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## Service Note Plug-In

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## 1.0 Introduction

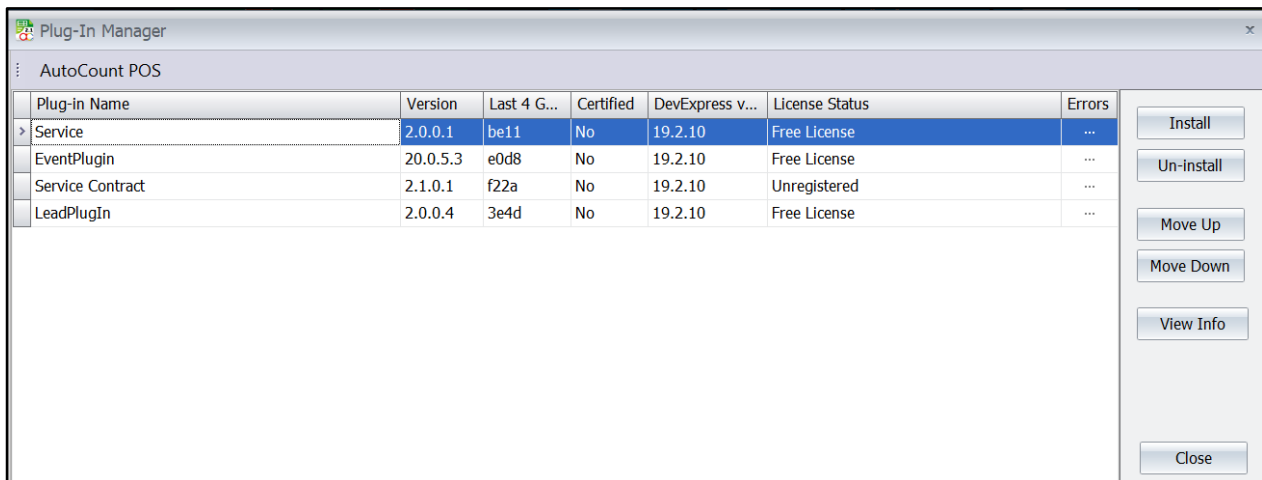
The Service Note plugin provides a convenient solution for users to log and track customer complaints, streamlining the process of scheduling service appointments and effectively addressing those concerns. Designed specifically for industries involved in service or repair, this plugin offers an efficient way to record and manage customer complaints, ensuring timely and accurate resolution.



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## 2.0 Installing the Plug-In

1. Go to **Tools > Plug-In Manager**
2. Click on the **“Install”** button.
3. Browse for the related **.app file (ServiceManagement)**
4. A new window will prompt with some basic information of this plug-in.
5. Click on the **“Install”** button again to proceed.
6. A confirmation message will be prompted after that.
7. Click **“Yes”** to confirm the installation.
8. A success message will appear after the plug-in is installed correctly.

