# 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.

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# Module: Support

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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

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

## 1.2 Feedback

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

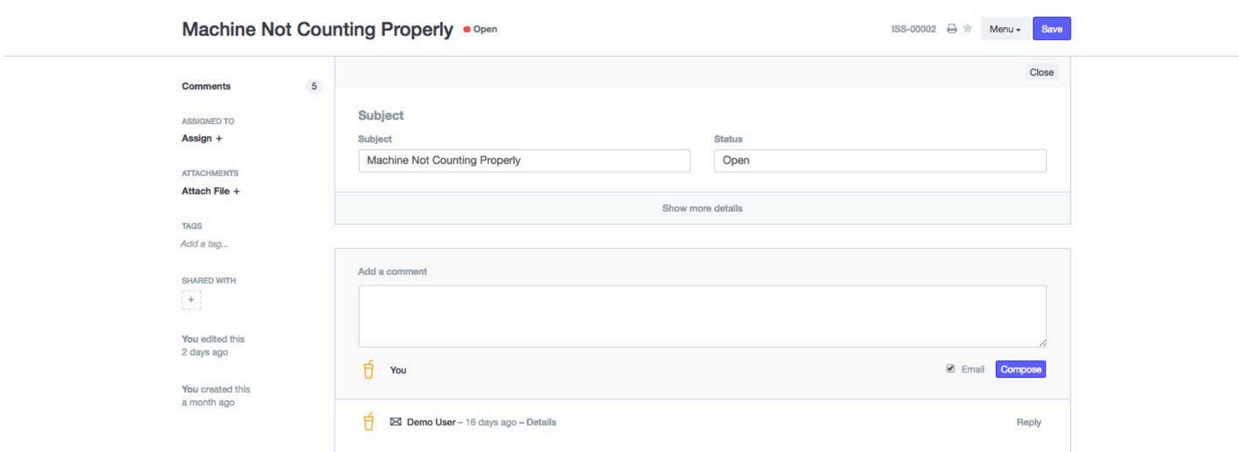
# 1.1 Topic: Common Support Topics

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




### 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.

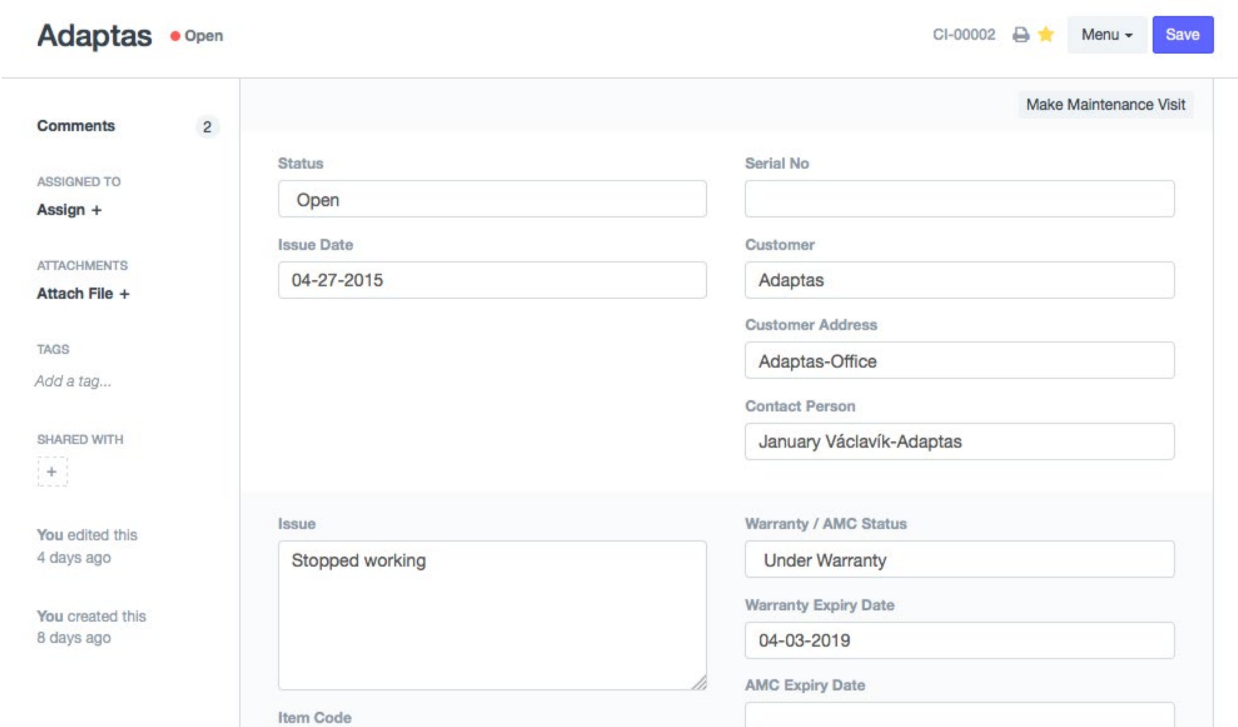
