

The MX-Contact Support Module Overview



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The complete Customer Relationship,
Contact Management
and
Sales Automation System
for
Microsoft Outlook

*Exchange***W!se**

MESSAGING, COLLABORATION AND CRM SPECIALISTS

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1 Introduction

The purpose of this document is to give an overview of some of the functionality that is available in the Support Module of MX-Contact.

The Support Module consists of the following components:

- Asset Management/Product Registrations
- Incident/Service Request Management
- Issue/Defect Management
- Service Contracts

2 Product Registrations

This module deals with the registration of Products that have been purchased by a Customer.

2.1 Registered Products

The Registered Products screen records the details of each product sold to a customer, either a company or an individual client (contact) purchaser:

The screenshot shows the 'Registered Product 00008 - Registered Product' window. The form contains the following fields:

Registration No:	Registered Product 00008	Serial No:	
Product Code/ID:		Type:	
Description:		Family:	
Cost Price:	\$0.00	Selling Price:	\$0.00
Group:			
Primary Company:		Reg. Date:	23/11/2005
Primary Contact:		Installation:	23/11/2005
Primary User:		Expiry Date:	23/11/2005

Below the form is a table with the following columns: Product Registration No, Component Registration No, Product Code, Product Description. The table is currently empty, displaying the message 'There are no items to show in this view.'

2.2 Product Components

Components are attached to Registered Products and record details of each component of a main system or configuration.

For example a computer system may be built up of Case, Power Supply, Motherboard, CPU, Hard Drive(s), etc. Each component may be individually tracked.

The screenshot shows a software window titled "Component 00021 - Component". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Save And Close", "Print", "Refresh", "New", "Delete", "Copy", "Paste", "Undo", and "Redo". The main area of the window contains a form with the following fields:

- Registered Product: Registered Product 00007
- Registration No: Component: 00021
- Product Code/ID: [Empty field]
- Description: [Empty field]
- Cost Price: \$0.00
- Selling Price: \$0.00
- Serial No: [Empty field]
- Type: [Dropdown menu]
- Family: [Dropdown menu]
- Group: [Dropdown menu]
- Reg. Date: 23/11/2005
- Installation: 23/11/2005
- Expiry Date: 23/11/2005
- Notes: [Empty text area]

3 Incident Management

This module deals with the management of Support Incidents.

An Incident is a record you create and associate with a company or contact to record a problem and its resolution. For example, a customer may have a problem with a product that you have supplied. Logging, handling, resolving, and closing Incidents are the primary tasks of most support system users.

Support Incidents are also referred to as Work Tickets, Job Cards, Service Calls, etc. depending on the nature of the industry, and may be renamed accordingly.

3.1 Incidents

3.1.1 Incident Details

There are many details associated with a Support Incident, starting with the Incident General (Details) Form:

Incident 00007 - Incident

File Edit View Insert Tools Actions Help

Save And Close

General Resolution

Incident No: Incident 00007 Registered Product: [Dropdown]

Date Opened: 23/11/2005 Component: [Dropdown]

Opened By: Robert King Primary Company: [Dropdown]

Type: [Dropdown] Primary Contact: [Dropdown]

Status: [Dropdown] E-Mail: [Text]

Priority: [Dropdown] Location... [Text]

Date Assigned: 23/11/2005 Business: [Dropdown]

Assigned to: [Dropdown]

Description Registered Products Companies Contacts Users Costs Appointments Tasks Journals Documents E-Mail

3.1.2 Resolution Details

Incident 00007 - Incident

File Edit View Insert Tools Actions Help

Save And Close

General Resolution

Incident No: Incident 00007

Date Closed: 23/11/2005

Closed By: [Dropdown]

Status: [Dropdown]

Description: [Text]

Resolution: [Text]

3.1.3 Associated Companies

The Associated Companies tab allows one to link any number of companies that are associated with this incident in some way. Usually this would be only

one but cases may arise where you want to link the partner of the customer, or the supplier, to the incident as well.

3.1.4 Associated Contacts

The Associated Contacts tab shows the contacts that are linked to this incident.

3.1.5 Associated Users/Teams

The Associated Users tab shows the internal contacts (users and/or teams/departments) that are involved with this incident.

3.1.6 Journals

Journals record the details about each time a Customer Support Representative works on an Incident.

3.1.7 Tasks

Tasks can be linked to an Incident and assigned to internal staff members responsible for carrying out the task. This is handled via the standard Outlook Task functionality but with links to the Incident.

3.1.8 E-Mail

All outbound and incoming e-mail will be linked to both the respective Companies/Contacts as well as the Incident.

3.1.9 Documents

Documents of any type (Word, Excel, PowerPoint, etc.) can be linked to an Incident for Drawings, Correspondence, etc.

3.1.10 Costs

The costs incurred on any stage of the Incident are tracked, namely:

These costs would be typically parts used, but could also be used to record sundry items like plane tickets, etc.

4 Issue Management

This module deals with the management of support issues or defects.

Using MX-Contact, you can track and resolve issues. These may be product defects or feature requests that help your organization improve its products.

