

*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**

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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

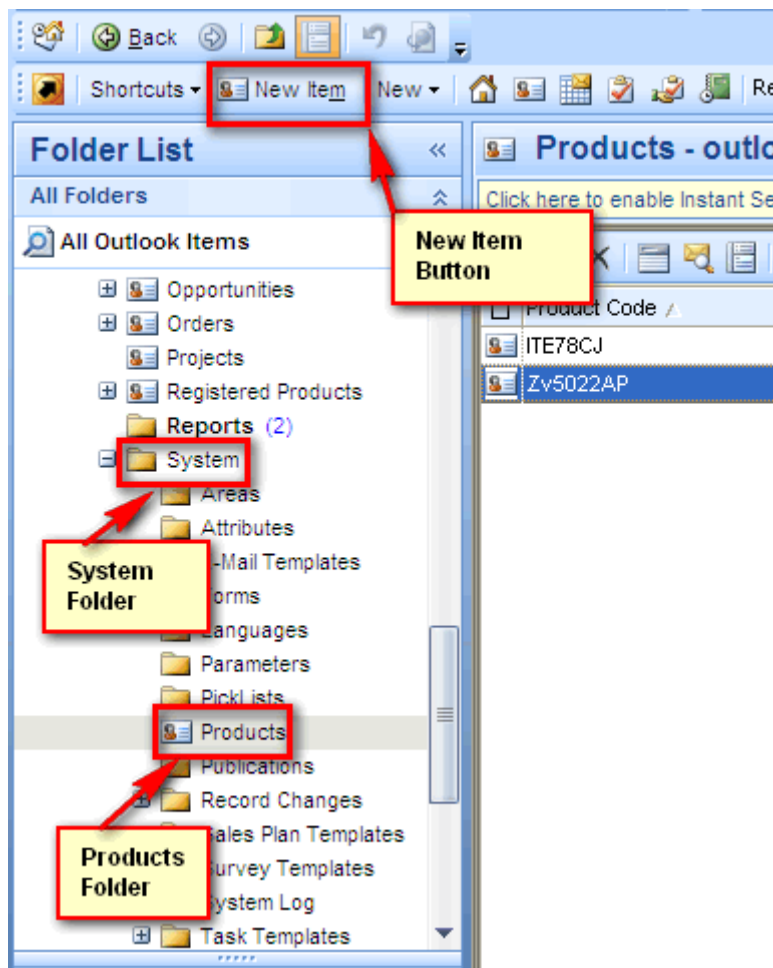
Add the HP Pavilion Notebook to the Product Register

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.



2. A blank Product Form will open:

The MX-Contact Support Module Tutorial

The screenshot shows the 'New Product' form in the MX-Contact Support Module. The form is titled 'Untitled - Product' and has a ribbon with 'Product', 'Insert', and 'Format Text' tabs. The 'Product' tab is active, showing various action buttons like 'Save & Close', 'Print', 'New Letter', 'New Document', 'Details', 'E-mail', 'Meeting', 'Call', 'Business Card', 'Follow Up', 'Spelling', and 'Contact Notes'. Below the ribbon, the form is divided into several sections: 'General' (Product Code, Description, Type, Family, Group), 'Unit' (Unit, Volume, Weight, Inclusive, Taxable), 'Status' (Status, Warehouse, Vendor, Supplier), and 'Pricing' (Cost Price, Selling Price). A 'Notes' section is at the bottom.

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 displays the MX-Contact Support Module interface. The window title is 'Zv5022AP'. The interface includes a ribbon with tabs for 'Contact', 'Insert', and 'Format Text'. The 'Contact' tab is active, showing various action buttons like 'Save & Close', 'Print', 'New Letter', 'New Document', 'Details', 'E-mail', 'Meeting', 'Call', 'Business Card', 'Picture', 'Categorize', 'Follow Up', 'Spelling', and 'Contact Notes'. Below the ribbon, the form contains the following fields:

Product Code:	Zv5022AP	Type:	Product Type 1
Description:	HP Pavilion Notebook	Family:	Product Family 1
		Group:	Product Group 1
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
Inclusive:	<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

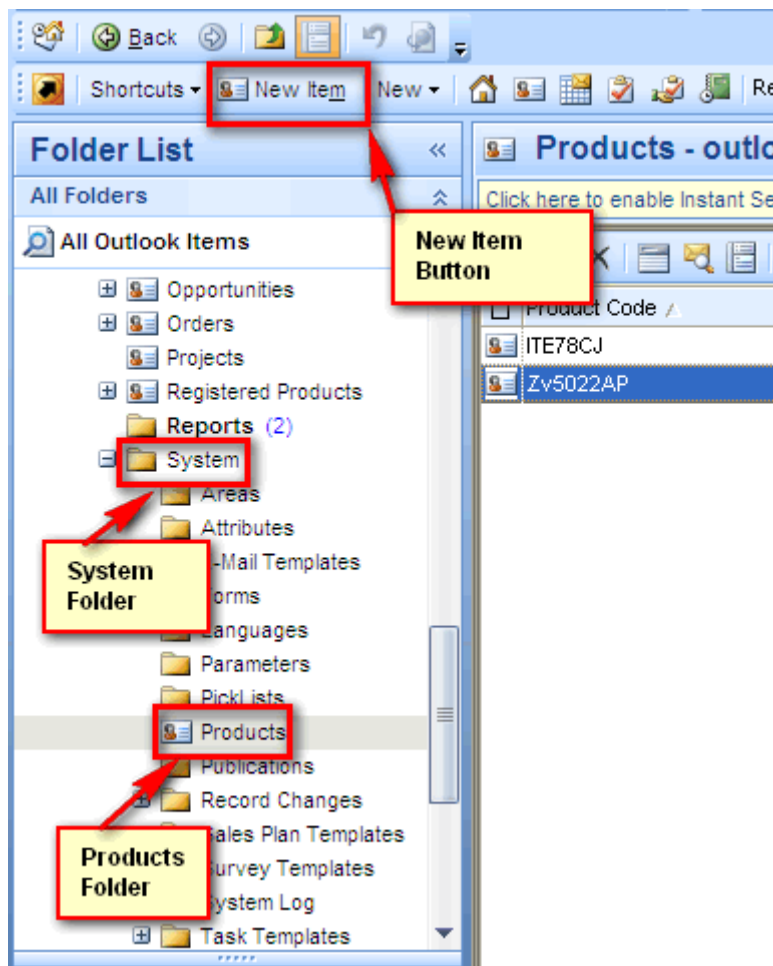
Add the Microsoft Optical Mouse to the Product Register.

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.



2. A blank Product Form will open:

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "Untitled - Product". The interface includes a ribbon with tabs for "Product", "Insert", and "Format Text". The ribbon contains various icons for actions such as "Save & Close", "Print", "New Letter", "New Document", "Details", "E-mail", "Meeting", "Call", "Business Card", "Follow Up", "Spelling", and "Contact Notes". Below the ribbon, the form is organized into several sections with input fields and dropdown menus. The fields include "Product Code", "Description", "Type", "Family", "Group", "Unit", "Volume", "Weight", "Inclusive", "Taxable", "Status", "Warehouse", "Vendor", "Supplier", "Cost Price", and "Selling Price". A "Notes" section is located at the bottom of the form.

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 displays the MX-Contact Support Module interface. The window title is 'ITE78CJ'. The ribbon includes 'Contact', 'Insert', and 'Format Text' tabs. The 'Contact' ribbon has several groups of icons: 'Actions' (Save & Close, Print), 'MX-Contact' (New Letter, New Document), 'General' (Details, Show), 'Communicate' (E-mail, Meeting, Call), 'Options' (Business Card, Categorize, Follow Up), 'Proofing' (Spelling), and 'OneNote' (Contact Notes). The main form area contains the following fields:

Product Code:	ITE78CJ	Type:	Product Type 2
Description:	Microsoft Optical Mouse	Family:	Product Family 2
		Group:	Product Group 2
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
Inclusive:	<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

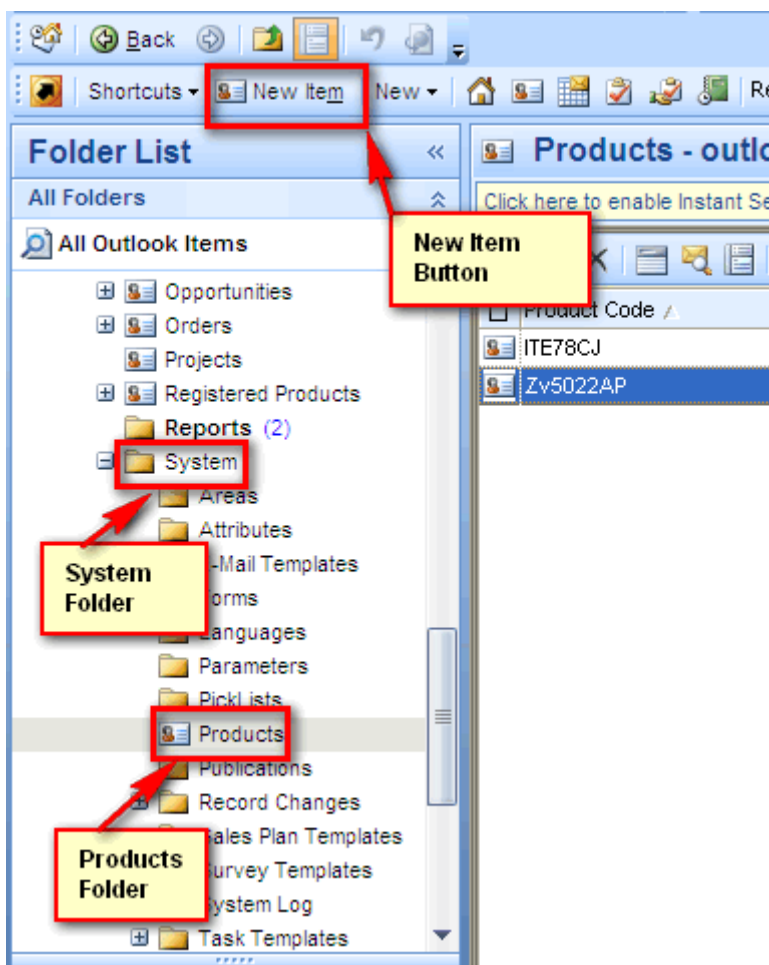
Add the following Product Part:

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.