## 2. Warranty Claim

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 break-down 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.

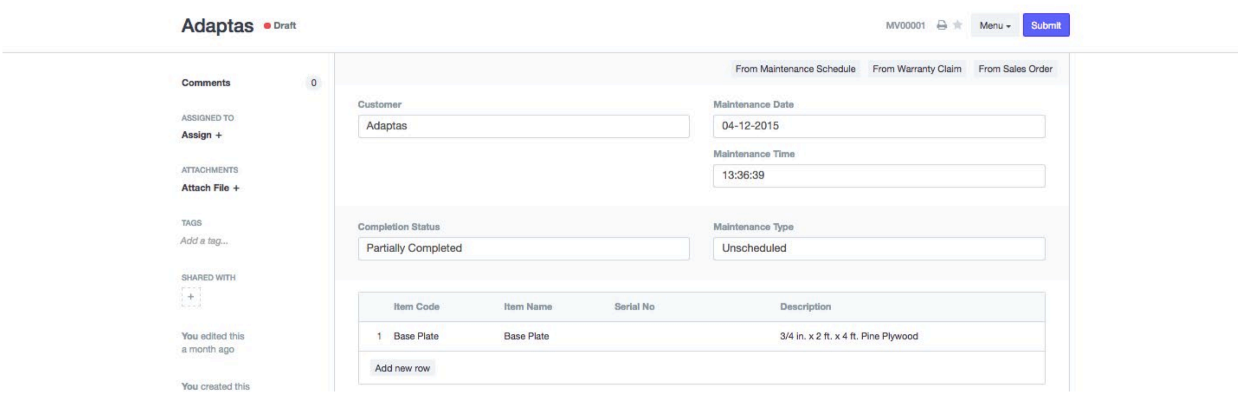
To create a new Warranty Claim: Support > Warranty Claim > New Warranty Claim




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




The Maintenance Visit contains information about the:

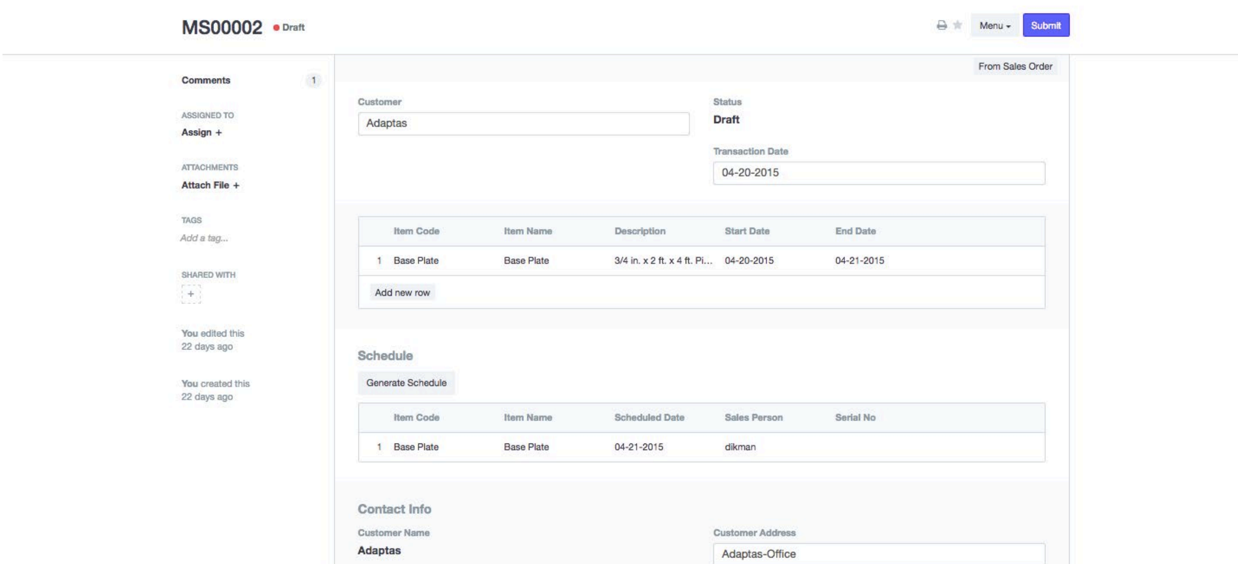
- Customer.
- The Items that were inspected / maintenance activity was carried out on.
- Details of actions taken.
- The person who carried out the actions.
- Feedback from the Customer.

