

# USER GUIDE

## **Remedy Support Request (SPRT) Process**

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**Release Notice**

This is the October 2005 release (Revision A) of the  
*Remedy Support Request (SPRT) Process User Guide*.

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# Introduction

This document describes how to use the Remedy software. In most cases these procedures apply worldwide. Where procedures vary between regions, these are noted.

# System Configuration

Several configuration steps are required before you can use Remedy. You can access the options you need to configure from the *Home Page*.

To open the *Home Page*, click the Home icon



Configure the following:

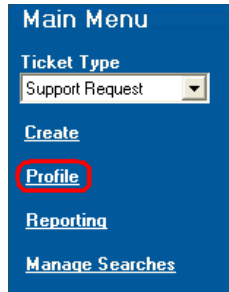
- *Assign yourself to Groups you want to appear in*
- *Setting your Manager in your Profile*

See the following sections.

## Assign yourself to Groups




As a minimum, all support staff should be in the *Support* group.

1. In the *Home Page*, click **Profile**.



2. Select the *Auto Assign* tab.

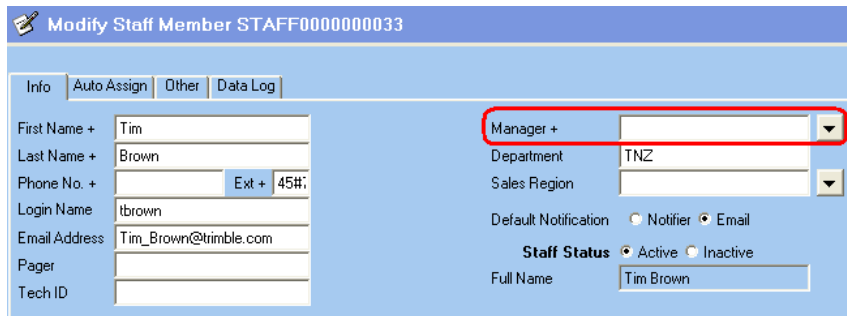
 A screenshot of a web form titled 'Modify Staff Member STAFF0000000033'. The 'Auto Assign' tab is selected and circled in red. The form includes fields for 'Currently Available?' (Yes/No), 'Hours on Duty' (From/To), 'Groups' (Technical Support ROW), 'Specialty 1', 'Specialty 2', and 'Capacity Rating' (100). On the right, there are fields for 'No. Currently Assigned' (7), 'No. Times Reassigned' (186), and 'Last Assigned Time' (23 Aug 2005 11:42:16 a.m.). A 'Recompute No. Assigned' button is also present. The 'Groups' field is circled in red.

3. To add yourself to one or more Groups, do the following:
  - Click  and then select the Groups you want to appear in. These will be added to the *Groups* field.
4. To remove yourself from a Group, do the following:
  - a. Click  to view all the entries in the *Groups* field.
  - b. Delete the group(s) you do not want to appear in and then click **OK**.
5. Click  to **Save** your Profile.

## Setting your Manager in your Profile

This enables your manager to create searches that can be made available to everyone reporting to them.

1. From the *Home Page* select the **Profile** link from the *Main Menu*.
2. Select the *Info* tab.



The screenshot shows a web form titled "Modify Staff Member STAFF0000000033". The form has several tabs: "Info", "Auto Assign", "Other", and "Data Log". The "Info" tab is active. The form contains the following fields and options:

- First Name +: Tim
- Last Name +: Brown
- Phone No. +: [ ] Ext + 45#
- Login Name: tbrown
- Email Address: Tim\_Brown@trimble.com
- Pager: [ ]
- Tech ID: [ ]
- Manager +: [ ] (highlighted with a red box)
- Department: TNZ
- Sales Region: [ ]
- Default Notification:  Notifier  Email
- Staff Status:  Active  Inactive
- Full Name: Tim Brown

3. In the *Manager* field, click ▼ and then select your manager from the list.
4. Click **Save** button to update your Profile.



# The Trimble Home Page

The Trimble *Home Page* is the starting point for working in the Remedy system. To open the *Home Page*, click the Home icon.



From this page, you can access Support Requests (SPRT), Regional Fulfillment Center (RFC), Service Work Orders (SWO), and Warranty Claims (DWCR) tickets:

Trimble

Welcome Tim Brown

Tue 30 Aug 2005 1:10:03 pm

Work Management Customer

Show Me My Tickets Ticket Type All Status All Region All Refresh

Search For Ticket Type All Product Line All Value Retrieve

Query Login = \$USER\$ AND STATUS = "Closed" AND REGION\_NAME = "Asia Pacific" Select Columns

Ticket ID	Priority	Product Line	Assigned Group	Summary	Submission ID	Company Name	Region	Business Area
SPRT00000000141	Low	GPS PATHFINDER DP	Support	Problems installing onto Win98	21 Jul 2005 4:00Z	Company	Asia Pacific	TFS - GIS
SPRT00000002015	Low	DIS SERVICE PARTS	Repair Author	GeoCE touch screen not respo	22 Aug 2005	Trimble Technology	Asia Pacific	TFS - GIS
SPRT00000003277	Low	PRD-G1	Support	Battery Calibration issue	23 Aug 2005 10:12Z	Company	Asia Pacific	TFS - GIS

Summary GeoCE touch screen not responding Ticket Count 3

## Color Coding

On the *Home Page*, all incoming cases are color coded for easier identification.

The color of the case is determined by the *Contact Type* field, and indicates who originated the case.

<b>RED</b> Key Account/End User Key Customer VRS Operator	<b>BLUE</b> Joint Venture Trimble Location Supported Customer	<b>GREEN</b> Ag – OEM Business Partner Dealer – Sales Only OEM Service & Training Service Provider Support & Service Support & Training Support Provider Support, Service and Training Training Provider	<b>BLACK</b> End User
--	--	---	--------------------------

## Auto-Priority System

Not all customers have the same priority when receiving Technical Support. The Auto-Priority System assigns a Priority status to a support case based on the Contact Type. Priority status can be set as: Critical, High, Medium, Low, or Unspecified.

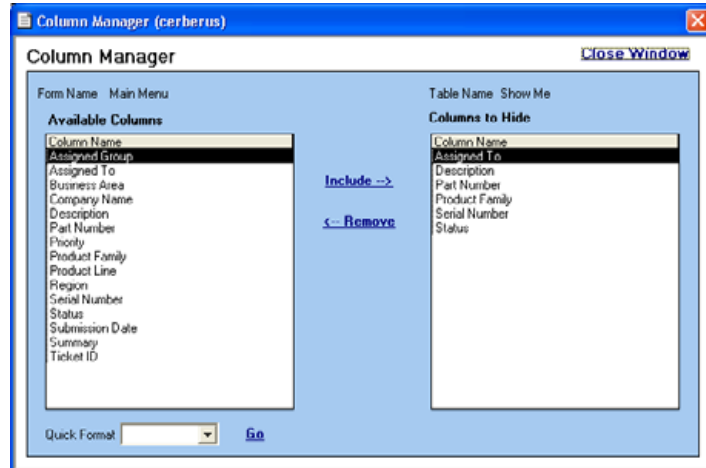
For example, a case from a Dealer is automatically set to High. A case from a Key Account is set automatically to Critical.

