



User Manual (English)

The following are the various modules and domains offered by ERP+ from Technocom, covering a wide range of businesses. You can be a small distributor, a manufacturer, running an educational institute, or a healthcare organization. There is something for everyone.

Connect

info@technocom.me

+973 39 394939

www.erpplus.me

www.technocom.me

Document Version: 01.01.2019

Release Date: April 25, 2019

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Technocom Co. W.L.L. - Kingdom of Bahrain

Module: **Support**

Module: Support

Great customer support and maintenance is at the heart of any successful small business. With ERP+ you track all incoming customer requests and issues so that you can respond quickly. The database of incoming queries will also help you to identify the biggest opportunities for improvements.

You can track incoming queries from your email using Support Ticket. You can keep track of Customer Issues linked with a specific Serial No and respond to them based on their warranty and other information. You can also make Maintenance Schedules for Serial NOs and keep a record of all Maintenance Visits made to your Customers.

1. Topics

1.1 Common Support Topics

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3. Maintenance Visit
4. Maintenance Schedule
5. Support Reports

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1. Setting Up Feedback
2. Submit Feedback
3. Resend Feedback Request
4. Manual Feedback Request

1.1 Topic: Common Support Topics

1. Issue
2. Warranty Claim
3. Maintenance Visit
4. Maintenance Schedule
5. Support Reports

1. Issue

Issue is an incoming query from your Customer, usually via email or from the “Contact” section of your website. (To fully integrate the Support Ticket to email, see the Email Settings section).

Tip: A dedicated support Email Address is a good way to integrate incoming queries via email. For example, you can send support queries to ERP+ at support@ERP+.com and it will automatically create an Issue in the Frappe system.

Support > Issue > New Issue

The screenshot shows the Frappe Issue interface for the issue titled "Machine Not Counting Properly" (ISS-00002). The interface is divided into several sections:

- Header:** Shows the issue title "Machine Not Counting Properly" with a red "Open" status indicator, the ID "ISS-00002", and a "Close" button.
- Left Sidebar:** Contains navigation options: "Comments" (5), "ASSIGNED TO" (Assign +), "ATTACHMENTS" (Attach File +), "TAGS" (Add a tag...), and "SHARED WITH". It also shows activity logs: "You edited this 2 days ago" and "You created this a month ago".
- Main Content Area:**
 - Subject:** A form with "Subject" (Machine Not Counting Properly) and "Status" (Open) fields.
 - Comments:** A section for adding comments with a text area, a "You" label, and "Email" and "Compose" buttons.
 - Activity:** A list of comments, showing one from "Demo User" 16 days ago with a "Details" link and a "Reply" button.

Discussion Thread

When a new email is fetched from your mailbox, a new Issue record is created and an automatic reply is sent to the sender indicating the Support Ticket Number. The sender can send additional information to this email. All subsequent emails containing this Issue number in the subject will be added to this Issue thread. The sender can also add attachments to the email.

Issue maintains all the emails which are sent back and forth against this issue in the system so that you can track what transpired between the sender and the person responding.

Status

When a new Issue is created, its status is “Open”, when it is replied, its status becomes “Waiting for Reply”. If the sender replies back its status again becomes “Open”.

Closing

You can either “Close” the Issue manually by clicking on “Close Ticket” in the toolbar or if its status is “Waiting for Reply”. If the sender does not reply in 7 days, then the Issue closes automatically.

Allocation

You can allocate the Issue by using the “Assign To” feature in the left sidebar. This will add a new To Do to the user and also send a message indicating that this Issue is allocated.

2. Warranty Claim

If you are selling Items under warranty or if you have sold and extended service contract like the Annual Maintenance Contract (AMC), your Customer may call you about an issue or a breakdown and give you the Serial No of this Item.

To record this, you can create a new Warranty Claim and add the Customer and Item / Serial No. The system will then automatically fetch the Serial No's details and indicate whether this is under warranty or AMC.

You must also add a description of the Customer's issue and assign it to the person who needs to look into solving the issue.

