

*Exchange***W!se**

MESSAGING, COLLABORATION AND CRM SPECIALISTS

MX-Contact

Support Module Tutorial



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

Table of Contents

1	The MX-Contact Support Module Tutorial - Introduction.....	1
2	Tutorial Exercises - Products.....	2
2.1	Adding a Product : Exercise	3
2.2	Adding a Product : Solution.....	4
2.3	Adding a Second Product : Exercise.....	8
2.4	Adding a Second Product: Solution.....	9
2.5	Adding a Product Part : Exercise.....	13
2.6	Adding a Product Part : Solution	14
3	Tutorial Exercises – Registered Products.....	17
3.1	Adding a Registered Product from the Registered Products Folder: Exercise	18
3.2	Adding a Registered Product from the Registered Products Folder: Solution	19
3.3	Adding a Registered Product with Components to a Company: Exercise	25
3.4	Adding a Registered Product with Components to a Company: Solution.....	26
4	Tutorial Exercises – Service Contracts.....	31
4.1	Adding a Service Contract from the Contracts Folder: Exercise	32
4.2	Adding a Service Contract from the Contracts Folder: Solution	33
4.3	Adding a Service Contract from the Companies Folder: Exercise.....	37
4.4	Adding a Service Contract from the Companies Folder: Solution	38
5	Tutorial Exercises - Incidents	42
5.1	Opening an Incident from a Contact: Exercise	43
5.2	Opening an Incident from a Contact: Solution	44
5.3	Assigning an Incident: Exercise	48
5.4	Assigning an Incident: Solution	49
5.5	Creating and Assigning a Task from an Incident: Exercise	50
5.6	Creating and Assigning a Task from an Incident: Solution	51
5.7	Responding to a task: Exercise.....	55
5.8	Responding to a task: Solution.....	56
5.9	Closing an Incident: Exercise	58
5.10	Closing an Incident: Solution.....	59
5.11	Adding Incidents to the Link Items Menu: Exercise	61
5.12	Adding Incidents to the Link Items Menu: Solution.....	62
5.13	Opening an Incident from an Incoming Email: Exercise	64
5.14	Opening an Incident from an Incoming Email: Solution.....	65
5.15	Running an Incidents Report: Exercise	68
5.16	Running an Incidents Report: Solution	69

1 The MX-Contact Support Module Tutorial - Introduction

The Support Module consists of the following components:

1. **Product File/Parts and Components Listings**

[Tutorial Exercises - Products](#)

2. **Asset Management/ Product Registrations**

[Tutorial Exercises – Registered Products](#)

3. **Service Contracts**

[Tutorial Exercises – Service Contracts](#)

4. **Incident/Service Request Management**

[Tutorial Exercises - Incidents](#)

Please note the **exercises are designed to be done in sequence**, as exercises in the later sections depend on data that is added earlier in the tutorial. Also, these exercises assume that you have at least completed the exercises in section 2 of the Base System tutorial, namely Database Exercises. References are made in this tutorial to the Companies and Contacts that are added as part of those exercises.

Note that for the e-mail exercises, please set Outlook's **Mail Format** (under **Tools, Options**) to **Rich Text**, and **do not set** Microsoft Word as your E-Mail Editor.

2 Tutorial Exercises - Products

The Products Folder stores details of the products/services that your company sells. This folder is for keeping details of not only major items (systems) but also components that can be attached to systems as well as parts that might be used to repair faulty units (for cases where this is applicable).

In this section you will do the following exercises:

1. Add a Product

[Adding a Product : Exercise](#)

2. Add a Second Product

[Adding a Second Product : Exercise](#)

3. Add a Product Part

[Adding a Product Part : Exercise](#)

Once you have done these exercises you are ready to learn about adding Registered Products to companies and contacts. ([Tutorial Exercises – Registered Products](#))

2.1 Adding a Product : Exercise

Add the HP Pavilion Notebook to the Product Register

Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

Show me the **Solution** ([Adding a Product : Solution](#))

2.2 Adding a Product : Solution

Add the HP Pavilion Notebook to the Product Register

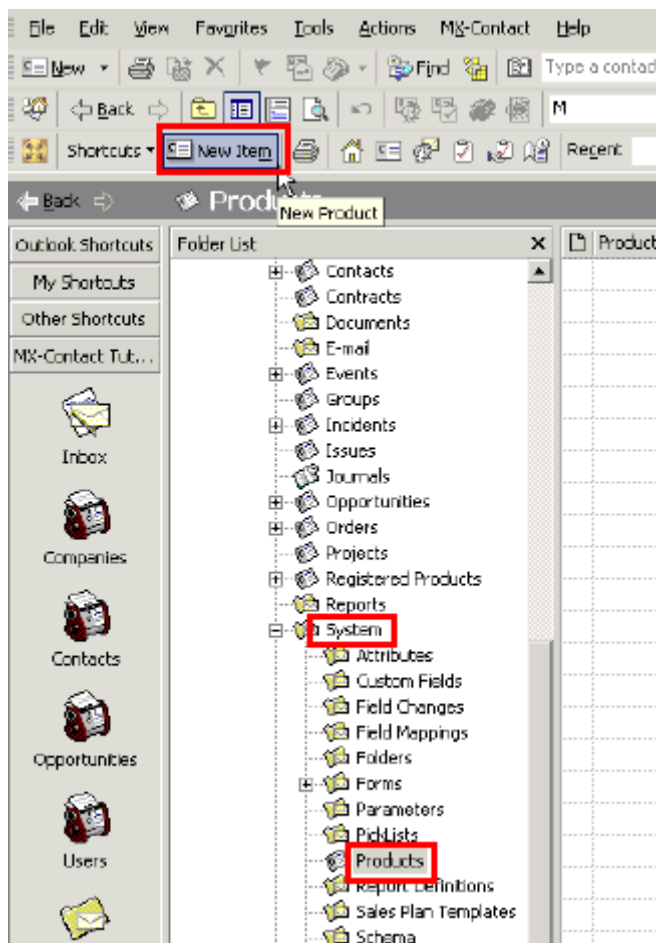
Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

Basic Steps:

1. **Select the System Folder and then the Product Sub-Folder. Click on the New Item button.**

The MX-Contact Support Module Tutorial



2. A blank Product Form will open:

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "Untitled - Product". It features a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", "Zoom In", "Zoom Out", and "Reset". The main area contains several input fields and dropdown menus:

- Product Code: [Text Field]
- Description: [Text Field]
- Product ID: [Text Field]
- Type: [Dropdown Menu]
- Family: [Dropdown Menu]
- Group: [Dropdown Menu]
- Unit: [Dropdown Menu]
- Volume: [Text Field with 0]
- Weight: [Text Field with 0]
- Status: [Dropdown Menu]
- Warehouse: [Dropdown Menu]
- Vendor: [Dropdown Menu]
- Supplier: [Dropdown Menu]
- In Stock:
- Taxable:
- Cost Price: [Text Field] \$0.00
- Selling Price: [Text Field] \$0.00
- Notes: [Large Text Area]

3. In the New Product form, add the details for the HP Pavilion Notebook:

Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "zv5022AP - Product". 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", "Copy", "Paste", "Undo", "Redo", "Refresh", "Home", "Back", and "Forward". The form contains the following fields:

Product Code:	zv5022AP	Type:	Product Type 1
Description:	HP Pavilion Notebook	Family:	Product Family 1
Product ID:		Group:	Product Group 1
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
In Stock:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$1,793.00	Selling Price:	\$2,015.00
Notes:			

4. Click Save and Close.

Take me to the next **Exercise** ([Adding a Second Product : Exercise](#))

2.3 Adding a Second Product : Exercise

Add the Microsoft Optical Mouse to the Product Register.

Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

Show me the **Solution** ([Adding a Second Product: Solution](#))

2.4 Adding a Second Product: Solution

Add the Microsoft Optical Mouse to the Product Register.

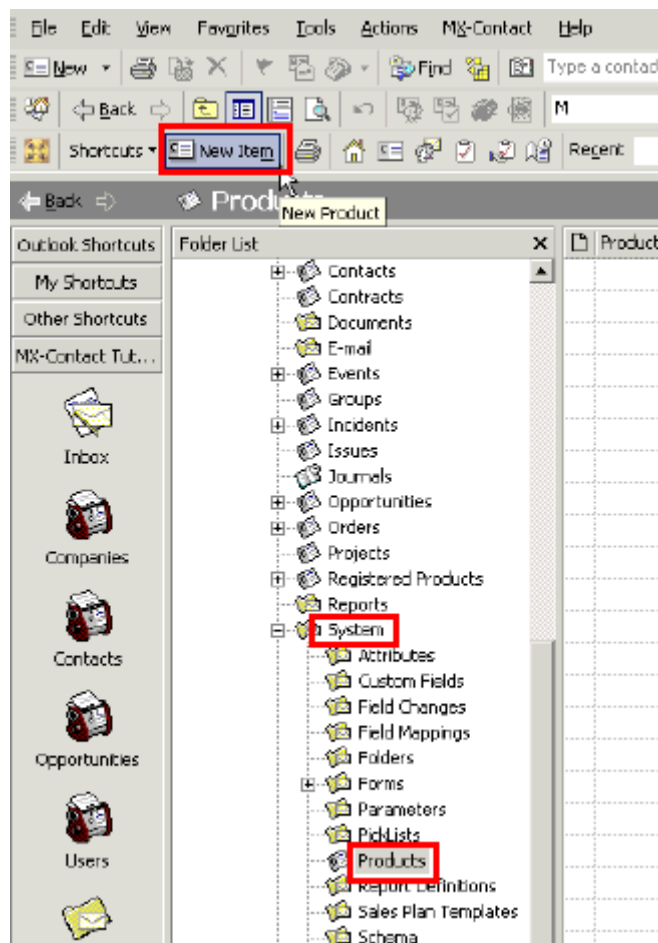
Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

Basic Steps:

1. **Select the System Folder and then the Product Sub-Folder. Click on the New Item button.**

The MX-Contact Support Module Tutorial



2. A blank Product Form will open:

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "Untitled - Product". It features a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", and "Refresh". The main form area contains the following fields:

- Product Code: [Text Input]
- Description: [Text Input]
- Product ID: [Text Input]
- Type: [Dropdown Menu]
- Family: [Dropdown Menu]
- Group: [Dropdown Menu]
- Unit: [Dropdown Menu]
- Volume: [Text Input]
- Weight: [Text Input]
- Status: [Dropdown Menu]
- Warehouse: [Dropdown Menu]
- Vendor: [Dropdown Menu]
- Supplier: [Dropdown Menu]
- In Stock:
- Taxable:
- Cost Price: [Text Input] \$0.00
- Selling Price: [Text Input] \$0.00
- Notes: [Large Text Area]

3. In the New Product form, add the details for the Microsoft Optical Mouse.

Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "ITE78CJ - Product". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including a "Save and Close" button. The main area of the window is a form with the following fields:

Product Code:	ITE78CJ	Type:	Product Type 2
Description:	Microsoft Optical Mouse	Family:	Product Family 2
Product ID:		Group:	Product Group 2
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
In Stock:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$43.00	Selling Price:	\$55.00
Notes:			

4. Click Save and Close.

Take me back to the Exercise ([Adding a Product : Solution](#))

Take me to the next Exercise ([Adding a Product Part : Exercise](#))

2.5 Adding a Product Part : Exercise

Add the following Product Part:

Complete the following information:

Product Code:	ST2550
Description:	Seagate 60 GByte Hard Disc
Type:	Product Type 1
Unit:	Product Unit 1

Show me the Solution ([Adding a Product Part : Solution](#))

2.6 Adding a Product Part : Solution

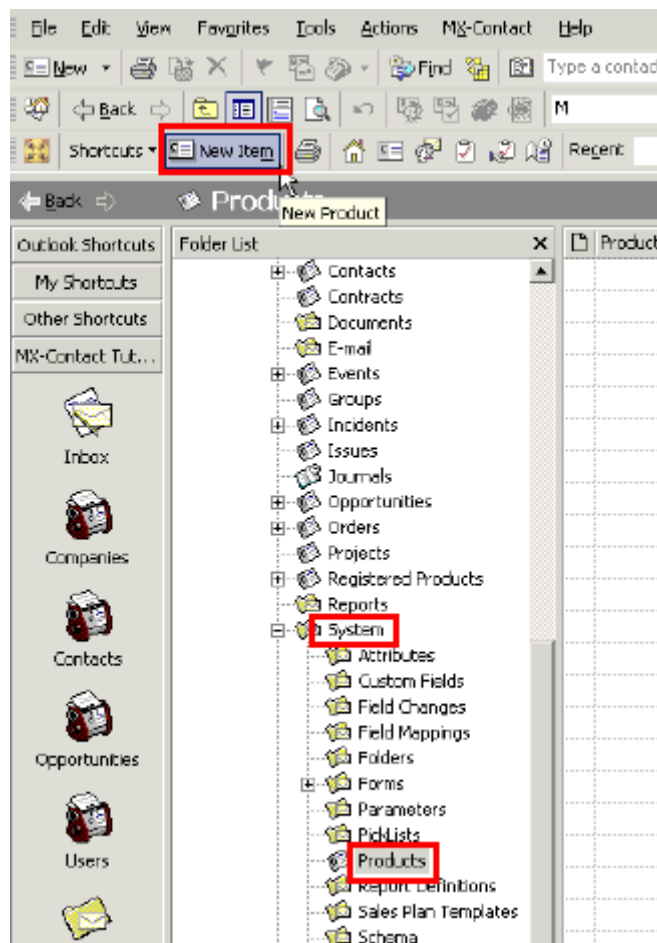
Add the following Product Part:

Complete the following information:

Product Code:	ST2550
Description:	Seagate 60 GByte Hard Disc
Type:	Product Type 1
Unit:	Product Unit 1

Basic Steps:

1. **Select the System Folder and then the Product Sub-Folder. Click on the New Item button.**



The MX-Contact Support Module Tutorial

2. A blank Product Form will open:

The screenshot shows a software window titled "Untitled - Product". It features a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", "Zoom In", "Zoom Out", and "Reset". The main area contains several input fields and dropdown menus:

- Product Code: [Text Box]
- Description: [Text Box]
- Product ID: [Text Box]
- Type: [Dropdown Menu]
- Family: [Dropdown Menu]
- Group: [Dropdown Menu]
- Unit: [Dropdown Menu]
- Volume: [Text Box]
- Weight: [Text Box]
- In Stock:
- Taxable:
- Status: [Dropdown Menu]
- Warehouse: [Dropdown Menu]
- Vendor: [Dropdown Menu]
- Supplier: [Dropdown Menu]
- Cost Price: [Text Box] \$0.00
- Selling Price: [Text Box] \$0.00
- Notes: [Large Text Area]

3. In the New Product form, add the details for the Seagate 60GByte Hard Disc

Product Code:	ST2550
Description:	Seagate 60 GByte Hard Disc
Type:	Product Type 1
Unit:	Product Unit 1

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "ST2550 - Product". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including a "Save and Close" button. The main area of the window is a form with the following fields:

Product Code:	ST2550	Type:	Product Type 1
Description:	Seagate 60 GByte Hard Disc	Family:	
Product ID:		Group:	
Unit:	Product Unit 1	Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
In Stock:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$0.00	Selling Price:	\$0.00
Notes:			

4. Click Save and Close

Take me back to the Exercise ([Adding a Second Product: Solution](#))

Take me to the next Exercise ([Tutorial Exercises – Registered Products](#))

3 Tutorial Exercises – Registered Products

The Registered Products folder records the details of each product sold to a customer, either a company or an individual client (contact) purchaser. Multiple components may be attached to a registered product, which record details of each item that make up a main system or configuration.