Information provided by Color Coding, Auto-Priority System, and the Escalation Rules, together with the Region field, is a clear indication for the sequence in which SPRTs should be handled.

## Configuring the Ticket List Table

To configure the columns you want displayed in the ticket list table, do the following:

1. Click the **Select Columns** link on the right of the form. The following dialog appears:



2. By default, all the columns in the *Available Columns* list are displayed. Remove any columns you do not want displayed by adding them to the *Columns to Hide* list.
3. For Technical Support people, Trimble recommends that you select *Support* from the *Quick Format* field and then click **Go**. This populates the *Columns to Hide* list with fields that are less important for a support person to see.
4. You can also use the **Include →** and **← Remove** links to include or exclude fields manually.
5. When finished, click **Close Window**. The ticket list table updates to show only the selected columns.

## Displaying Tickets Assigned to You

To view the tickets assigned to you, do the following:

1. From the *Show Me* field, select *Standard / My Tickets*.



2. To filter these results further, use the *Ticket Type*, *Status*, and *Region* fields.
3. To update the list of cases displayed, click **Refresh**.

**Note** – *By default, tickets that are Closed or Rejected do not appear.*

## Displaying Open Tickets For Your Group

To view tickets assigned to your Groups, use one of the following methods:

### My Group Tickets

**Note** – *By default, this search shows tickets that are Not Closed. This can include tickets that are already assigned to another person and not just Open tickets. We therefore recommend that you use a search configured by your manager. See A search configured by your manager, page 9*

1. From the *Show Me* field, select *Standard / My Group Tickets*:



2. To filter these results further, use the *Ticket Type*, *Status*, and *Region* fields.
3. To update the list of cases displayed, click **Refresh**.

**Note** – *The Tickets that appear depend on which Groups you set up in your Profile. For more information, see Assign yourself to Groups, page 3.*

## A search configured by your manager

If your manager has set up some pre-defined searches and made these available to you, do the following:

1. From the *Show Me* field, select *Shared / <Search Name>*.



2. To filter these results further, use the *Ticket Type*, *Status*, and *Region* fields.
3. To update the list of cases displayed, click **Refresh**.

**Note** – You will only see *Shared Searches* if you have the name of your manager set in your Profile, and if your manager has set up *Shared Searches*. For more information, see *Setting your Manager in your Profile*, page 4.

## Searching for Tickets

You can search for open tickets that have not been assigned or for a specific ticket, including product, serial number, or company name.

### Tickets submitted by a company or contact

1. Select the *Customer* tab:

Work Management Customer

Enter data in one of the fields below and press Enter to search for a specific record. Clear

Company Name: XYZ Company First Name: Ticket Type: [Dropdown]

Billing ID: 123456 Last Name: Create Ticket

Phone No.: 123-456-7890 Email Address:

Address: 123 North Main Street Region: EMEA Post Code: 45005

City: Dayton State: OH

Active/Recent Tickets [Currently open or closed within the last 30 days] Refresh

Ticket ID	Status	Assigned To	Assigned To	Part Number	Serial Number	Description	Summary	Submission Date	Priority
SPRT100000000	Open	Support		56439-52		KIT - KOMATSU GD655	call summary	23 Aug 2005 7:40	Unspecified
RFC000000000	Open	Support		56439-52		KIT - KOMATSU GD655	call summary	23 Aug 2005 7:41	Unspecified
SPRT100000000	Closed	Support	Tim Brown				This was prompted	23 Aug 2005 9:17	Low
SPRT100000000	Closed	Support	Tim Brown				Test of new QN e	23 Aug 2005 11:3	Low
DWLR000000002	Assigne	TLN2 Repair	Tim Brown	46502-00	0240000763	GeoExplorer Series DHC	This is the subject	23 Aug 2005 11:4	Unspecified
SWD0000000003	New	WestRSC R		46502-00	0240000763	GeoExplorer Series DHC	This is the subject	23 Aug 2005 11:4	Unspecified
SPRT100000000	Assigne	Support	Tim Brown				Battery Calibration	23 Aug 2005 1:33	Low
SPRT100000000	Closed	Support	Tim Brown					23 Aug 2005 1:34	Low
SPRT100000000	Open	Support		46506-00-		GEODEXPLORER CE MA	call summary	26 Aug 2005 1:58	Unspecified
SPRT100000000	Open	Support		44311		GPS Pathfinder Pocket	summary	26 Aug 2005 2:34	Unspecified
SPRT100000000	Open	Support		43277		LIGHTNING PROTECTORS	ing summary	26 Aug 2005 2:37	Unspecified
SPRT100000000	Open	Support		46274-00		MODL 3C2, RWD, SIB	ing summary	26 Aug 2005 2:47	Unspecified

Ticket Count 135

2. In the *Company Name* field, enter the company name or part of the company name and then press **Enter**. The tickets submitted by this company that are currently open or have been closed within the last 30 days appear.

Alternatively, to view tickets submitted by a particular person enter a *First Name* or a *Last Name* and then press **Enter**. The tickets submitted by this person that are currently open or have been closed within the last 30 days appear.

3. Double-click a ticket to open it.



**Tip** – To create a new ticket for that company or contact, select from the drop down list in the *Ticket Type* field and then click **Create Ticket**. A new ticket is created with the contact details filled in automatically.

## Tickets based on Ticket ID, Part Number, Serial Number, Case Summary, Problem Details, or Solution Details.

1. Select the *Work Management* tab:

The screenshot shows the 'Work Management' interface for a 'Customer'. At the top, there are several filter dropdowns: 'Show Me' (My Tickets), 'Ticket Type' (All), 'Status' (All), and 'Region' (All). A 'Refresh' button is located to the right. Below these is a 'Search For' section with a dropdown menu, 'Ticket Type' (All), 'Product Line' (All), and a 'Value' field. A red box highlights the 'Search For' dropdown and the 'Ticket Type' dropdown. To the right of the 'Value' field is a '<- Retrieve' button. Below the search section is a 'Query' field containing the text: 'Login' = "brown" AND 'STATUS' = "Closed" AND 'REGION\_NAME' = "Asia Pacific". To the right of the query field is a 'Select Columns' button. The main area is a table with the following columns: Ticket ID, Priority, Product Line, Assigned Group, Summary, Submission Dt, Company Name, Region, and Business Area. The table contains three rows of data:

Ticket ID	Priority	Product Line	Assigned Group	Summary	Submission Dt	Company Name	Region	Business Area
SPRT00000000141	Low	GPS PATHFINDER OF	Support	Problems installing onto Windo	21 Jul 2005	XYZ Company	Asia Pacific	TFS - GIS
Dw\CR000000023015	Low	GIS SERVICE PARTS	TNZ Repair Admin	GeoCE touch screen not respo	22 Aug 2005	Trimble Navigati	Asia Pacific	TFS - GIS
SPRT00000000277	Low	PR0-34	Support	Battery Calibration issue	23 Aug 2005	XYZ Company	Asia Pacific	TFS - GIS

At the bottom right of the window, it says 'Ticket Count: 3'.