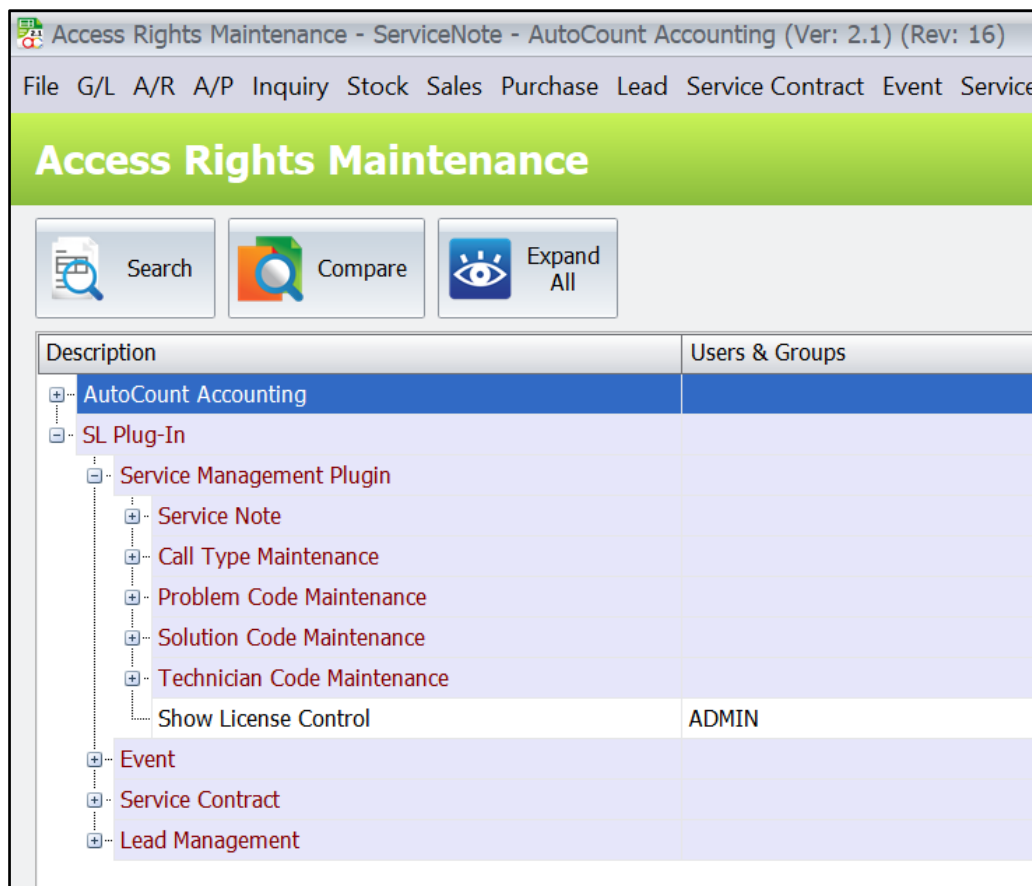




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### 3.0 Assign Access Rights

1. Go to **General Maintenance > Access Right Maintenance**
2. Locate the “SL Plug-In” and click on the “+” icon next to it.
3. Locate the “Service Management Plugin” and click on the “+” icon next to it.
4. Click on “Service Management Plugin” and proceed by clicking “Set Group Access Rights”.
5. In the pop-up window, navigate to “Admin”. *(Example)*
6. Change the “Don’t change” status to “Add”.
7. Click on “OK” to save changes.
8. Click on “Yes” to apply the Access Right to the rest of the sub commands.





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## 4.0 Technician Code

1. Go to **Service > Technician Code Maintenance**
2. Click on the **“New”** button.
3. Key in Technician Code
4. Provide simple and brief description.
5. Click on the **“OK”** button to save.

Technician Code Maintenance - ServiceNote - AutoCount Accounting (Ver: 2.1) (Rev: 16)

File G/L A/R A/P Inquiry Stock Sales Purchase Lead Service Contract Event Service General Maintenance Tools Tax Window Help

### Technician Code Maintenance

Hint: In this window, you can create, edit, or delete Technician Code

New Edit Delete Refresh

Drag a column header here to group by that column

Technician Code	Description
TC0001	Technician 1
TC0002	Technician 2
> TC003	Cable Service

Technician Code Maintenance

Technician Code : TC003  Is Active

Description : Cable Service

OK Cancel

The “Technician Code Maintenance” feature allows users to create, edit, and delete Technician Code. This functionality serves the crucial purpose of enabling users to effectively track and manage responsibility for specific services. By utilizing this feature, users can assign and keep a record of which technicians are accountable for particular services.



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## 5.0 Call Type

1. Go to **Service > Call Type Maintenance**
2. Click on the **“New”** button.
3. Key in Call Type
4. Provide simple and brief description.
5. Click on the **“OK”** button to save.

Call Type Maintenance - ServiceNote - AutoCount Accounting (Ver: 2.1) (Rev: 16)

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### Call Type Maintenance

Hint: In this window, you can create, edit, or delete Call Type

New Edit Delete Refresh

Drag a column header here to group by that column

Call Type	Description
> CT0001	Emergency 1
CT0002	Call Type 2

Call Type Maintenance

Call Type: Frustrated  Is Active

Description: Repeating issue

OK Cancel

The "Call Type Maintenance" feature provides users with the capability to create, edit, and delete Call Types, serving a vital purpose in capturing and documenting user complaints related to the provided service. This functionality ensures that users can accurately record and categorize the nature of the complaints received.



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## 6.0 Problem Code

1. Go to **Service > Problem Code Maintenance**
2. Click on the **“New”** button.
3. Key in Problem Code
4. Provide simple and brief description.
5. Click on the **“OK”** button to save.