In this section you will perform the following exercises:

1. Add a Registered Product from Registered Products Folder

[Adding a Registered Product from the Registered Products Folder: Exercise](#)

2. Add a Registered Product with Components from the Companies Folder

[Adding a Registered Product with Components to a Company: Exercise](#)

Now that you have some basic data in your system, you can learn how to link Registered Products to Service Contracts. ([Tutorial Exercises – Service Contracts](#))

3.1 Adding a Registered Product from the Registered Products Folder: Exercise

Premier Foods purchases a HP Pavilion Notebook from your Company.

Record the following details.

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK231453RT
Selling Price:	2025
Reg.Date:	10/02/2005
Installation:	14/02/2005

Show me the **Solution** ([Adding a Registered Product from the Registered Products Folder: Solution](#))

3.2 Adding a Registered Product from the Registered Products Folder: Solution

Premier Foods purchases a HP Pavilion Notebook from your Company.

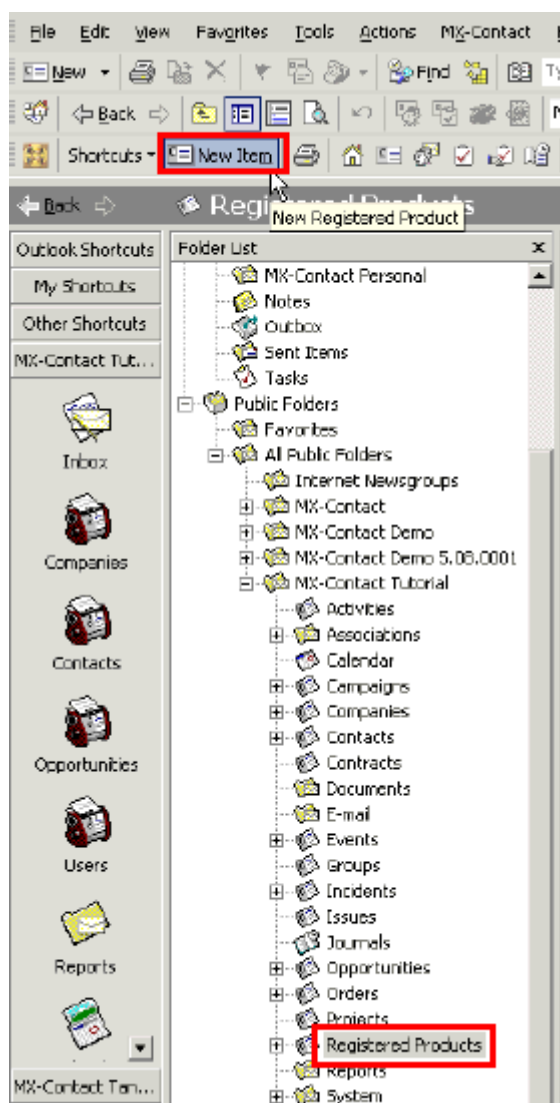
Record the following details.

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK231453RT
Selling Price:	2025
Reg.Date:	10/02/2005
Installation:	14/02/2005

Basic Steps:

1. **Select the Registered Products Folder from the MX-Contact Folder List.**
2. **Click on the New Item button:**

The MX-Contact Support Module Tutorial



3. A blank Registered Products form will appear:

The MX-Contact Support Module Tutorial

Registered Product 00001 - Registered Product

File Edit View Insert Format Tools Actions Help

Save and Close

Registration No: Registered Product 00001

Product Code/ID: [Open]

Description:

Cost Price: \$0.00 Selling Price: \$0.00

Serial No:

Type:

Family:

Group:

Primary Company:

Primary Contact:

Primary User:

Reg. Date: 10/02/2005

Installation: 10/02/2005

Expiry Date: 10/02/2005

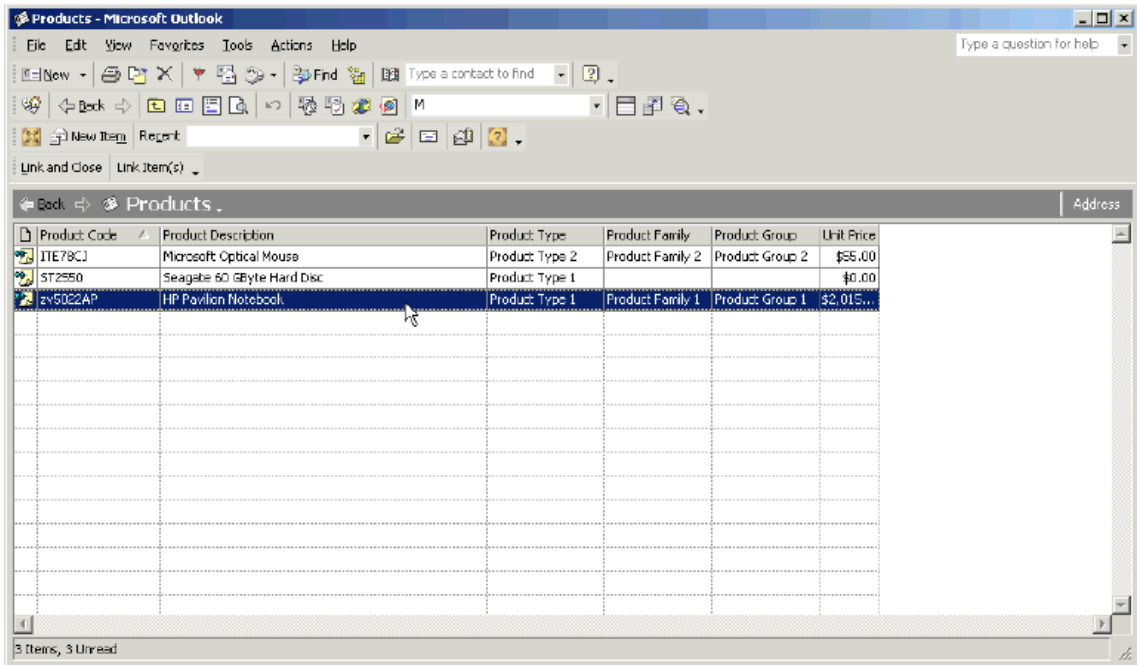
Notes | Components | Contracts | Companies | Contacts | CSR's | Journals | Documents

4. To enter the following details,:

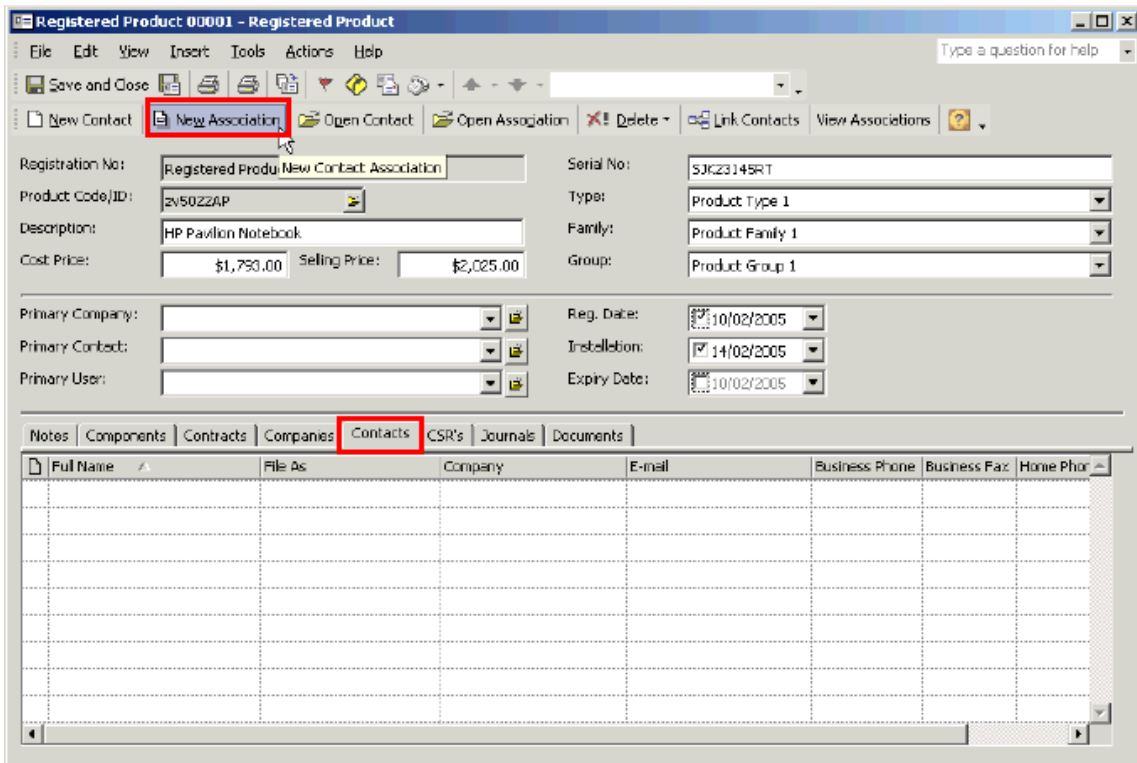
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK231453RT
Selling Price:	2025
Reg.Date:	10/02/2005
Installation:	14/02/2005

click on the Open button attached to the Product Code field. The Product Register will appear.

The MX-Contact Support Module Tutorial



5. Select the relevant Product Code and then click on the Link and Close button.
6. Enter all the remaining details.
7. Click on the Contacts tab and select New Association.



8. A Product to Contact Association screen will appear.

The MX-Contact Support Module Tutorial

Untitled - Product to Contact Association

File Edit View Insert Format Tools Actions Help

Save and Close Print Copy Paste Undo Redo

Reg. Product: Registered Product 00001

Contact: [Dropdown]

Job Title: [Dropdown]

Company: [Dropdown]

Relationship: [Dropdown]

Role: [Dropdown]

Influence: [Dropdown]

Notes: [Text Area]

9. Click on the Open button attached to the Contact field. A list of Contacts will appear. Select the relevant Contact and then click on the Close and Link button.

Contacts - Microsoft Outlook

File Edit View Favorites Tools Actions Help

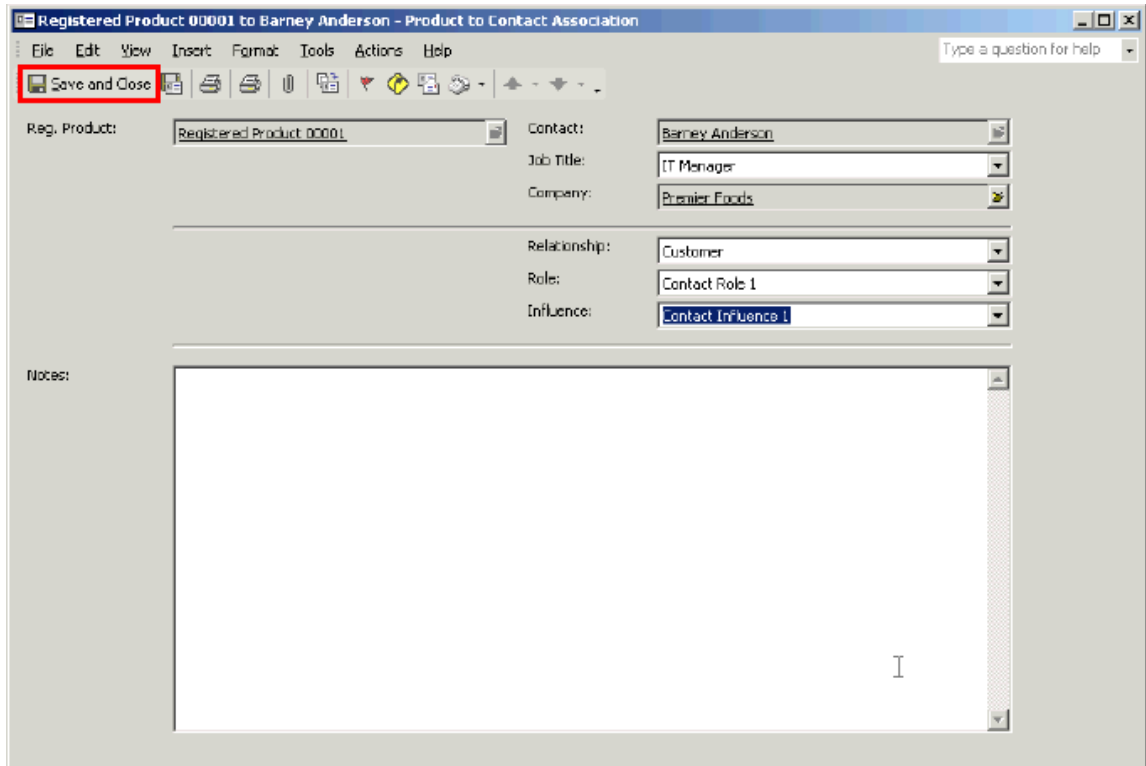
New Find Back Forward

Link and Close Link Item(s)

Full Name	File As	Company	E-mail	Business Phone	Business Fax	Home Phone	Mobile Phone
Barney Anderson	Anderson, Barney	Premier Foods	Barney Anderson (barne...	+1 (206) 555...	+1 (206) 5...		
Gillian Meyer	Premier Foods	Premier Foods	Gillian Meyer (gillann@pr...	+1 (206) 555...	+1 (206) 5...		
Jim Bothwell	Bothwell, Jim	JMB Consultants	Jim Bothwell (jbothwell@...				+1 (780) 3...
Johnny Walker	Walker, Johnny	Compaq Corporation (Se...	Johnny Walker (johnny...				+1 (780) 3...
Tom Watson	Watson, Tom	Casalinga Restaurant	tomwatson342@hotmail...	+27 (011) 46...	+27 (011) ...		+27 (082) ...

