

# Online Support Tool

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## Revision History

Version	Date	Author(s)	Revision Notes
0.1	14/03/2013	Rachael Walker	-
-	-	-	-

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## Overview

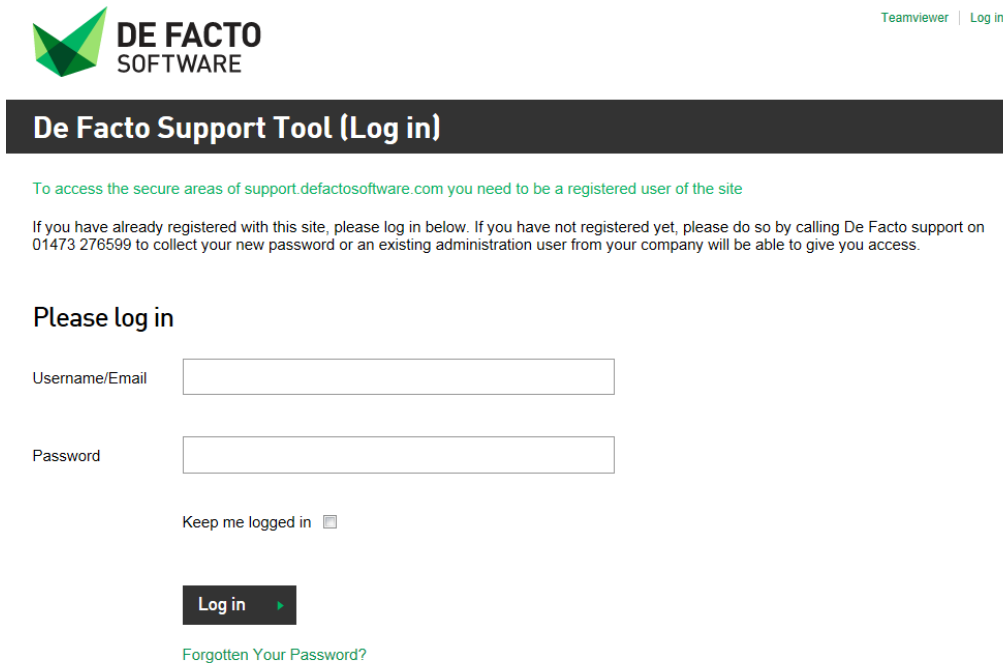
The De Facto online support website has been re-designed and improved. The following notes describe the new functionality and how to use the website.

Depending on what browser you use some of the screen shots and options may be slightly different.

## Login

Your current login details have not changed, unless you have been advised otherwise, the username should be your email address.

When directed to the De Facto EPR online support tool you will get presented with the login screen.



The screenshot shows the De Facto Software logo in the top left and 'Teamviewer | Log in' in the top right. A dark grey banner reads 'De Facto Support Tool (Log in)'. Below this, a green link says 'To access the secure areas of support.defactosoftware.com you need to be a registered user of the site'. A paragraph of text explains that existing users should log in, while new users should call support. The login form includes fields for 'Username/Email' and 'Password', a 'Keep me logged in' checkbox, and a 'Log in' button with a right-pointing arrow. A green link 'Forgotten Your Password?' is located below the button.

**WARNING:** You have accessed a computer operated by De Facto Software. You are required to have a personal authorisation from the system administrator before you can use this computer and you are strictly limited to the use set out in that authorisation. Unauthorised access to, or misuse of this system is prohibited and constitutes an offence under the Computer Misuse Act 1990. If you are not authorised to access this computer, you must log off immediately.