2. A blank Product Form will open:

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "Untitled - Product" with a ribbon menu at the top containing "Product", "Insert", and "Format Text". Below the ribbon are several toolbars with icons for "Save & Close", "Print", "New Letter", "New Document", "Details", "E-mail", "Meeting", "Call", "Business Card", "Picture", "Categorize", "Follow Up", "Spelling", and "Contact Notes". The main form area contains the following fields:

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

- 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 the 'Product' form in the MX-Contact software. The window title is 'ST2550 - Product'. The ribbon at the top includes 'Product', 'Insert', and 'Format Text' tabs. The 'Product' tab is active, showing various icons for actions like 'Save & Close', 'Print', 'New Letter', 'New Document', 'Details', 'E-mail', 'Meeting', 'Call', 'Business Card', 'Follow Up', 'Spelling', and 'Contact Notes'. The form fields are as follows:

Product Code:	ST2550	Type:	Product Type 1
Description:	Seagate 60 GByte Hard Disc	Family:	
		Group:	
Unit:	Product Unit 1	Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
Inclusive:	<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

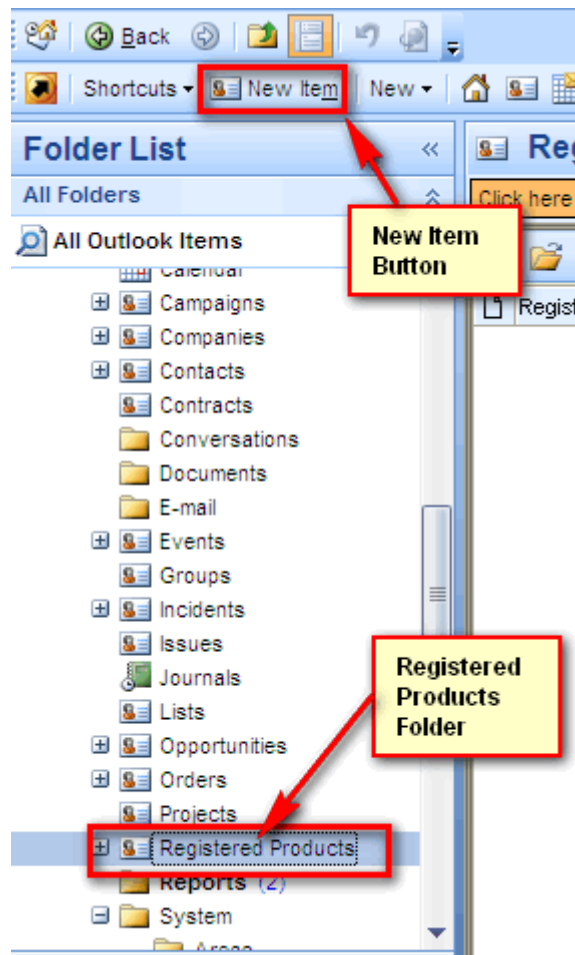
Premier Foods purchases a HP Pavilion Notebook from your Company.

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:**



3. A blank Registered Products form will appear:

The MX-Contact Support Module Tutorial

Registered Product NUM000001

Registration No: Registered Product NUM000001 Serial No:

Product Code/ID: Type:

Description: Family:

Cost Price: \$0.00 Sell Price: \$0.00 Group:

Primary Company: Reg. Date: 6 /26/2011

Primary Contact: Installation: 6 /26/2011

Primary User: Expiry Date: 6 /26/2011

Notes | Components | Companies | Contacts | Users | Journals | Documents

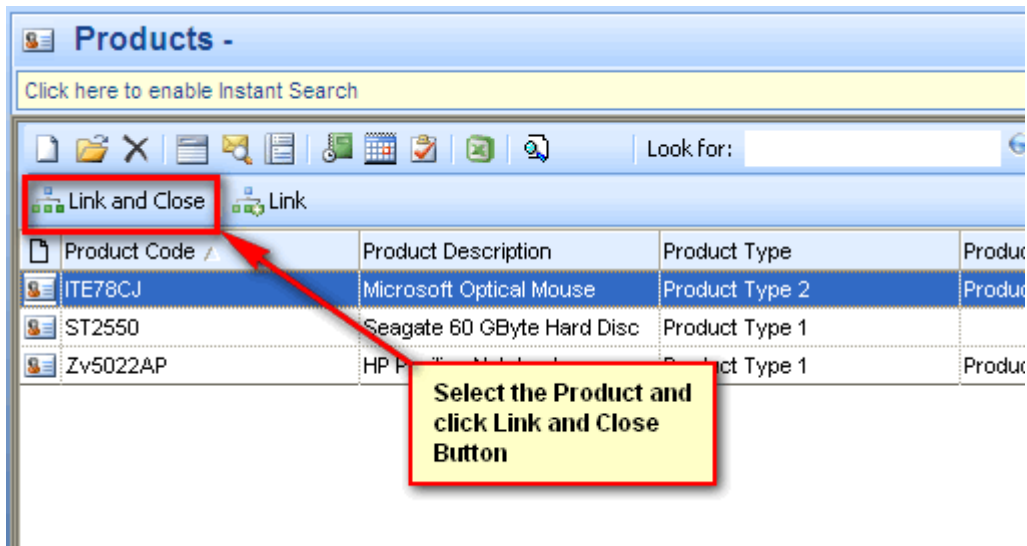
Registered Product Form

4. To enter the following details,:

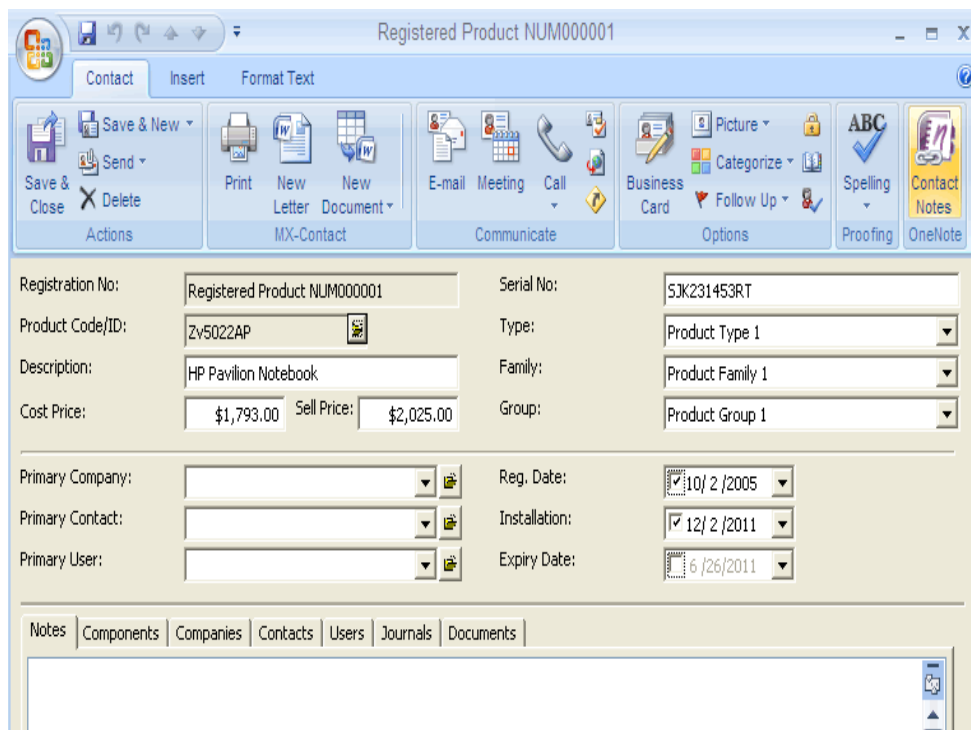
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Serial No:	SJK231453RT
Selling Price:	2025
Reg.Date:	10/02/2005
Installation:	12/02/2005

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

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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 Open Companies button and select Premier Foods. Click Link and Close.

The MX-Contact Support Module Tutorial

Cost Price: \$1,793.00 Sell Price: \$2,025.00 Group

Primary Company: [Dropdown] [Open Company Folder Button] Reg.

Primary Contact: [Dropdown] [Open Company Folder Button] Instal

Primary User: [Dropdown] [Open Company Folder Button] Expir

Notes | Components | Companies | Contacts | Users | Journals | Documents

Open Company Folder Button

8. Click on the Open Contacts button and select Barney Anderson. Click Link and Close.

Primary Company: Premier Foods [Open Contacts Folder Button] Reg. Dat

Primary Contact: [Dropdown] [Open Contacts Folder Button] Installati

Primary User: [Dropdown] [Open Contacts Folder Button] Expiry D.

