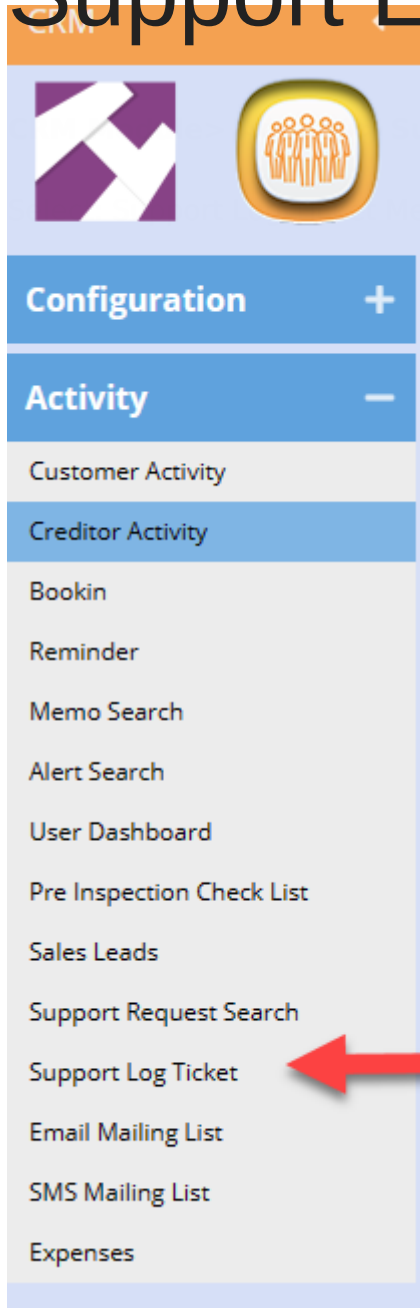


Support Log Capture Process



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:
 Priority: Sub Priority:
 Estimated Hours: Month:
 Budget Value: Monitoring Active: ☐
 Incl. Toll in Budget: ☐ Incl. Travel in Budget: ☐
 Asset: L: ☒
 In Warranty: ☐
 BookIn No:
 Stock Item:
 Job Number:
 Equipment Down: ☐ Order No.:
 Date Completed:

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

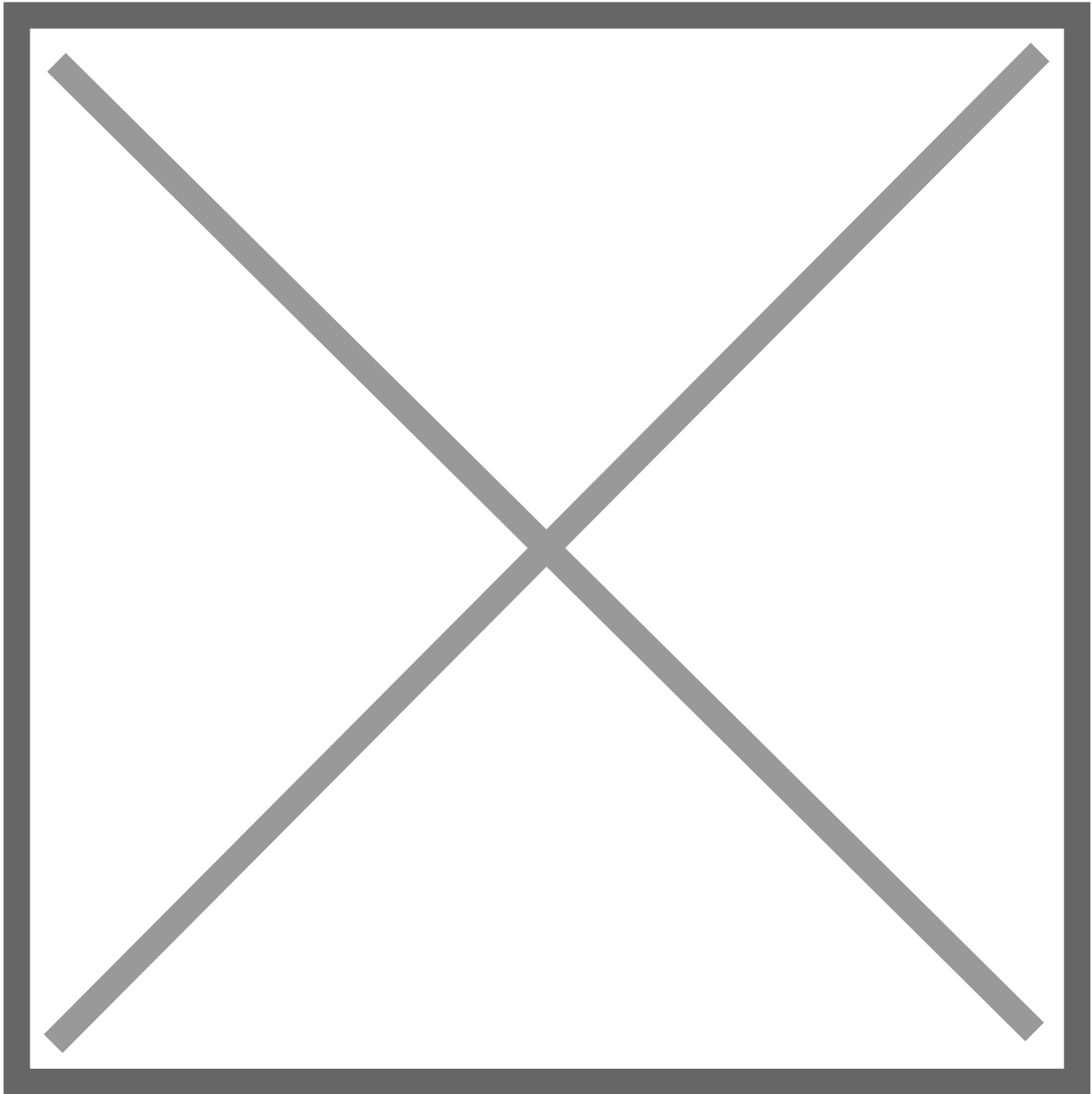
Save And Close

Save