2. Enter details in the menu fields on the *Search For* line and then click **←Retrieve**. The matching tickets appear in the window.

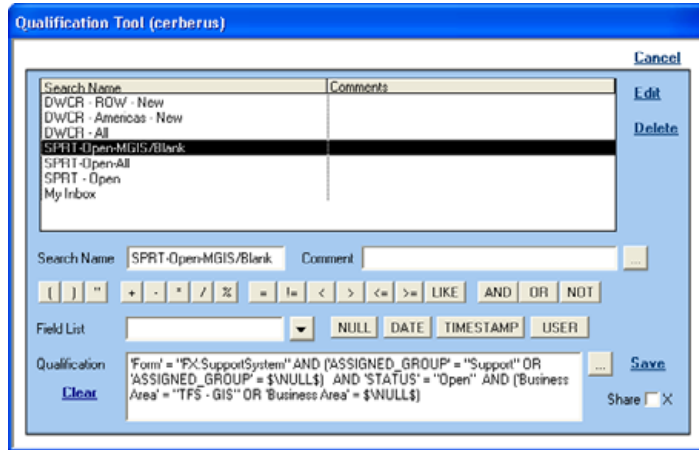
## Creating personal searches (Custom searches)

To create a specific search and use it again, click **Manage Searches** in the Main Menu. Searches created here are saved as *Personal* searches.

When you use the Search For options or the Show Me filters, the actual query string that Remedy uses appears in the *Query* field. You can use these queries to create your own saved queries to run each time.

To create a reusable search, do the following:

1. In the Main Menu, click **Manage Searches**. The following screen appears:



2. In the *Qualification* field, enter the search string.
3. In the *Search Name* field, enter the name of your search.
4. Click **Save**.
5. Click **Cancel** to close this dialog.
6. To access the saved search, select *Personal Searches* from the *Show Me* field and then select your saved search.

The following are some examples of search strings:

- Find all DWCRs for the Americas region that have not been assigned to a group.

'Form' = "FX:DealerWarranty" AND 'STATUS' = "New" AND 'REGION\_NAME' = "Americas"



- Find all DWCRs for the dealer Cansel created after 1 July 2005 that are still being worked on.

```
'Form' = "FX:DealerWarranty" AND 'CREATE_DATE' >
"1/7/2005" AND 'COMPANY_NAME' ="Cansel Survey
Equipment" AND 'STATUS' !="Denied" AND 'STATUS'
!="Approved" AND 'STATUS' !="Closed"
```

- Find all tickets that have arrived in the last 24 hours.

```
'Submission Date' > ($\DATE$ - (60*60*24))
```

## Assigning a Support Case to a Group, Business Unit, or Region

If you notice a Support Case that is not assigned to the correct Group, Business Area, or Region, you can update the case:

1. Highlight the case in the list.
2. From the Main Menu, use the drop down lists in the *Quick Update* fields to set the correct Region, Business Area, and Assigned group. You can select one or more of these options. If a Business Area is already set for the case, the Business Area option is not available.



The image shows a screenshot of a web form titled "Quick Update". It contains three dropdown menus stacked vertically. The first dropdown is labeled "Region", the second is labeled "Business Area", and the third is labeled "Assigned Group". Each dropdown menu has a small downward-pointing arrow on its right side.

3. To apply these selections, click **Quick Update**.

When you assign a support case to a Group, use the following Group definitions as a guide.

Assign to Group	Tasks
Logistics	Shipping, Mis-shipments, returns, RMA, DOA, P/N enquiries, P/N availability, advising stock levels
Sales	Finished goods sales order administration, Sales Leads
Service	Service Support, Service Administration (Service Parts & Tools Orders) DWCR and SWO are handled from their own specific forms.
Support	Technical Support
Support Sales	Extended warranties, product registration, update mail-outs, issuing codes
Support Systems	Remedy, SharePoint, Customer & Product Registration System, Database management, DocuShare, Partners Website, Trimble Store (istore), Dealer locator, trimble.com website, support.trimble.com website.
Training	Training administration, organization and delivery (including Service Training), Breeze Account Requests

---

# The Support Request (SPRT) Form

Use the **Support Request (SPRT)** form to manage all incoming requests for technical support, and enable the requests to be classified and easily assigned to the appropriate personnel for follow-up.

A typical Support Request ticket in progress looks like this:

The screenshot displays the Support Request (SPRT) form interface. The top header shows the Request ID (SPRT0000000320), Case Time (697.04), and Status (Assigned). The form is divided into several sections:

- Product Line:** PRDGH
- Submission Date:** 30 Aug 2005 2:11:33 p.m.
- Type:** Product Failure - Hardware
- Priority:** Low
- Reason:** Battery
- Company Name:** XYZ Company
- Assigned Group:** Support
- Full Name:** Tim Brown
- Sub Group:** (empty)
- Phone:** 643-963-5521
- Assigned To:** Tim Brown
- Region:** Americas

The main content area is divided into three tabs: **Problem Solution**, **Audit**, and **Case History**. The **Problem Solution** tab is active, showing a case summary and problem details.

**Case Summary:** ProGH battery wont charge

**Problem Detail:** [Spell Check](#)  
 Dear Support,  
 After charging the battery in my ProGH overnight as soon as I unplug the power the battery light starts flashing and won't stop.  
 Regards,  
 Tim Brown

**Solution Detail:** [Spell Check](#)  
 Recommended upgrade to latest version of receiver firmware which includes a firmware fix for this know problem. Get attachment

**Case Activity:** Manual Entry, Quick Note, Add, Add QN

Entry Type	Entered By	Create Date	Short Note
Linking	Tim Brown	22 Sep 2005 3:28:32 p.	Link to SPRT0000000310 was removed
Assignment	Tim Brown	22 Sep 2005 1:34:13 p.	Ticket Assignment to Tim Brown
Assignment	Tim Brown	22 Sep 2005 1:32:59 p.	Assigned To cleared
Status	Tim Brown	22 Sep 2005 1:32:59 p.	Status updated to Open
Quick Note	Tim Brown	30 Aug 2005 2:46:00 p.	Left message - solution advised.
Submission	Tim Brown	30 Aug 2005 2:11:33 p.	Ticket Submitted
Assignment	Tim Brown	30 Aug 2005 2:11:33 p.	Ticket Assignment to Tim Brown
Status	Tim Brown	30 Aug 2005 2:11:33 p.	Ticket Submitted with Status of Assigned

Buttons: [Details](#), [Refresh](#)

## Assigning Support Cases

To work a support case, you can do the following:

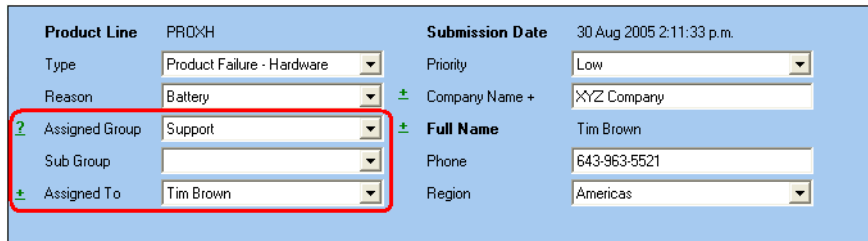
- assign a case to yourself (See page 16)
- create a new case (See page 17)

You can also assign a case to another group or person. (See page 43.)