Notes | Components | Companies | Contacts | Users | Journals | Documents

Open Contacts Folder Button

9. 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

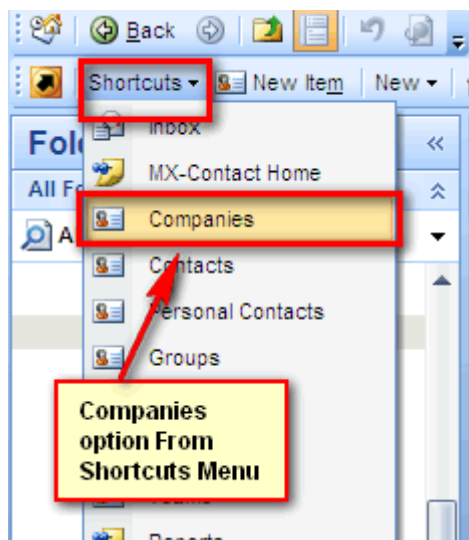
Components:

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

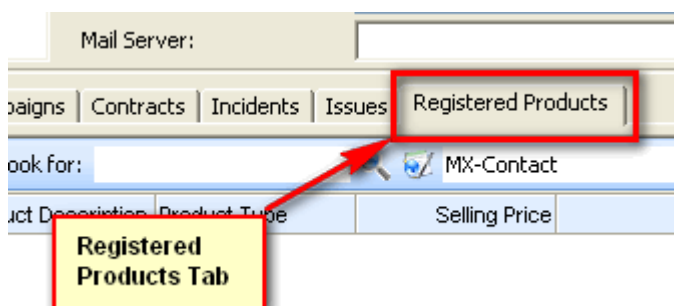
Basic Steps:

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

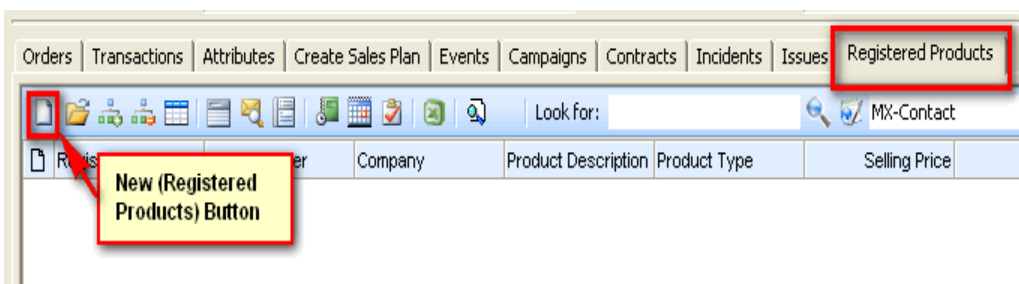
The MX-Contact Support Module Tutorial



2. Click on the Registered Products Tab



3. Then on the New Registered Product button.



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

The MX-Contact Support Module Tutorial

5. Enter the details of the Registered Product and then click on the Components tab. Click on New Registered Product Component.

6. A New Component Form will open.

The MX-Contact Support Module Tutorial

The screenshot shows a software window titled "Component 00001" with a ribbon menu (Contact, Insert, Format Text) and various toolbars. The main form contains the following fields:

Registered Product:	Registered Product NUM000002		
Registration No:	Component 00001		
Product Code:	<input type="text"/>	Serial No:	<input type="text"/>
Description:	<input type="text"/>	Type:	<input type="text"/>
Cost Price:	\$0.00	Family:	<input type="text"/>
Selling Price:	\$0.00	Group:	<input type="text"/>
Reg. Date:	6 /26/2011		
Installation:	6 /26/2011		
Expiry Date:	6 /26/2011		
Notes:	<input type="text"/>		

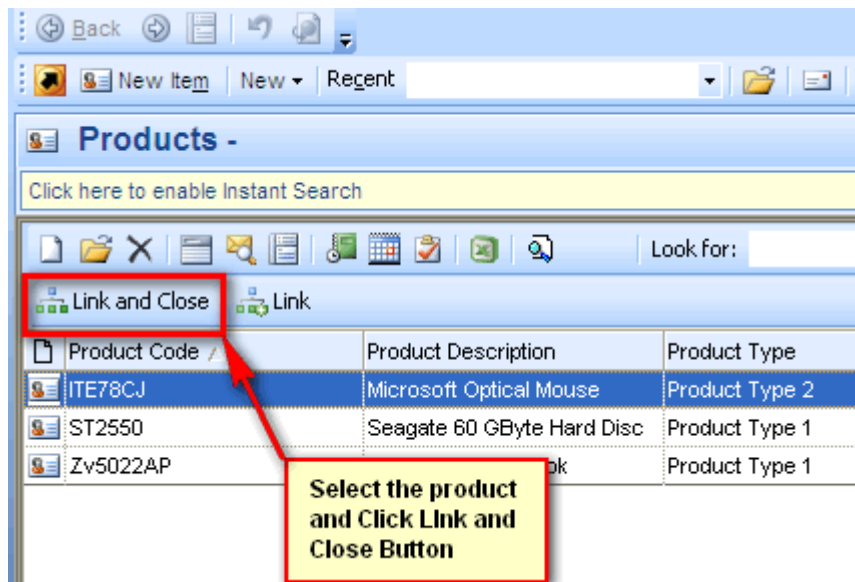
7. Click on the Open button attached to the Product Code field. The Product Register will appear.

This close-up view of the Product Code field shows a red box around a small icon labeled "Open Folder Button". A red arrow points from the text box to the icon.

Registered Product:	Registered Product NUM000002
Registration No:	Component 00001
Product Code:	<input type="text"/>
Description:	<input type="text"/>
Cost Price:	<input type="text"/>
Selling Price:	<input type="text"/>

8. Select the relevant Product Code and then click on the Link and Close button.

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9. Enter all the remaining details and then click on Save and Close.

Component 00001

Contact Insert Format Text

Save & Close Custom Actions X Print New Letter Document MX-Contact Show Communicate Options

Registered Product: Registered Product NUM000002

Registration No: Component 00001

Product Code: ITE78CJ Serial No: MSO6751M

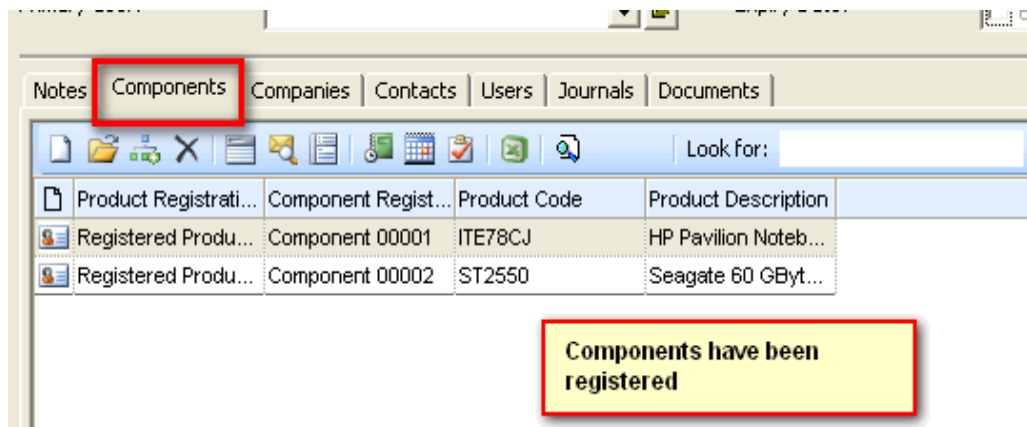
Description: HP Pavilion Notebook Type: Product Type 1

Cost Price: \$1,793.00 Family: Product Family 1

Selling Price: \$0.00 Group: Product Group 1

10. Repeat steps 5 – 8 until all components have been added.
11. You should now see all the components listed in the Components Tab.

The MX-Contact Support Module Tutorial



12. 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:

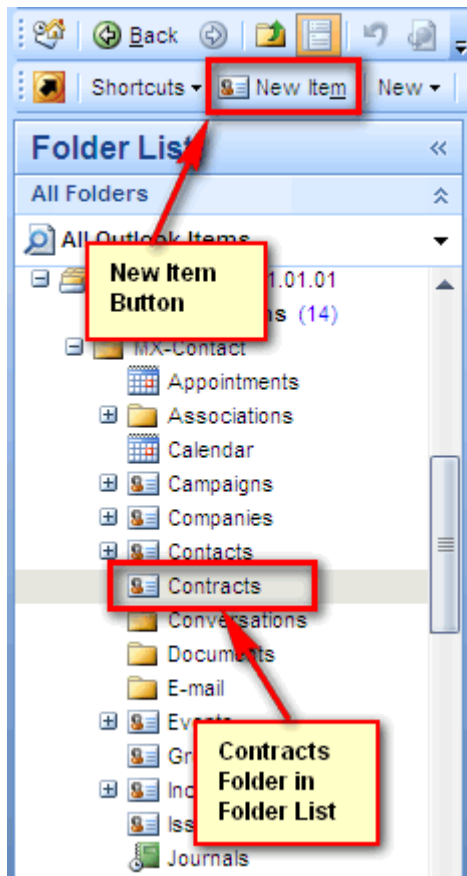
Company:	Premier Foods
Contact:	Barney Anderson
Reference No:	20050214PRE001
Start Date:	14/02/2005
Expiry.Date:	14/02/2006
Value:	\$350

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.**



2. A New Contract Form will appear.

The MX-Contact Support Module Tutorial

The screenshot displays a software window titled "Contract NUM000001 - Contract". The interface includes a ribbon menu with tabs for "Contract", "Insert", and "Format Text". The ribbon contains various icons for actions like "Save & New", "Send", "Delete", "Print", "New Letter", "New Document", "E-mail", "Meeting", "Call", "Business Card", "Follow Up", "Spelling", and "Contact Notes".

