
Assign To	search by selecting the person the support log is assigned to a certain user
Task	search by selecting the status from the drop down arrow
Show Completed	tick the box to search for completed support log
Support Tasks	
Status	

System Buttons

The Navigation Ribbon Used to Action Following Functions



The screenshot displays the 'Support Log Ticket' application interface. At the top, a navigation ribbon is highlighted with a red box, containing buttons for Search, Add, Edit, Cancel, Create Time Log, Workflow, Complete, Open Log, Email Self, Import, and Print. Below the ribbon, there are tabs for 'Detailed', 'Custom Search', and 'Contract'. The main area is divided into two columns of search criteria. The left column includes fields for Log No., Debtor, Date Type (set to Action Date), Date From (2024-01-18), Employee Log (All), Task (All), Subtask (All), Show Completed (unchecked), Show Open Items (checked), and Job Number. The right column includes fields for Reference, Debtor To, Status / Severity (All), Date To (2024-01-23), Assign To (Otsile Loate), Asset, Root Cause, and Priority (All).

Search	The search function will return support log ticket records based on the search criteria entered.
Add	Allows you to create a new support log ticket
Edit	Allows you to make changes to an existing support log ticket

Cancel	Allows you to cancel support log ticket
Create Time Log	Duplicate an existing debtor or customer
Workflow	Allows you to load a workflow and move support logs around
Complete	Allows you to highlight a support log and complete it
Email Self	Allows you to email support logs to yourself
Import	Allows you to import support logs
Print Dropdown	Allows you to print your Support log ticket in PDF or download an Excel sheet of your support log tickets

Add Support Log Ticket

Detail Tab

Video training manual 2016 - [Click Here](#)

Support log tickets are used to capture work for internal and technical staff.

Customer problems or support issues.

CRM Module > Activity > Support log ticket

Edit Support Log

Support Log Ticket Edit

Create Time log | Info | Attachments | Create Reminder | Generic Fields | Debtor Details | Audit | Print | Close

Detail | Problem | Memo | Solution | Feedback | Custom Fields | Time Log | Docs

Date Started: 2021-06-08 14:42:04 Otsile Loate

Debtor: X001 Debtor

Reference: Faulty Tank

Task: PRO - Problem

Sub Task: Sub - Sub Problem

Root Cause: Unassigned

Log No: S16

Employee Log: Thabile Khumalo

Manager: Imraan Saljee

Comment:

Action Date: 2021-06-08

Due Date: 2021-06-15

Assign to: BCC Otsile Loate

Last Assign To: 2021-06-08 14:42:04

Status: Logged

% Completed: 20%

Priority: Priority - 1

Sub Priority: 0

Estimated Hours:

Budget Value: 0

Incl. Toll in Budget:

Incl. Travel in Budget:

Asset:

In Warranty:

BookIn No:

Stock Item:

Job Number:

Equipment Down:

Order No.:

Date Completed:

Save and New | Save And Close | Save | Close | Send Status

It shows a list of support log from customers

Search according to user's preference

Search

Log No – search using a support log number

Reference – search by entering the reference of the support log

Employee Log – search by selecting the employee from the drop down arrow

Assign To – search by selecting the person the support log is assigned to a certain user

Debtor – search by the debtor

Date From – search by entering the from which the support log will run from

Date To – search by entering the date to, in order to limit to search run

Task – search by selecting the status from the drop down arrow

Show Completed – tick the box to search for completed support logs

Details Tab - to show the support log details

Support Tasks Tab – to show support log tasks

Status Tab - to show and allocate different colours to the status codes

Standard Tab has five buttons

Insert button – to insert the time log

Amend button - allows changes on an existing time log

Delete button – to delete the time log

Print button – to print the time log

Print Grid button – to print support log report

Extras Tab

Create Time Log button – to create a time log

New Features

Colour Code Status of Task

Colour code in the the Support Log Status makes it easier to view the different status of support tasks sitting in the Support Log Queue.

The user has the ability to change the status colours themselves.

Colour Codes On the due date - denotes at a glance which support logs need urgent attention.

Closing or Cancelling of Service Logs

Service Logs cannot be deleted off the Webaccounting system and the only way in which they can be resolved is by either closing or cancelling the Service Log.

To search for completed and cancelled Service Logs tick the Added Show Completed tick box.

Status Task Percentage Complete

The Service Log progress can be monitored by assigning a % completed.

Support Website logging

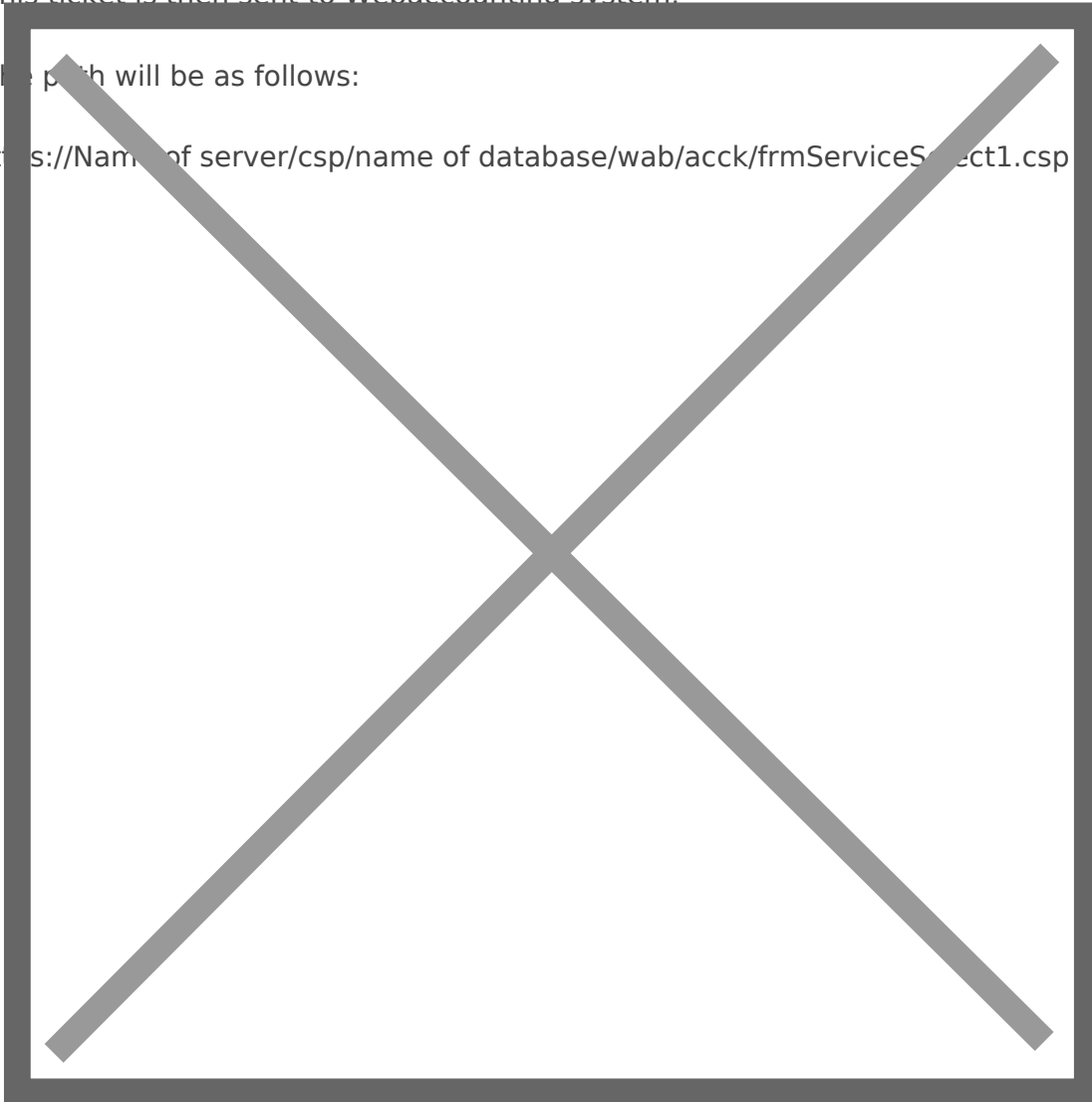
With Webaccounting we can integrate a logging system so that customers can go to your website, click on a support button and log a ticket.