An Issue is a record that describes a problem in a product or process, or a feature request for a product or process improvement. It is similar to a Support Incident except that people involved in the design or construction of the product or process typically resolve Issues. In the support system, the term "Issue" includes both feature requests and defects/bugs, etc.

4.1 Issues

4.1.1 Issue Details

There are many details associated with a Support Issue, starting with the Issue General (Details) Form:

Issue 00001 - Issue

File Edit View Insert Tools Actions Help

Save And Close Print New Open Close Find Home Back Forward Refresh

General Resolution

Issue Number: Issue 00001 Registered Product: [dropdown]

Date Opened: 23/11/2005 Component: [dropdown]

Opened By: Robert King Primary Company: [dropdown]

Type: [dropdown] Primary Contact: [dropdown]

Status: [dropdown]

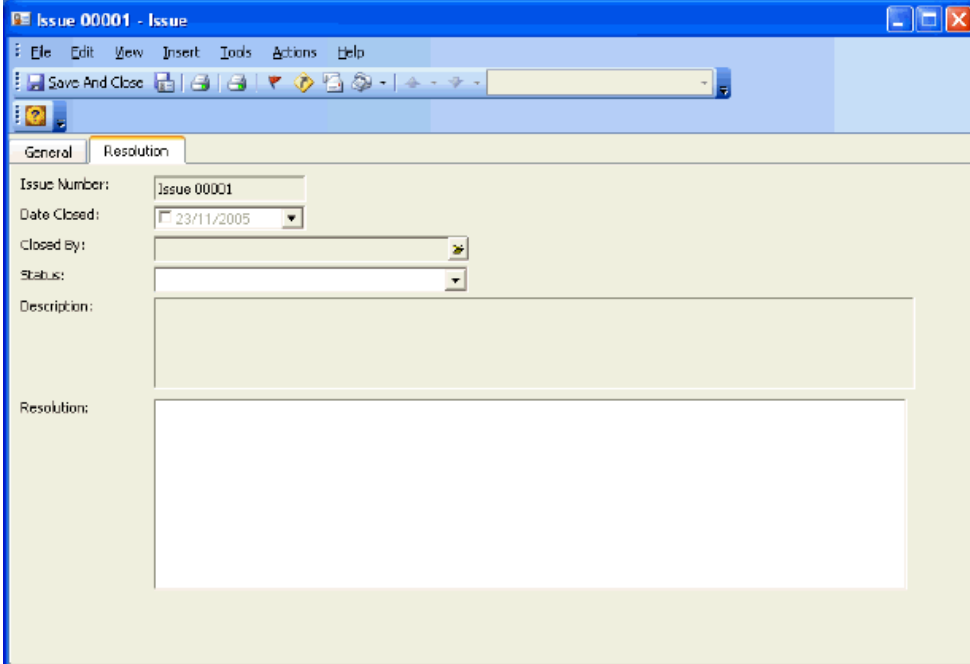
Priority: [dropdown] Location... [button]

Date Assigned: 23/11/2005 Business: [dropdown]

Assigned to: [dropdown]

Description Registered Products Companies Contacts Users Appointments Tasks Journals Documents E-Mail

4.1.2 Resolution Details



The screenshot shows a software window titled "Issue 00001 - Issue". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Save And Close", "Print", "Refresh", "Undo", "Redo", "Zoom In", "Zoom Out", and "Home". The main area of the window is divided into two tabs: "General" and "Resolution". The "Resolution" tab is active and contains the following fields:

- Issue Number: Issue 00001
- Date Closed: 23/11/2005
- Closed By: [Empty field]
- Status: [Empty dropdown menu]
- Description: [Empty text area]
- Resolution: [Empty text area]

5 Support Contracts

This module deals with the management of support contracts.

Support contracts are agreements between your organization and your customers to provide support services. It is imperative to ensure that there is a valid support contract for the account so that your organization is paid for the support services it provides.

Support Contracts are typically linked to certain Registered Products supplied to the Customer. One Support Contract usually covers several products, of which each one in turn may comprise several components.

5.1 Contracts

5.1.1 Contract Details

There are many details associated with a Support Issue, starting with the Issue General (Details) Form:

Contract Number: Contract 00005

Reference No:

Start Date: 23/11/2005

Expiry Date: 23/11/2005

Value: \$0.00

Primary Company:

Primary Contact:

Primary User:

Notes | Registered Products | Companies | Contacts | Users | Appointments | Tasks | Journals | Documents | E-Mail

5.1.2 Associated Companies

The Associated Companies tab allows one to link any number of companies that are associated with this contract. Usually this would only be used if one contract is setup for one company but with several different branches/locations, each of which is entered into MX-Contact as a separate company.

5.1.3 Associated Contacts

The Associated Contacts tab shows the contacts that are linked to this contract.

5.1.4 Associated Users/Teams

The Associated Users tab shows the internal contacts (users and/or teams/departments) that are involved with this contract.

5.1.5 Associated Products

The Associated Products tab shows the (registered) products that are covered by the contract.

5.1.6 Documents

Documents of any type (Word, Excel, PowerPoint, etc.) can be linked to a Contract.