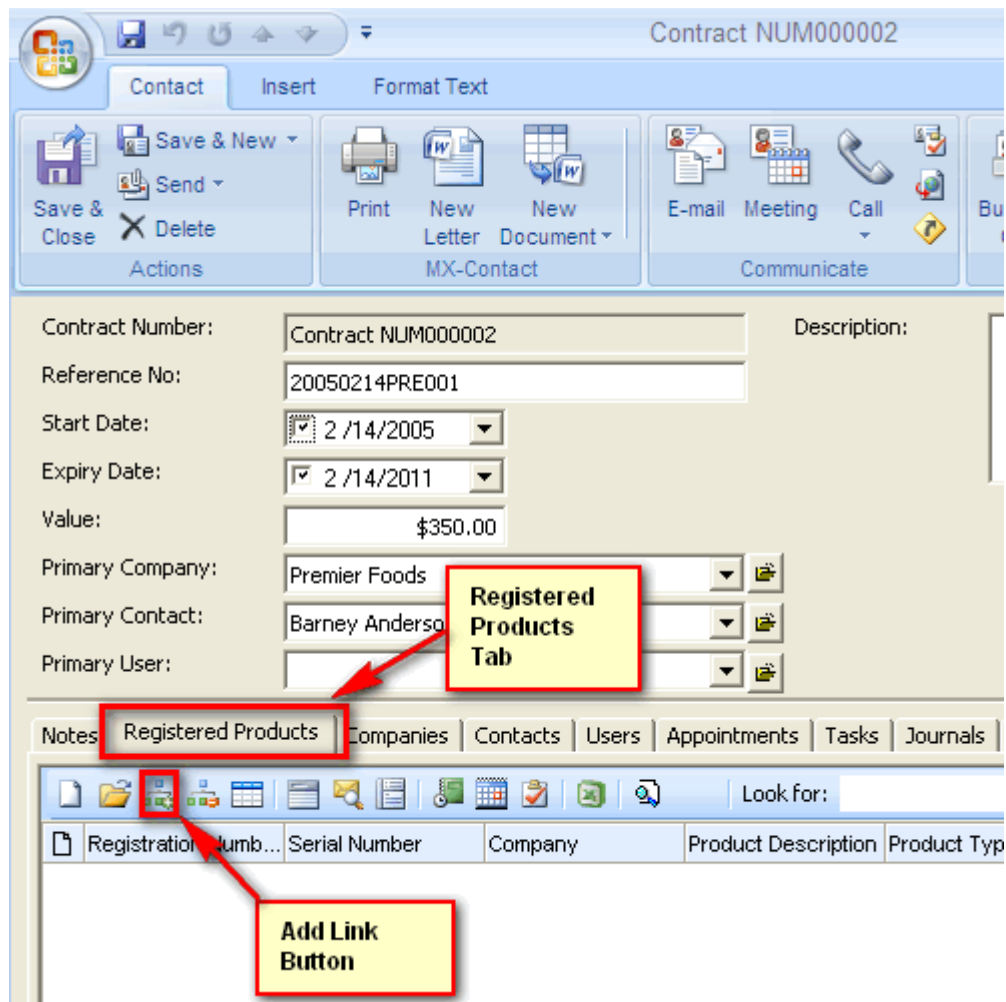
The main form area contains the following fields:

- Contract Number: Contract NUM000001
- Description: (Empty text area)
- Reference No: (Empty text field)
- Start Date: 6 /26/2011
- Expiry Date: 6 /26/2011
- Value: \$0.00
- Primary Company: (Dropdown menu)
- Primary Contact: (Dropdown menu)
- Primary User: (Dropdown menu)

At the bottom, there is a tabbed interface with the following tabs: "Notes", "Registered Products", "Companies", "Contracts", "Users", "Appointments", "Tasks", "Journals", "Documents", and "E-Mail". The "Registered Products" tab is currently selected, showing a large empty area with a vertical scrollbar on the right.

3. Complete this form with all the relevant Contract information.
4. Select the Registered Products tab. Click on the Add Link button.

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5. 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.
6. 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

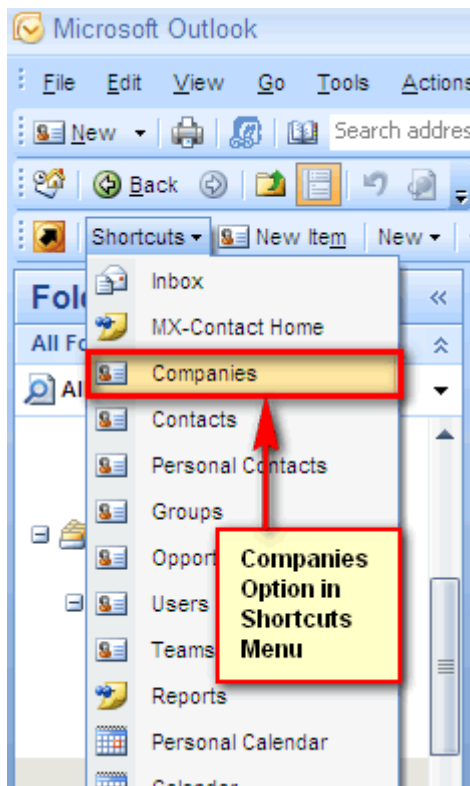
Registered Products:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook

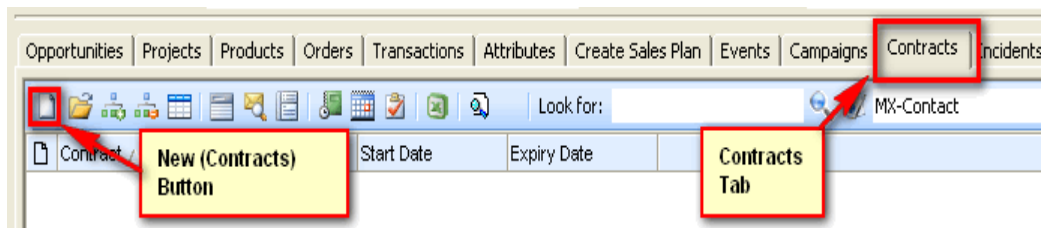
Basic Steps:

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

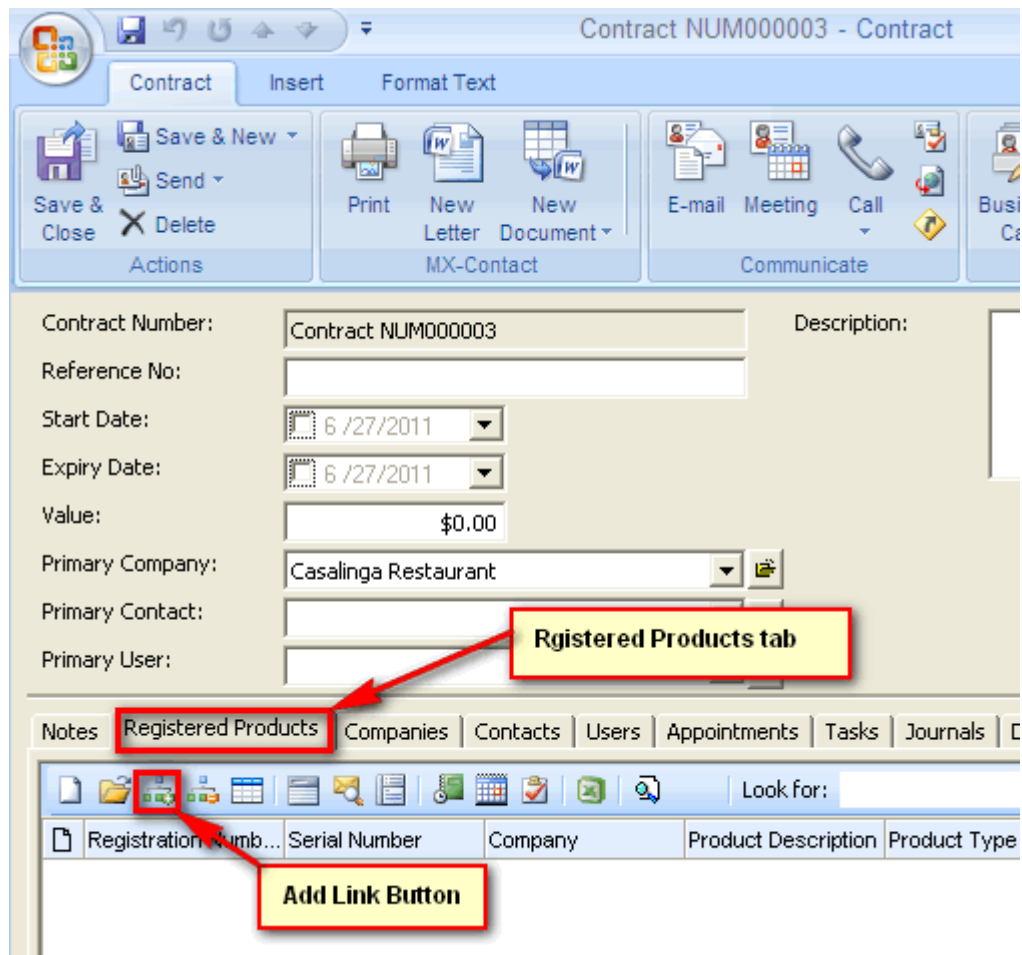
The screenshot displays a software window titled "Contract NUM000003 - Contract". The interface includes a ribbon menu with tabs for "Contract", "Insert", and "Format Text". The ribbon contains several groups of icons: "Actions" (Save & New, Send, Delete), "MX-Contact" (Print, New Letter, New Document), "Communicate" (E-mail, Meeting, Call), "Options" (Business Card, Follow Up), "Proofing" (Spelling), and "OneNote" (Contact Notes). Below the ribbon is a form with the following fields:

- Contract Number: Contract NUM000003
- Description: [Empty text box]
- Reference No: [Empty text box]
- Start Date: 6 /27/2011
- Expiry Date: 6 /27/2011
- Value: \$0.00
- Primary Company: Casalinga Restaurant
- Primary Contact: [Empty text box]
- Primary User: [Empty text box]