To create a new Warranty Claim: Support > Warranty Claim > New Warranty Claim

The screenshot displays the Adaptas software interface for creating a new Warranty Claim. The interface is divided into a sidebar on the left and a main form area on the right. The sidebar contains several sections: 'Comments' with a count of 2, 'ASSIGNED TO' with an 'Assign +' button, 'ATTACHMENTS' with an 'Attach File +' button, 'TAGS' with an 'Add a tag...' link, and 'SHARED WITH' with a '+' icon. The main form area has a top bar with the text 'Adaptas' and a red dot next to 'Open', followed by 'CI-00002', a printer icon, a star icon, a 'Menu' dropdown, and a 'Save' button. Below this is a 'Make Maintenance Visit' button. The form itself is organized into two columns. The left column contains 'Status' (Open), 'Issue Date' (04-27-2015), and 'Issue' (Stopped working). The right column contains 'Serial No', 'Customer' (Adaptas), 'Customer Address' (Adaptas-Office), 'Contact Person' (January Václavík-Adaptas), 'Warranty / AMC Status' (Under Warranty), 'Warranty Expiry Date' (04-03-2019), and 'AMC Expiry Date'. At the bottom left of the form, there is an 'Item Code' field.

If a Customer visit is required to address the issue, you can create a new Maintenance Visit record from this.

3. Maintenance Visit

A Maintenance Visit is a record of a visit made by an engineer to a Customer's premise usually against a Customer Issue. You can create a new Maintenance Visit from: Support > Maintenance Visit > New Maintenance Visit

Adapta ● Draft MV00001 🗑️ ★ Menu ▼ Submit

From Maintenance Schedule From Warranty Claim From Sales Order

Customer: Maintenance Date:

Maintenance Time:

Completion Status: Maintenance Type:

Item Code	Item Name	Serial No	Description
1	Base Plate		3/4 in. x 2 ft. x 4 ft. Pine Plywood

[Add new row](#)

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

You edited this a month ago

You created this

The Maintenance Visit contains information about the:

- Customer.
- The Items that were inspected / maintenance activity was carried out on.
- Details of actions taken.
- The person who carried out the actions.
- Feedback from the Customer.

4. Maintenance Schedule

All machines require regular maintenance, especially those that contain a lot of moving parts, so, if you are in the business of maintaining those or have some of them in your own premises, this is a useful tool to plan a calendar of activities for its maintenance.

If the Customer Issue refers to “Breakdown Maintenance”, this refers to “Preventive Maintenance”.

To create a new Maintenance Schedule, go to: Support > Maintenance Schedule > New Maintenance Schedule

The screenshot shows a web form for creating a maintenance schedule. The form is titled "MS00002" and is in "Draft" status. It includes a "Comments" section on the left with a count of 1. The main form area is divided into several sections:

- Customer:** A text input field containing "Adaptas".
- Status:** A dropdown menu set to "Draft".
- Transaction Date:** A text input field containing "04-20-2015".
- Item Table:** A table with columns: Item Code, Item Name, Description, Start Date, End Date. It contains one row: "1 Base Plate Base Plate 3/4 in. x 2 ft. x 4 ft. Pl... 04-20-2015 04-21-2015". Below the table is an "Add new row" button.
- Schedule:** A section with a "Generate Schedule" button. Below it is a table with columns: Item Code, Item Name, Scheduled Date, Sales Person, Serial No. It contains one row: "1 Base Plate Base Plate 04-21-2015 dkman".
- Contact Info:** A section with "Customer Name" (Adaptas) and "Customer Address" (Adaptas-Office) fields.

In the Maintenance Schedule, there are two sections:

In the first section, you select the Items for which you want to generate the schedule and set how frequently you want to plan a visit or a maintenance. These can be optionally fetched from a Sales Order. After selecting the Items, “Save” the record.

The second section contains the maintenance activities planned in the schedule. “Generate Schedule” will generate a separate row for each maintenance activity.

Each Item in a Maintenance Schedule is allocated to a Sales Person.