## 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




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.

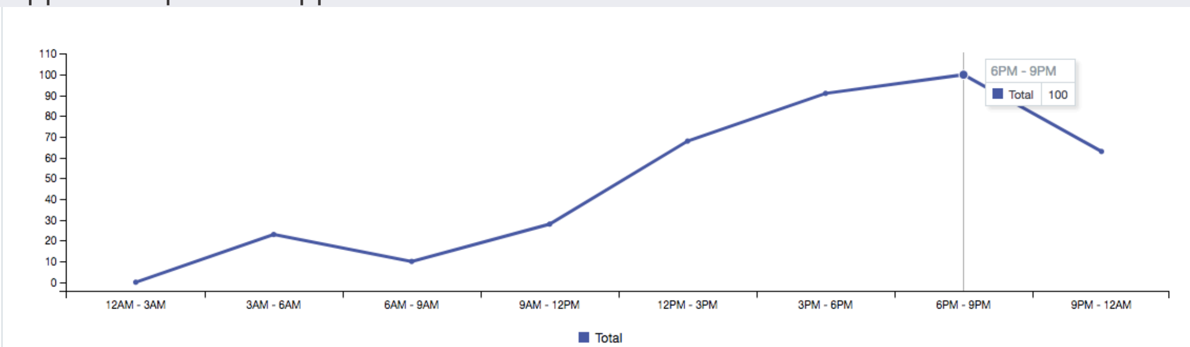
When the document is “Submitted” Calendar events are created in the User of the Sales Person for each maintenance.

# 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.

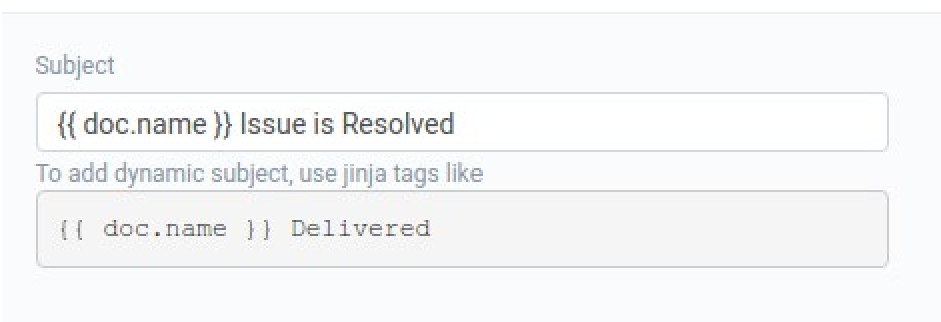
For this, you will need to setup the Feedback Trigger: Setup > Email > Feedback Trigger