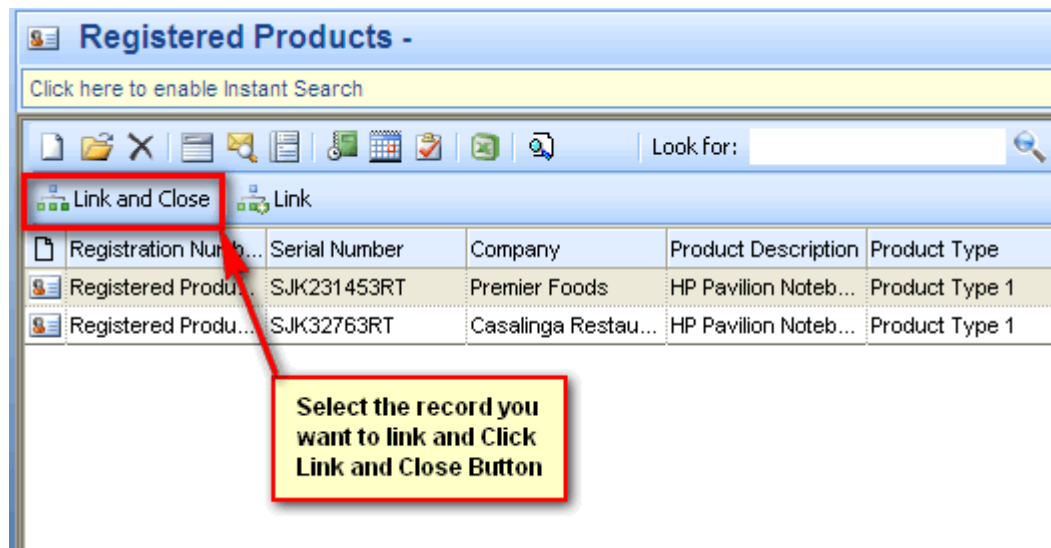
At the bottom of the form is a tabbed interface with the following tabs: Notes, Registered Products, Companies, Contacts, Users, Appointments, Tasks, Journals, Documents, and E-Mail. The "Registered Products" tab is currently selected, and its content area is empty.

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

The MX-Contact Support Module Tutorial



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



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
Registered Product:	HP Pavilion Notebook
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

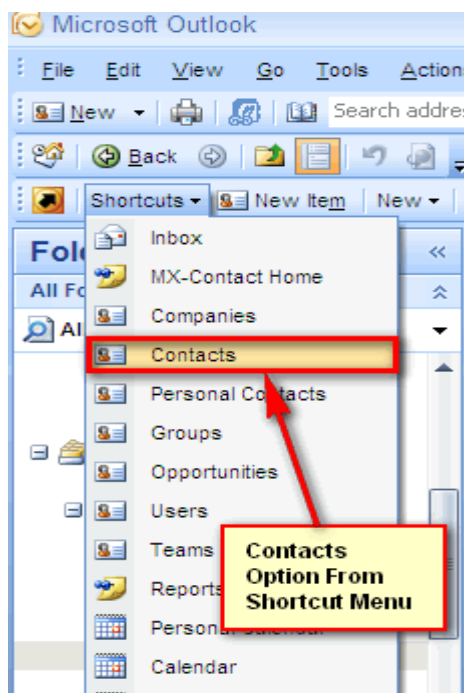
Barney Anderson of Premier Foods calls in to say that there is no sound on his HP Pavilion Notebook that he purchased from your company. He has an existing Service Contract to cover this Notebook. Open an Incident from Barney Anderson's contact record.

Complete the following information:

Company:	Premier Foods
Contact:	Barney Anderson
Type:	Incident Type 1
Status:	Open
Priority:	Medium
Registered Product:	HP Pavilion Notebook
Description:	No sound on Notebook

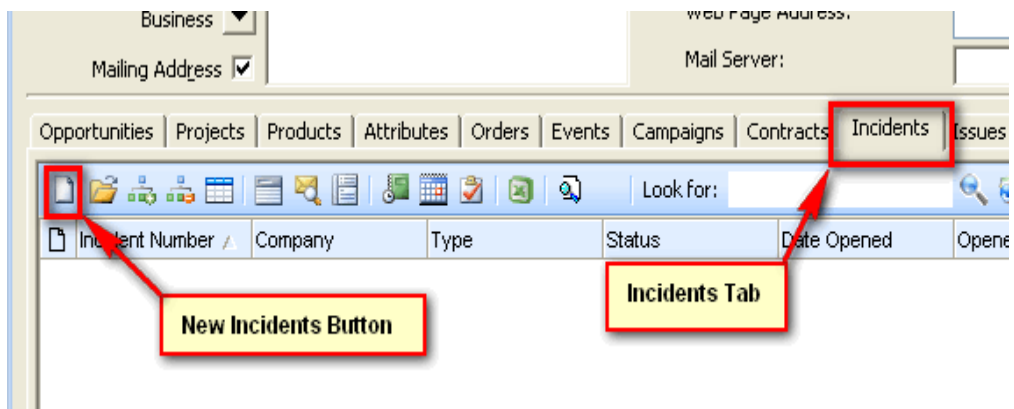
Basic Steps:

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 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 Notes tab in order to enter a description of the problem that is being reported.

The MX-Contact Support Module Tutorial

The screenshot displays the MX-Contact Support Module interface for Incident NUM000001. The window title is "Incident NUM000001". The interface includes a ribbon with tabs for "Contact", "Insert", and "Format Text". The ribbon contains various icons for actions like "Save & Close", "Print", "New Letter", "New Document", "Resolution", "E-mail", "Meeting", "Call", "Business Card", "Picture", "Categorize", "Follow Up", "Spelling", and "Contact Notes".

The main form area contains the following fields:

Incident No:	Incident NUM000001	Registered Product:	Registered Product NUM000001
Date Opened:	6 /27/2011	Component:	
Opened By:		Primary Company:	Premier Foods
Type:	Incident Type 1	Primary Contact:	Barney Anderson
Status:	Open	E-Mail:	
Priority:	2 - Medium	Location...:	
Date Assigned:	6 /27/2011	Business:	
Assigned to:			

Below the form is a "Notes" section with a tabbed interface for "Registered Products", "Companies", "Contacts", "Users", "Appointments", "Tasks", "Journals", "Documents", and "E-Mail". The "Notes" tab is active, showing the text "No sound on Notebook".

5. 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.

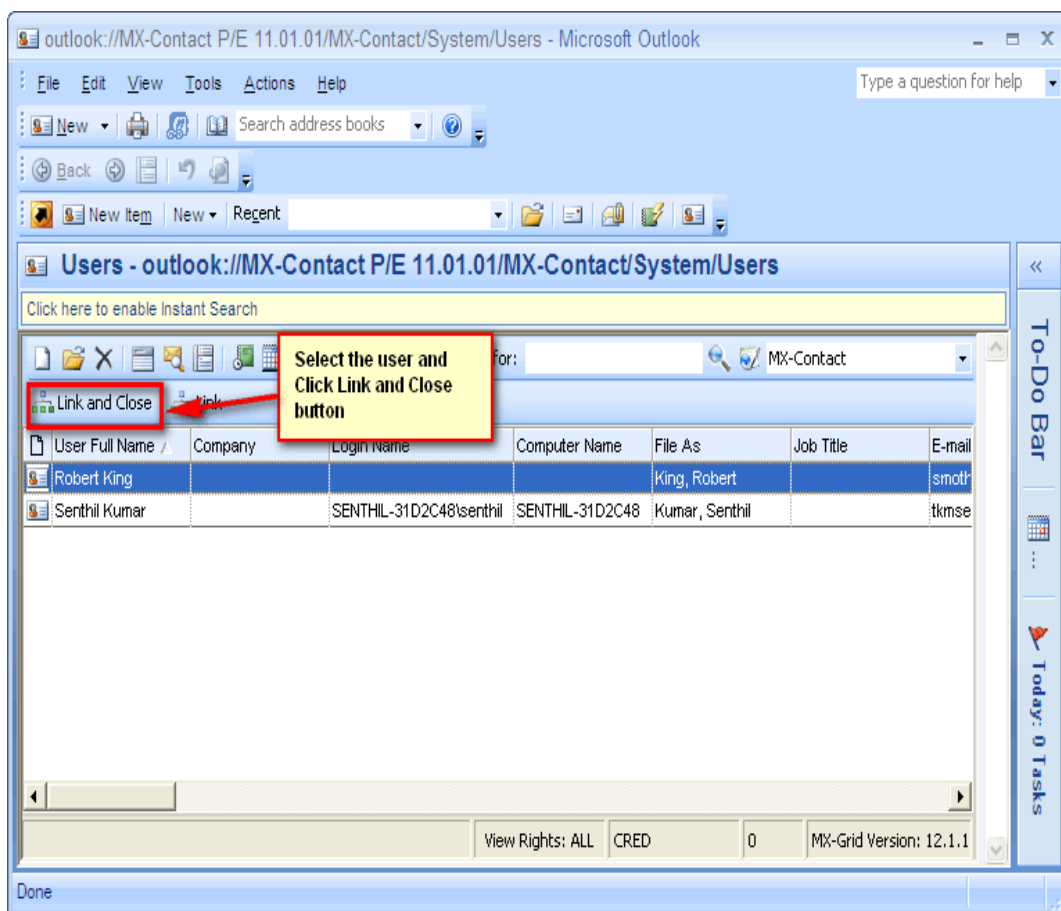
Complete the following information:

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.**

The MX-Contact Support Module Tutorial



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.

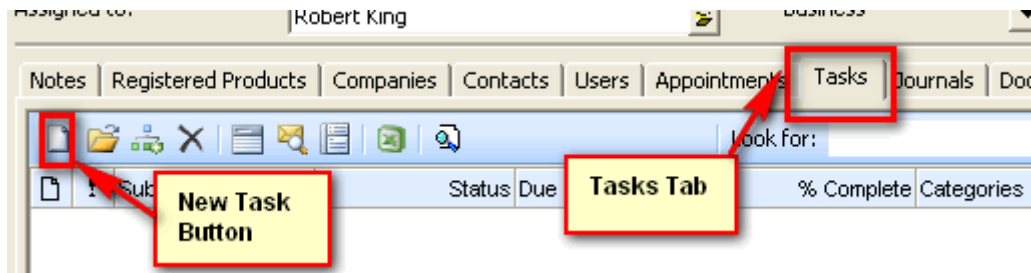
Note: You will not be able to do this exercise as the only Inbox that you have access to in the tutorial is your own. The system will not allow you to assign an incident or a task to yourself. Please follow along with the screen shots to see the solution to this exercise.