10. Complete the rest of the details and then click on Save and Close.

The MX-Contact Support Module Tutorial



11. A prompt will appear asking if you wish to create an association between Barney Anderson's Primary Company and this Registered Product. Click on Yes. This Registered Product will now also be linked to Premier Foods.
12. Click Save and Close. You should see this Registered Product displayed on the Registered Products List.

Take me back to the Exercise ([Tutorial Exercises – Registered Products](#))

Take me to the next Exercise ([Adding a Registered Product with Components to a Company: Exercise](#))

3.3 Adding a Registered Product with Components to a Company: Exercise

Casalinga Restaurant has purchased a HP Pavilion Notebook from your Company. The Registered Product has two Components, a mouse and a 60 GByte Hard Drive. Record the details.

Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK32763RT
Selling Price:	2030
Reg.Date:	14/02/2005
Installation:	24/02/2005

Components:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Serial Number:	MSO6751M
Product Code:	ST2550
Description:	Seagate 60 GByte Hard Disc
Serial Number:	SG2167RTT

Show me the **Solution** ([Adding a Registered Product with Components to a Company: Solution](#))

3.4 Adding a Registered Product with Components to a Company: Solution

Casalinga Restaurant has purchased a HP Pavilion Notebook from your Company. The Registered Product has two Components, a mouse and a 60 GByte Hard Drive. Record the details.

Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK32763RT
Selling Price:	2030
Reg.Date:	14/02/2005
Installation:	24/02/2005

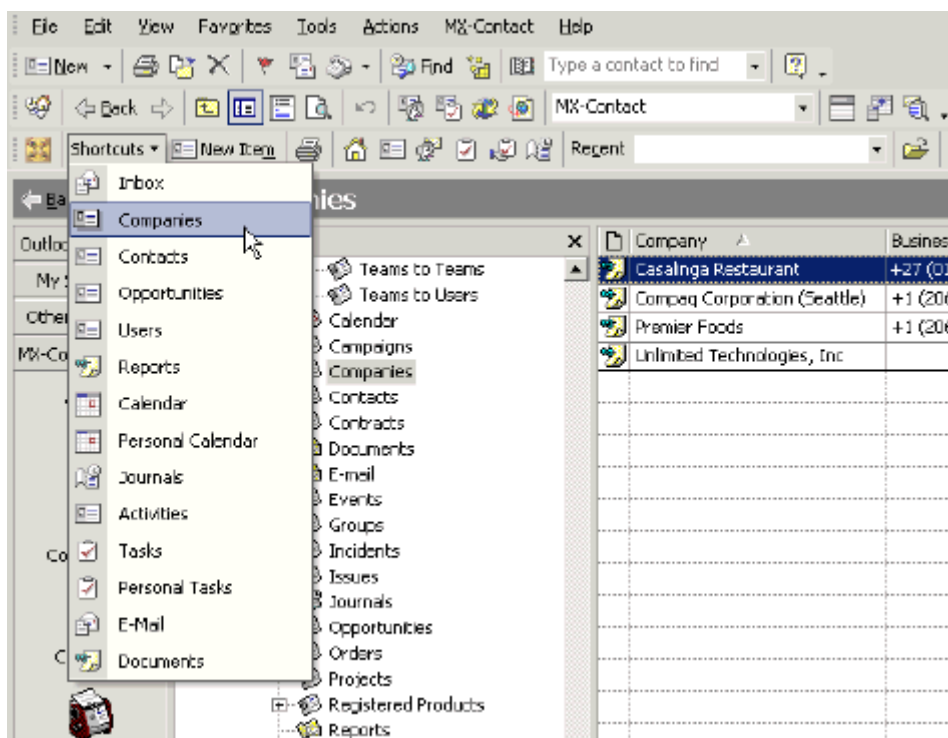
Components:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Serial Number:	MSO6751M
Product Code:	ST2550
Description:	Seagate 60 GByte Hard Disc
Serial Number:	SG2167RTT

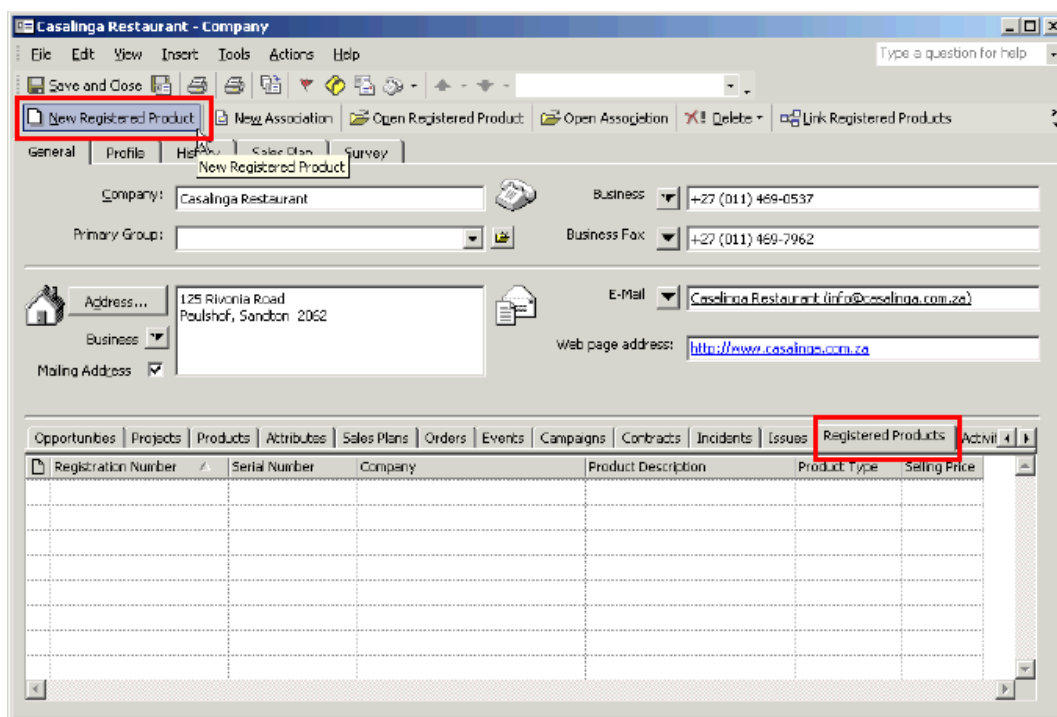
Basic Steps:

1. Select Companies from the MX-Contact Shortcut Menu and then click on Casalinga Restaurant to open the Company record.

The MX-Contact Support Module Tutorial



2. Click on the Registered Products Tab and then on the New Registered Product button.



3. A Registered Product Form will open. The Company Casalinga Restaurant will automatically be linked to this Registered Product.

The MX-Contact Support Module Tutorial

Registered Product 00002 - Registered Product

File Edit View Insert Format Tools Actions Help

Save and Close

Registration No: Registered Product 00002 Serial No: []

Product Code/ID: [] Type: []

Description: [] Family: []

Cost Price: \$0.00 Selling Price: \$0.00 Group: []

Primary Company: Casdings Restaurant Reg. Date: 10/02/2005

Primary Contact: [] Installation: 10/02/2005

Primary User: [] Expiry Date: 10/02/2005

Notes Components Contracts Companies Contacts CSR's Journals Documents

4. Enter the details of the Registered Product and then click on the Components tab:

Registered Product 00002 - Registered Product

File Edit View Insert Tools Actions Help

Save and Close

New Registered Product Component Open Registered Product Component Delete Link Registered Product Components

Registration No: Registered Product Component Serial No: []

Product Code/ID: zv5022AP Type: Product Type 1

Description: HP Pavilion Notebook Family: Product Family 1

Cost Price: \$1,790.00 Selling Price: \$0.00 Group: Product Group 1

Primary Company: Casdings Restaurant Reg. Date: 10/02/2005

Primary Contact: [] Installation: 10/02/2005

Primary User: [] Expiry Date: 10/02/2005

Notes Components Contracts Companies Contacts CSR's Journals Documents


Product Registration No	Component Registration No	Product Code	Product Description
There are no items to show in this view.			

5. Click on New Registered Product Component. A New Component Form will open.

The MX-Contact Support Module Tutorial

Registered Product: Registered Product 00002

Registration No:

Product Code/ID: 

Description:

Cost Price:

Selling Price:

Reg. Date:

Installation:

Expiry Date:

Serial No:

Type:

Family:

Group:

Notes:

6. Click on the Open button attached to the Product Code field. The Product Register will appear.

Product Code	Product Description	Product Type	Product Family	Product Group	Unit Price
ITE78CJ	Microsoft Optical Mouse	Product Type 2	Product Family 2	Product Group 2	\$55.00
ST2550	Seagate 60 GByte Hard Disc	Product Type 1			\$0.00
zv5022AP	HP Pavilion Notebook	Product Type 1	Product Family 1	Product Group 1	\$2,015...

7. Select the relevant Product Code and then click on the Link and Close button.
8. Enter all the remaining details and then click on Save and Close.
9. Repeat steps 5 – 8 until all components have been added.

The MX-Contact Support Module Tutorial

10. You should now see all the components listed in the Components Tab.
11. Click Save and Close on the Registered Product Form.

Take me back to the Exercise ([Adding a Registered Product from the Registered Products Folder: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Service Contracts](#))

4 Tutorial Exercises – Service Contracts

Service 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 each account so that your organization is paid for the support services it provides.

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

In this section you will perform the following exercises:

1. Add a Service Contract from the Contracts Folder

[Adding a Service Contract from the Contracts Folder: Exercise](#)

2. Add a Service Contract from the Companies Folder.

[Adding a Service Contract from the Companies Folder: Exercise](#)

Once you know how to enter Product and Contract information, you will need to learn how to log Incident information. ([Tutorial Exercises - Incidents](#))

4.1 Adding a Service Contract from the Contracts Folder: Exercise

Add a Service Contract for Premier Foods.

Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Reference No:	20050214PRE001
Start Date:	14/02/2005
Expiry.Date:	14/02/2006
Value:	\$350

Registered Products:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

Show me the **Solution** ([Adding a Service Contract from the Contracts Folder: Solution](#))

4.2 Adding a Service Contract from the Contracts Folder: Solution

Add a Service Contract for Premier Foods.

Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Reference No:	20050214PRE001
Start Date:	14/02/2005
Expiry.Date:	14/02/2006
Value:	\$350

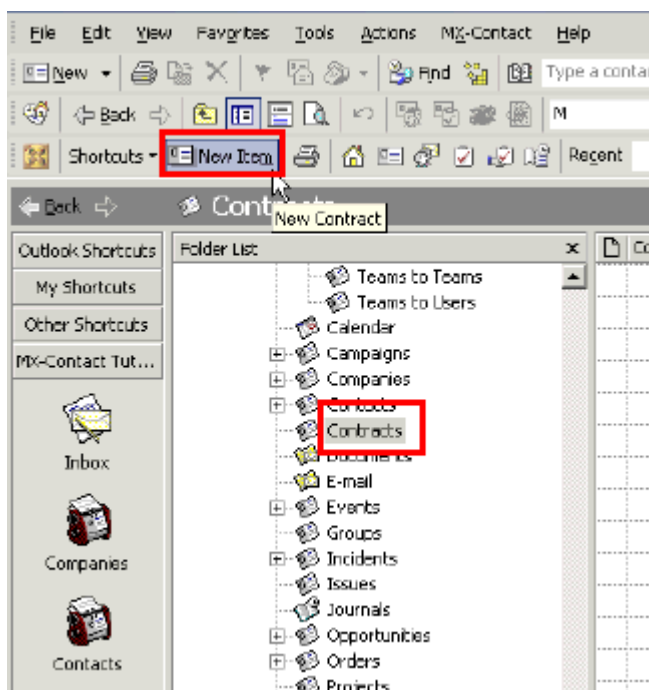
Registered Products:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

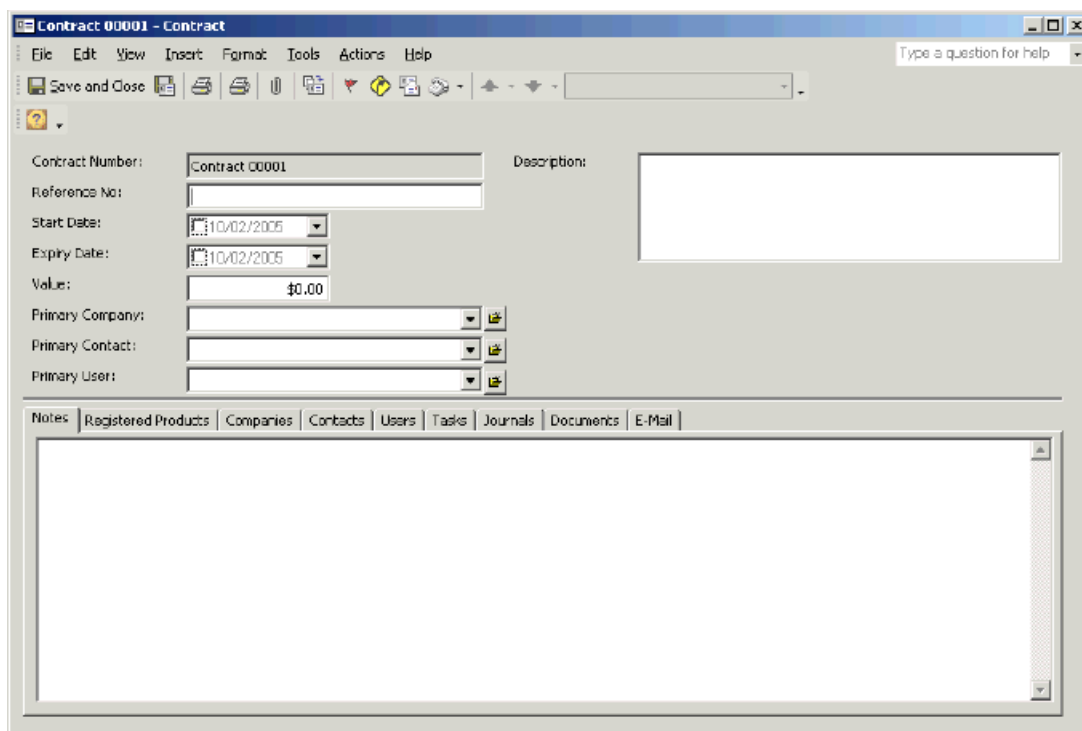
Basic Steps:

1. **Select the Contracts Folder from the MX-Contact Folder List. Click on the New Item button.**

The MX-Contact Support Module Tutorial

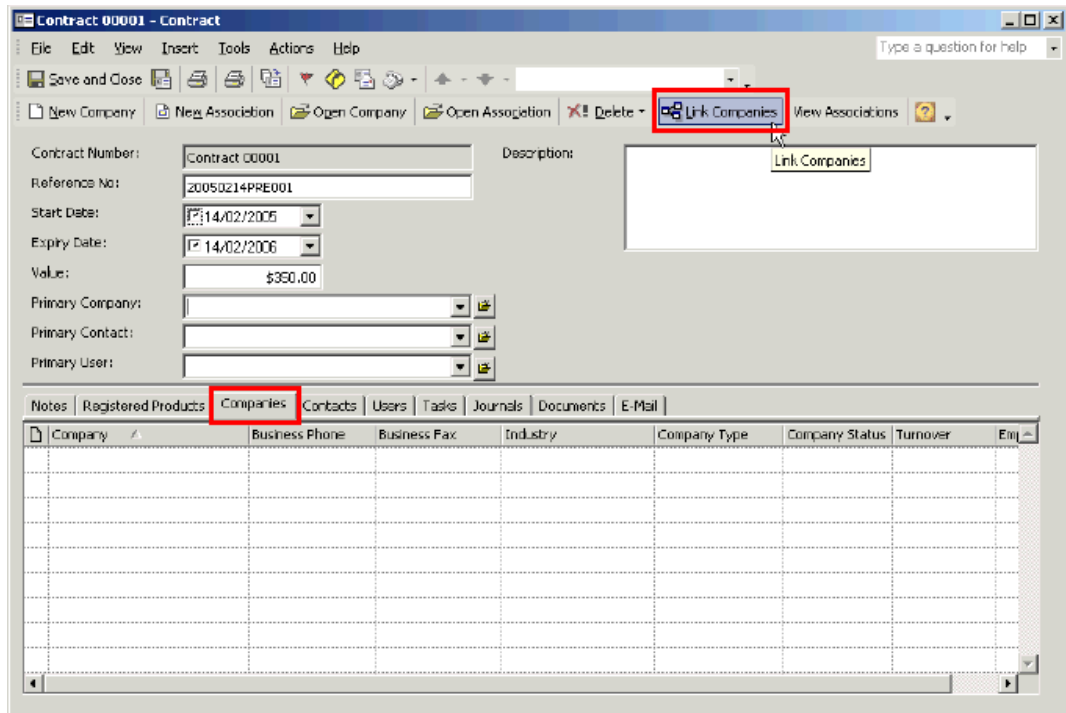


2. A New Contract Form will appear.

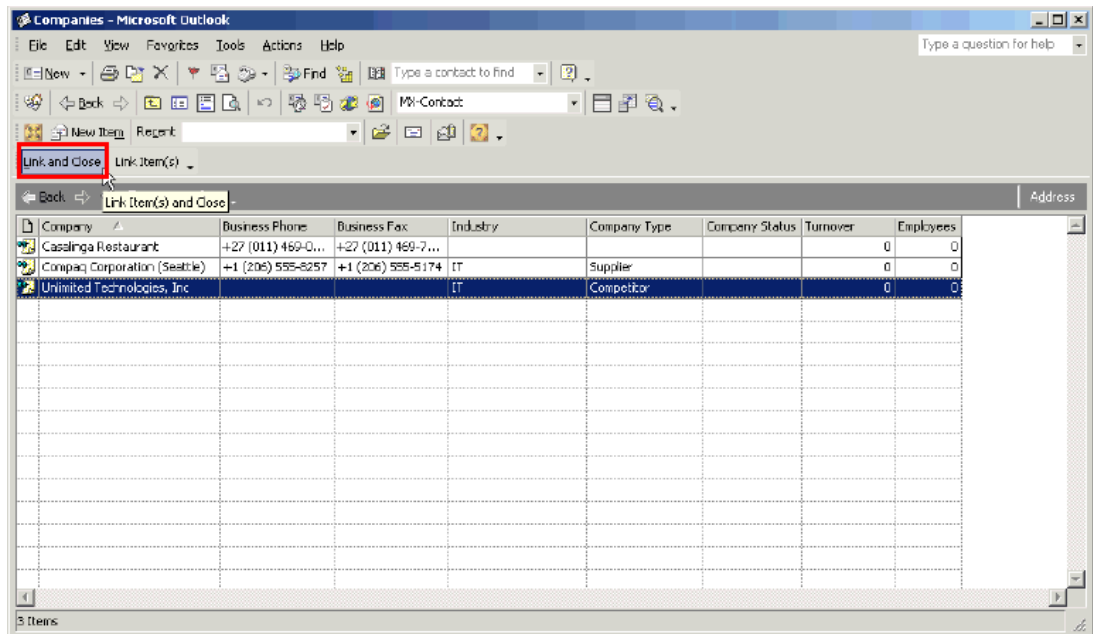
A screenshot of the 'Contract: 00001 - Contract' form. The form has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar. The form fields are: Contract Number: Contract 00001; Reference No: (empty); Start Date: 10/02/2005; Expiry Date: 10/02/2005; Value: \$0.00; Primary Company: (dropdown); Primary Contact: (dropdown); Primary User: (dropdown). There is a large Description text area. At the bottom, there are tabs for Notes, Registered Products, Companies, Contracts, Users, Tasks, Journals, Documents, and E-Mail. The 'Contracts' tab is selected.

3. Complete this form with all the relevant Contract information.
4. Select the Companies Tab and click on the Link Companies button.

The MX-Contact Support Module Tutorial

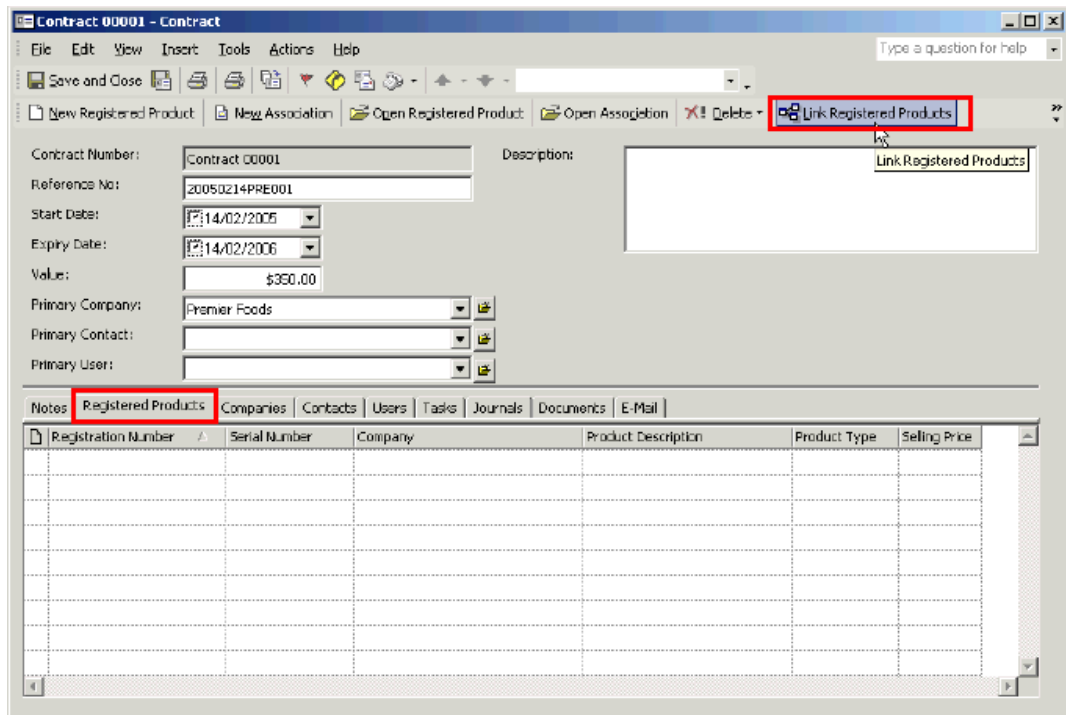


5. A list of Companies will appear. Select Premier Foods and click on the Link and Close button. Premier Foods will now be linked to this Contract.



6. Select the Registered Products tab. Click on the Link Registered Product button.

The MX-Contact Support Module Tutorial



7. A list of Registered Products will appear. Select the HP Pavilion linked to Premier Foods click on Link and Close. This Registered Product will now be visible on the Registered Products tab.
8. Click on Save and Close.

4.3 Adding a Service Contract from the Companies Folder: Exercise

Add a Service Contract for Casalinga Restaurant.

Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Reference No:	20050214CAS001
Start Date:	24/02/2005
Expiry.Date:	24/02/2006
Value:	\$250

Registered Products:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

Show me the **Solution** ([Adding a Service Contract from the Companies Folder: Solution](#))

4.4 Adding a Service Contract from the Companies Folder: Solution

Add a Service Contract for Casalinga Restaurant.

Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Reference No:	20050214CAS001
Start Date:	24/02/2005
Expiry.Date:	24/02/2006
Value:	\$250

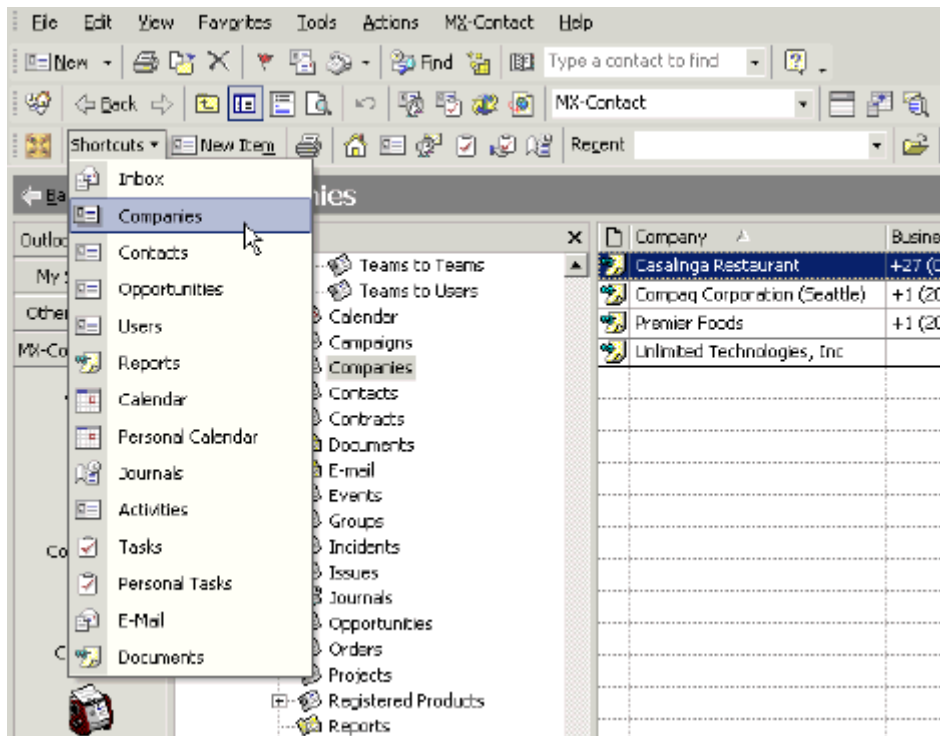
Registered Products:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

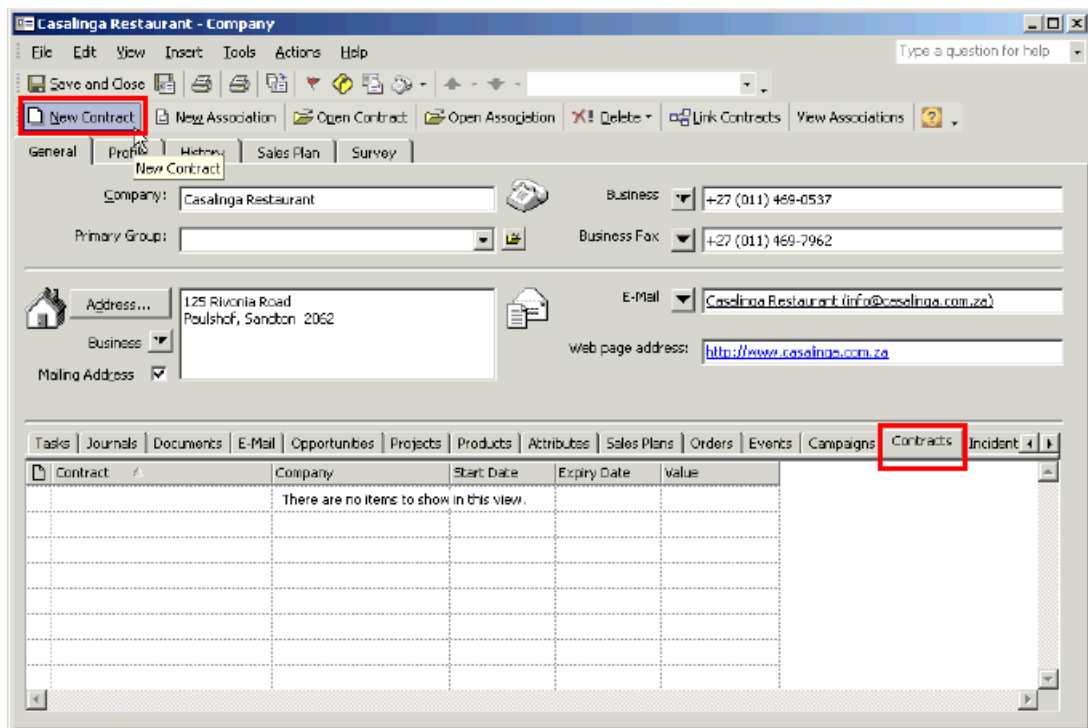
Basic Steps:

1. **Select Companies from the MX-Contact Shortcut Menu and then click on Casalinga Restaurant to open the Company record.**