This feature also allows the company to publish basic support manuals to their customers by using the Search Help files button.

This ticket is then sent to Webaccounting system.

The path will be as follows:

<https://Name of server/csp/name of database/wab/acck/frmServiceSupport1.csp>



Once the customer proceeds with the support, a new window will come up.

If the customer knows his customer code, he can enter it in the Company Code and when he clicks on tab.

It will bring up the companies list of contact persons. If the person logging the call is on the system then they can select their name.

The person can also update their information.

If you don't know your company code then skip the first line and go and enter your company name and details to log a support log.

For the company codes, we suggest putting random four digit numbers after the code. (like a bank code)

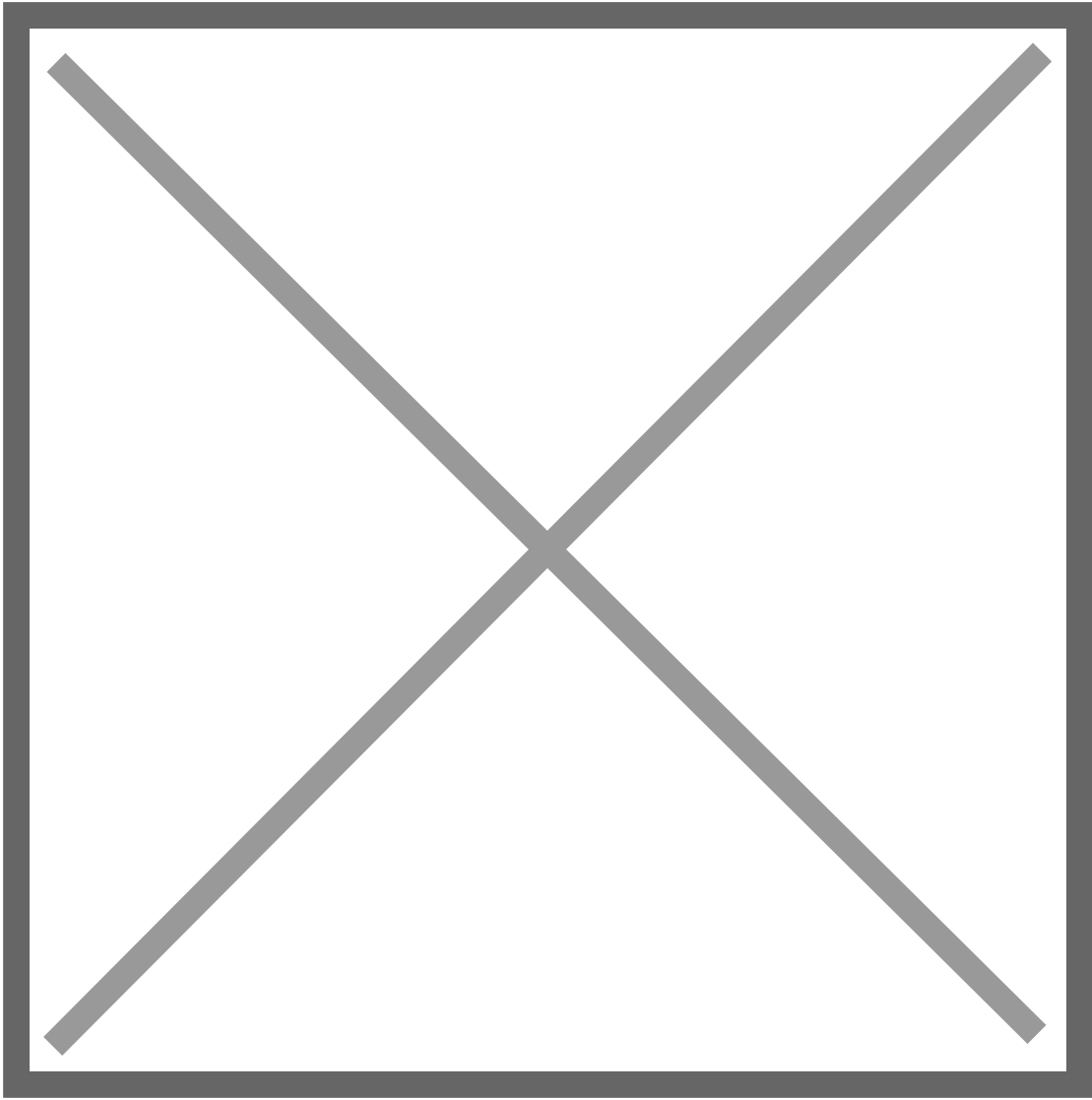
Example

ABC company code is usually ABC001

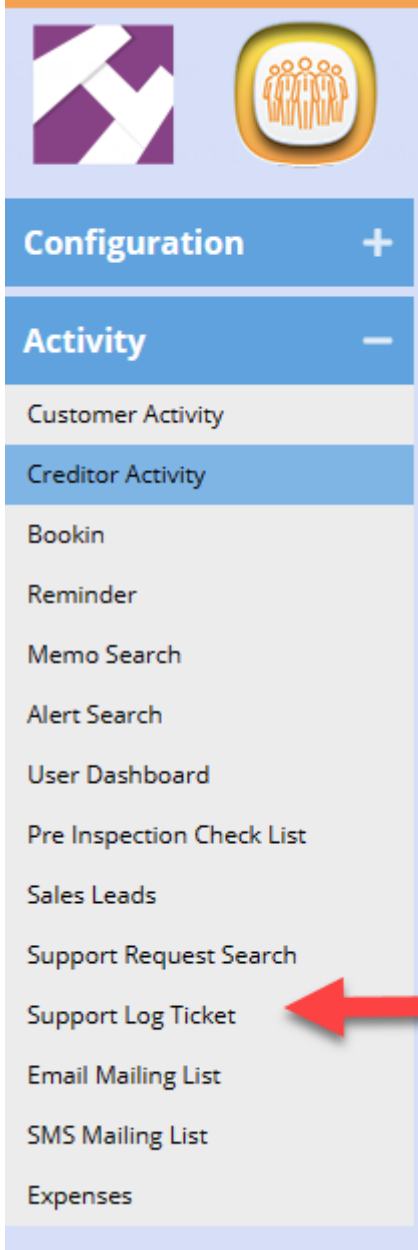
But this is easy for people to guess your code and therefore read the users.

So we suggest doing your code as usual but with a code after - ABC001-2681

The company Code enter, must be an exact match inorder for information to be displayed.



Support Log Capture Process



Support Log Ticket

nu Item

[bv](#)

Click the Add Button

Support Log Ticket

Search
 Add
 Edit
 Cancel
 Create Time Log
 Workflow
 Complete
 Open Log
 Email Self
 Import
 Print

Detailed
Custom Search
 Expand

Log No:
 Debtor:
 Date Type:
 Date From:
 Employee Log:
 Reference:
 Debtor To:
 Status / Severity:
 Date To:
 Assign To:

Edit Support Log

Support Log Ticket Edit

Create Time log
 Info
 Attachments
 Create Reminder
 Generic Fields
 Debtor Details
 Audit
 Print
 Close

Detail
Problem
Memo
Solution
Feedback
Custom Fields
Time Log
Docs

Date Started: **2021-06-08 14:42:04 Otsile Loate**
 Debtor:
 Reference:
 Task:
 Sub Task:
 Root Cause:
 Log No: **S16** Complete
 Employee Log: E: ☒ S: ☐
 Manager: E: ☐ S: ☐
 Comment:
 Action Date:
 Due Date:
 Assign to: E: ☒ S: ☐
 Last Assign To: **2021-06-08 14:42:04**
 Status:
 % Completed: Send Status
 Priority: Sub Priority:
 Estimated Hours: Month:
 Budget Value: Monitoring Active: ☐
 Incl. Toll in Budget: ☐ Incl. Travel in Budget: ☐
 Asset: L: ☒
 In Warranty: ☐ View Asset Item
 BookIn No: Create BookIn
 Stock Item:
 Job Number:
 Equipment Down: ☐ Order No.:
 Date Completed:

Save and New
 Save And Close
 Save
 Close
 Send Status

Debtor	Enter the Company Name
Reference	Enter a Reference for the Support Call
Task	Select a Task from the Drop Down
Sub Task	Select a Sub Task from the Drop down
Action Date	Enter the Action Date: Typically, this would be the date the task will be done
Due Date	Enter the Due date for the Task to be completed

Assign To	Select the Technician that the Support Call is to be assigned to
Status	Select the Support Call Status

Click Save

Click the Problem Tab

Enter the details of the problem or task that is required to be performed

After clicking save you note that the notes typed will move to the right-hand side

Edit Support Log

Support Log Ticket Edit

Create Time log

Info

Attachments

Create Reminder

Generic Fields

Debtor Details

Audit

Print

Close

Detail

Problem

Memo

Solution

Feedback

Custom Fields

Time Log

Docs

Enter Current Notes:

Tank is licking on the top right

Note History:

2024-01-23 10:59:57 Otsile Loate
Tank is licking

2021-06-08 14:42:10 Imraan Salijee
vrgsggEA

2021-06-08 14:42:04 Imraan Salijee
crrgrsd sac

SMS Problem Note

Email Problem Note

Email Problem Note History

Save and New

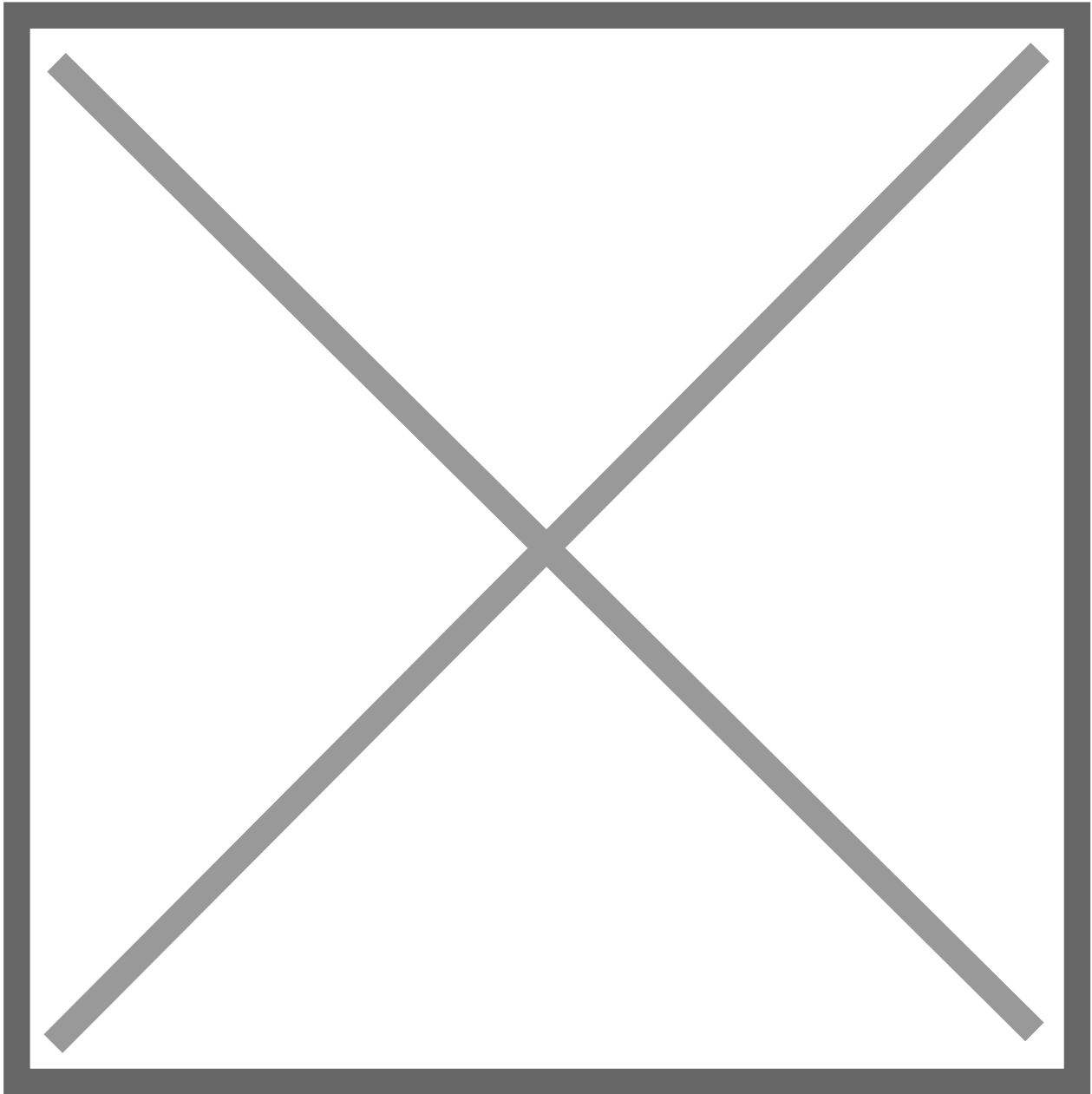