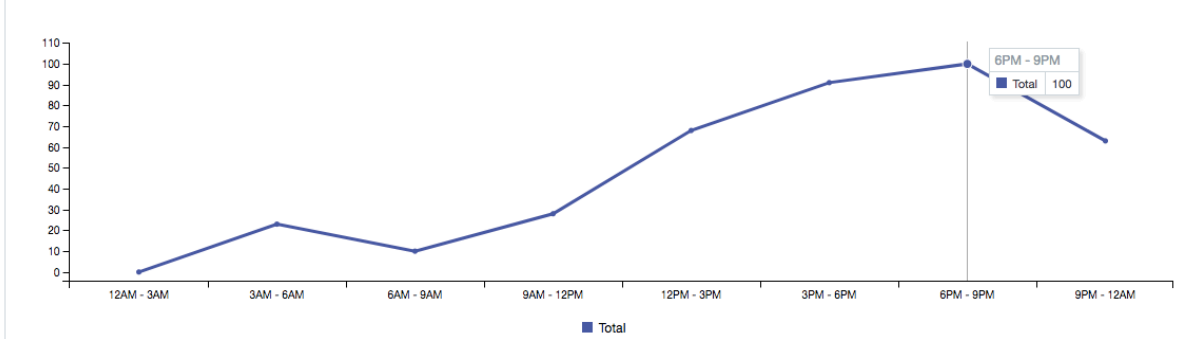
When the document is “Submitted” Calendar events are created in the User of the Sales Person for each maintenance.

5. Support Reports

Support Hours

This report provides the information about the time slot along with the count of issues that has been reported during the slot day-wise.

Support > Reports > Support Hours



1.2 Topic: **Feedback**

1. Setting Up Feedback
2. Submit Feedback
3. Resend Feedback Request
4. Manual Feedback Request

1. Feedback Trigger

You can set up the Feedback Trigger for various documents to get the Feedback from the user.

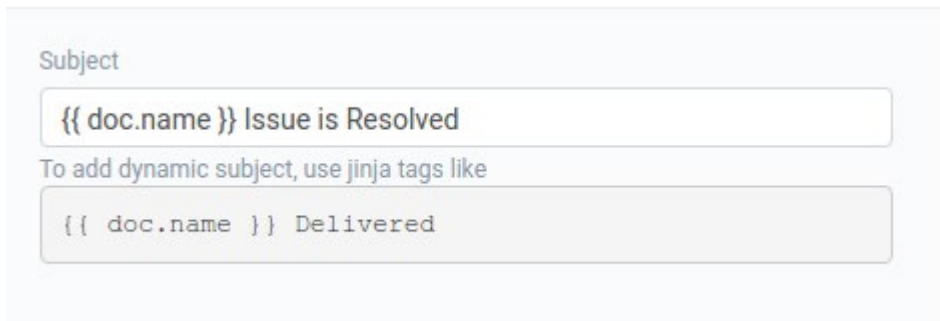
For this, you will need to setup the Feedback Trigger: Setup > Email > Feedback Trigger

Setting Up Feedback Trigger

1. Select which Document Type you want to send feedback request mail.
2. Select the Email Field, this field will be used to get the recipients email id.
3. Set the Subject for feedback request mail.
4. Set the conditions, if all the conditions are met only then the feedback request mail will be sent.
5. Compose the message.

Setting a Subject

You can retrieve the data for a particular field by using `doc.[field_name]`. To use it in your subject/message, you have to surround it with `{{ }}`. These are called [Jinja](#) tags. So, for example, to get the name of a document, you use `{{doc.name}}`. The below example sends a feedback request whenever Issue is Closed with the Subject, "ISS-##### Issue is Resolved"



The screenshot shows a configuration window for setting a subject. It has a title "Subject" and two input fields. The first field contains the text `{{ doc.name }} Issue is Resolved`. Below this field is a hint: "To add dynamic subject, use jinja tags like". The second field contains the text `{{ doc.name }} Delivered`.

Setting Conditions

Feedback Trigger allows you to set conditions according to the field data in your documents. The feedback request email will be sent on document save only if the all conditions are true For example if you want to trigger the feedback request mail to a customer if an Issue is has been saved as "Closed" as it's status, you put `doc.status == "Closed"` in the conditions textbox. You can also set more complex conditions by combining them.