Complete the following information:

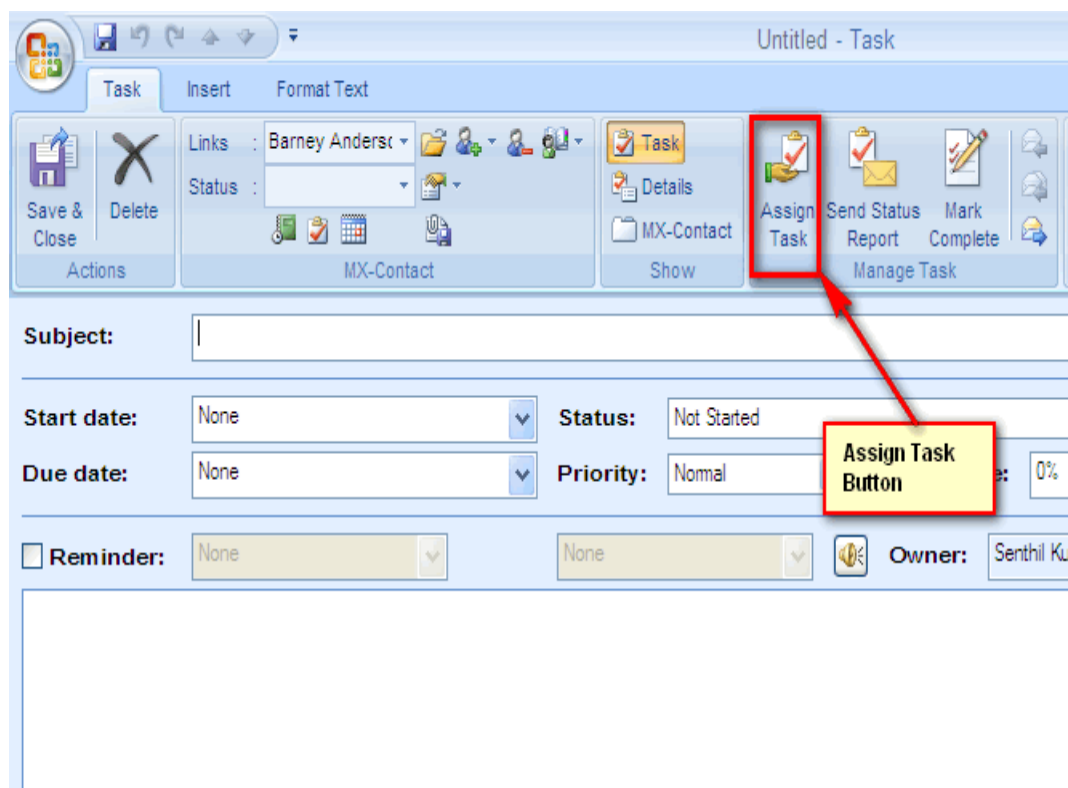
Subject:	Sort out sound problem on Barney Anderson's notebook.
Assign to:	Robert King

Basic Steps

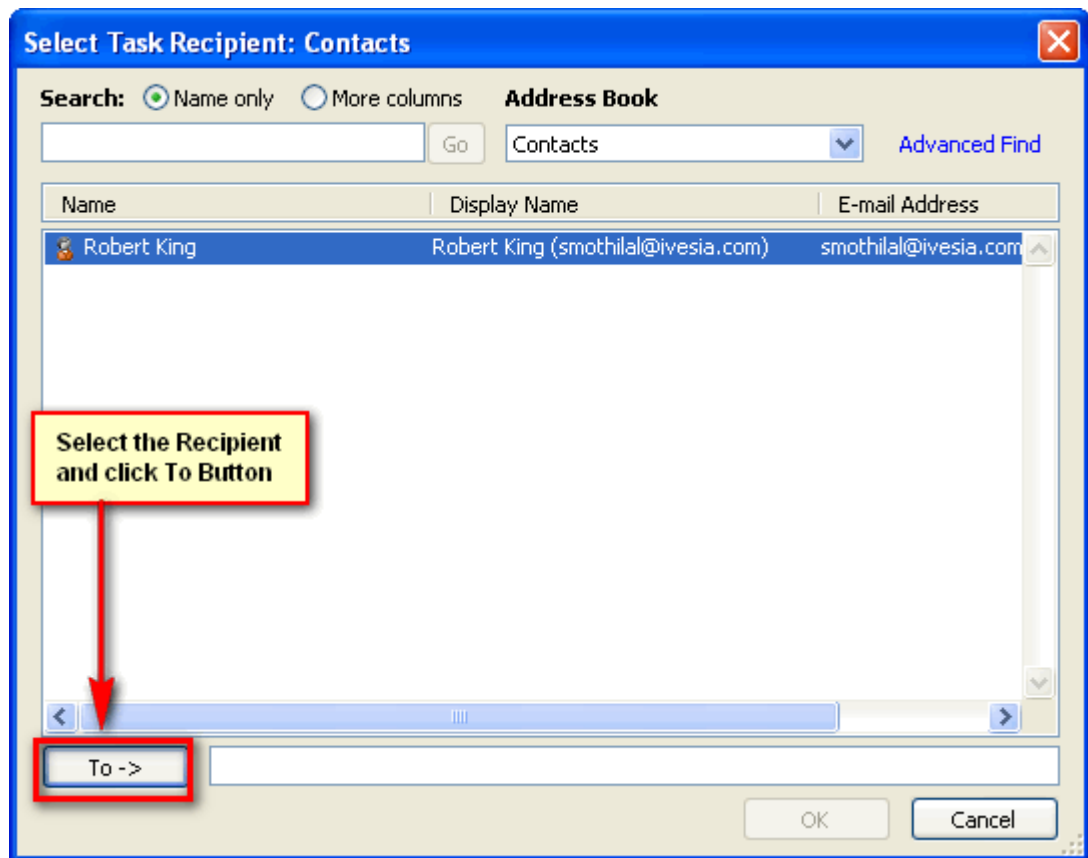
1. To create a task from this Incident , select the Tasks Tab. Click on the New (Task) button.



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



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.



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

The MX-Contact Support Module Tutorial

The screenshot shows the MX-Contact Support Module interface. At the top, there is a ribbon with tabs for 'Task', 'Insert', and 'Format Text'. Below the ribbon, there are several action buttons: 'Delete', 'Task', 'Details', 'MX-Contact', and 'Cancel Assign'. The main area displays a task form with the following fields:

- To...**: Robert King (smothilal@ivesia.com)
- Subject**: Sort out sound problem on Barney Anderson's notebook.]
- Start date**: None (dropdown menu)
- Due date**: None (dropdown menu)
- Status**: Not Start
- Priority**: Normal

Below the form, there are two checked checkboxes:

- Keep an updated copy of this task on my task list
- Send me a status report when this task is complete

The 'Send' button is highlighted with a red box.

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.

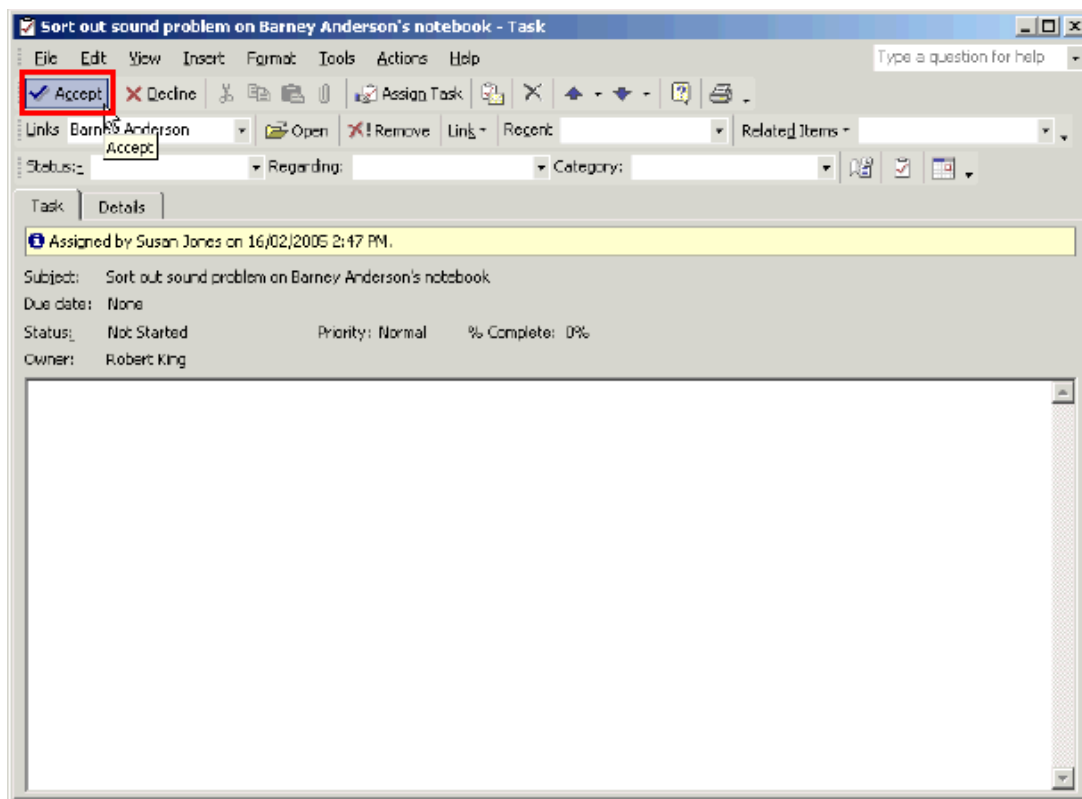
Complete the following information:

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.