The MX-Contact Support Module Tutorial

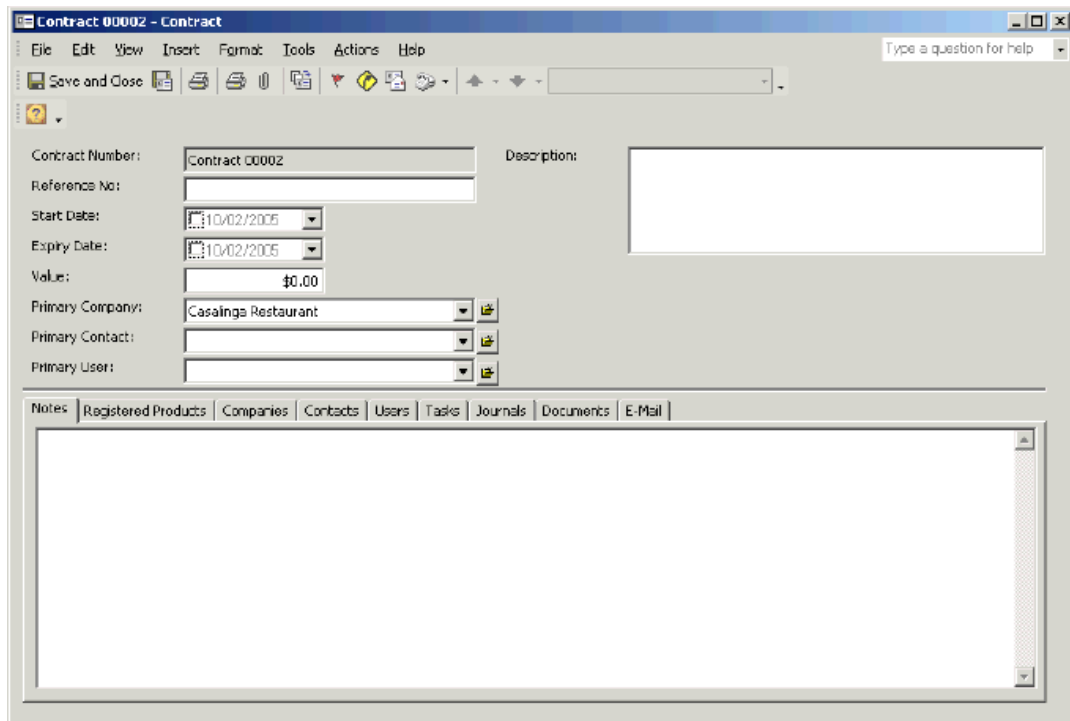


2. Click on the Contracts Tab and then on the New Contract button.

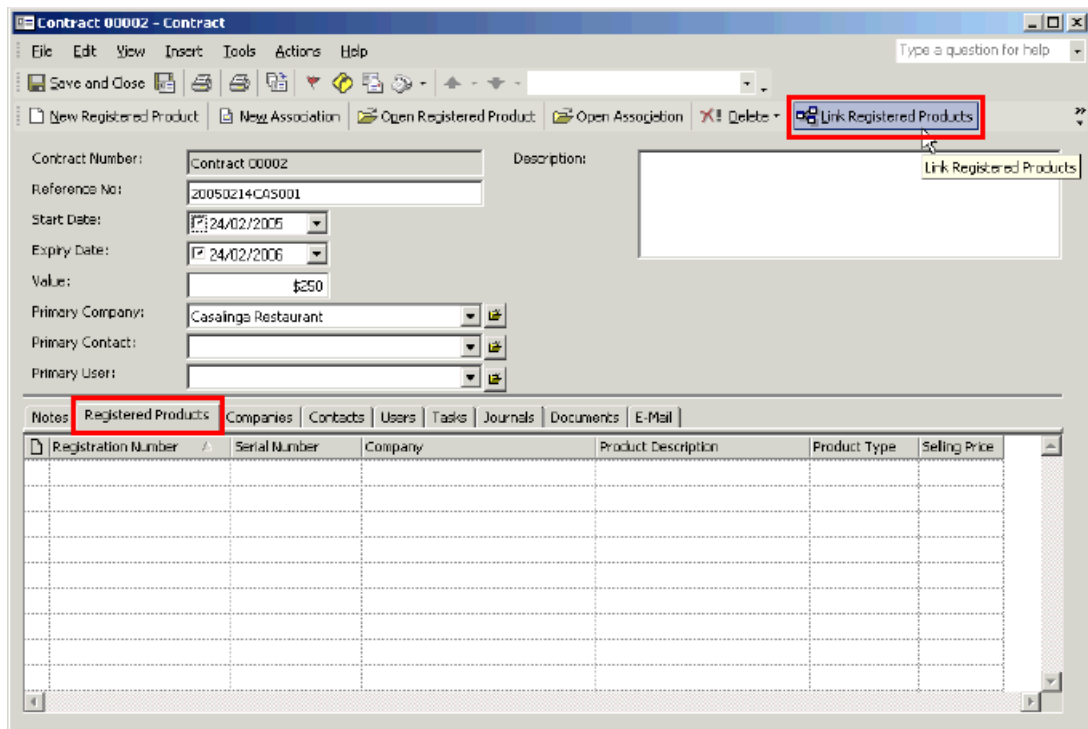


3. A New Contract form will appear. Casalinga Restaurant will be automatically linked to this Contract.

The MX-Contact Support Module Tutorial

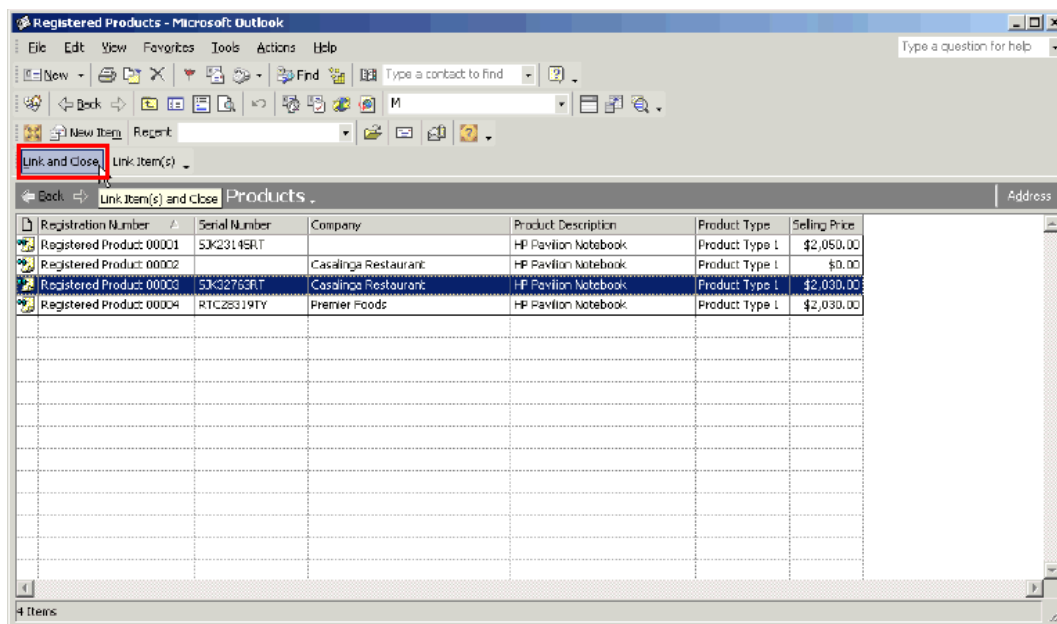


4. Select the Registered Products tab. Click on the Link Registered Product button.



5. Select the HP Pavilion Notebook that is linked to Casalinga Restaurant. Click on Link and Close.

The MX-Contact Support Module Tutorial



6. This Registered Product will now appear on the Registered Products tab of this Service Contract.
7. Click on Save and Close.

Take me back to the Exercise ([Adding a Service Contract from the Contracts Folder: Solution](#))

Take me to the next Section ([Tutorial Exercises - Incidents](#))

5 Tutorial Exercises - 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 your industry, and may be renamed accordingly.

In this section you will perform the following exercises:

1. **Open an Incident**

[Opening an Incident from a Contact: Exercise](#)

2. Assign an Incident to another User

[Assigning an Incident: Exercise](#)

3. **Create and Assign a Task from an Incident**

[Creating and Assigning a Task from an Incident: Exercise](#)

4. **Respond to an Incident**

[Responding to a task: Exercise](#)

5. **Close an Incident**

[Closing an Incident: Exercise](#)

6. **Add Incidents to Link Items Menu**

[Adding Incidents to the Link Items Menu: Exercise](#)

7. **Open an Incident from an Incoming Email**

[Opening an Incident from an Incoming Email: Exercise](#)

8. **Run an Incidents Report**

[Running an Incidents Report: Exercise](#)

5.1 Opening an Incident from a Contact: Exercise

Barney Anderson of Premier Foods calls in to say that there is no sound on his HP Pavilion Notebook that he purchased from your company. He has an existing Service Contract to cover this Notebook. Open an Incident from Barney Anderson's contact record.

Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Type:	Incident Type 1
Status:	Open
Priority:	Medium
Reg Prod Serial No:	RTC28319TY
Description:	No sound on Notebook

Show me the **Solution** ([Opening an Incident from a Contact: Solution](#))

5.2 Opening an Incident from a Contact: Solution

Barney Anderson of Premier Foods calls in to say that there is no sound on his HP Pavilion Notebook that he purchased from your company. He has an existing Service Contract to cover this Notebook. Open an Incident from Barney Anderson's contact record.

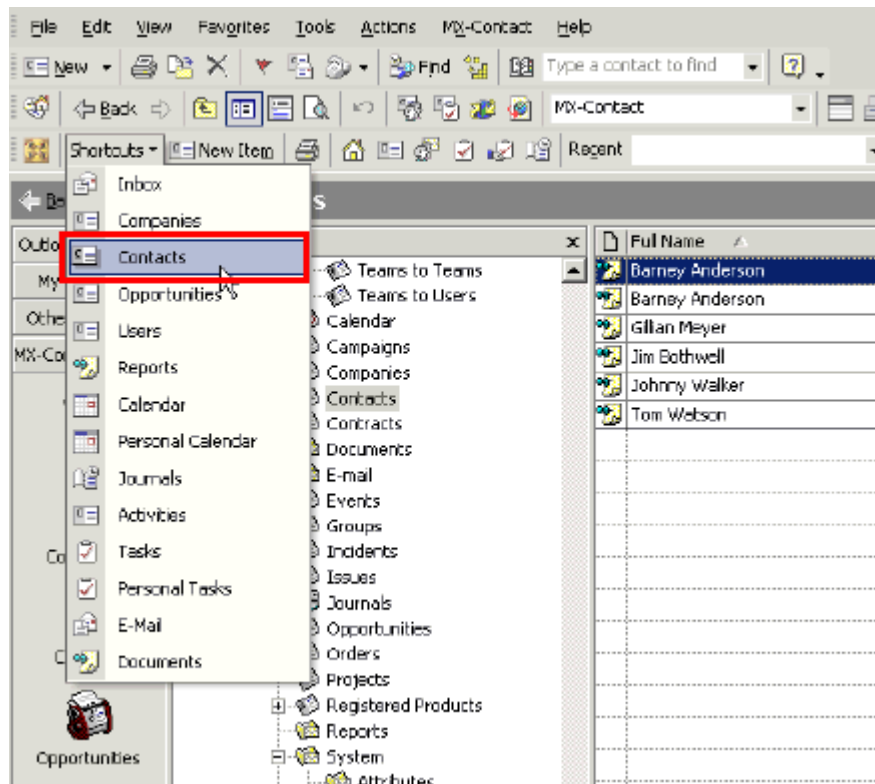
Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Type:	Incident Type 1
Status:	Open
Priority:	Medium
Reg Prod Serial No:	RTC28319TY
Description:	No sound on Notebook

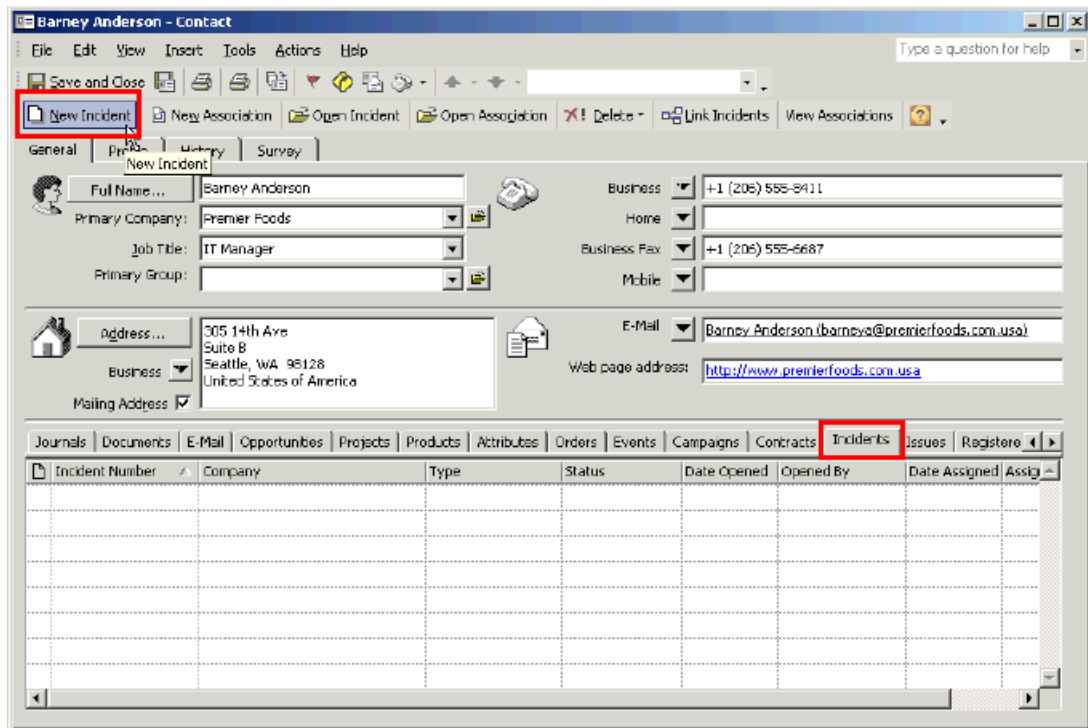
Basic Steps:

1. Click on the **Shortcut Menu** and select **Contacts**. Open **Barney Anderson's** record.

The MX-Contact Support Module Tutorial



2. Select the Incidents tab. Click on the New Incident button.



3. A New Incident Form will open. The Barney Anderson's name will appear in the Primary contact field because this incident was automatically linked to him because

The MX-Contact Support Module Tutorial

it was opened from his contact record. Barney Anderson's Primary Company (Premier Foods) will appear in the Primary Company field.