Email Field

Raised By (Email)

Email Fieldname

raised_by

Condition

doc.status == 'Closed'

Optional: The alert will be sent if this expression is true

Setting a Message

You can use both Jinja Tags ({{ doc.[field_name] }}) and HTML tags in the message textbox.

<h3>Your Support Ticket is Resolved</h3>

<p>Issue {{ doc.name }} Is resolved. Please check and confirm the same.</p>

<p> Your Feedback is important for us. Please give us your Feedback for {{ doc.name }}</p>

<p> Please visit the following url for feedback.</p>

{{ feedback_url }}

Example

1. Setting up Feedback Trigger

Issue ● Enabled
Menu ▼ Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

♥ 0

You edited this
2 days ago

Enabled

Email Field

Email Fieldname

raised_by

Subject

To add dynamic subject, use jinja tags like

Condition

doc.status == 'Closed'

Optional: The alert will be sent if this expression is true

Condition Examples:

```
doc.status=="Closed"
doc.due_date==nowdate()
doc.total > 40000
```

2. Setting the Recipients and Message

MESSAGE

Message

```
<h3>Issue Resolved</h3>

<p>Issue {{ doc.name }} Is resolved. Please check and confirm the same.</p>

<p> Your Feedback is important for us. Please give us your Feedback for {{ doc.name }}</p>
```

2. Submit Feedback

Once feedback request mail is sent the user/customer. He / She can visit the URL to submit the feedback as well as rating for the document.

Please share your feedback for ISS-00016

Your rating: ★ ★ ★ ★ ☆

Detailed feedback

We were able to set the permission to sales invoice. Thank you for your support.



Submit

Once Feedback is submitted the feedback details message and ratings will be recorded and will be shown on Document sidebar and timeline. Also, once the Feedback is successfully submitted by the user the link shared to the user will be expired and cannot be used to submit the Feedback again.

On Document sidebar the latest feedback ratings will displayed.

Unable to setup row level permissions ● Closed ISS-00016 Menu

Feedback Rating
★ ★ ★ ★ ☆

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

[Reopen](#)

SUBJECT

Subject Status

Unable to setup row level permissions Closed

Mins to First Response Customer

Also, The Feedback details such as Feedback message and ratings will be shown in the Document's Timeline along with Comment, Email.

Add a comment Comment

Ctrl+Enter to add comment

New Email

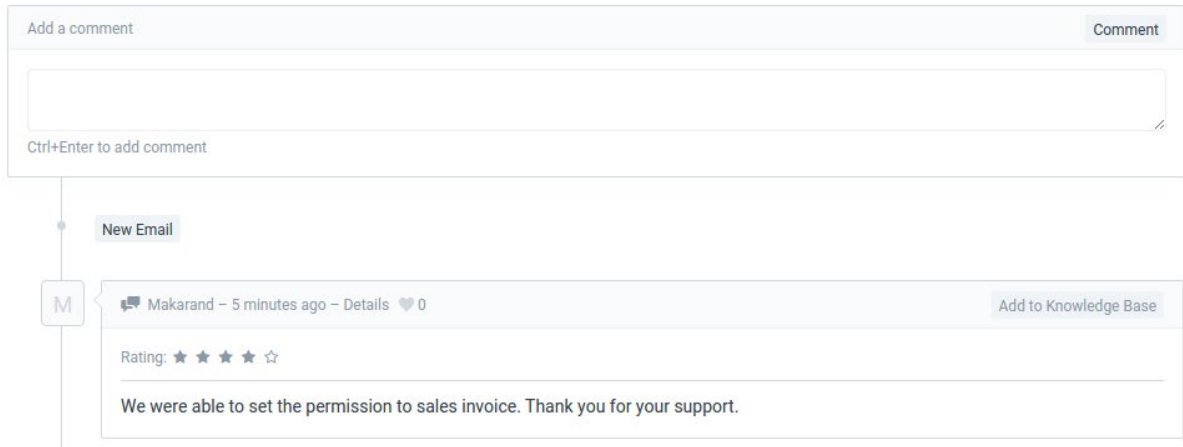
M 🗨️ Makarand - 5 minutes ago - Details ♥️ 0 Add to Knowledge Base