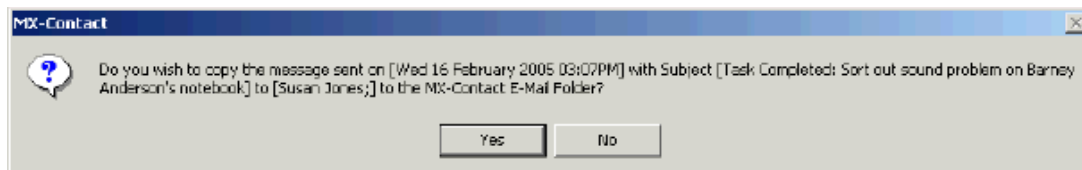
Basic Steps:

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 application window titled "Incident 00001 - Incident". 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 content area 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 dropdown arrow)
- 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](#))

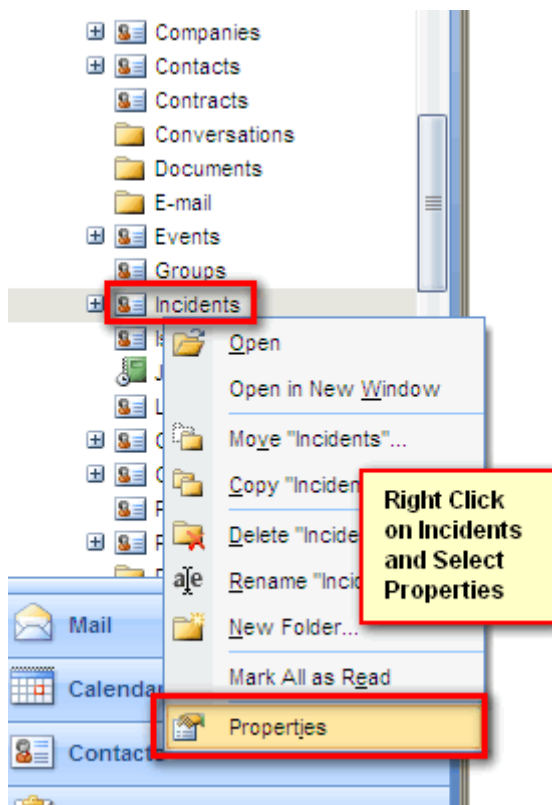
5.12 Adding Incidents to the Link Items Menu: Solution

You want add Incidents to the Link Items Menu.

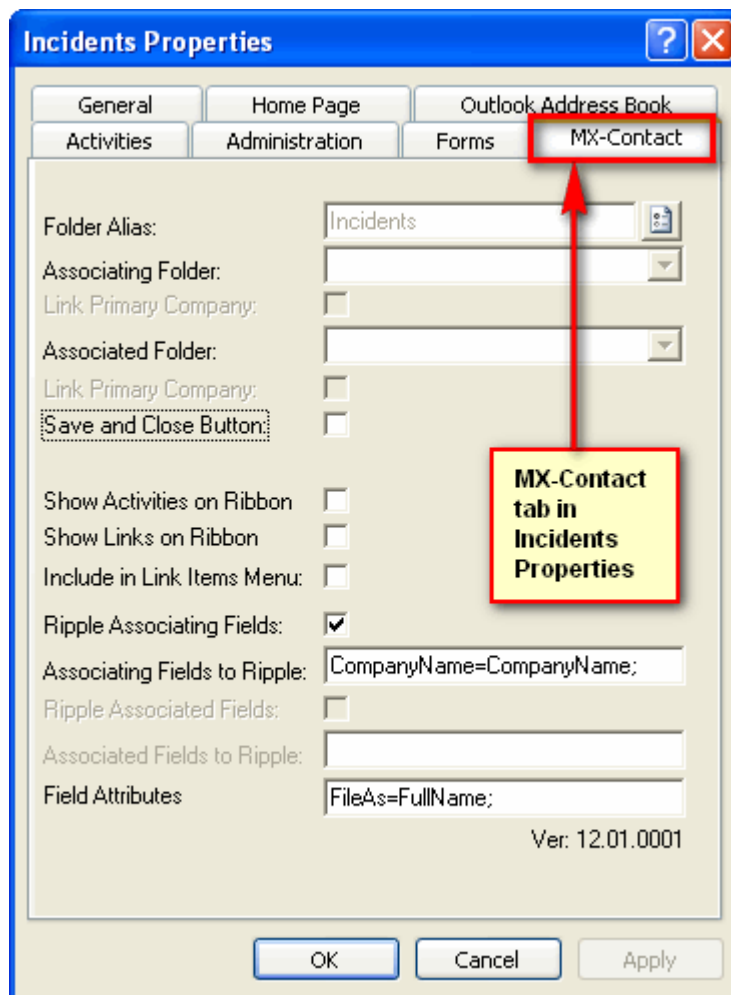
Link Items Menu:	Incidents
------------------	-----------

Basic Steps:

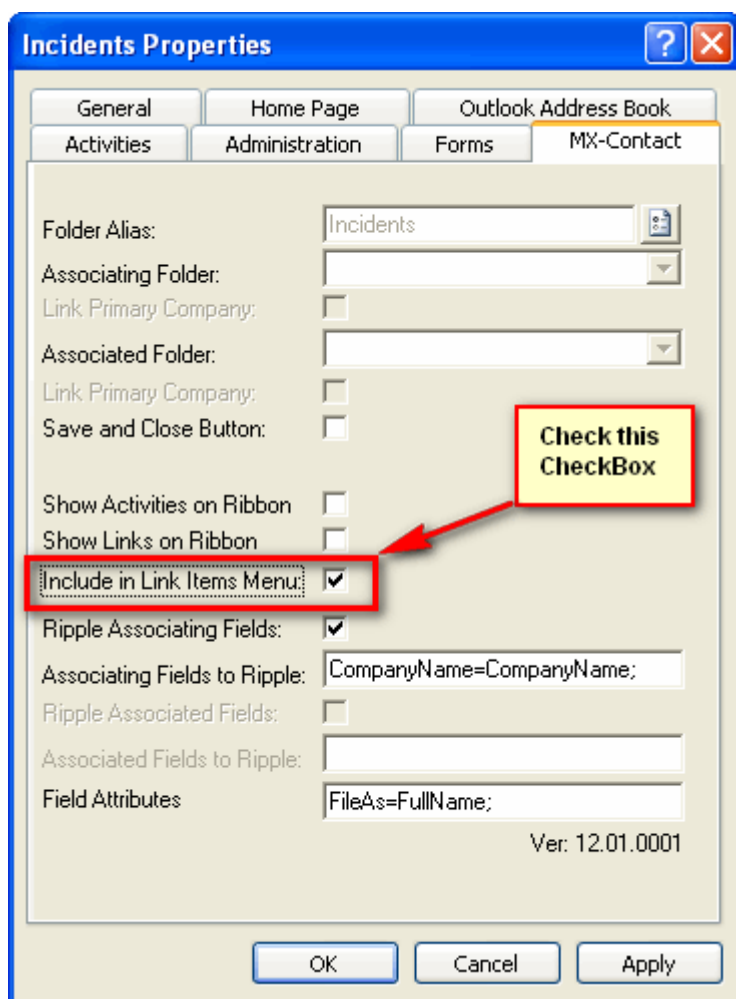
1. Select the Incidents Folder from the MX-Contact Folder List:



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



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:	Today's Date
Assigned To:	Robert King
Problem:	Notebook not booting up properly
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

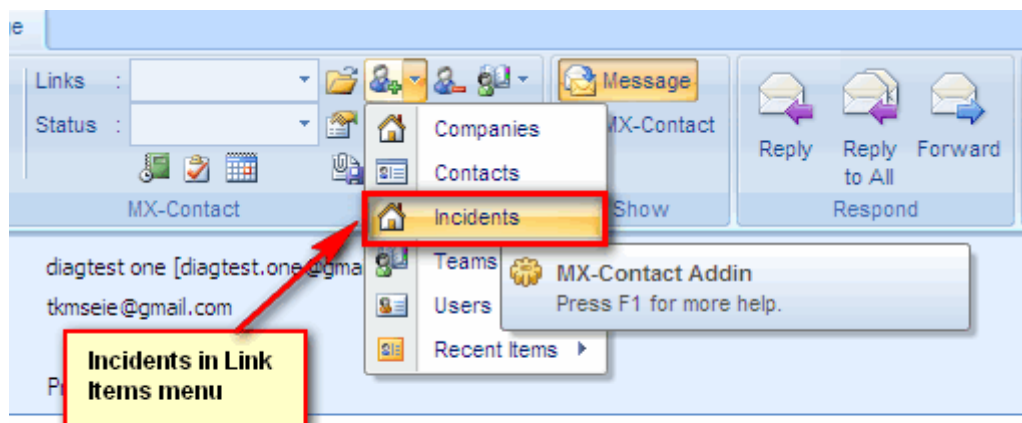
Susan Jones receives an email from Tom Watson of Casalinga Restaurant. He has a problem with his notebook. Open an Incident from this email.