Close

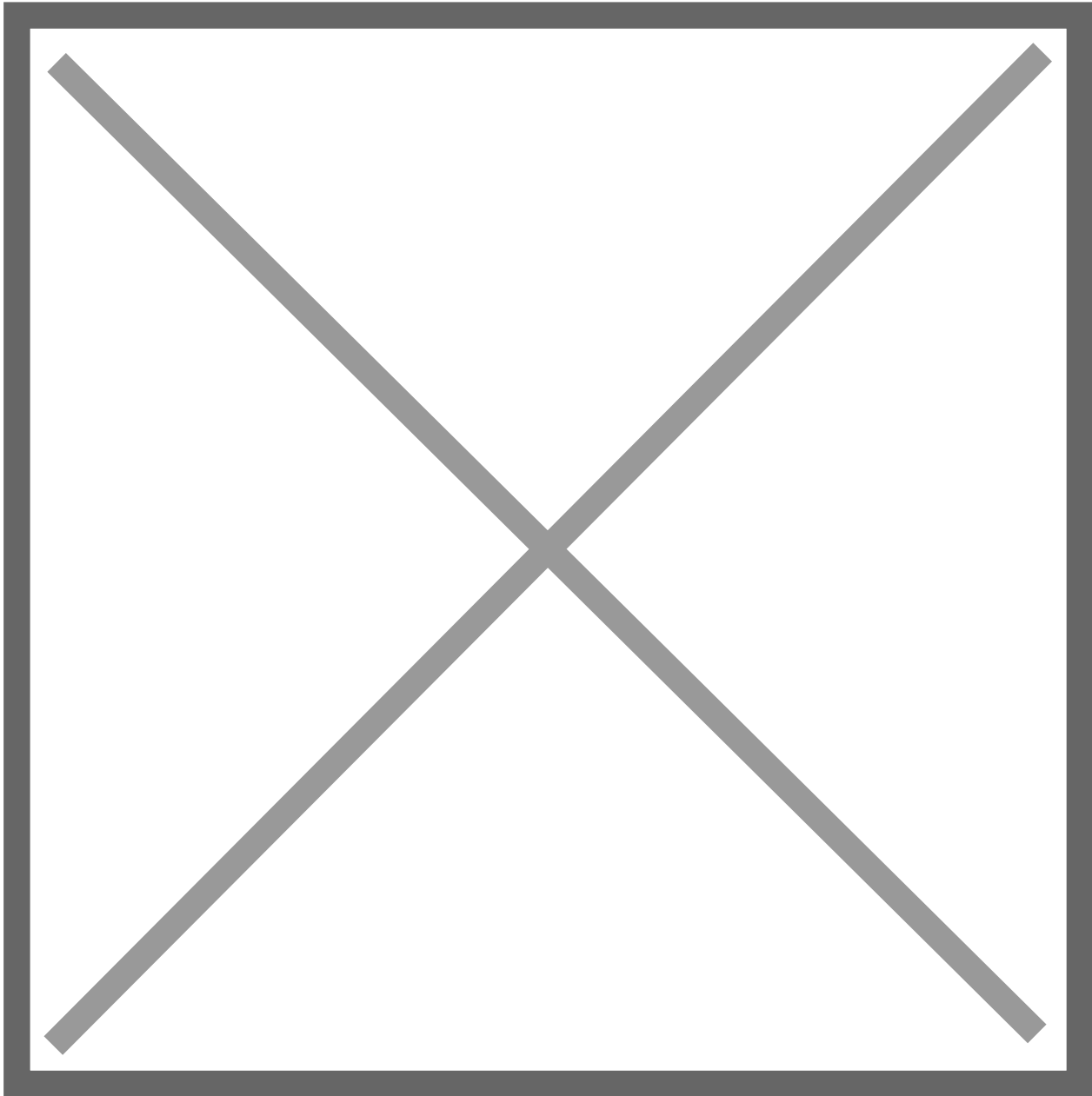
Send Status

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