Problem Code Maintenance - ServiceNote - AutoCount Accounting (Ver: 2.1) (Rev: 16)

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### Problem Code Maintenance

Hint: In this window, you can create, edit, or delete Problem Code

New Edit Delete Refresh

Drag a column header here to group by that column

Problem Code	Description
PC0001	Problem 1
PC0002	Problem 2

Problem Code Maintenance

Problem Code   Is Active

Description

The "Problem Code Maintenance" feature provides users the capability to create, edit, and delete Problem Codes, allowing them to accurately document and categorize the specific problems associated with the services provided. This functionality enables users to systematically, track, and manage various issues or challenges encountered by customers.



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## 7.0 Solution Code

1. Go to **Service > Solution Code Maintenance**
2. Click on the **“New”** button.
3. Key in Solution Code
4. Provide simple and brief description.
5. Click on the **“OK”** button to save.

Solution Code Maintenance - ServiceNote - AutoCount Accounting (Ver: 2.1) (Rev: 16)

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### Solution Code Maintenance

Hint: In this window, you can create, edit, or delete Solution Code

New Edit Delete Refresh

Drag a column header here to group by that column

Solution Code	Description
> SC001	Solution 1
SC002	Solution 2

Solution Code Maintenance

Solution Code: Cable Solution 1  Is Active

Description: Cable Repair

OK Cancel

The "Solution Code Maintenance" feature provides users the capability to create, edit, and delete Solution Codes. This functionality enables users to efficiently record and categorize the specific approaches and solutions implemented to address service-related issues. By utilizing this feature, users can effectively document the steps taken to resolve customer concerns, ensuring accurate and standardized reporting.





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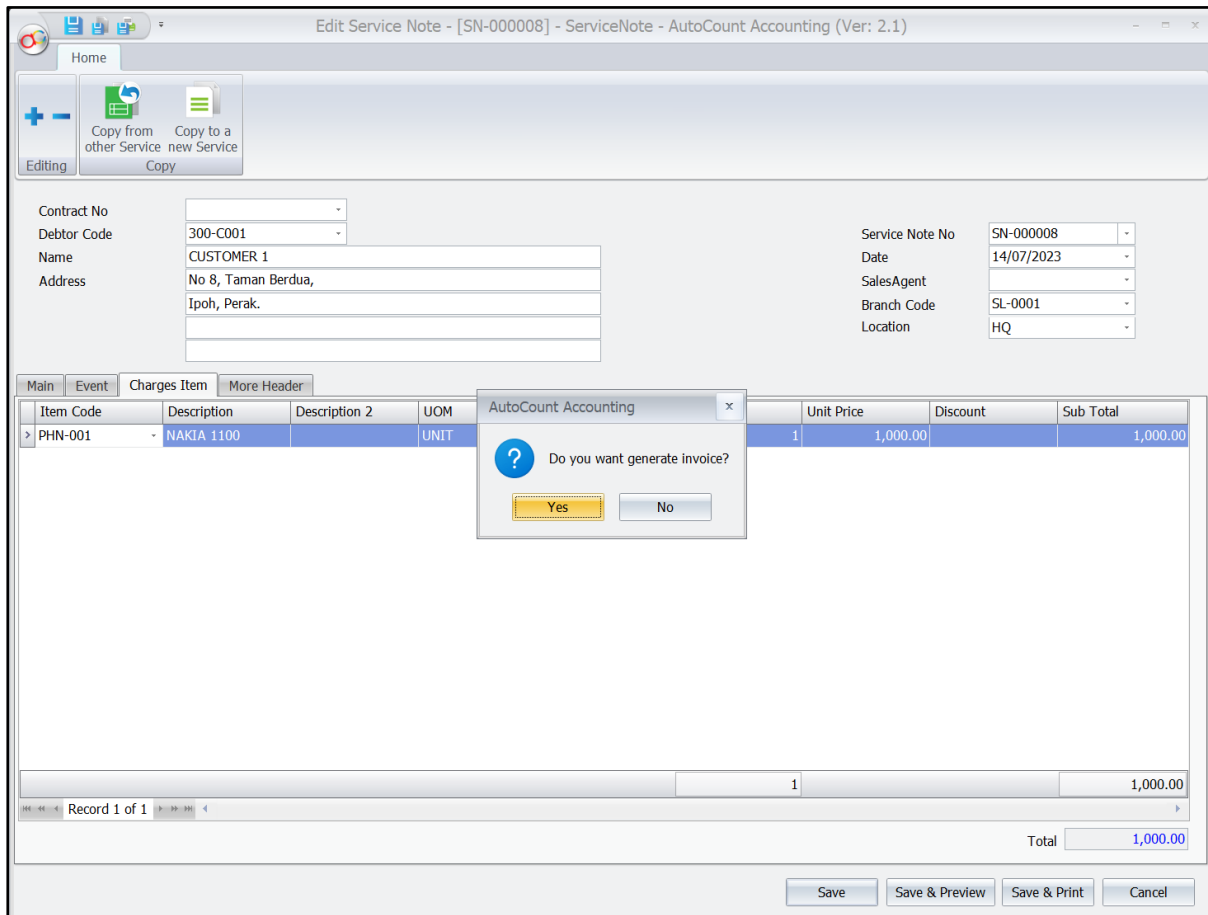
## 8.0 Service Note