4. Click on the description tab in order to enter a description of the problem that is being reported.

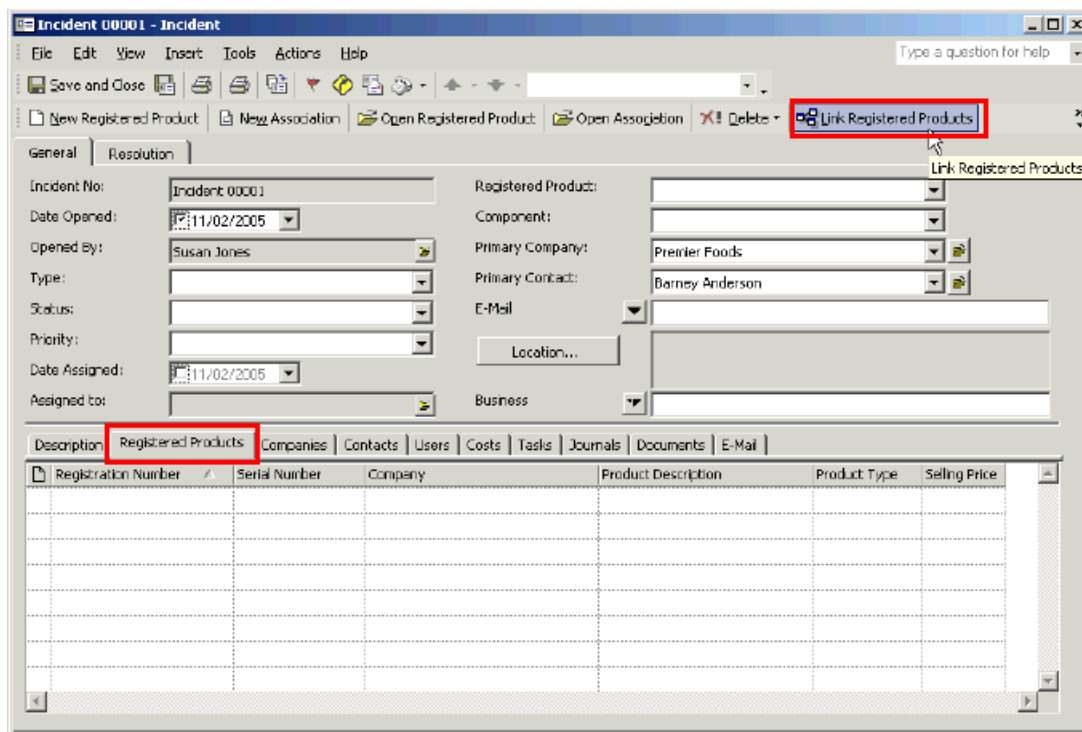
The screenshot shows a software window titled "Incident 00001 - Incident". The window has a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and a toolbar. Below the toolbar are two tabs: "General" and "Resolution". The "General" tab is selected and contains the following fields:

- Incident No.: Incident 00001
- Date Opened: 11/02/2005
- Opened By: Susan Jones
- Type: [Empty dropdown]
- Status: [Empty dropdown]
- Priority: [Empty dropdown]
- Date Assigned: 11/02/2005
- Assigned to: [Empty dropdown]
- Registered Product: Registered Product 00009
- Component: [Empty dropdown]
- Primary Company: Premier Foods
- Primary Contact: Barney Anderson
- E-Mail: [Empty dropdown]
- Location: [Empty dropdown]
- Business: [Empty dropdown]

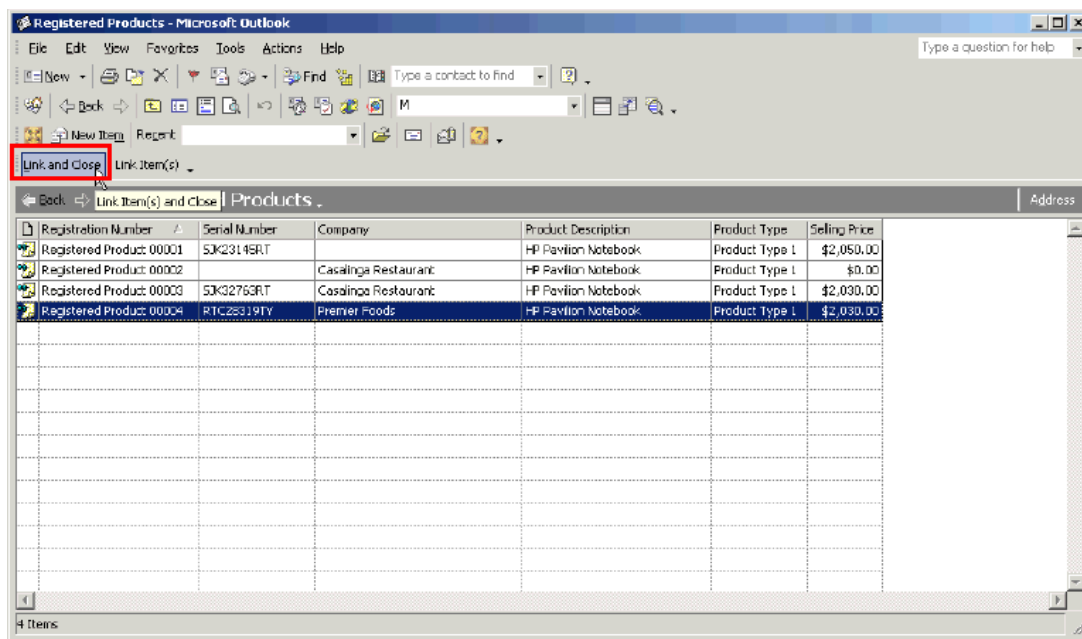
Below the "General" tab is a tabbed interface with the following tabs: "Description", "Registered Products", "Companies", "Contacts", "Users", "Costs", "Tasks", "Journals", "Documents", and "E-Mail". The "Description" tab is highlighted with a red box and contains the text "No sound on Notebook."

5. Click on the Registered Products tab in order to link a registered product to this Incident.

The MX-Contact Support Module Tutorial



6. Click on the Link Registered Products button. A list of Registered Products will appear. Select the relevant product (you can compare Serial Numbers) and then click on Link and Close.



7. Complete all the relevant information in the Incident form before assigning this incident to one of your Service Personnel. (See [Assigning an Incident: Solution](#) details)

5.3 Assigning an Incident: Exercise

Continuing with the previous exercise, assign this incident to Robert King and create a task for him to complete.

Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. The system will not allow you to assign an incident or a task to yourself. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

Assign to:	Robert King
Date Assigned:	Today's Date

Show me the solution ([Assigning an Incident: Solution](#))

5.4 Assigning an Incident: Solution

Continuing with the previous exercise, assign this incident to Robert King and create a task for him to complete.

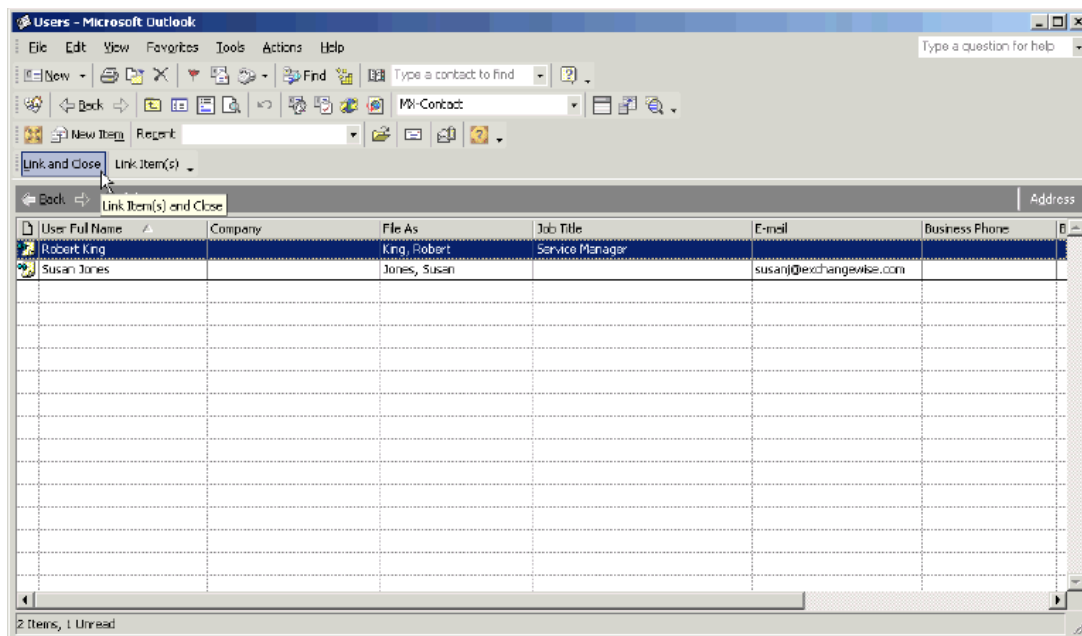
Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. The system will not allow you to assign an incident or a task to yourself. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

Assign to:	Robert King
Date Assigned:	Today's Date

Basic Steps:

1. Select the Date Assigned.
2. Click on the folder button attached to the Assigned To field. A list of MX-Contact Users will appear. Select the user that you wish to assign this Incident to. Click on Link and Close.



3. To create a task from this Incident, see [Creating and Assigning a Task from an Incident: Solution](#) for details.

5.5 Creating and Assigning a Task from an Incident: Exercise

Continuing with the previous exercise, once this incident has been assigned to Robert King, create a task for him to complete.

Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. The system will not allow you to assign an incident or a task to yourself. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

Subject:	Sort out sound problem on Barney Anderson's notebook.
Assign to:	Robert King

Show me the solution ([Creating and Assigning a Task from an Incident: Solution](#))

5.6 Creating and Assigning a Task from an Incident: Solution

Continuing with the previous exercise, once this incident has been assigned to Robert King, create a task for him to complete.

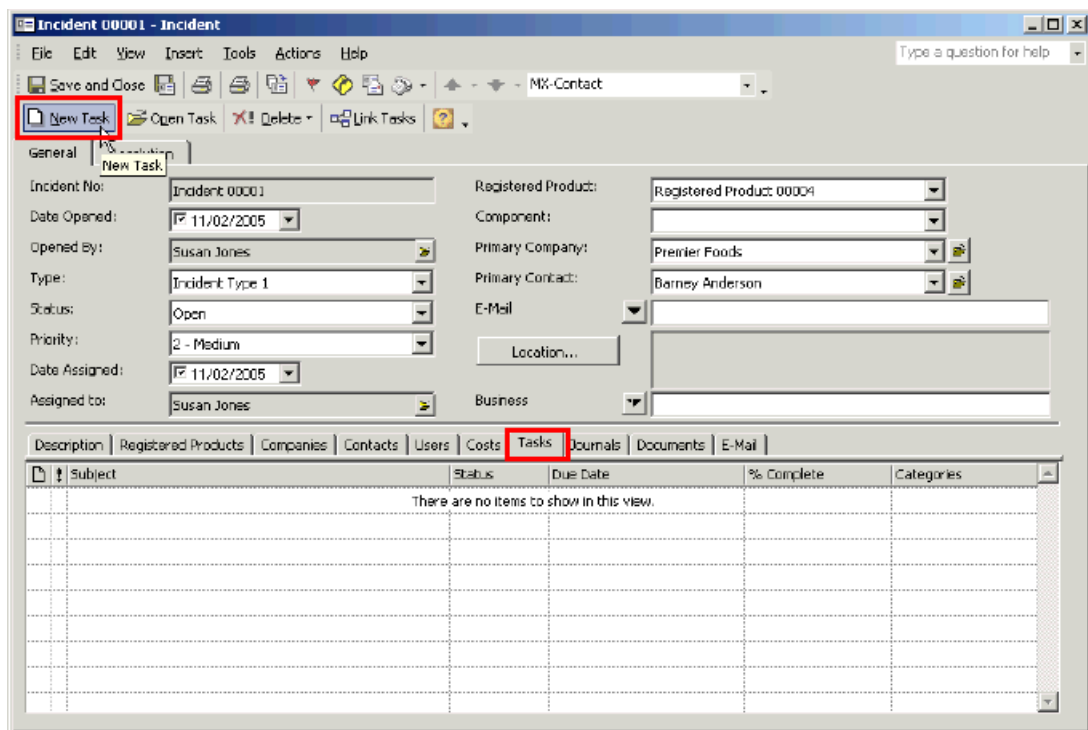
Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. The system will not allow you to assign an incident or a task to yourself. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

Subject:	Sort out sound problem on Barney Anderson's notebook.
Assign to:	Robert King