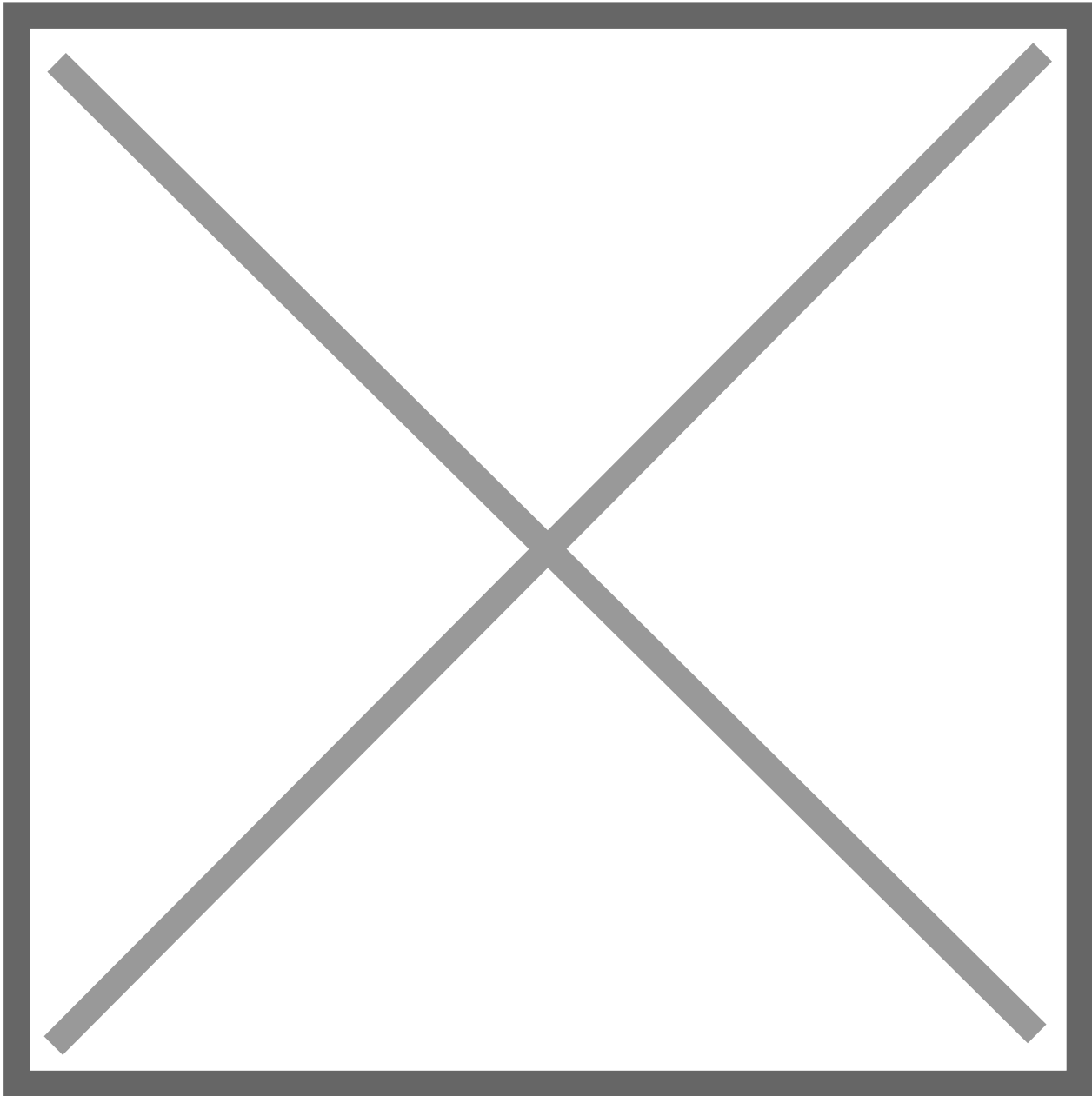


Click Save

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