### 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.

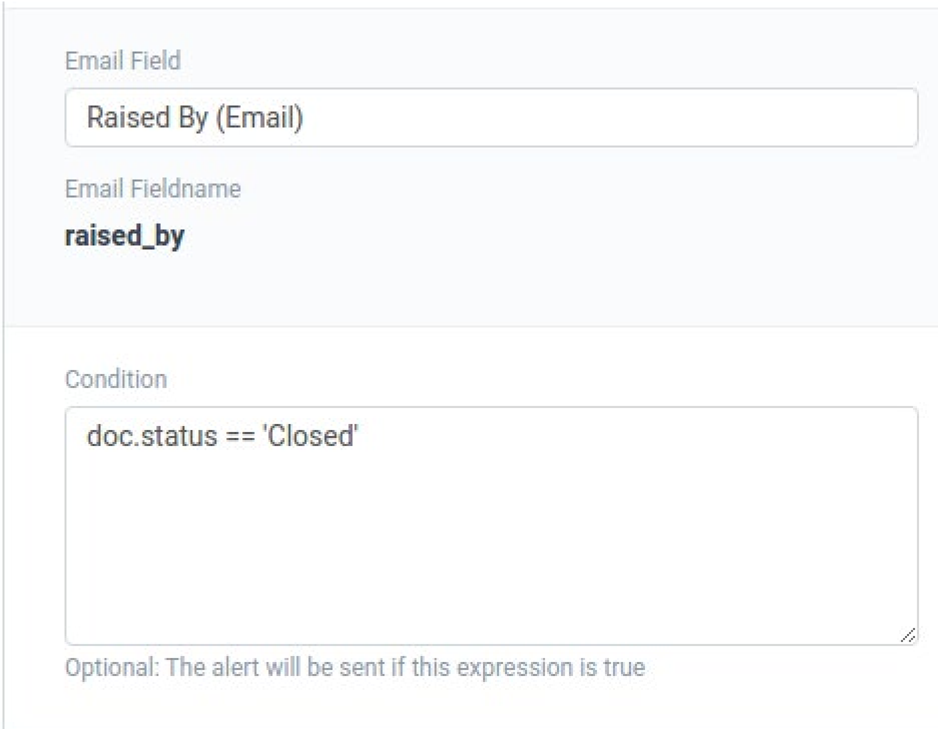
### Setting a Subject

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"




### 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.




**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>

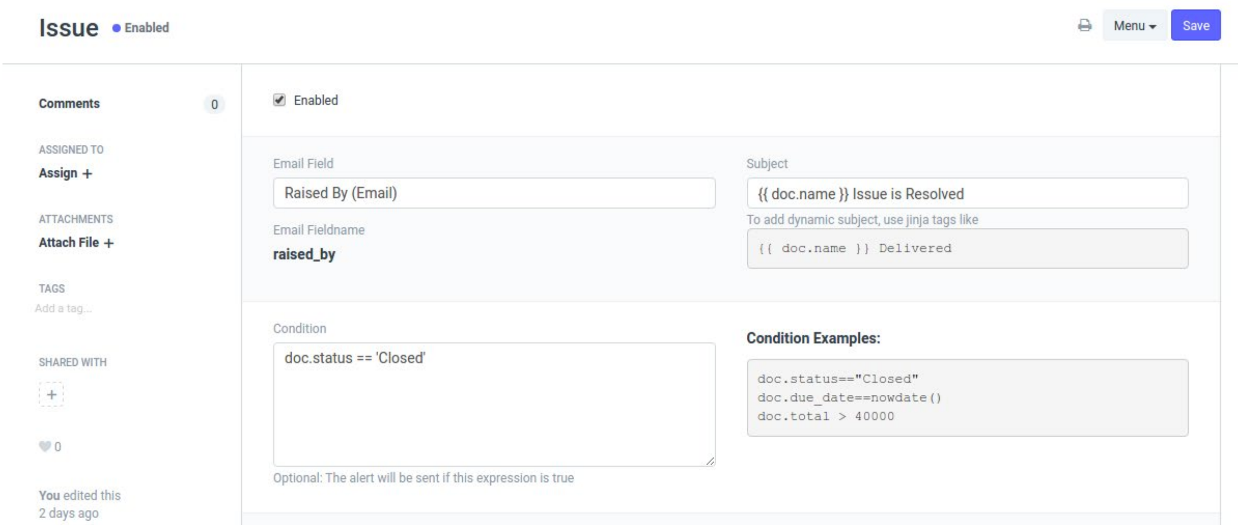
<p> Your Feedback is important for us. Please give us your Feedback for {{ doc.name }}</p>