### Assigning a case to yourself

Always assign a case to yourself before you work on it. This ensures that only one person works on a case at a time.

1. From the case list on the *Home Page*, double-click the case to open it.
2. In the static window, set the *Assigned Group* to *Support* and set *Assigned To* to your name:



The screenshot shows a form with two columns of fields. The left column contains: Product Line (PROXH), Type (Product Failure - Hardware), Reason (Battery), Assigned Group (Support), Sub Group, and Assigned To (Tim Brown). The right column contains: Submission Date (30 Aug 2005 2:11:33 p.m.), Priority (Low), Company Name (+ XYZ Company), Full Name (+ Tim Brown), Phone (643-963-5521), and Region (Americas). A red box highlights the Assigned Group and Assigned To fields.

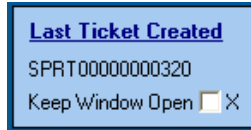
<b>Product Line</b>	PROXH	<b>Submission Date</b>	30 Aug 2005 2:11:33 p.m.
Type	Product Failure - Hardware	Priority	Low
Reason	Battery	Company Name +	XYZ Company
Assigned Group	Support	Full Name +	Tim Brown
Sub Group		Phone	643-963-5521
Assigned To	Tim Brown	Region	Americas

3. Click **Save**.

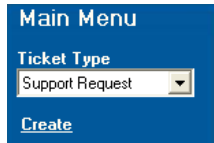
## Creating a new support case

1. From the Main Menu, select the *Keep Window Open* check box. This ensures that once you create and save the new case, it remains open while you work on it.

Alternatively, to reopen a case, select **Last Ticket Created**:



2. From the *Main Menu*, set the *Ticket Type* to *Support Request*.



3. Click **Create**. A new blank support case is created. The following section outlines the fields to complete before you close the case.



---

**CAUTION** – When you save the case, the person selected as the Contact for the case is sent an e-mail advising them that a Support Case has been created for them. The e-mail includes the Case Summary and Problem Details fields, so these fields must be completed carefully.

---

## Common Steps when working a Support Case

Once you assign yourself a support case, or create a new case, follow these typical steps to handle the case.

### Case Type and Reason

You must complete the *Type* and *Reason* fields in the static window before you close a case, so that you can generate meaningful reports:

Product Line		Submission Date	
Type	<input type="text"/>	Priority	<input type="text"/>
Reason	<input type="text"/>	Company Name +	<input type="text"/>
Assigned to Group	<input type="text"/>	Full Name	<input type="text"/>
Sub Group	<input type="text"/>	Phone	<input type="text"/>
Assigned To	<input type="text"/>	Region	<input type="text"/>



**Tip** – For more information, see Case Types and Case Reasons, page 51.

### Contact details

Make sure the contact details of a case are entered correctly. If they have not already been populated, you can enter them through the static window. Use one of the following methods.

#### Selecting a contact using first name, last name, e-mail, or phone number

If you have the first name, last name, e-mail, or phone number of the contact, you can do a search using this information to see if they are already registered:

1. Make sure the *Company Name* field on the static window is blank. If not, go to the *Contact Details* tab and then click **Clear**:

<b>Product Line</b>		<b>Submission Date</b>	
Type	<input type="text"/>	Priority	<input type="text"/>
Reason	<input type="text"/>	Company Name +	<input type="text"/>
Assigned Group	<input type="text"/>	Full Name	<input type="text"/>
Sub Group	<input type="text"/>	Phone	<input type="text"/>
Assigned To	<input type="text"/>	Region	<input type="text"/>

Email / Attachments / Links	Audit	Case History
Problem Solution	<b>Contact Details</b>	Product

**Company Information** [Clear](#)

<b>Address</b>	<b>Billing ID</b>
	<b>Company Type</b>
	<b>Relationship</b>
	<b>Region</b>
<b>City</b>	Sub Region <input type="text"/>
<b>State</b>	Address Type <input type="text"/>
<b>Postal Code</b>	
<b>Country</b>	

2. In the Main Menu, click **Select Contact**.

3. Use the following dialog to enter the details you have and then click **Search**. Contacts that match your search criteria appear.



**Tip** – Use the e-mail address first, as this will give the best results:

Search Contacts (cerberus) Cancel

**Search** First Name  Email Address   
Clear Last Name  Phone No.

The First Name and Last Name fields allow for leading searches. The other fields require an exact match.

Last Name	First Name	Email Address	Company Name	Site Name	City
-----------	------------	---------------	--------------	-----------	------

Double Click a record to select. Count

4. Double-click a record to select it and populate the contact details for the support case.

If the contact does not exist in the system, then you need to add the contact's details. For more information, see the following sections.



## Selecting a contact using the company name

1. In the *Company Name* field, enter the name of the company (or part of the name) and then press **Enter**. A list of companies appears:

Product Line		Submission Date	
Type	<input type="text"/>	Priority	<input type="text"/>
Reason	<input type="text"/>	Company Name +	<input type="text"/>
Assigned Group	<input type="text"/>	Full Name	<input type="text"/>
Sub Group	<input type="text"/>	Phone	<input type="text"/>
Assigned To	<input type="text"/>	Region	<input type="text"/>



**Tip** – To search for a company using part of the company name only, enter the “%” character and then enter the first few letters of the company name. For example “%Trimb”.

2. From the list, double-click the correct company name.
3. In the Main Menu, click **Select Contact** and then select from the list.

**Note** – If the company name can not be found and you have already tried finding the contact using the *Selecting a Contact Using First Name, Last Name, E-mail, or Phone Number*, described above, then it is likely that neither the company nor the contact are registered. See *Adding a contact for a new company*, page 23.

## Adding a contact for an existing company

1. In the Main Menu, click **Add Contact**:

The screenshot shows the 'New Contact' form in a Contact Manager application. The form is divided into two main sections. The top section, titled 'Contact Manager', contains fields for 'First Name', 'Last Name', 'Contact Type', 'Notes', 'Contact Status' (Active/Inactive), 'Company Name' (XYZ Company), 'Customer ID', 'Site Name +', and 'Registration Company'. The bottom section, titled 'Address/Phone', contains fields for 'Country +', 'Address', 'City', 'State', 'Post Code', 'Phone No. +', 'Ext. +', 'Account ID +', 'Password', 'Email Address +', 'Fax No.', 'Alternate Phone No.', 'Cellular', 'Pager', 'Company Type', 'Relationship', and 'Associate to Company'. Several fields are highlighted with red boxes: 'First Name', 'Last Name', 'Site Name +', 'Email Address +', and 'Phone No. +'. The 'Same As Company' and 'Same As Site' buttons are also highlighted.