Save And Close

Save

Close

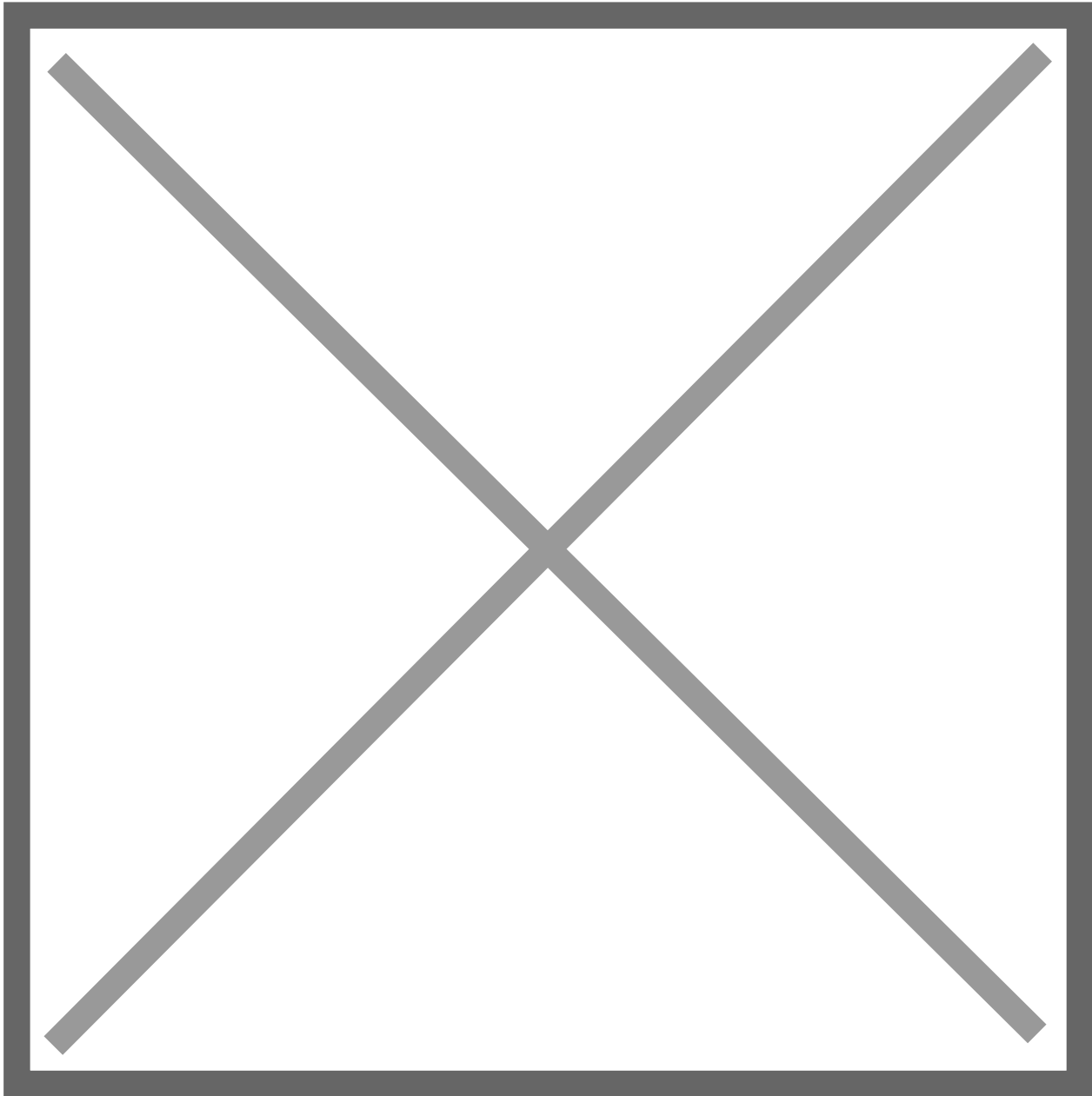
Send Status

And the date time and user who captured the note is logged



Click the Feedback tab

Enter details of the feedback that you wish to forward to the client