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

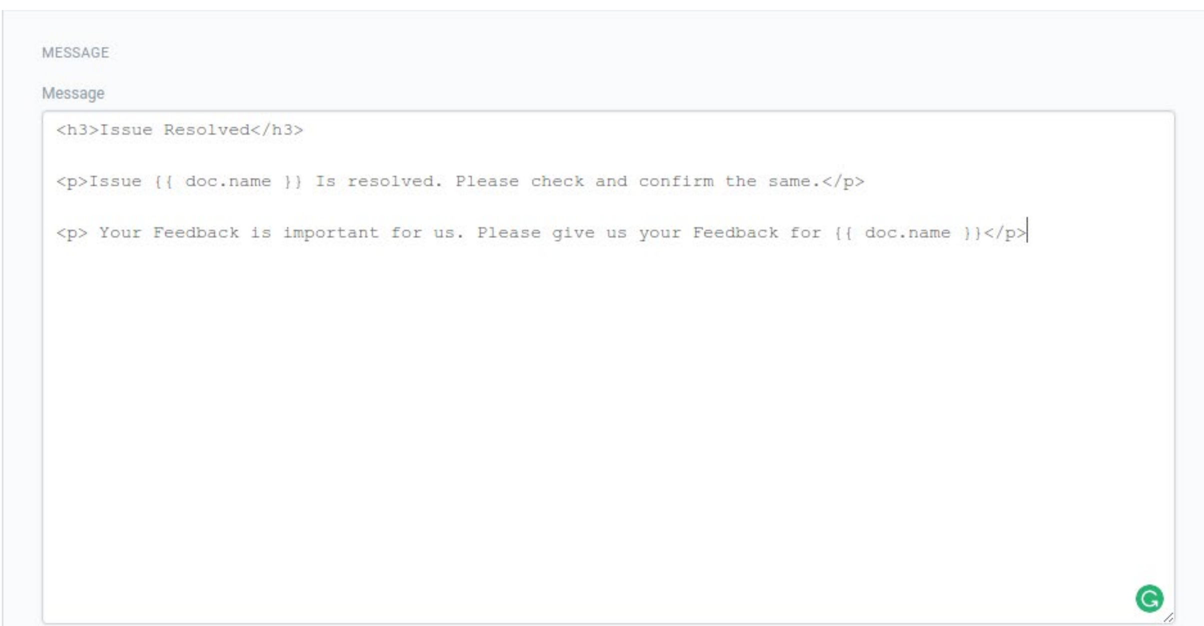
{{ feedback_url }}

## Example

1. Setting up Feedback Trigger

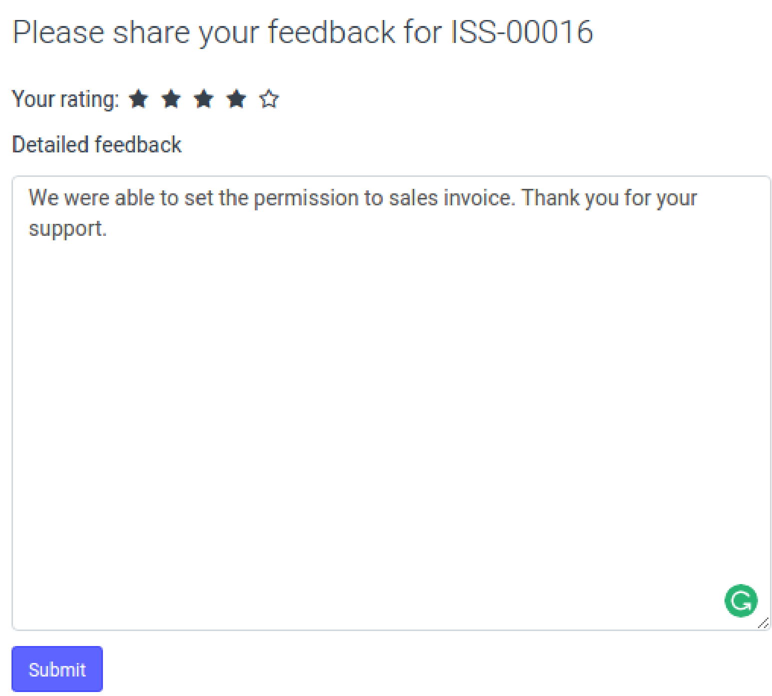



2. Setting the Recipients and Message



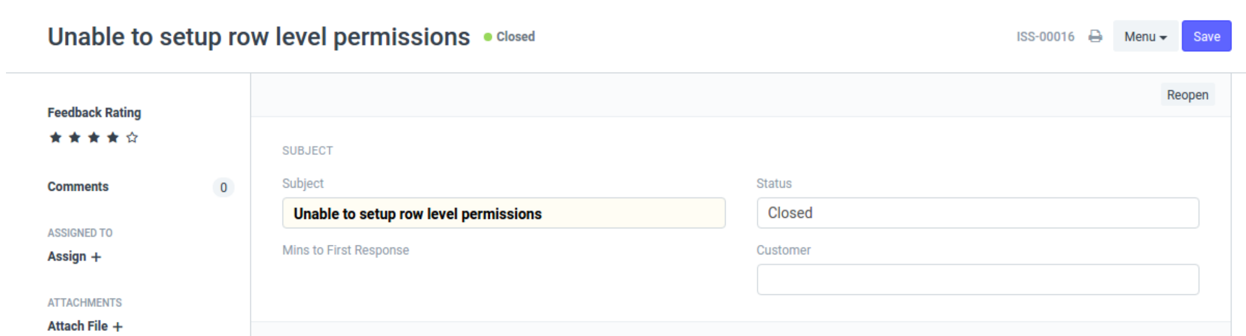
## 2. Submit Feedback

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.