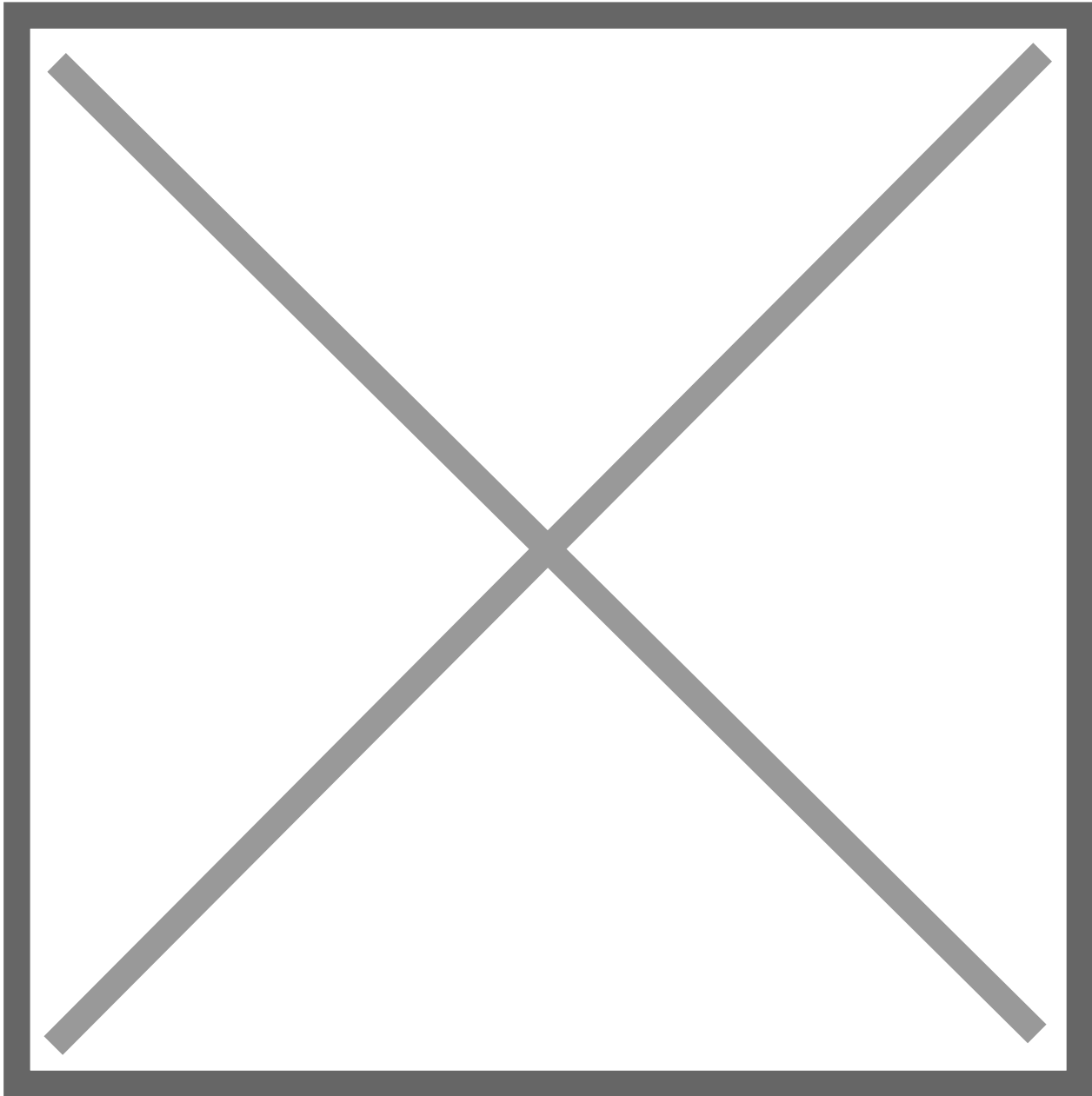
If you wish to email the client feedback as well, you can click the Save and Send Button.