### *Login screen shot*

There are a couple of options on this page including

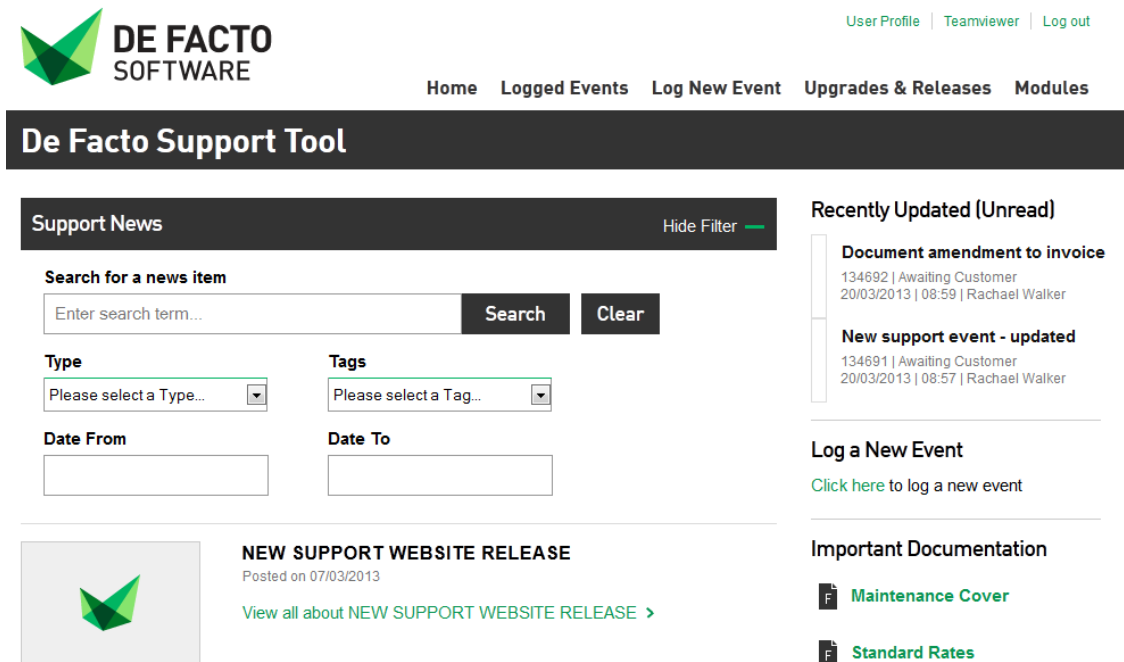
Keep me logged in: this will keep you logged in and allow you to return to the site without having to re-enter your login details, unless you log off the website.

Forgotten your password: if selected you will get prompted to enter in your username/email address, when submitted you will get emailed your password.

## Home page

The home page will give you any news posted e.g. the launch of the new support website. You can also add any of your own comments to any news item posted on this page by opening the news item.

There is also the ability to filter on previous news items by using the Filter News option



The screenshot shows the De Facto Support Tool interface. At the top left is the De Facto Software logo. To the right are links for 'User Profile', 'Teamviewer', and 'Log out'. Below these are navigation links: 'Home', 'Logged Events', 'Log New Event', 'Upgrades & Releases', and 'Modules'. A dark banner reads 'De Facto Support Tool'. The main content area is titled 'Support News' and includes a search bar with 'Search' and 'Clear' buttons, and dropdown menus for 'Type' and 'Tags'. Below these are 'Date From' and 'Date To' input fields. On the right, a 'Recently Updated (Unread)' section lists two items: 'Document amendment to invoice' and 'New support event - updated'. Below that is a 'Log a New Event' link. At the bottom left, a news item titled 'NEW SUPPORT WEBSITE RELEASE' is shown with a 'View all about' link. At the bottom right, an 'Important Documentation' section lists 'Maintenance Cover' and 'Standard Rates'.

News screen shot

From the Home Page there are also links to the following, these are also available on several other of the web pages.

**Recently updated events** – this will show any events De Facto have updated recently. You can click on the event and it will take you to the full content of the event to view.

**Log new Event** – this is a quick link so you can log a new event.

**Important Documentation** – this lists the De Facto support maintenance terms & conditions and our standard rates.

## Logged events

This section will show all logged events. If you are an admin user you will be able to see your logged events as well as all other users logged event. If you are not an admin user you will only be able to see events logged against you.