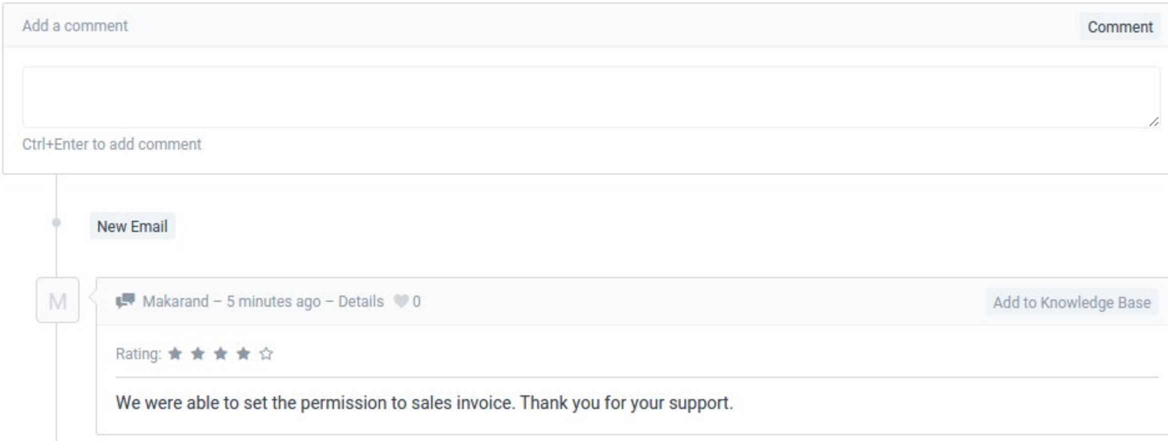



Once Feedback is submitted the feedback details message and ratings will be recorded and will be shown on Document sidebar and timeline. Also, once the Feedback is successfully submitted by the user the link shared to the user will be expired and cannot be used to submit the Feedback again.

On Document sidebar the latest feedback ratings will displayed.