Complete the following information:

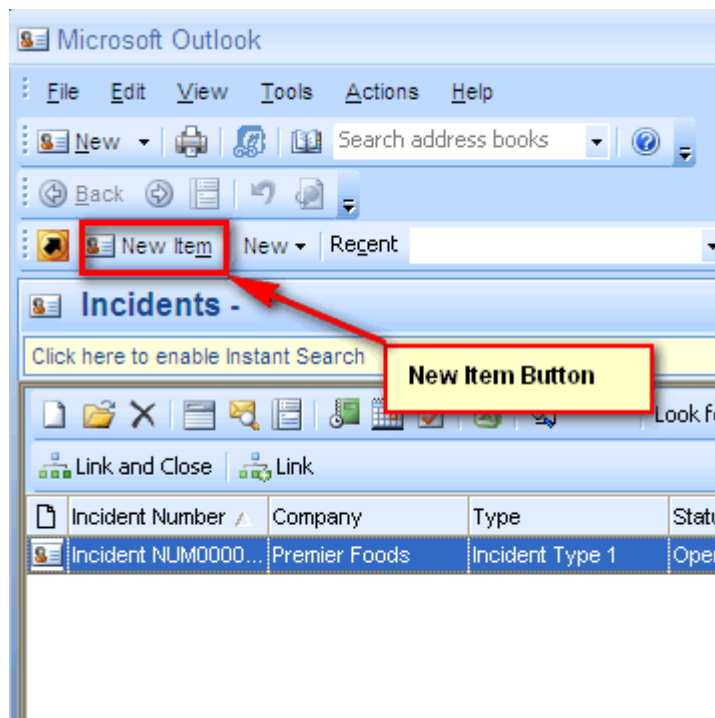
Company:	Casalinga Restaurant
Contact:	Tom Watson
Type:	Incident Type 1
Status:	Open
Priority:	High
Date Assigned:	Today's Date
Assigned To:	Robert King
Problem:	Notebook not booting up properly
Description:	HP Pavilion Notebook

Basic Steps:

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



3. Click on New Item Button in Incidents Window



4. New Incident Form will be opened. Fill the form with relevant details.

The MX-Contact Support Module Tutorial

The screenshot displays the MX-Contact Support Module interface for Incident NUM000002. The window title is "Incident NUM000002 - Incident". The interface includes a ribbon with tabs for "Incident", "Insert", and "Format Text". The ribbon contains various action buttons such as "Save & Close", "Print", "New Letter", "New Document", "General", "Resolution", "E-mail", "Meeting", "Call", "Business Card", "Picture", "Categorize", "Follow Up", "Spelling", and "Contact Notes".

The main form area contains the following fields:

Incident No:	Incident NUM000002	Registered Product:	
Date Opened:	6 /27/2011	Component:	
Opened By:		Primary Company:	Casalinga Restaurant
Type:	Incident Type 1	Primary Contact:	Tom Watson
Status:	Open	E-Mail:	
Priority:	1 - High	Location...:	
Date Assigned:	6 /27/2011	Business:	
Assigned to:	Robert King		

Below the form is a "Notes" section with a tabbed interface. The "Notes" tab is selected, and the text "Notebook not booting up properly" is visible in the note area. Other tabs include "Registered Products", "Companies", "Contacts", "Users", "Appointments", "Tasks", "Journals", "Documents", and "E-Mail".

5. Click Link and Close Button. Complete the required information and click on Save and Close.

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).

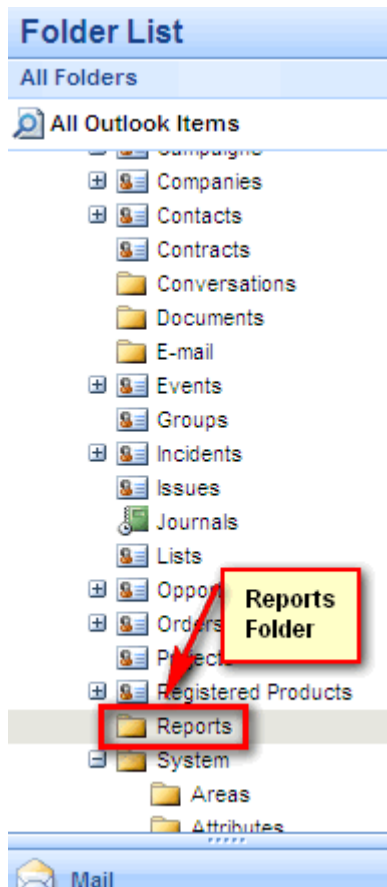
Show me the **Solution** ([Running an Incidents Report: Solution](#))

5.16 Running an Incidents Report: Solution

Run a Detailed Incident Report (Landscape).

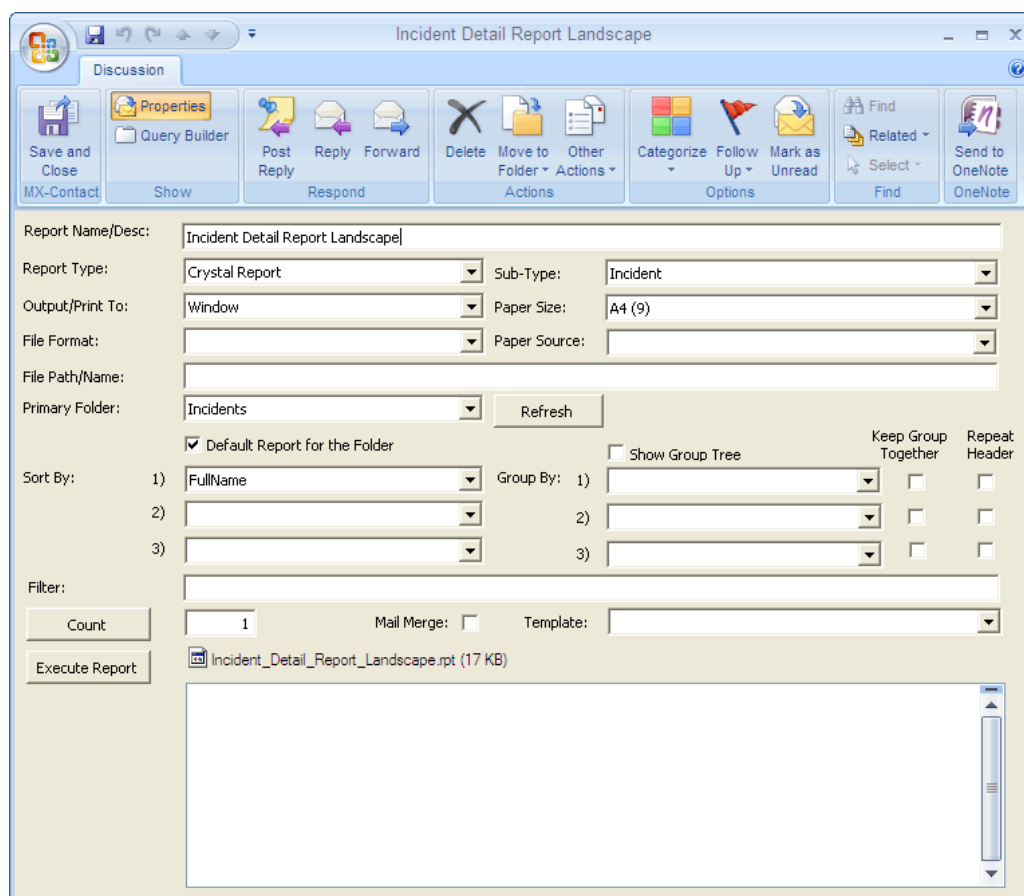
Basic Steps:

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



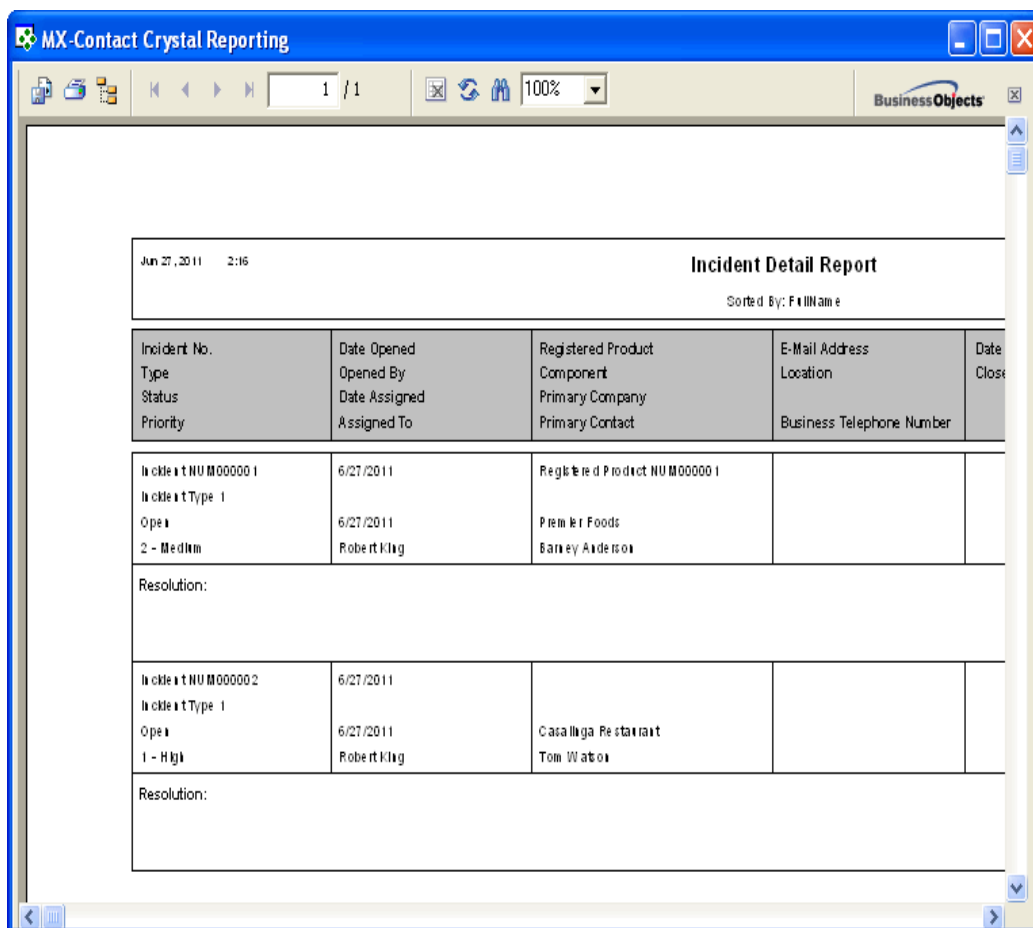
2. Select the Incident Detailed Report Landscape.

The MX-Contact Support Module Tutorial



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

The MX-Contact Support Module Tutorial



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](#))