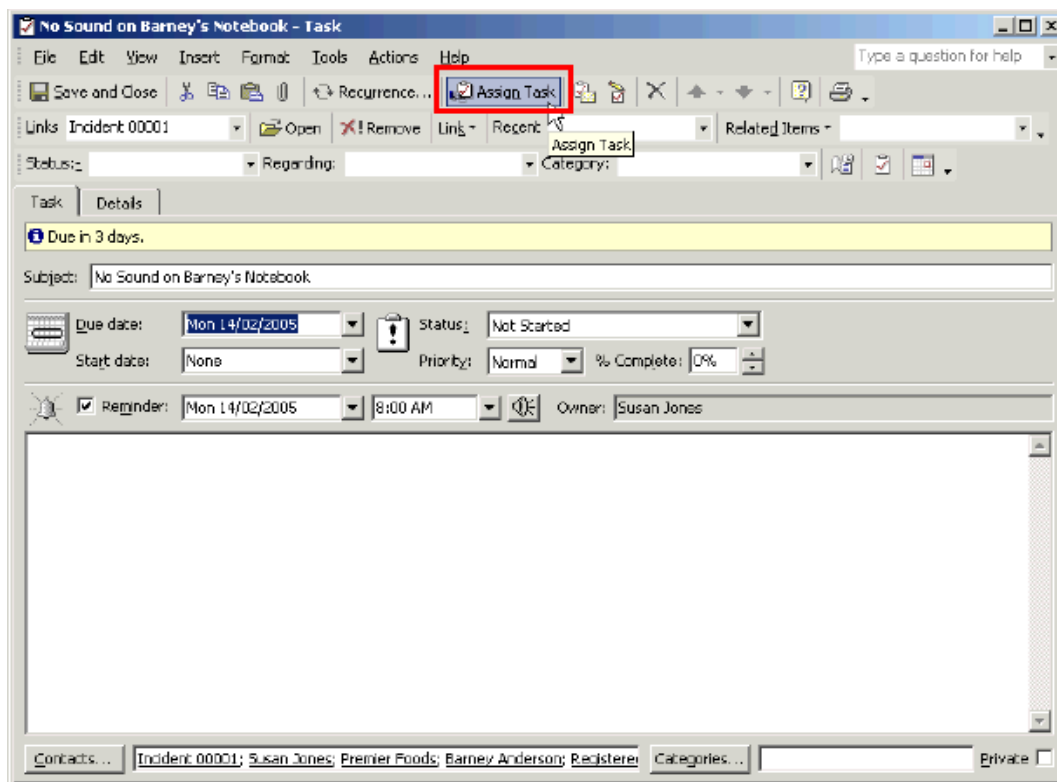
Basic Steps

1. To create a task from this Incident , select the Tasks Tab. Click on the New Task button.



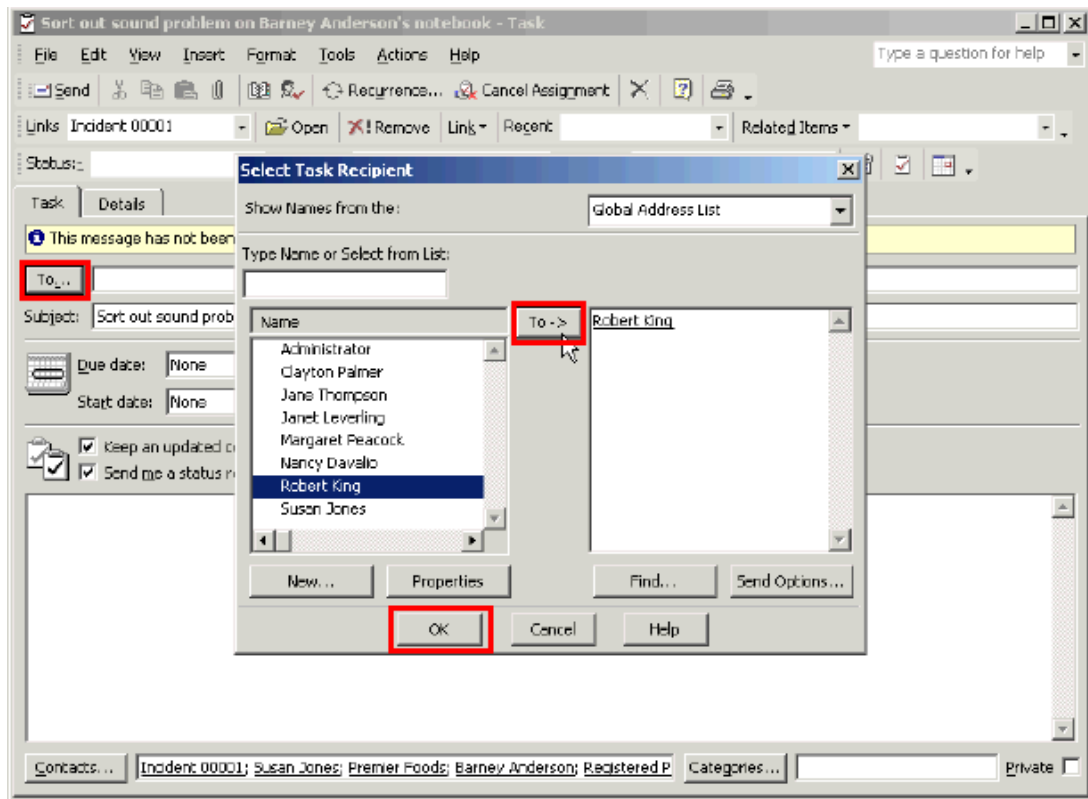
2. When the New Task Form opens, complete all the relevant details and then click on the Assign Task button.

The MX-Contact Support Module Tutorial

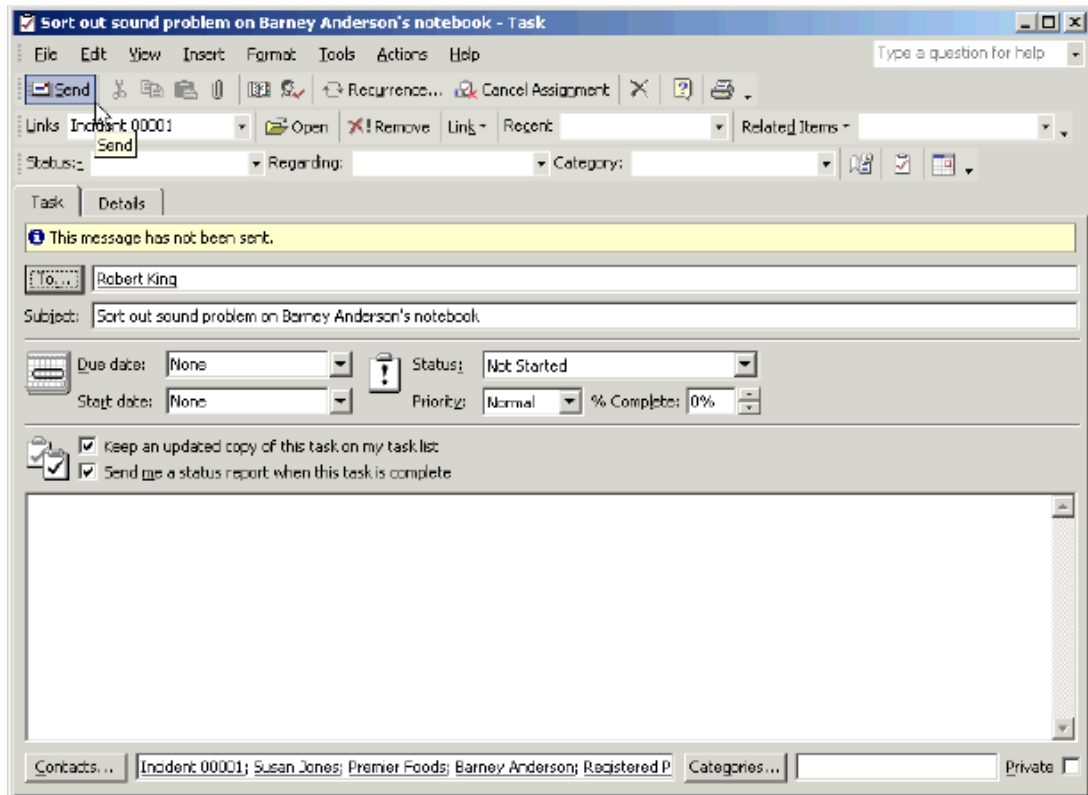


3. The task form will now include a To button allowing you to select a user that you wish to assign this task to.
4. Once you click on the To button, a Select Task Recipient screen will appear. Select Robert King and then click on the To button on this screen. Click on Ok.

The MX-Contact Support Module Tutorial



5. Click on the Send button in order to send this Task Assignment to Robert King.



6. Click on Save and Close on the Incident Form.

Take me back to the Exercise ([Opening an Incident from a Contact: Exercise](#))

Take me to the next Exercise ([Responding to a task: Exercise](#))

5.7 Responding to a task: Exercise

Continuing with the previous exercise, Robert King responds to the task that was assigned to him.

Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Subject:	Sort out sound problem on Barney Anderson's notebook.
Status:	Complete
Notes:	Sorted out Problem. Barney hadn't installed the drivers correctly. Re-installed drivers with him telephonically. Sound working.

Show me the **Solution** ([Responding to a task: Solution](#))

5.8 Responding to a task: Solution

Continuing with the previous exercise, Robert King responds to the task that was assigned to him.

Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. Please follow along with the screen shots to see the solution to this exercise.

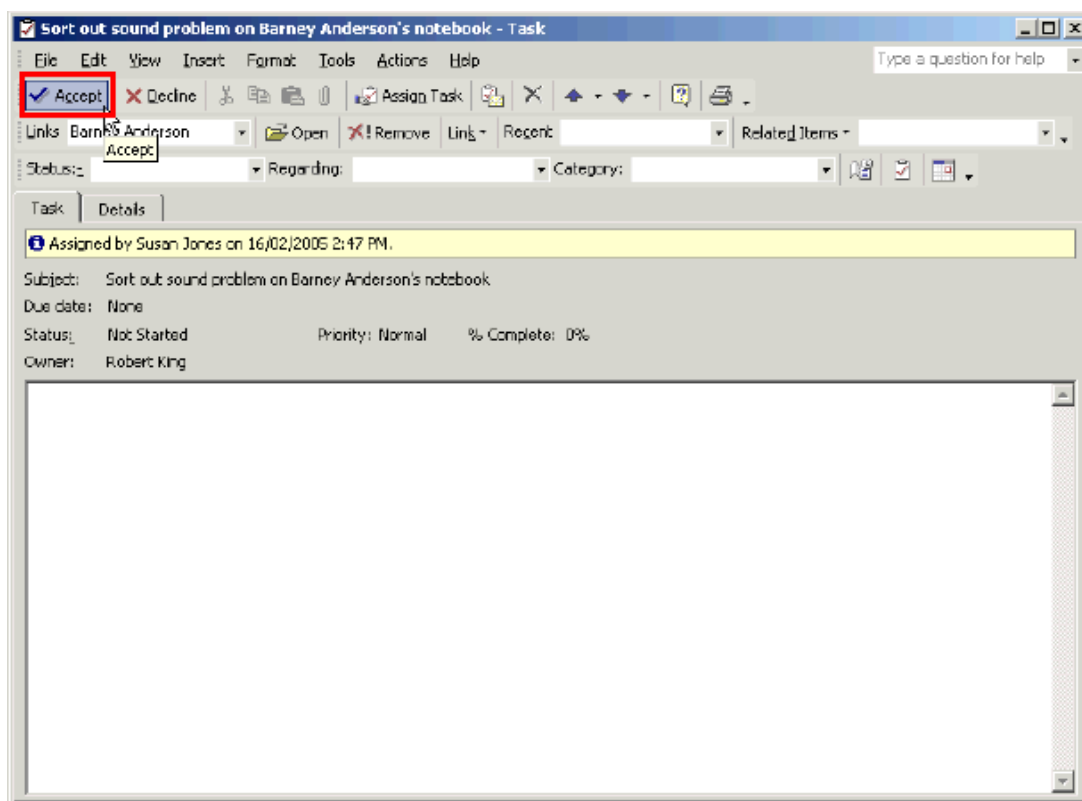
Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Subject:	Sort out sound problem on Barney Anderson's notebook.
Status:	Complete
Notes:	Sorted out Problem. Barney hadn't installed the drivers correctly. Re-installed drivers with him telephonically. Sound working.

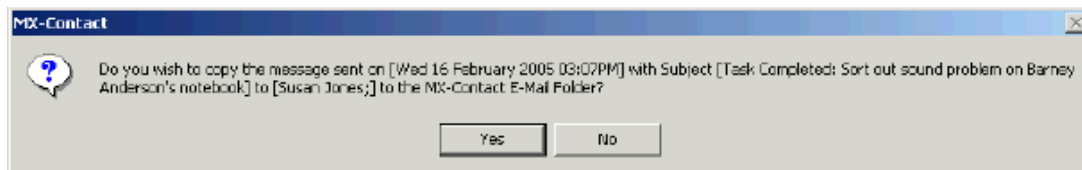
Basic Steps:

1. The task assigned to him will appear in Robert King's Inbox. Once opened, he will have to accept or decline the task.

The MX-Contact Support Module Tutorial



2. Once a task has been accepted, it is moved from the Inbox to the Tasks Folder.
3. When Robert King completes the task, he will update the information. When he clicks on Save and Close, the following prompt will appear:



4. Select Yes to copy the task to Susan Jones.

Take me back to the Exercise ([Creating and Assigning a Task from an Incident: Exercise](#))

Take me to the next Exercise ([Closing an Incident: Exercise](#))

5.9 Closing an Incident: Exercise

Robert King sorts out the notebook sound problem for Barney Anderson. The completed task is copied to Susan Jones who is now able to close the Incident.

Complete the following information:

Incident Date Opened:	11/02/2005
Company:	Premier Foods
Contact:	Barney Anderson
Status:	Closed
Date Closed:	11/02/2005
Closed by:	Susan Jones
Resolution:	Barney hadn't installed the drivers correctly. Robert re-installed drivers with him telephonically. Sound working.

Show me the **Solution** ([Closing an Incident: Solution](#))

5.10 Closing an Incident: Solution

Robert King sorts out the notebook sound problem for Barney Anderson. The completed task is copied to Susan Jones who is now able to close the Incident.

Note: *You will not be able to do step 1 of this exercise as the only Inbox that you have access to in the tutorial is your own. There won't be an email from Robert King in Susan Jones' Inbox for you to open.*

Complete the following information:

Incident Date Opened:	11/02/2005
Company:	Premier Foods
Contact:	Barney Anderson
Status:	Closed
Date Closed:	11/02/2005
Closed by:	Susan Jones
Resolution:	Barney hadn't installed the drivers correctly. Robert re-installed drivers with him telephonically. Sound working.

Basic Steps:

1. **Open the email from Robert Jones indicating that the problem has been solved.**
2. **Open the Incident that was logged for Premier Foods on the 11/02/2005.**
3. **Click on the Resolution tab.**

The MX-Contact Support Module Tutorial

The screenshot shows a web-based form titled "Incident 00001 - Incident". The form has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including "Save and Close". The form is divided into two tabs: "General" and "Resolution". The "Resolution" tab is currently selected and highlighted with a red rectangular box. The form fields are as follows:

- Incident No.: Incident 00001
- Date Closed: 16/02/2005
- Closed By: (empty field with a list icon)
- Status: Open
- Description: No sound on Notebook.
- Resolution: (empty text area)

4. Complete the information with the details that Robert King provided in his email (see details in exercise grid).
5. Change the Status to "Closed".
6. Click on the List button attached to the Closed By field and select Susan Jones. Click on Link and Close.
7. Click on Save and Close.

Take me back to the Exercise ([Responding to a task: Exercise](#))

Take me to the next Exercise ([Adding Incidents to the Link Items Menu: Exercise](#))

5.11 Adding Incidents to the Link Items Menu: Exercise

If you are working on public folders, you will only be able to complete this exercise if you have administrator rights.