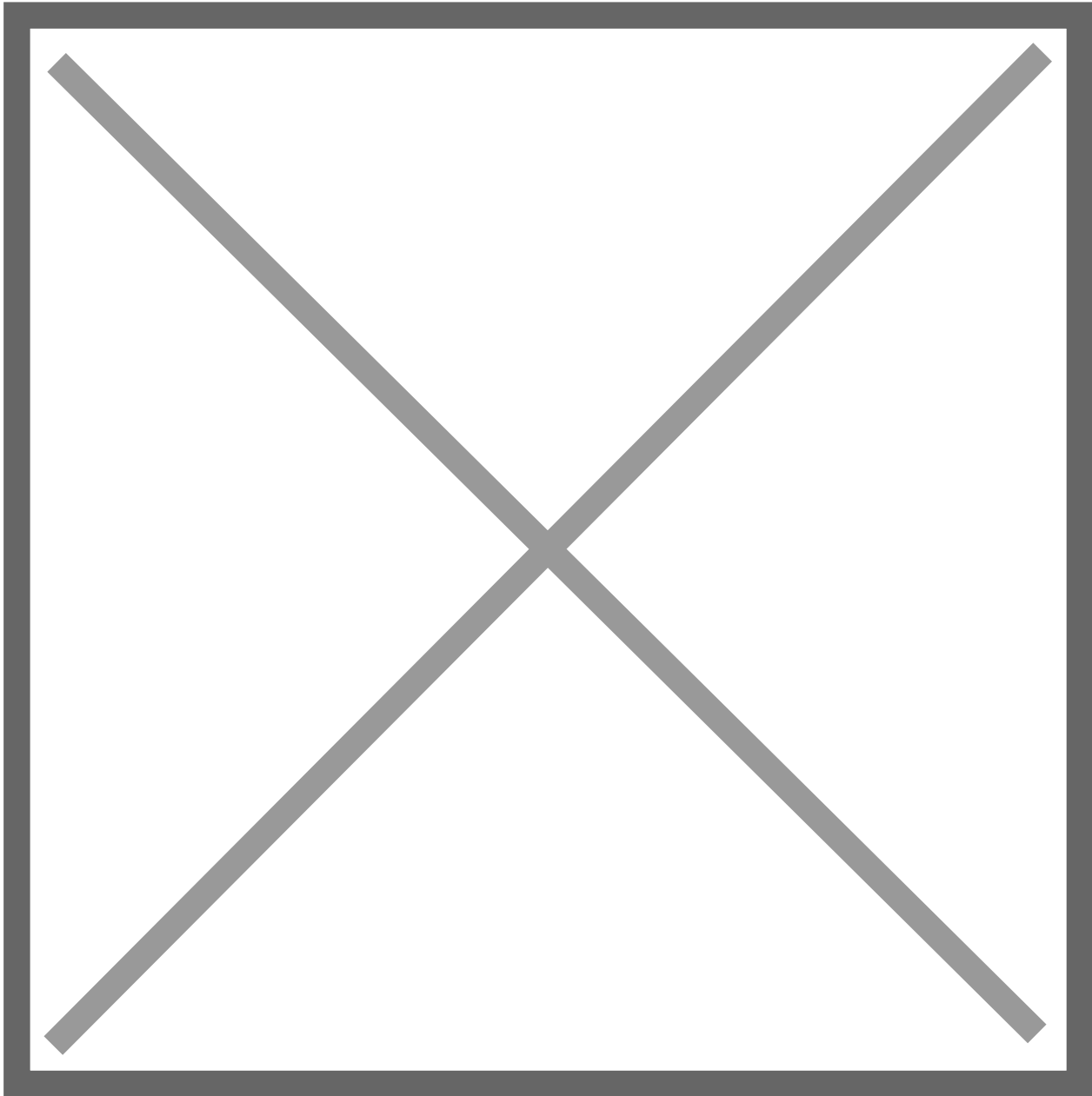


Click Save

Once again, the note is moved to the right-hand side and logged with Time, date and user.

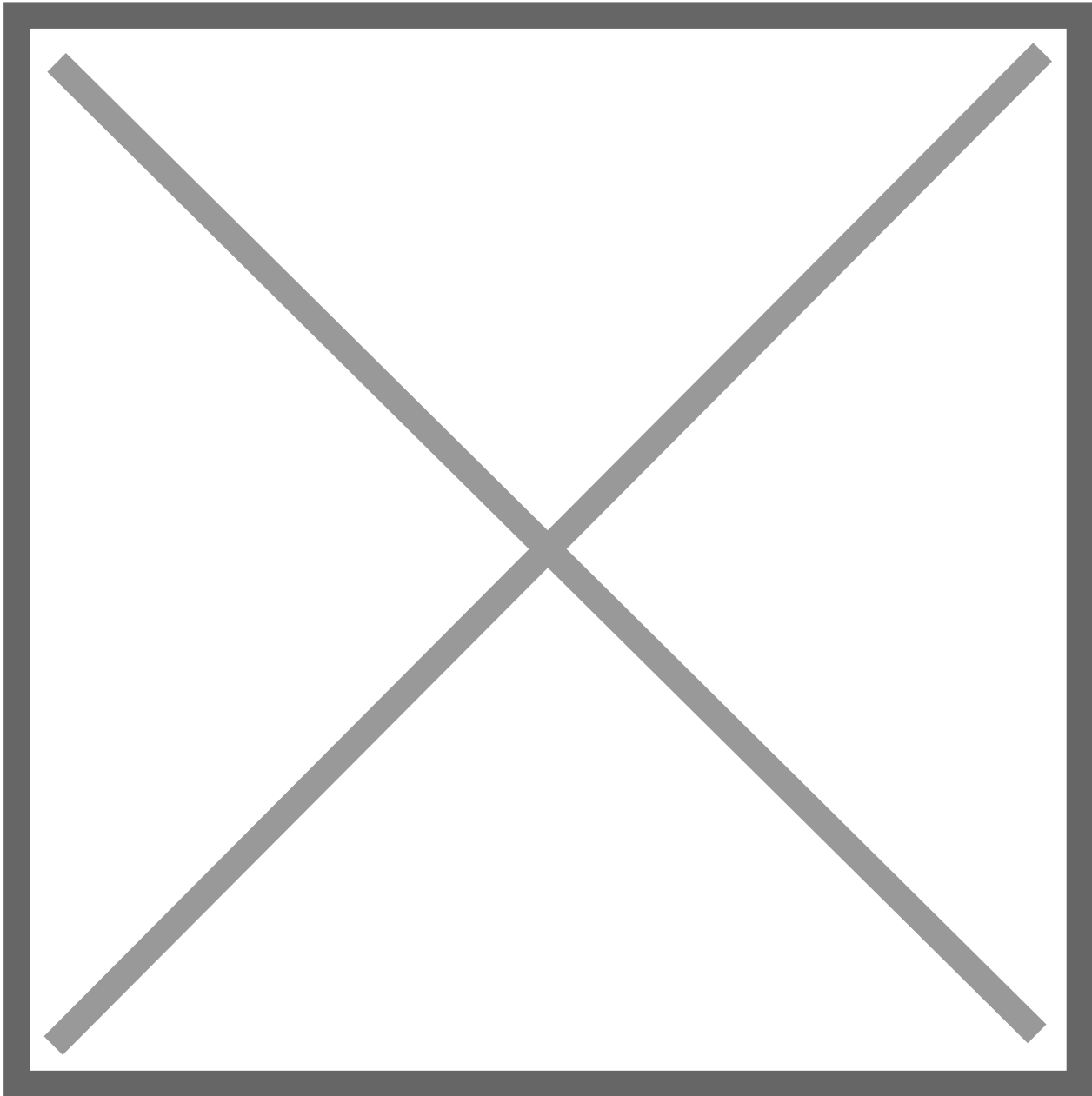
If you wish to email the client feedback as well, you can click the Save and Send Button.