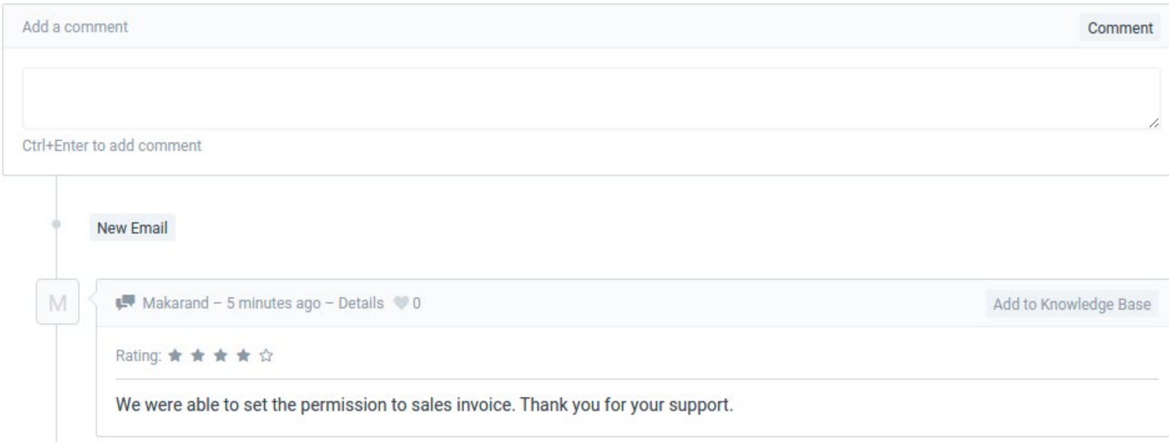



Also, The Feedback details such as Feedback message and ratings will be shown in the Document's Timeline along with Comment, Email.

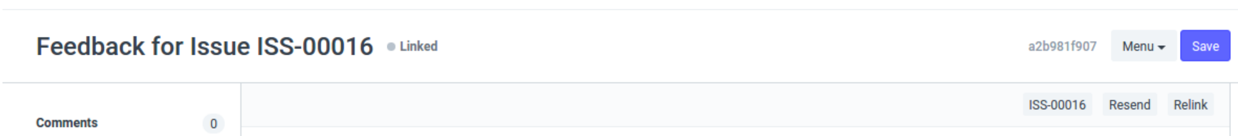

Add a comment
Comment
Ctrl+Enter to add comment
New Email
M
Makarand – 5 minutes ago – Details 0
Add to Knowledge Base
Rating:
We were able to set the permission to sales invoice. Thank you for your support.

## Resend Feedback Request

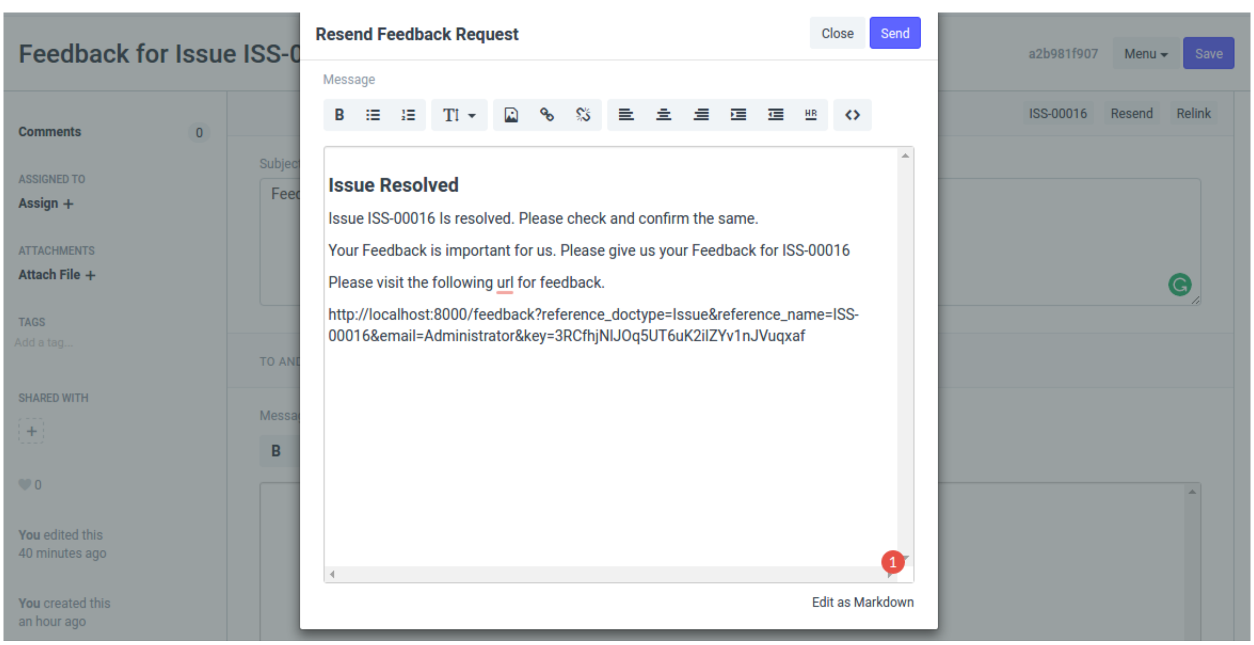
We can also Resend the Feedback Request to the Customer/User.