### 8.1 Service Note (New)

1. Go to **Service > Service Note**
2. Click on the **“New”** button.
3. Input Debtor info.
  - **NOTE:** If the chosen debtor has multiple branches, the user **NEEDS** to select the branch **“Branch Code”** where the customer is lodging the complaint.
4. Input Service Note info. (*Call Type, Problem Code, Solution Code, Technician Code ... etc*)
5. Key in Item info in the **“Charges Item”** tab.
6. If necessary, key in more detailed info in the **“More Header”** tab.
7. Click on the **“Save”** button to save.
8. Click on the **“Yes”** button to generate invoice if required.
  - **NOTE:** Input Sales Agent info when generating the invoice.



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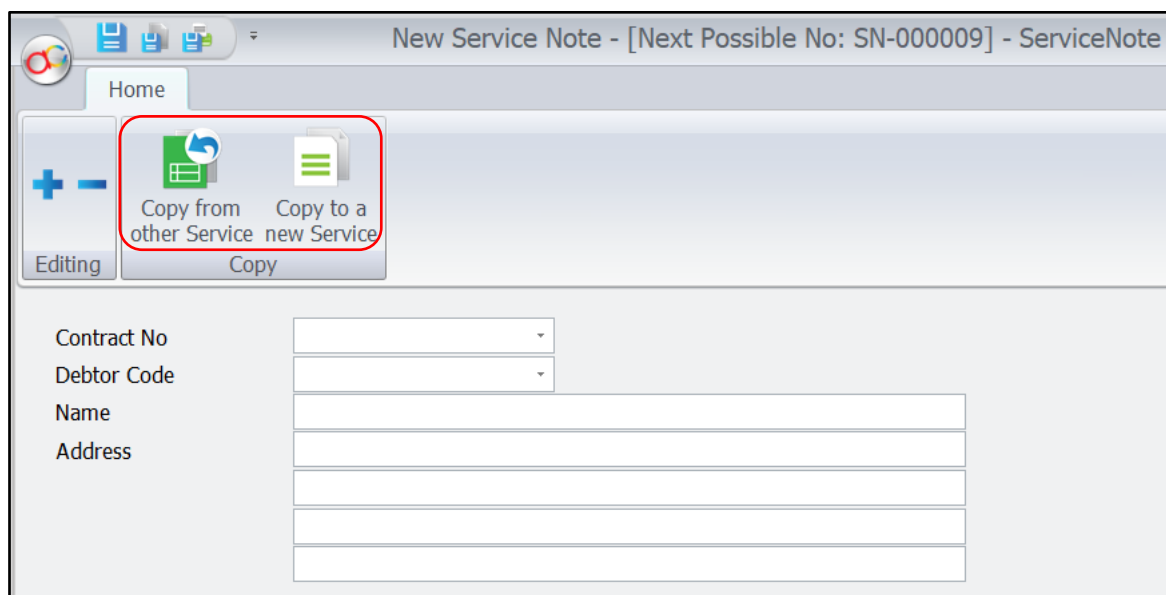
The system allows users to efficiently document essential information related to customer service interactions. Users can record the customer's complaint method (Call Type), specify the specific issue encountered (Problem Code), and document the corresponding method of resolution (Solution Code). Additionally, users have the capability to document the Technician Code, Appointment Date, Attended Date, and Closed Date. This comprehensive documentation enables effective assignment of technicians to handle service tasks and facilitates convenient scheduling of service appointments based on suitable timings. Moreover, users have the flexibility to choose whether they want the created Service Note to be generated into an invoice.