### Logged events tabs

There are 5 event tabs at the top, please see below for the descriptions of each

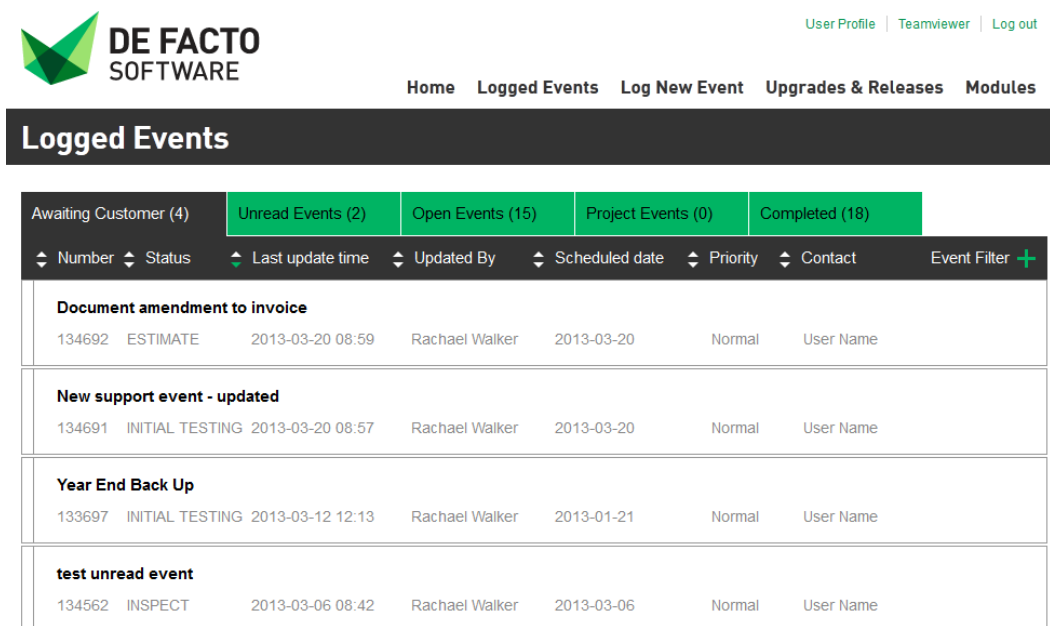
**Awaiting customer** – this shows all events if the event has been read or un-read where the owner of the event is customer, i.e. any events we have updated you on.

**Unread Events** – this tab shows events which you have not been read by you. We have updated an event but you have not read the response yet. Once you have read the event it will move into the Awaiting customer tab.

**Open Events** – the open events tab shows all events which are logged with a De Facto resource, be it with support, documentation or development.

**Project Events** – if you have any on-going projects with De Facto you can view all open project events within this tab.

**Completed** – this will show all completed events. Note you cannot re-open any completed events, a new event will have to be raised. This tab has also been limited to the past years events, there is an option to view all events if needed.



User Profile | Teamviewer | Log out

Home Logged Events Log New Event Upgrades & Releases Modules

### Logged Events

Awaiting Customer (4) Unread Events (2) Open Events (15) Project Events (0) Completed (18)

Number	Status	Last update time	Updated By	Scheduled date	Priority	Contact	Event Filter +
<b>Document amendment to invoice</b>							
134692	ESTIMATE	2013-03-20 08:59	Rachael Walker	2013-03-20	Normal	User Name	
<b>New support event - updated</b>							
134691	INITIAL TESTING	2013-03-20 08:57	Rachael Walker	2013-03-20	Normal	User Name	
<b>Year End Back Up</b>							
133697	INITIAL TESTING	2013-03-12 12:13	Rachael Walker	2013-01-21	Normal	User Name	
<b>test unread event</b>							
134562	INSPECT	2013-03-06 08:42	Rachael Walker	2013-03-06	Normal	User Name	

*Events tabs screen shot*

If you click on the event it will open up a window showing you the event notes and allow you to update the notes. You will also have an option called 'view full event information' which will open the full detail of the event for you to review.

Please note that clicking on the view full event information option will open a new browser tab.