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



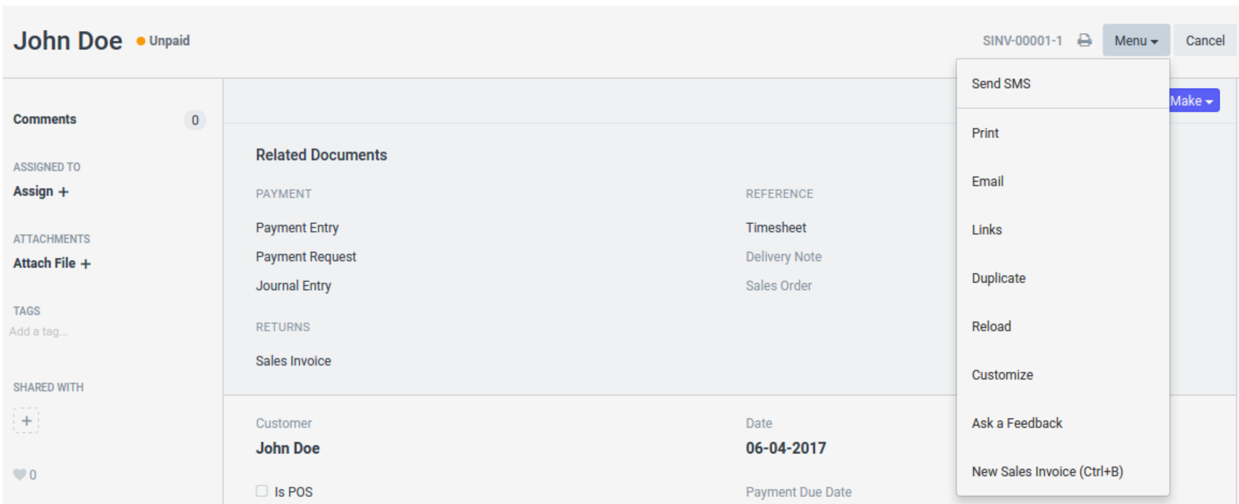

On Resend Button click a dialog with the Feedback Request message will appear user can either send the Feedback Request with same message or he/she can make the changes in the Feedback Request message.



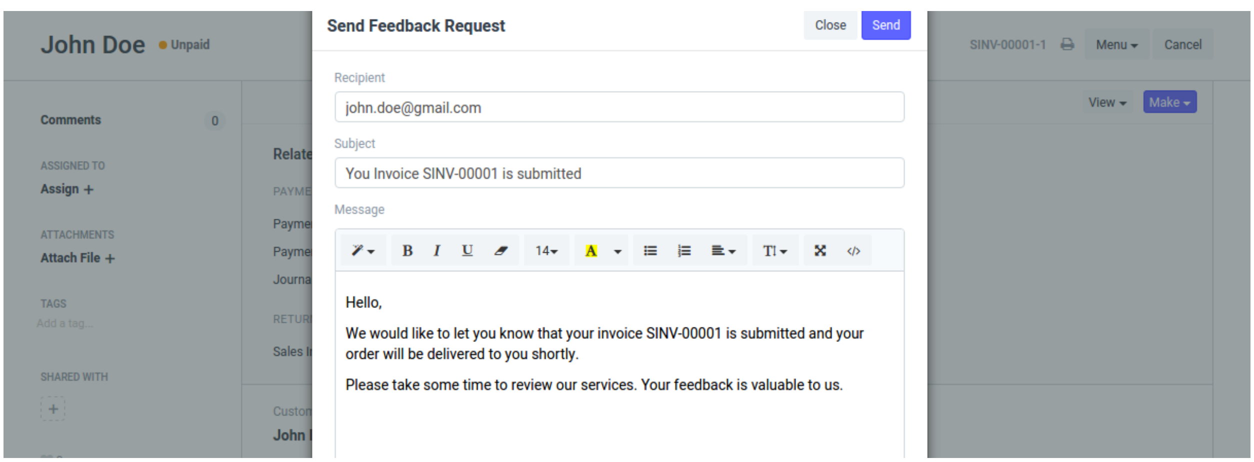
## 3. Manual Feedback Request

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).