Rating: ★ ★ ★ ★ ☆

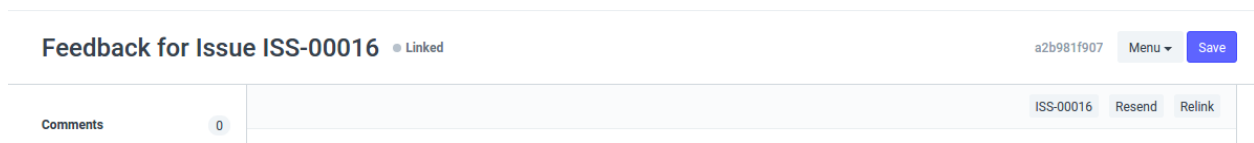
We were able to set the permission to sales invoice. Thank you for your support.

Resend Feedback Request

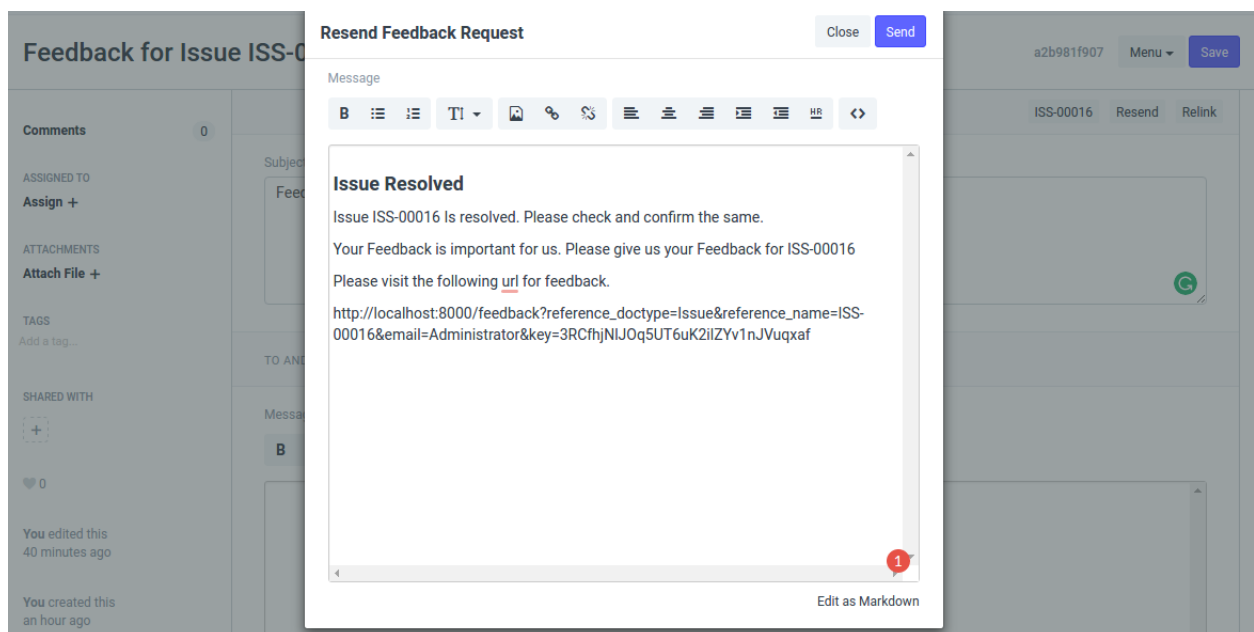
We can also Resend the Feedback Request to the Customer/User.



To resend the Feedback Request we will need to navigate the Communication by clicking the Details link on Timeline Feedback.