## Support Event no. 134691

Event Detail for:

134691

**Subject:** New support event - updated  
**Owner:** Assigned Customer      **Recorded Date:** 20/03/2013  
**Category 1:** ERP Nominal Ledger      **Finished Date:** 20/03/2013  
**Category 2:** NL Batches      **Priority:**  [Change](#)

Event Information:

[+ Maximise Information Window](#)

 RW - 20 MAR 13 10:31 Version # B.06.11h - Build # 61106  
 This is a new update on an event for the support web site - Example

Update Event Information:

24725 Characters Left

*Events full view screen shot*

## Event Filter

There is the ability to filter on all of the above tabs using the event filter option, the filtering will apply to all tabs.

**Search for an event** – this allows you to search for an event number and also any text string within the event subject or event body. If you wish to search on the event body text then you will need to ensure you select the option 'enable full text search'.

**Category 1 & 2 and Priority** – you can filter on either of these options

**Owner/Status/Customer Contact** – this allows you to filter on the owner of the event e.g. Rachael Walker, the status of the event e.g. Requirement or the customer contact, this will list all customer contacts if you an admin user.

Clear filter will clear all options selected for filtering and search events will search as per the criteria you have selected.

Awaiting Customer (2)	Unread Events (0)	Open Events (10)	Project Events (0)	Completed (18)		
Number	Status	Last update time	Updated By	Scheduled date	Priority	Event Filter
Search for an event <input type="text"/> <input type="checkbox"/> Enable full text search (May slow down results)						
<b>Category 1</b> <input type="text" value="Please select a Category 1..."/>	<b>Category 2</b> <input type="text" value="Please select a Category 2..."/>	<b>Priority</b> <input type="text" value="Please select a Priority..."/>				
<b>Owner</b> <input type="text" value="Please select an Owner..."/>	<b>Status</b> <input type="text" value="Please select a Status..."/>	<b>Customer Contact</b> <input type="text" value="Please select a Contact Owner..."/>				
					Clear Filters	Search Events