This will email the Client and the Technician the notes captured.



Once the technician has been to site and performed the relevant tasks, he can enter further details on this page and again Save or Save and Send.

Upon completion of the Support Call, the technician can then call up the Support Log Ticket and enter and further details as well as enter the "Root Cause" if applicable.



Creating a Time Log from Support Log Ticket

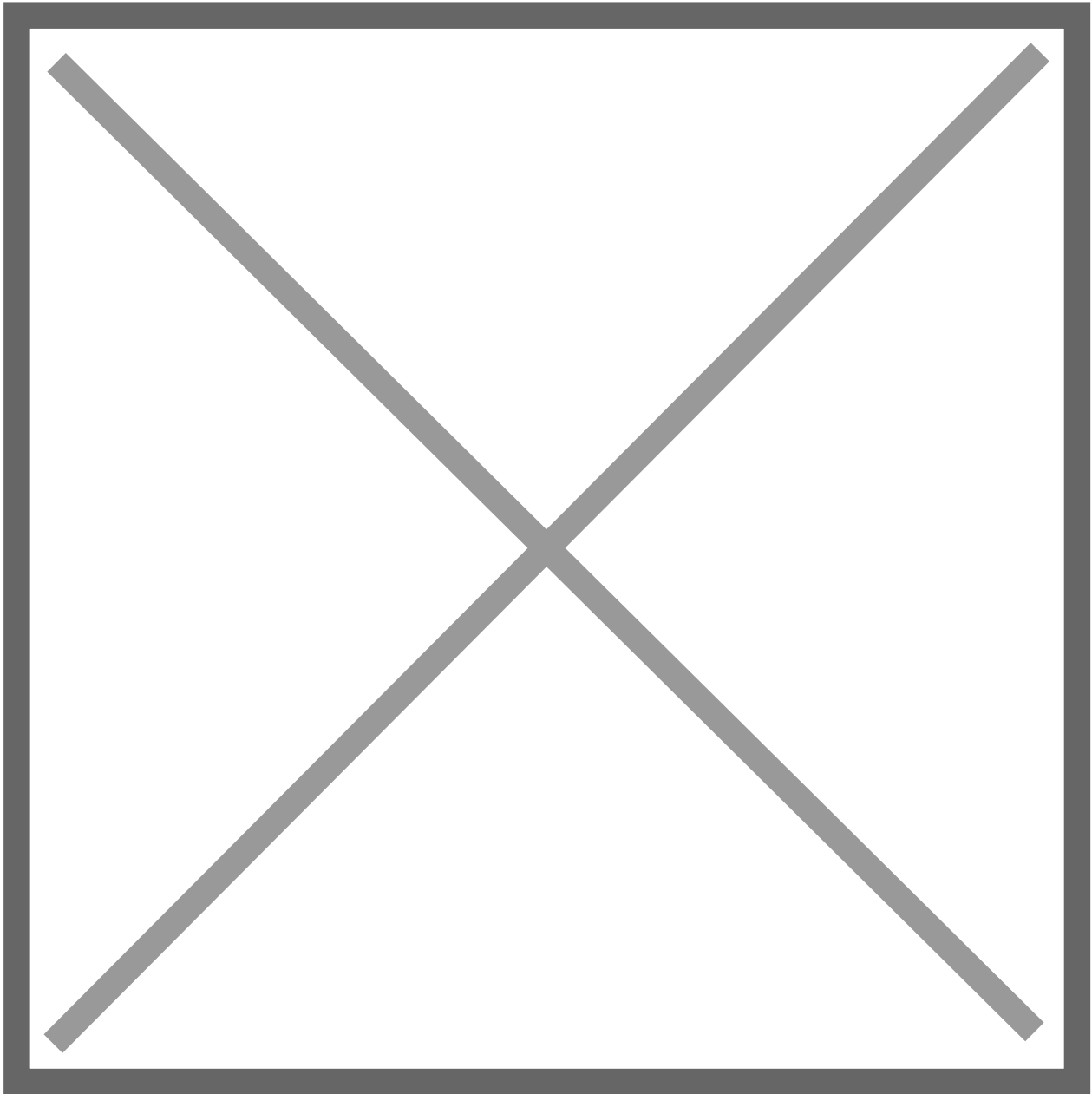
If you wish for the Technician to log their time spent on the Support Call, while on the Support Log Ticket, the Technician can opt to create a time log as follows:

The Technician can Search for the Support Ticket

Debtor Module> Interactions> Support Log Ticket

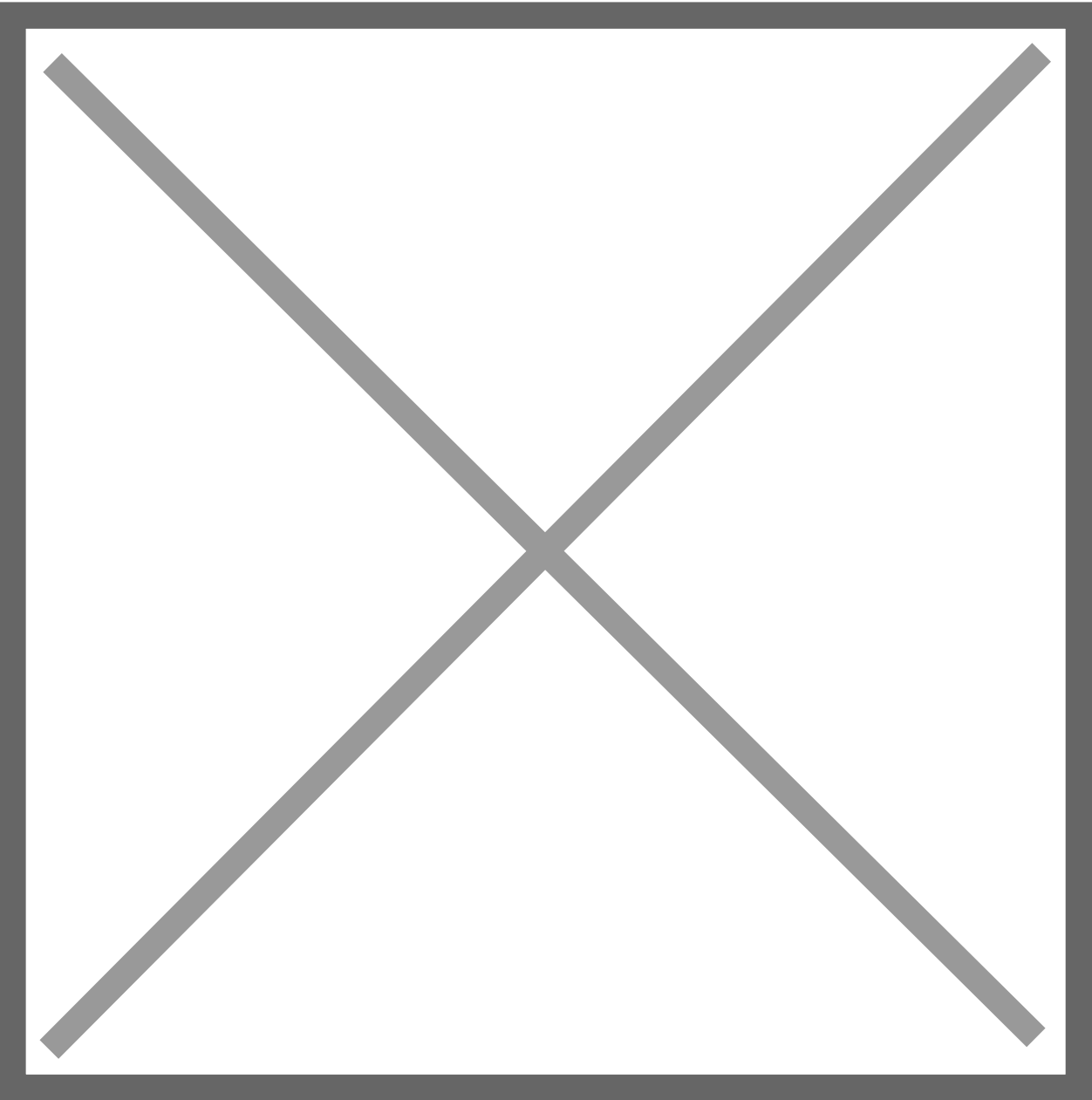
Enter the client name or date range or log number