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## 8.2 Service Note (Copy Feature)

1. Go to **Service > Service Note**
2. Click on the “**New**” button.
3. Choose prefer Copy Feature
  - **Copy from other Service:** Copy existing Service Note info to new Service Note
  - **Copy to a new Service:** Copy created Service Note info to a new one



New Service Note - [Next Possible No: SN-000009] - ServiceNote

Home

Editing

Copy from other Service Copy to a new Service

Contract No

Debtor Code

Name

Address

The Copy feature in the Service Note allows users to expediently generate new Service Notes by duplicating existing ones. This functionality enables users to quickly create new Service Notes based on previous entries, eliminating the need to manually input repetitive information.



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### 8.3 Service Note (Service Contract Plug-In)

1. Go to **Service > Service Note**
2. Click on the “**New**” button.
3. Able to choose available Contract Number in “**Contract No**” text field.

By installing the Service Contract plugin, users gain the advantage of selecting from available Contract Numbers, eliminating the need for manual input of Debtor information. When a Contract Number is chosen, the associated Debtor information stored within the contract will automatically populate the corresponding text fields. The Service Contract plugin enhances efficiency by seamlessly integrating contract information into the system, providing users with convenient access to the necessary debtor details without the need for repetitive manual input.



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## 8.4 Service Note (Event Plug-In)

1. Go to **Event > Event Entry**
2. Click on the **“New”** button.
3. Able to choose available Service Note in **“Service Note”** text field.
4. Click on the **“Save”** button to save.
5. Go to **Service > Service Note**
6. Click on the **“View”** button.
7. Click on the **“Event”** tab to view the created event.

The screenshot shows the 'Event Entry' window. The title is 'Executive Meeting'. The calendar is set to 'Calendar 1'. The start date is '14/07/2023' at '5:01 PM' and the end date is '14/07/2023' at '6:01 PM'. The 'Service Note' dropdown is highlighted with a red box and shows 'SN-000008'. The 'Note' editor is open, showing a rich text editor with 'Arial' font and size '10'. The 'Save' and 'Cancel' buttons are at the bottom right.



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View Service Note - [SN-000008] - ServiceNote - AutoCount Accounting (Ver: 2.1)

Home

Preview Print Edit Delete New Event

View Navigation

Contract No: [ ] Debtor Code: 300-C001 Name: CUSTOMER 1 Address: No 8, Taman Berdua, Ipoh, Perak.

Service Note No: SN-000008 Date: 14/07/2023 SalesAgent: [ ] Branch Code: SL-0001 Location: HQ

Main Event Charges Item More Header

Title	Area Code	Start Date	End Date	Description
> Executive Meeting		14/07/2023	14/07/2023	

The installation of the Event plugin grants users the capability to assign a Service Note to a created event, offering a valuable feature for scheduling appointments specifically dedicated to discussing service-related matters. This functionality proves particularly useful when users need to organize appointments for in-depth conversations regarding service situations.



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## 8.5 Service Note (Lead Management Plug-In)

1. Go to **Event > Event Entry**
2. Click on the “**New**” button.
3. Able to choose available Lead Number in “**Lead Number**” text field.

The screenshot shows the 'Event Entry' window in AutoCount. The form is titled 'Event Entry' and has a 'Home' button. The main form area contains the following fields:

- Title: Board Meeting
- Calendar: Calendar 1
- Start Date: 14/07/2023, 5:15 PM
- End Date: 14/07/2023, 6:15 PM
- Reminder:
- Service Note: SN-000003
- Debtor Code: [Empty]
- Lead Number: LD-000001 (highlighted with a red box)
- Name: [Empty]
- Address: [Empty]
- Attention: [Empty]
- Area Code: [Empty]
- Mobile: [Empty]

On the right side, there is a 'Description' field and a 'Note' editor with a toolbar (Arial font, size 10, bold, italic, underline) and a large text area. At the bottom right, there are 'Save' and 'Cancel' buttons.

By installing the Lead Management plugin, users are able to input Lead Number when creating a new Event. The reason to key in a Lead Number in an Event Entry is because assigned Lead has the ability to assign task / events to sales agent.