*Events Filter screen shot*

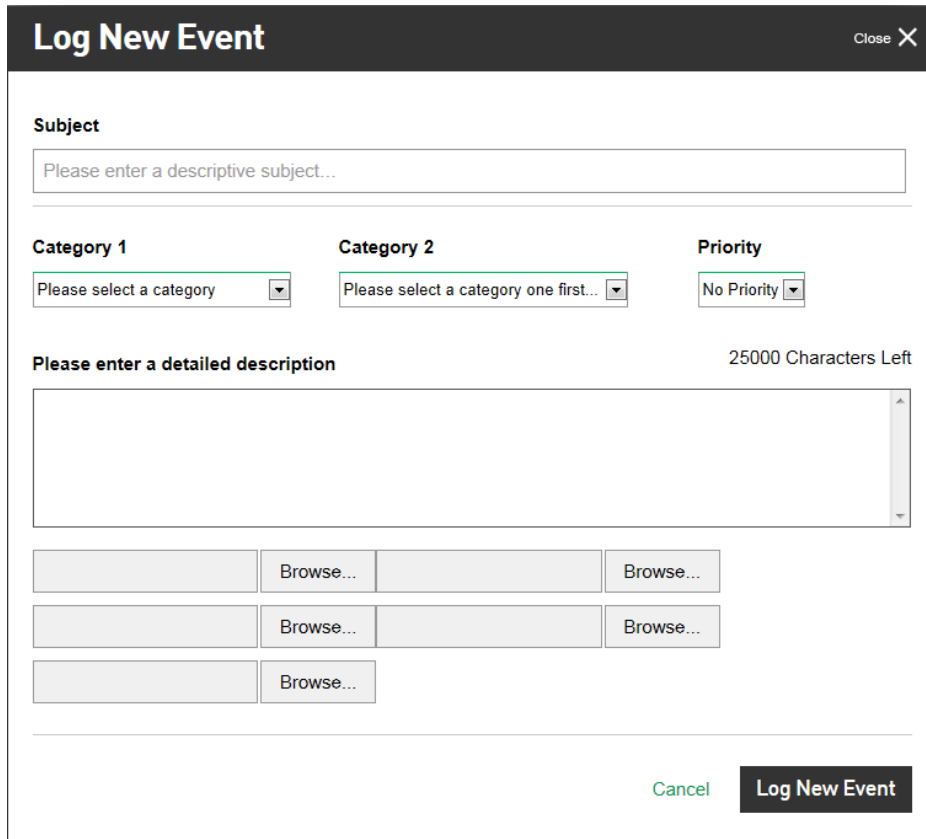
## Log new Event

This option will open a new window where you can add a new event.

You will need to enter a subject, category 1 and 2 and the detail of the issue you are having.

You also have the ability to select a priority and add attachments.

Once complete click on the log new event, this will post the event into our database for us to review.



The screenshot shows a 'Log New Event' window with a dark header and a 'Close X' button. The form contains the following fields and controls:

- Subject:** A text input field with the placeholder text 'Please enter a descriptive subject...'
- Category 1:** A dropdown menu with the placeholder text 'Please select a category'.
- Category 2:** A dropdown menu with the placeholder text 'Please select a category one first...'
- Priority:** A dropdown menu with the selected option 'No Priority'.
- Description:** A large text area with the placeholder text 'Please enter a detailed description' and a character count of '25000 Characters Left'.
- Attachments:** Three rows of input fields, each with a 'Browse...' button next to it.
- Buttons:** A 'Cancel' button and a 'Log New Event' button at the bottom right.

*New event screen shot*

Note: the event body field can only save up to 25000 characters, we have added a character count, if this is a minus number in red the character count has exceed the maximum number of characters. Please raise a new event referencing the original event if this happens.

## Upgrades and Releases

This section will advise you of the latest ERP release of De Facto. You will be able to review the release notes and also download the test and live upgrade instructions for full and library upgrades.

You will also be able to review previous releases; this will only go back to the most recent release of v7.0.

### Upgrades and Releases

Current Release: De Facto ERP 70002

[All information about De Facto ERP 70002](#)

Download instructions

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[Download De Facto ERP 70002 Live Full Upgrade](#)



[Download De Facto ERP 70002 Live Library Upgrade](#)



[Download De Facto ERP 70002 Test Full Upgrade](#)



[Download De Facto ERP 70002 Test Library Upgrade](#)



[Download De Facto ERP 70002 Release Notes Build 70002](#)

*Upgrades & release screen shot*



## Modules

This section shows you what modules you currently have configured and the modules you do not have configured but are available.

Each section will give you an overview of each module and will also show if there is a related documentation to that module.

### Modules

#### Modules and Services you currently use

Enterprise Resource Planning (ERP)	—
Distribution & Manufacturing	+
Financials	—
Sales Ledger	+
Nominal Ledger	+
Purchase Ledger	+
Banking	+
CRM	+

#### Modules and Services also available

Enterprise Resource Planning (ERP)	—
Distribution & Manufacturing	+
Financials	+
Business Intelligence	+
Document Management	+
Online Services	+

*Modules screen shot*

## User profile

This section of the website enables you to manage your contact details with in our live database. If you are admin user you can manage all users, if you are a normal user you can only view and update your own contact details.

Admin users can create new users, update existing users, add an admin user, lock users out and remove users, as well as the below.

Normal users can edit their existing contact details and change their password.




























**User Profile**

Contact Details +

Change Password +

Add / Edit Customer Contact Support Site Users -

Contacts with Support Site Access

Name	Lock User	Role	Reset Password	Change Role	Remove User
Adrian Paul		User			X
Alberto Garcia		Administrator			X
Andrew Garnham		User			X
Andrew Pick		User			X
Mr Andy Jordan Hawes		Administrator			X
Mr Andy Test		User			X
Charlie Calver		User			X
Chris Everett		User			X
Daniel Stamp		Administrator			X

*User profile screen shot*

## Teamviewer

This is a link to enable you to download Teamviewer so that we can access your machine if needed.