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

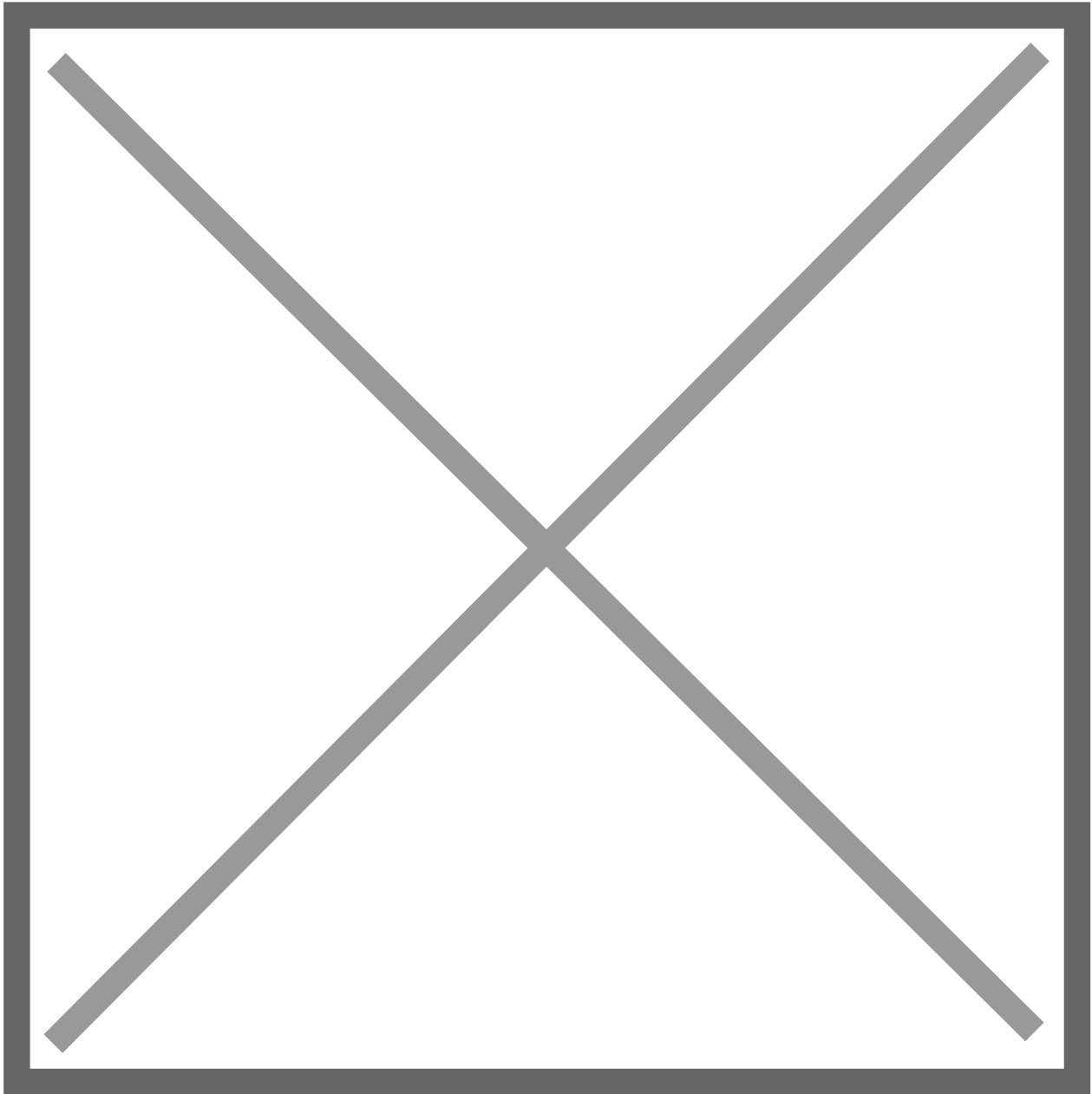
If you wish for the Technician to log their time spent on the Support Call, while on the Support Log Ticket, the Technician can opt to create a time log as follows:

The Technician can Search for the Support Ticket

Debtor Module> Interactions> Support Log Ticket

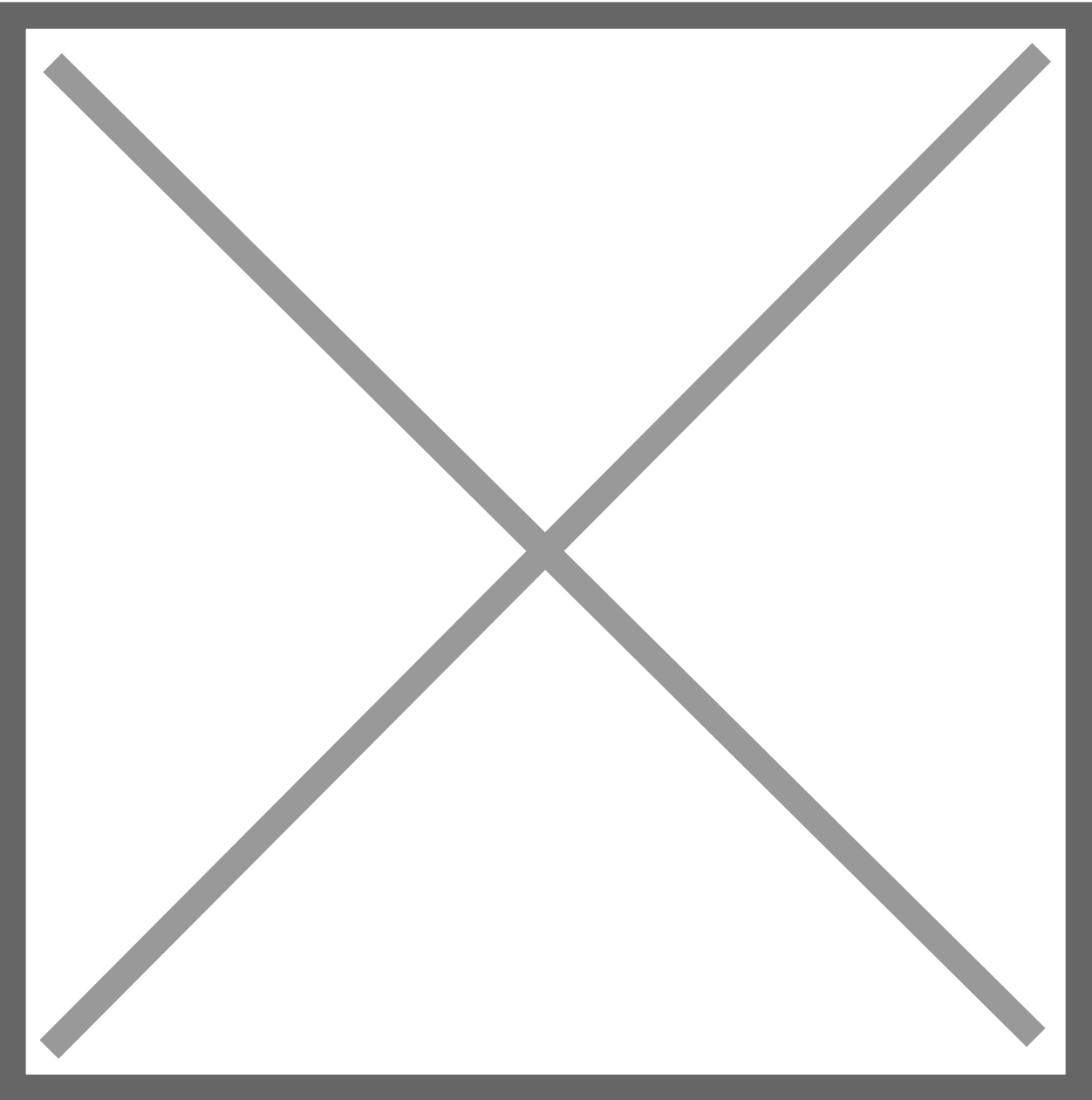
Enter the client name or date range or log number