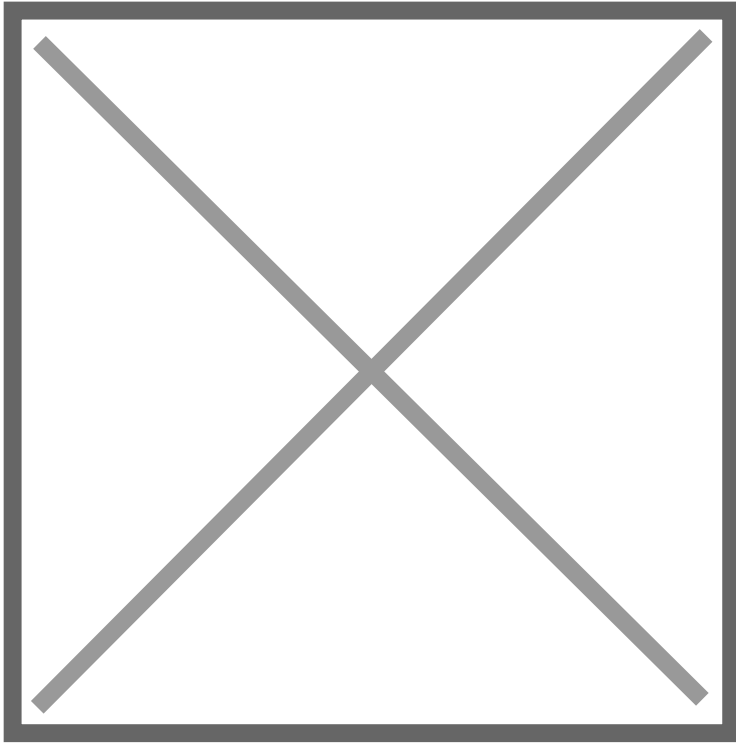
And click Search



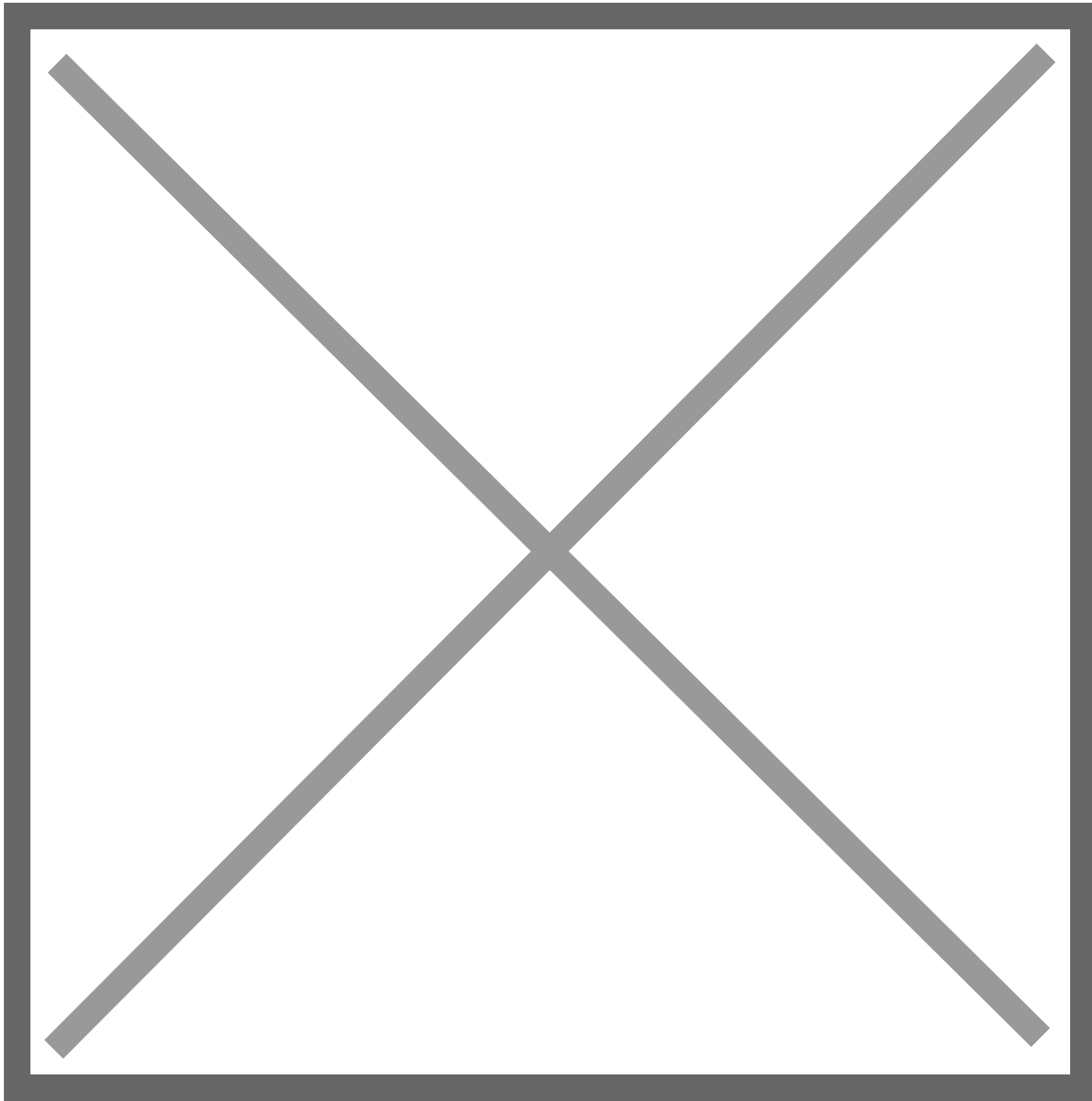
Highlight (click Once) on the required Support log Ticket

Click the Create Time Log Button





Click Yes



1.Select the Agreement Contract

2.Select the Task performed from the drop down

3.Select the respective sub task

4.Select the respective Billing Rate

5.Capture details of the task performed

check the time log date is correct

1.Enter Time Started

2.Enter the Time Ended

The time log can then be either printed or emailed to yourself and then forwarded to the client for signature and /or their records.

Support Log recurring tickets

- Create multiple future recurring tickets.
- Useful when creating tickets for monthly maintenance on items.
- Create one recurring ticket and save and close
- Go to support ticket and highlight, click on Create Recurring Tickets button

Support Log Ticket

Search

Add

Edit

Cancel

Create Time Log

Workflow

Complete

Open Log

Email Self

Import

Create Recurring Tickets

Print

Detailed

Custom Search

Expand

Log No:

Reference:

Debtor:

Debtor To:

Date Type:

Action Date

Status / Severity:

All

Date From:

2024-06-23

Date To:

2024-06-28

Employee Log:

All

Assign To:

Details

Graph

Due Date Schedule

Page 1 of 1

Remove Paging

Filter Sort

Due To

#	Due	Att	Memo	Update	Info	Log No	Action Date	Sub Prio	Progress	Created Month	Est			
1	▲	📎	📅	✅	ℹ️	S61	2022-05-13							
2	▲	📎	📅	✅	ℹ️	S6	2021-03-08							
3	▲	📎	📅	✅	ℹ️	S54	2022-01-19		▶▶▶▶	1	ABC007	50%	January	
4	▲	📎	📅	✅	ℹ️	S46	2022-01-18		▶▶▶▶	1	ABC001		January	
5	▲	📎	📅	✅	ℹ️	S28	2021-11-24		▶▶▶▶	1	DAV001		November	
6	▲	📎	📅	✅	ℹ️	S25	2021-08-31		▶▶▶▶	1	ABC001		August	
7	▲	📎	📅	✅	ℹ️	S24	2021-08-31		▶▶▶▶	1	DAV001		August	

Link to Recurring license

If license is not active, button is disabled

Specify the recurring occurrences and click on create

Create Recurring Support Tickets

Transaction Period Setup

Initialise:

Select: ☒ Immediately ☐ Initialise Date

Support Log Recurring Setup:

☐ On The

Day Of Every:

☒ On The

Day Of Every:

☐ Every

Support Log Occurrence :

Number Of Support Logs:

Create

Cancel

This will create future recurring tickets

If you want to see the future tickets, change your date to into the future

Support Log Ticket

Search Add Edit Cancel Create Time Log Workflow Complete Open Log Email Self Import Create Recurring Tickets Print

Detailed Custom Search Expand

Log No:

Debtors:

Date Type:

Action Date

Date From:

2024-06-23

Employee Log:

All

Reference:

monthly

Debtor To:

Status / Severity:

All

Date To:

2025-07-03

Assign To:

Malcolm Granville

Details Graph Due Date Schedule

Page 1 of 1															Remove Paging:		Filter Sort		Due Today		7	
#	Due	Att	Memo	Info	Update	Log No	Bookin	Priority	Estimated Month	Reference	Action Date	Due Date	Status / Severity	Debtors Code								
1						S25		0	September	Monthly support o...	2024-09-25	2024-10-02	Received	ABC0010								
2						S24		0	August	Monthly support o...	2024-08-25	2024-09-01	Received	ABC0010								
3						S23		0	June	Monthly support o...	2024-06-27	2024-07-04	Received	ABC0010								
4						S22		0	June	Monthly support o...	2024-06-27	2024-06-27	Received	ABC0010								