You want add Incidents to the Link Items Menu.

Link Items Menu:	Incidents
-------------------------	------------------

Show me the **Solution** ([Adding Incidents to the Link Items Menu: Solution](#))

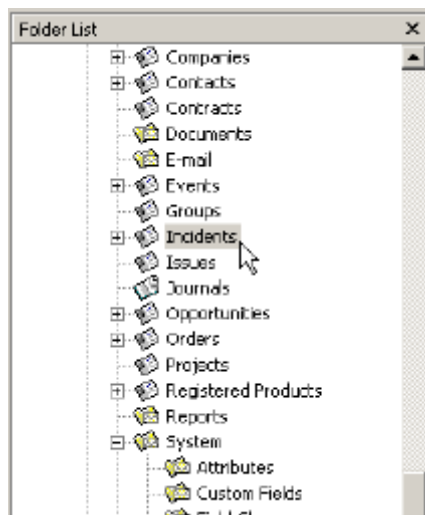
5.12 Adding Incidents to the Link Items Menu: Solution

You want add Incidents to the Link Items Menu.

Link Items Menu:	Incidents
-------------------------	------------------

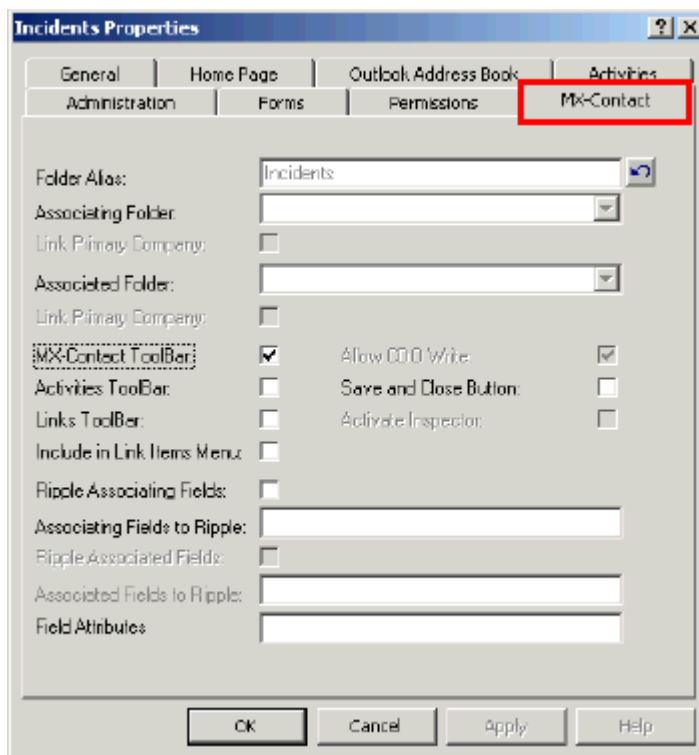
Basic Steps:

1. **Select the Incidents Folder from the MX-Contact Folder List:**



2. **Right click on Incidents and select Properties. Click on the MX-Contact Tab. The following screen will appear:**

The MX-Contact Support Module Tutorial



3. Tick the box for “Include in Link Items Menu and then click on OK.

Take me back to the Exercise ([Closing an Incident: Exercise](#))

Take me to the next Exercise ([Opening an Incident from an Incoming Email: Exercise](#))

5.13 Opening an Incident from an Incoming Email: Exercise

Susan Jones receives an email from Tom Watson of Casalinga Restaurant. He has a problem with his notebook. Open an Incident from this email.

Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Type:	Incident Type 1
Status:	Open
Priority:	High
Date Assigned:	11/02/2005
Assigned To:	Robert King
Serial No:	SJK32763RT
Problem:	Notebook not booting up properly
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

Show me the **Solution** ([Opening an Incident from an Incoming Email: Solution](#))

5.14 Opening an Incident from an Incoming Email: Solution

Susan Jones receives an email from Tom Watson of Casalinga Restaurant. He has a problem with his notebook. Open an Incident from this email.

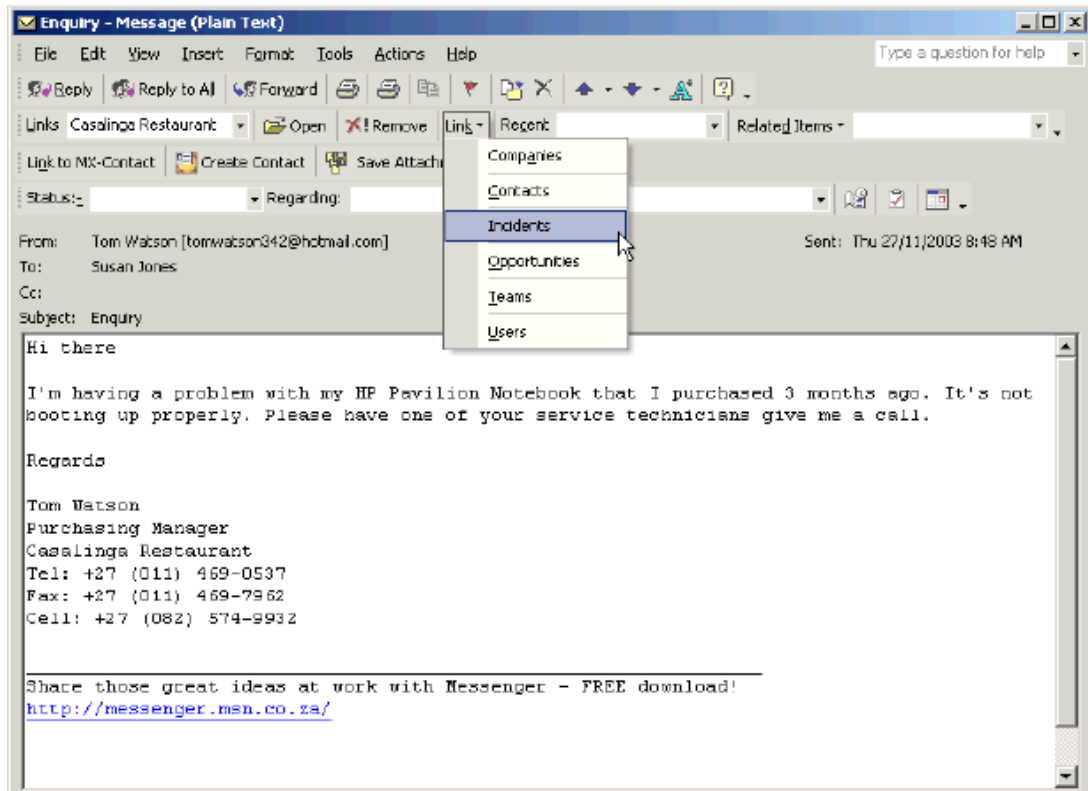
Complete the following information:

Company:	Casalinga Restaurant
Contact:	Tom Watson
Type:	Incident Type 1
Status:	Open
Priority:	High
Date Assigned:	11/02/2005
Assigned To:	Robert King
Serial No:	SJK32763RT
Problem:	Notebook not booting up properly
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

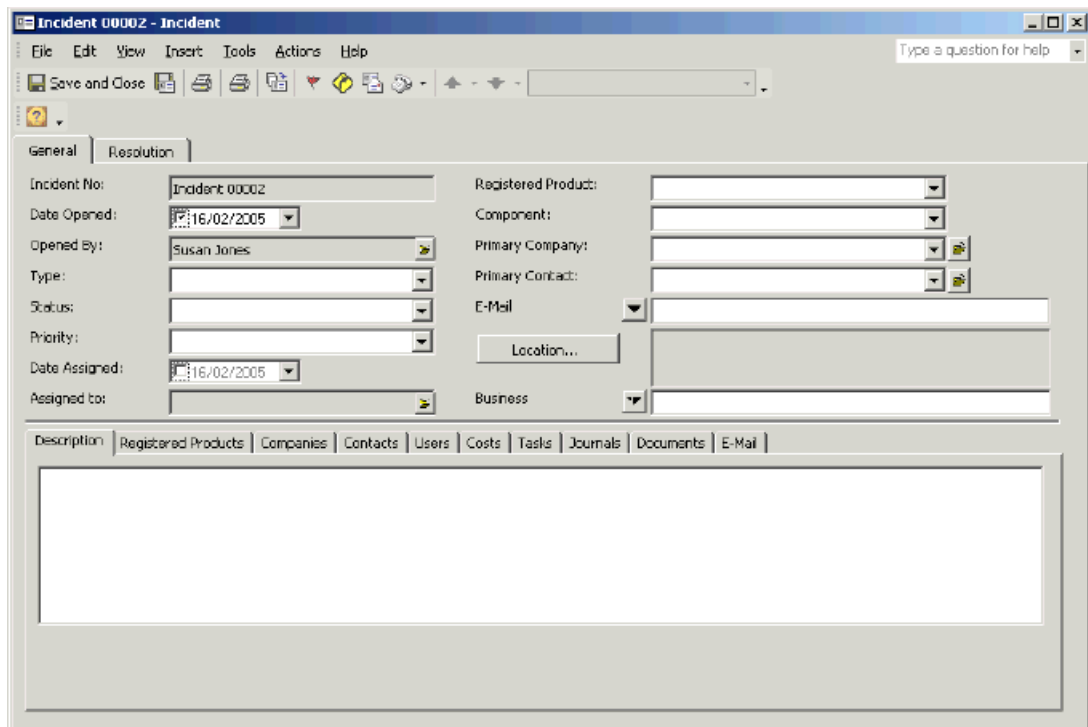
Basic Steps:

1. Open the email from Tom Watson in Susan Jones' Inbox.
2. Click on the Link Items Menu List.

The MX-Contact Support Module Tutorial



3. Select Incidents. An Incident form will open.



4. Complete the required information and click on Save and Close.

The MX-Contact Support Module Tutorial

Take me back to the Exercise ([Adding Incidents to the Link Items Menu: Exercise](#))

Take me to the next Exercise ([Running an Incidents Report: Exercise](#))

5.15 Running an Incidents Report: Exercise

Run a Detailed Incident Report (Landscape).

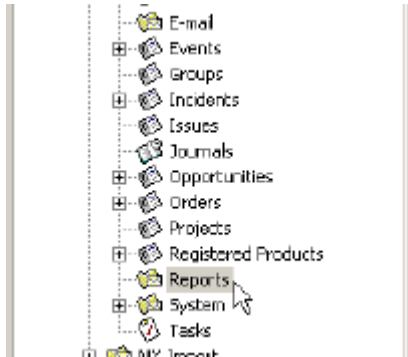
Show me the **Solution** ([Running an Incidents Report: Solution](#))

5.16 Running an Incidents Report: Solution

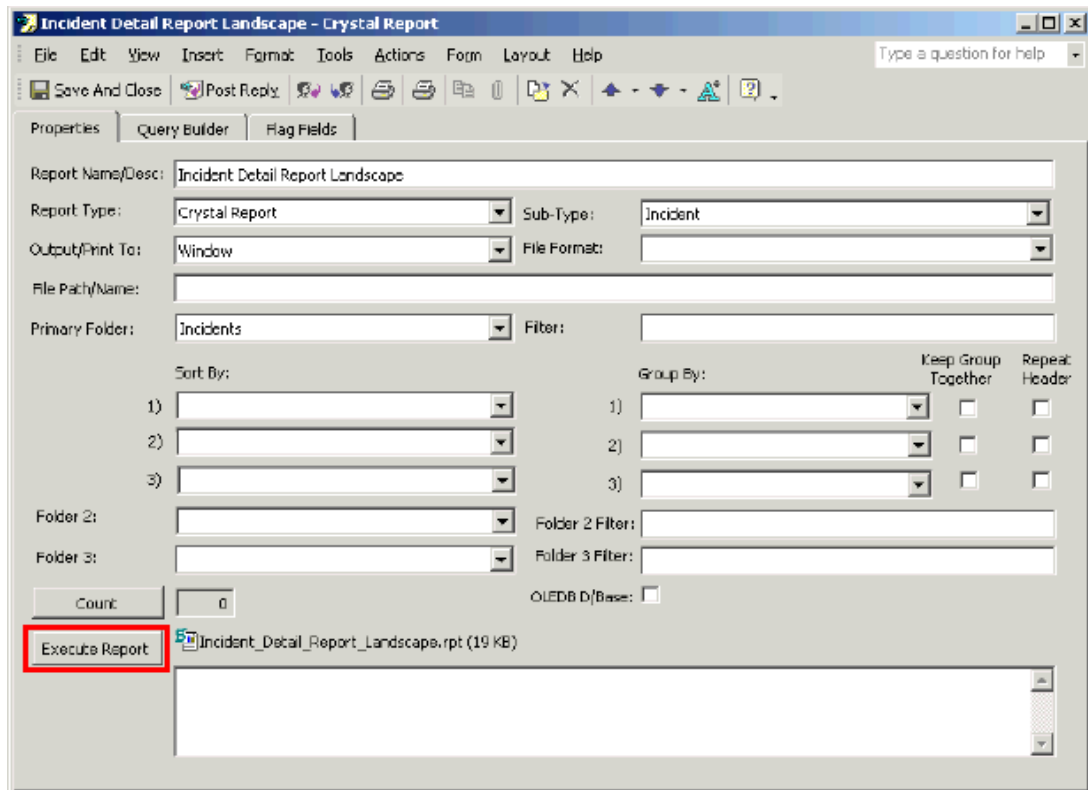
Run a Detailed Incident Report (Landscape).

Basic Steps:

1. Click on the Reports Folder in the MX-Contact Folder List.



2. Select the Incident Detailed Report Landscape.



3. Click on Execute Report. The report will be displayed as follows:

The MX-Contact Support Module Tutorial

Feb 17, 2005 13:16		Incident Detail Report			Page 1 of 1	
Incident No. Type Status Priority	Date Opened Opened By Date Assigned Assigned To	Registered Product Component Primary Company Primary Contact	E-Mail Address Location Business Telephone Number	Date Closed Closed By	Description	
Incident 10001 Incident Type 1 Open 2 - Medium	11/02/2005 Seth Jones 11/02/2005 Seth Jones	Registered Product 10001 Primary Company Primary Contact		10/02/2005 Seth Jones	Reopened on Notebook	
Resolutions:						

4. Close the Report. Select No if you are prompted to 'Save Changes'.

Take me back to the Exercise ([Opening an Incident from an Incoming Email: Exercise](#))