2. Enter the following information:
  - *First Name* and *Last Name*
  - Select the *Site Name* from the list, if appropriate
  - Enter the *Email Address*, if you have it.
  - To copy the address details from the Company record, click **Same As Company** or **Same As Site**.
  - Enter the *Phone No*, if you have it.
3. Leave all other fields as they are.
4. Click **Save** and then close the Contact record.

You can now select the contact using the **Select Contact** link.

## Adding a contact for a new company

If neither the contact or company are registered, you can create a new contact record by doing the following.



**CAUTION** – If the contact is a Dealer, then their company should be registered already. Use the Company Form to search further before you continue with this procedure. If in doubt contact Sharron McKenzie for advice.

1. In the *Company Name* field, enter **Customer Registration System** and then press **Enter**:

Product Line		Submission Date	
Type	<input type="text"/>	Priority	<input type="text"/>
Reason	<input type="text"/>	± Company Name +	Customer Registration System
? Assigned Group	<input type="text"/>	± Full Name	
Sub Group	<input type="text"/>	Phone	<input type="text"/>
± Assigned To	<input type="text"/>	Region	<input type="text"/>

2. Click **Add Contact**:

**New Contact**

**Contact Manager**

First Name   
Last Name   
Contact Type   
Notes

**Contact Status**  Active  Inactive  
Company Name   
Customer ID   
Site Name +   
Registration Company

Address/Phone | Registration System | Certified Trainer | System

[Same As Company](#) [Same As Site](#)

Country +   
Address   
City   
State   
Post Code   
Phone No. +  Ext +   
Area Code  Country Code   
Region   
Dealer   
Associate to Company:  [Move](#)

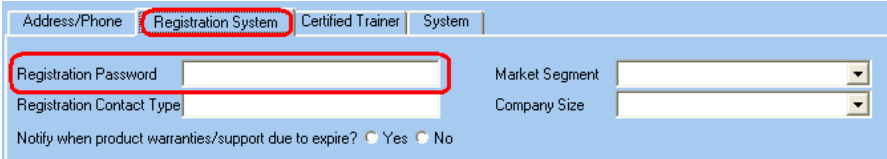
Account ID +   
Password   
Email Address +   
Fax No.   
Alternate Phone No.   
Cellular   
Pager   
Company Type   
Relationship   
Has Breeze account?  Yes

3. Enter the following information:

- The *Email Address*, if you have it.
- *First Name* and *Last Name*.
- Click **Same As Company**.
- Update the *Country* and *State* fields, if you have this information.
- Update any other information you have.

4. If required, you can also create a Registration System password that can be provided to the customer so that its staff can log into the registration system and maintain the customer's own details. To do this:

- a. Select the *Registration System* tab.



The screenshot shows a web form with a blue header and a light blue body. The header contains four tabs: "Address/Phone", "Registration System", "Certified Trainer", and "System". The "Registration System" tab is selected and highlighted with a red border. Below the tabs, there are several input fields: "Registration Password" (a text box with a red border), "Registration Contact Type" (a text box), "Market Segment" (a dropdown menu), and "Company Size" (a dropdown menu). At the bottom of the form, there is a checkbox labeled "Notify when product warranties/support due to expire?" with radio buttons for "Yes" and "No".

- b. In the *Registration Password* field, enter a new password.
- c. When you respond to the customer, let the contact know that you have created an account in the registration system. They can log into it at: <http://www.trimble.com/register> using the contact's email address and the new password.
5. Click **Save** and then close the Contact record.

You can now select the contact using the **Select Contact** link in the Main Menu.

## Updating contact details

1. Do one of the following:
  - From the *Contact Details* tab, enter the correct *Contact Information* and then click **Update Contact**.

The screenshot shows a web-based form for updating contact details. The form is organized into several sections:

- Company Information:** Includes fields for Address, City, State, Postal Code, and Country. A "Clear" link is visible.
- Billing ID:** Includes fields for Company Type, Relationship, Region, Sub Region (dropdown), and Address Type (dropdown).
- Contact Information:** Includes fields for Phone - Office, Phone - DID, Phone - Cell, Fax, and Email Address. There is also an "Ext" field and a "Contact Type" field.
- Contact Type:** Includes a "Site Name" field and a "Contact Notes" text area with a "..." button.

A red box highlights the "Update Contact" button at the bottom of the form.

- In the Main Menu, click **Edit Contact Info** to open the *Contact Details* dialog.
2. Make any changes and then click **Save**. The changes appear in the *Contact Details* tab when you close and then reopen the case.

## Product details

Each case must have a Product assigned to it. Often a case may relate to more than one product. As each case can have only one product assigned to it, select the product that is most significant in the issue. If part of the product has failed, use the part number of the failed part to specify the product.

To enter product information on the *Product* tab, do the following:

1. If you have the Part Number of the product, enter it (or the start of the part number) into the *Product Part Number* field and then press **Enter**. A list of possible part numbers and descriptions appears.

The screenshot shows the 'Product' tab of the SPRT form. At the top, there are three tabs: 'Email / Attachments / Links', 'Audit', and 'Case History'. Below these are three sub-tabs: 'Problem Solution', 'Contact Details', and 'Product'. The 'Product' sub-tab is active. Below the sub-tabs, there is a 'Clear Product Details' link. The form contains several fields: 'Product Family' (dropdown), 'Product Line' (dropdown), 'Product Part Number +' (text input, highlighted with a red box), 'Business Area' (dropdown), 'Supplier' (text input), 'Serial Number +' (text input), 'Part Description' (text input), 'Version' (text input), 'Original Sales Order' (text input), 'Check For OSD' (checkbox), 'Non-Serialized' (checkbox), 'Unknown' (checkbox), 'Extended Warranty S/D' (text input), and 'Original Ship Date' (dropdown).

2. Double-click the correct part number from the list. The associated Business Area, Product Family, Product Line, and Part Description is automatically populated.
3. If you do not have a part number, then select the appropriate Business Area from the *Business Area* field and then the appropriate Product from the *Product Line* field.

The screenshot shows the 'Product' tab of the SPRT form. At the top, there are three tabs: 'Email / Attachments / Links', 'Audit', and 'Case History'. Below these are three sub-tabs: 'Problem Solution', 'Contact Details', and 'Product'. The 'Product' sub-tab is active. Below the sub-tabs, there is a 'Clear Product Details' link. The form contains several fields: 'Product Family' (dropdown), 'Product Line' (dropdown, highlighted with a red box), 'Product Part Number +' (text input), 'Business Area' (dropdown, highlighted with a red box), 'Supplier' (text input), 'Serial Number +' (text input), 'Part Description' (text input), 'Version' (text input), 'Original Sales Order' (text input), 'Check For OSD' (checkbox), 'Non-Serialized' (checkbox), 'Unknown' (checkbox), 'Extended Warranty S/D' (text input), and 'Original Ship Date' (dropdown).