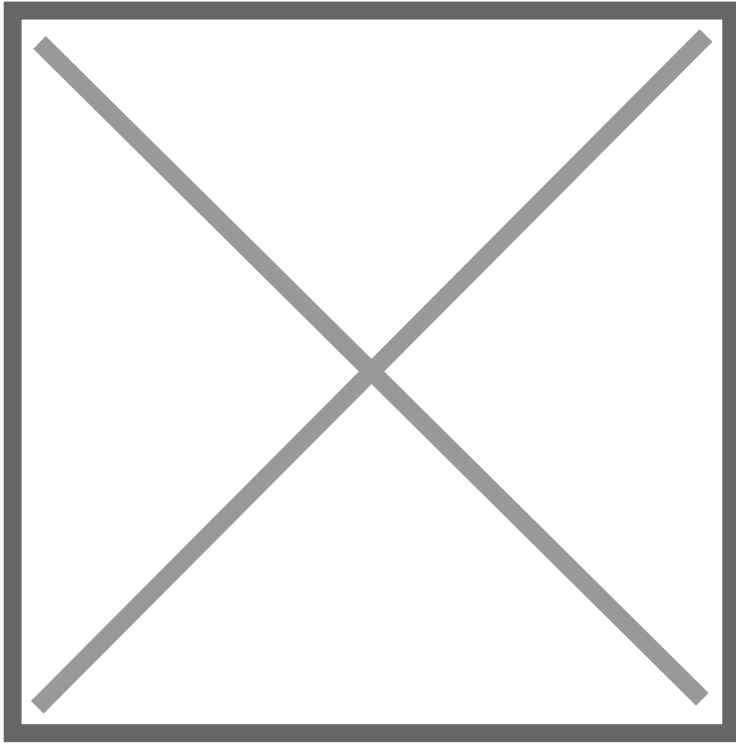
And click Search



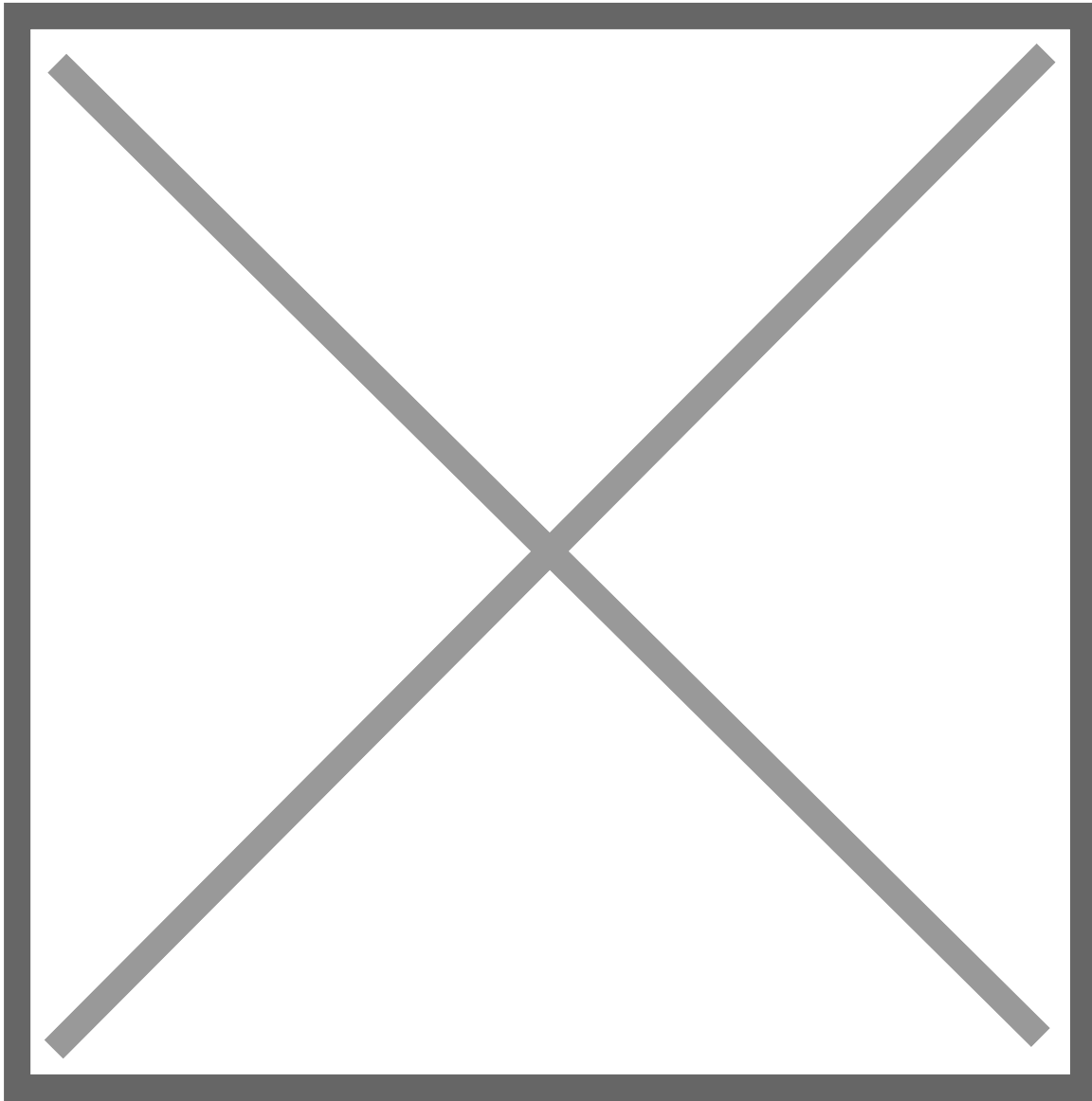
Highlight (click Once) on the required Support log Ticket

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.

Revision #2

Created 27 July 2023 18:42:58 by Paige

Updated 23 January 2024 09:10:38 by Otsile