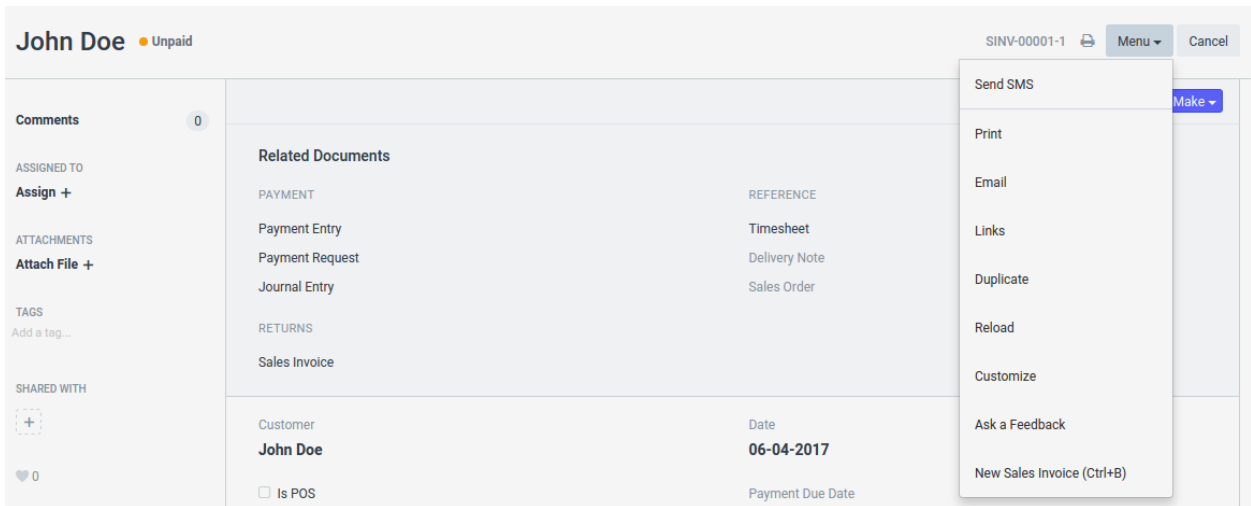
On Resend Button click a dialog with the Feedback Request message will appear user can either send the Feedback Request with same message or he/she can make the changes in the Feedback Request message.



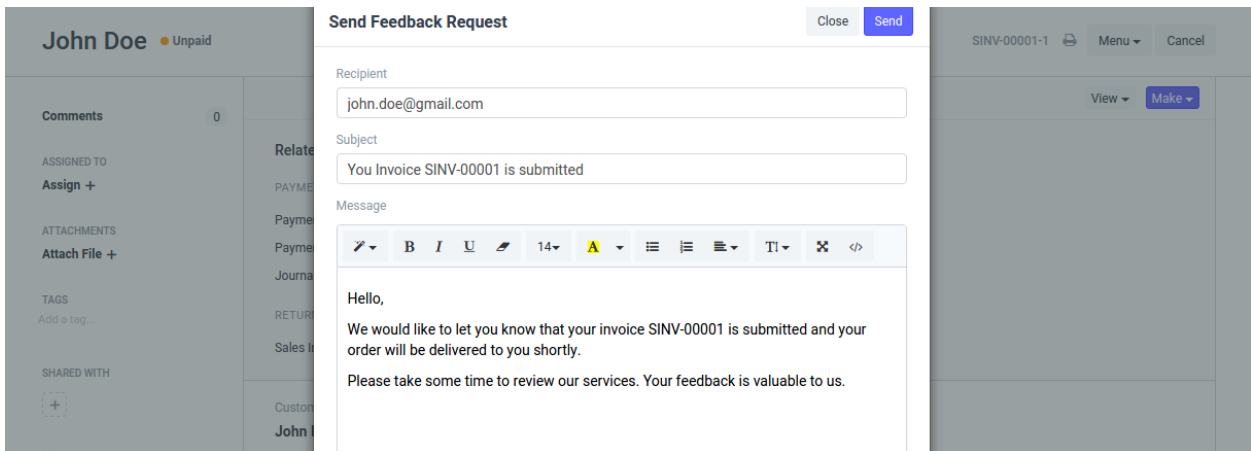
3. Manual Feedback Request

We can also send the feedback request to Customer/User without configuring the Feedback Trigger.

To request a feedback manually go to respective document e.g. Sales Order, Issue etc. and click on Request Feedback option in Menu.



Then, user can enter the feedback request details like email id, message and send the feedback request mail.



Note. If Feedback Trigger is already configured for the document then system will fetch Feedback Request details (email id, message).