4. If you are not sure which Business Area the product belongs to then select the appropriate Product from the *Product Line* field and then choose from the filtered list the appropriate Business Area from the *Business Area* field.

## The Support Request (SPRT) Form

- If you have the serial number of the product, enter this into the *Serial Number* field. If you have also entered the part number press **Enter** for the system to check if the product is registered. If it is, it populates the *Original Ship Date* field.

Email / Attachments / Links	Audit	Case History
Problem Solution	Contact Details	<b>Product</b>

[Clear Product Details](#)

<b>Product Family</b>	<input type="text"/>	<b>Business Area</b>	<input type="text"/>	
<b>Product Line</b>	<input type="text"/>	<b>Supplier</b>	<input type="text"/>	
<b>Product Part Number +</b>	<input type="text"/>	<b>Serial Number +</b>	<input type="text"/>	
<b>Part Description</b>		<a href="#">Check For OSD</a>	<a href="#">Non-Serialized</a>	<a href="#">Unknown</a>
Version	<input type="text"/>	Extended Warranty S/D	<input type="text"/>	
Original Sales Order	<input type="text"/>	<b>Original Ship Date</b>	<input type="text"/>	

- If you have the version number of the product, enter this into the *Version* field.

**Note** – If you have entered the part number and serial number of a product you can use the Product History pane in the Product tab to see if this product has been previously recorded on any other Support, RMA, DWCR, SWO, or RFC tickets. To do this, click Refresh. Double-click a ticket to open it.

Product History					
Ticket ID	Product Part Number	Serial Number	Date Repaired	Repaired By	Service Center

Records displayed here are previous records created for the same Part Number and Serial Number. [Refresh](#)



## Problem and solution details

The *Problem Solution* tab shows the case summary. If a case is created from an email, the *Case Summary* field will be the subject of the original email and the *Problem Detail* field will be the content of the original email. Record the following information in the *Problem Solution* tab.

The screenshot shows the 'Problem Solution' tab of the SPRT form. It features three main input areas: a large 'Case Summary' text box at the top, a 'Problem Detail' text box at the bottom left, and a 'Solution Detail' text box at the bottom right. Each of these three boxes is outlined with a red rectangle. To the right of the 'Case Summary' box is a 'Product Issue' dropdown menu, and below it are checkboxes for 'Attachments' and 'Knowledge Base'. At the bottom right, there is an 'Email Revd' field. The form has a blue header with tabs for 'Email / Attachments / Links', 'Audit', and 'Case History'. The 'Problem Solution' tab is currently selected.

### Case summary

Enter a short one line description of the problem. This field is often used in reporting and is also used in the subject line of some emails sent from Remedy. When a case is manually created, information in this field is sent to the customer when the case is saved.

### Problem detail

Enter an outline of the problem. This normally happens by default when an email is sent to Remedy. If a case is created manually, you must accurately describe the problem here.



**WARNING** – When a case is manually created, information in this field is sent to the customer once you save the case.

### Solution detail

Complete this field before you close a case.

Enter the solution or resolution to the case. This information is used in reporting and also in the future as a basis for a Knowledge Base system.

### Logging case activity

To ensure accurate reporting of our response times, you must use the Quick Notes options when contacting customers by phone.

When you work on a case, you must keep a log of the progress or current situation. This makes it easier to keep track of ongoing cases and for others who may have to pick up a case when someone is absent.

The *Problem Solution* tab contains the *Case Activity* pane.

Entry Type	Entered By	Create Date	Short Note
------------	------------	-------------	------------

This allows you to enter short notes that are time stamped and marked with the name of the person who entered them. There are two ways to enter a note:

- Select a predefined note from the list. If appropriate, select one from the *Quick Note* field drop down list and then click **Add QN**. The *Case Activity* pane updates with the new note.
- If the list of predefined notes is not appropriate, enter your note in the *Manual Entry* field and then click **Add**. The *Case Activity* pane updates with the new note.

A number of the Quick Note options also set the time that Trimble first responded to a customer. This is triggered if any of the following Quick Note options are selected:

- Left message - solution advised.
- Left message - requested call back.
- Left message - Trimble will attempt to reach you again.
- Unable to Contact Customer - wrong details.
- Waiting for additional info, data from Customer.
- Spoke with customer directly – working on solution

The First Response time is also set when replying to a customer by email from within Remedy—whichever event occurs first. The first response time for a case appears on the *Audit* tab.

## Sending Emails

All emails sent to customers should be sent from within Remedy when practical. This ensures that all correspondence is kept together and that Trimble can accurately report statistics such as First Response times.

## The Support Request (SPRT) Form

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To send an email to a customer from a Support case, do one of the following:

- To create a new blank email that already contains the customer's email address, click **Send Email** in the Main Menu.
- To reply to an email from the customer, do the following:
  - a. Select the *Email / Attachments / Links* tab.
  - b. The *Linked Records* table *Filter By* field defaults to *Email*. Click **Refresh** to view all emails associated with the case.

The screenshot shows the 'Email / Attachments / Links' tab selected. The 'Attachments' section is empty. Below it, there are links for 'Manage Files' and 'Refresh', and a 'Count' field. The 'Linked Records' section has a 'Filter By' dropdown menu set to 'Email' and a 'Refresh' button, both highlighted with a red box. Below the dropdown is a table with columns: Subject, To, From, Date Sent, Date Received. The table is empty and contains the text 'Click to Refresh'. At the bottom right of the table area, there is a 'Count 0' label and a small button with three dots.

- c. Highlight the email you want to reply to.
- d. Click **Reply To Email**. A new email is created that contains the customer's email address and the content of their email.

Once the email has been created, enter additional information, add attachments, use the spell checker and then click **Send**.

## Accessing file attachments

When a customer sends you file attachments by email, the *Attachments* check box on the *Problem/Solution* tab is automatically selected.

The screenshot shows the 'Problem Solution' tab selected. The 'Attachments' checkbox is checked and highlighted with a red circle. The case summary text reads 'ProXH battery wont charge'. Other visible elements include 'Product Issue' dropdown, 'Knowledge Base' checkbox, and 'Email Rcvd 2'.

To extract an attachment from the case, do one of the following:

- If there are only one or two attachments,
  - a. Select the *Email / Attachments / Links* tab.
  - b. Click **Refresh**. All the attachments associated with the case appear.

The screenshot shows the 'Email / Attachments / Links' tab selected. The 'Attachments' section displays a table with one file named '022501-061\_Trimble Ranger\_DS\_0705\_k.pdf'. The 'Refresh' button is highlighted with a red circle. Other visible elements include 'Manage Files' and 'Count 1'.

- c. To open an attachment, double-click the file name.
  - d. To save an attachment to your computer, click **Manage Files**. This enables you to Add, Remove, View, or Save individual attachments.
- If there are several attachments,
  - a. Select the *Email / Attachments / Links* tab.
  - b. The *Linked Records* table *Filter By* field defaults to *Email*. Click **Refresh** to view all emails associated with the case.
  - c. Highlight the email that contains the attachments you want to save to your computer.

## The Support Request (SPRT) Form

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- d. Double-click the required email.
- e. Select the *Original Email* tab.

**System Email** [Reply](#)

Ticket Type: Support Request      Email Type\*: Incoming  
Ticket ID: SPRT00000000320      Read Status: Unread  
Contact Name: Tim Brown      Attachments ?  Yes  No

Message | Attachments | **Original Email**

File Name	File Size	Attach Label
[-] Email257...	5 KB	Plain Text ... HTML Content RTF Content Values
[+] Email257...	56 KB	Email

- f. In the pane double-click the file name that has the *Attach Label* column with the value Email. This opens the original email in Outlook Express. You can then save the attachments from the email to your computer.
- If you want to see only the attachments sent in a specific email from the customer do the following:
    - a. Select the *Email / Attachments / Links* tab.
    - b. The *Linked Records* table *Filter By* field defaults to *Email*. Click **Refresh** to view all emails associated with the case.
    - c. Highlight the email that contains the attachments you want.
    - d. Double-click the required email.

- e. Select the *Attachments* tab.

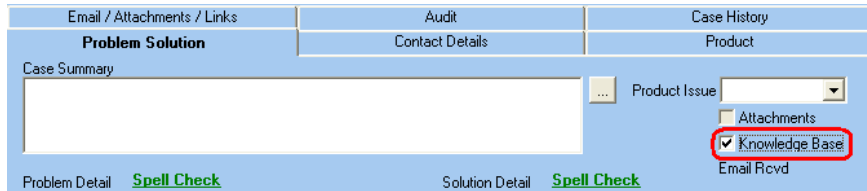
The screenshot displays the 'System Email' interface. At the top right is a 'Reply' link. The main area is divided into two sections. The upper section contains metadata: 'Ticket Type' (Support Request), 'Ticket ID' (SPRT00000000320), 'Contact Name' (Tim Brown), 'Email Type\*' (Incoming), 'Read Status' (Unread), and 'Attachments?' (Yes/No radio buttons). The lower section has three tabs: 'Message', 'Attachments', and 'Original Email'. The 'Attachments' tab is active, showing a table with one row: 'Attachment Name' and 'SP Details.xls'. Below the table are buttons for 'Add New Attachment', 'Remove Attachment', and 'Refresh Table'. At the bottom, there is an 'Existing Attachment' dropdown menu and an 'Add' button.

- f. To open an attachment double-click, the file name.
- g. To save the attachments, select the *Original Email* tab.
- h. In the pane double-click the file name that has the *Attach Label* column with the value Email. This opens the original email in Outlook Express. You can then save the attachments from the email to your computer.

## Flagging a case as a knowledge base item

If a support case you are working on fits the following criteria, select the *Knowledge Base* check box on the *Problem Solution* tab:

- The problem may affect others and it would be suitable to turn into a Support document to be distributed on the Trimble website or directly to Dealers and/or Service Providers
- The *Problem Detail* and *Solution Detail* fields contain enough information to form the basis of a Support document or for another support person to answer a similar case.



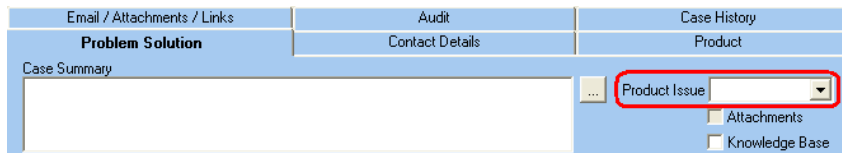
The screenshot shows the 'Problem Solution' tab of the SPRT form. The 'Case Summary' field is empty. The 'Product Issue' dropdown menu is open, and the 'Knowledge Base' checkbox is checked and highlighted with a red box. Other options include 'Attachments' and 'Email Rcvd'. The 'Problem Detail' and 'Solution Detail' fields have 'Spell Check' buttons.

## Flagging a case as product issue

**Note** – This process is not used by the Mapping & GIS Business Unit

If a support case you are working on is suspected of being a bug or a problem, and can be replicated, flag the case as a Product Issue:

1. From the *Problem Solution* tab, select the *Product Issue* drop down list.



The screenshot shows the 'Problem Solution' tab of the SPRT form. The 'Case Summary' field is empty. The 'Product Issue' dropdown menu is open and highlighted with a red box. Other options include 'Attachments' and 'Knowledge Base'.

2. Do one of the following:
  - If you are unsure if it is significant, select *Potential*
  - If you are certain you have discovered a significant problem, select *Yes*.



The Global support team will review the issue and create a Product Issue if appropriate.



**Tip** – For more details on the Product Issue process see the [Product Issue Process section](#).

## Closing a case

Once you complete a case or provide your customer with a solution that you believe will resolve their issue, close the case. Do this as soon as practical, to ensure reporting of case statistics is accurate.

1. Make sure that all of the following information has been entered:
  - Product Details (minimum of Business Area and Product Line)
  - Contact Details
  - Case Summary, Problem Details and Solution Details
  - Case Type and Reason
  - Assigned to someone
2. Change the *Status* field to *Closed*.

The screenshot shows a dark blue header bar with three fields: 'Request ID' with the value 'SPRT00000000320', 'Case Time' with the value '2:17', and 'Status' with the value 'Closed'. The 'Status' field is highlighted with a red border and a dropdown arrow.

3. Click **Save**.

## Managing duplicate requests

You may have a case where there are multiple requests in Remedy from the same customer on the same topic.



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**WARNING** – Do not reject duplicate cases, because this deletes them. Communication from a customer to a deleted case is unlikely to get to the correct support person.

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All requests, including the duplicates, must be assigned to the same person. If a customer responds to the wrong request the support person handling the case will still get the notification email.

To manage these duplicate requests so that no communication is lost with the customer:

1. Assign all support requests to yourself.
2. Nominate one request as the master request.
3. For each of the duplicate requests do the following:
  - a. Note the ticket ID.
  - b. Complete the Product details (minimum of Business Area and Product Line) & Contact details
  - c. For the *Case Summary*, *Problem Details* and *Solution Details* enter *Duplicate*
  - d. For the case *Type* select *Duplicate*.
  - e. For the case *Reason* select *Multiple Requests*.
  - f. Assign the case to yourself.
  - g. Set the *Status* to *Closed*.
  - h. Save the case.
4. From the master request, click **Link Tickets** in the Main Menu to link each of the duplicate tickets to the master request.
5. Respond to the customer from the master request and tell them to use this request for all future correspondence.

## Handling emails to closed RQSTs

As part of the transition from the RQST tickets to SPRT tickets, when an RQST has been closed, you will no longer be able to modify it. If a customer sends an email to a closed RQST, the support person assigned to the ticket will receive the following email:

**RQST00000xxxxxx is Closed. Please create a new SPRT record and Link the RQST and SPRT if any additional work needs to be completed.**

If additional correspondence with the customer is required, create a new SPRT ticket and link it to the original RQST. Inform the customer that all new correspondence should include the new SPRT number.

# Handing a Support Case to Another Group

You may need to hand a support case to another group or to create a different ticket type ( for example, an RMA, SWO, or RFC) for another group to handle. The most common actions are listed below:

## Assigning a support case back to the support inbox

If you have assigned yourself a case and then need to assign it back to the Support inbox for someone else to pick up, do the following:

1. In the static window set the *Status* to *Open*.



2. Click **Save**.

## Assigning a support case to a group, Business Area or region

If a support case has been assigned to the incorrect group, Business Area, or region, do one of the following to reassign the case:

1. Double-click the case in the case list.
2. In the static window, set the *Assigned Group* field to the appropriate group, if required.

<b>Product Line</b>	PROXH	<b>Submission Date</b>	30 Aug 2005 2:11:33 p.m.
Type	Product Failure - Hardware	Priority	Low
Reason	Battery	Company Name +	XYZ Company
Assigned Group	Support	Full Name	Tim Brown
Sub Group		Phone	643-963-5521
Assigned To	Tim Brown	Region	Americas

3. In the static window, set the *Region* to the appropriate region if required. Alternatively, you can set this in the *Contact Details* tab.
4. In the *Product* tab, set the *Business Area* to the appropriate Business area, if required. If you know additional information about the product, you can enter this in the *Product* tab.

Email / Attachments / Links	Audit	Case History
Problem Solution	Contact Details	Product
<a href="#">Clear Product Details</a>		
Product Family	Business Area	TFS - GIS
Product Line	Supplier	
Product Part Number +	Serial Number +	
Part Description	<a href="#">Check For OSD</a>	<a href="#">Non-Serialized</a> <a href="#">Unknown</a>

## Handing a Support Case to Another Group

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When assigning a support case to a group, use the following group definitions as a guide.

Assign to Group	Tasks
Logistics	Shipping, Mis-shipments, returns, RMA, DOA, P/N enquiries, P/N availability, advising stock levels
Sales	Finished goods sales order administration, Sales Leads
Service	Service Support, Service Administration (Service Parts & Tools Orders) DWCR and SWO are handled from their own specific forms.
Support	Technical Support
Support Sales	Extended warranties, product registration, update mail-outs, issuing codes
Support Systems	Remedy, SharePoint, Customer & Product Registration System, Database management, DocuShare, Partners Website, Trimble Store (istore), Dealer locator, trimble.com website, support.trimble.com website.
Training	Training administration, organization and delivery (including Service Training), Breeze Account Requests

---

## Assigning a support case to someone else

Assign a support case to someone else only if you know they are able to work on it. If you are not sure, you must contact them first. To assign a support case to someone else do the following:

1. In the static window, set the *Assigned To* field to the name of the person you are assigning the case to. You may need to change the *Assigned Group* if they are not listed in the group you select.

<b>Product Line</b>	PRDXH	<b>Submission Date</b>	30 Aug 2005 2:11:33 p.m.
Type	Product Failure - Hardware	Priority	Low
Reason	Battery	Company Name +	XYZ Company
? Assigned Group	Support	Full Name	Tim Brown
Sub Group		Phone	643-963-5521
± Assigned To	Tim Brown	Region	Americas

2. Click **Save**.

# Creating an RMA (Return Material Authorisation) from a Support Case

If an RMA is required to be created this can be done from within the support case. To create an RMA do the following:

1. The following information has to be entered before creating the RMA:
  - Product Details (must include *Part number* and *Serial Number* if it is a serialized item.)
  - Contact Details
  - Case Summary, Problem Details and Solution Details (must include what the reason for the RMA is and action required)
2. In the Main Menu, set the *Ticket Type* to *RMA*.
3. Click on the **Create** link to create a new RMA from the Support case. Information from the Support case will be pulled into the RMA.
4. Complete the RMA details and click the **Save** button.

**Note** – *Create an RMA only if you understand how to complete the RMA form. Otherwise, change the support case Assigned Group to Logistics. Make sure that you enter clear instructions into the case so that Logistics know exactly what is required to process the RMA.*



# Creating an SWO (Service Work Order) from a Support Case

If an SWO is required to be created this can be done from within the support case. To create an SWO do the following:

1. The following information has to be entered before creating the SWO:
  - Product Details (must include *Part number* and *Serial Number* if it is a serialized item)
  - Contact Details
  - Case Summary, Problem Details and Solution Details (must include what the reason for the SWO is and action required)
2. From the menu on the left hand side set the *Ticket Type* to *SWO*.
3. Click on the **Create** link to create a new SWO from the Support case. Information from the Support case will be pulled into the SWO.
4. Complete the SWO details and click the **Save** button.

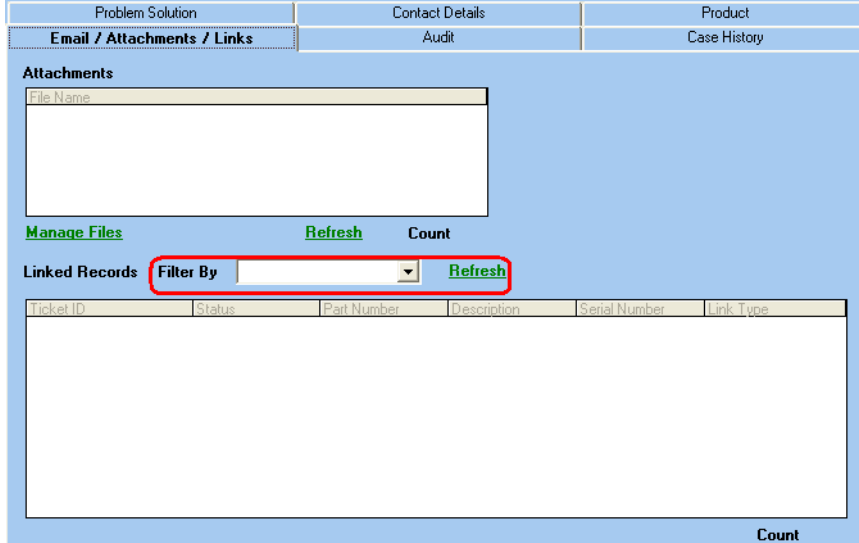
**Note** – *Create an SWO only if you understand how to complete the SWO form. Otherwise, change the support case Assigned Group to Service. Make sure that you enter clear instructions into the case so that Service know exactly what is required to process the SWO.*

# Ticket Linking

If you create an RMA, SWO, DWCR or other ticket type from a support request this is automatically linked to the support request. You can also manually link a support request to another ticket. The following instructions relate to working with linked tickets.

## Checking which tickets are linked to a support case

1. From within the support request, select the *Email / Attachments / Links* tab.
2. From the *Linked Records* table, set the *Filter By* field to *All (Except Email)*. Click **Refresh** to view all tickets associated with the case.



3. To open a ticket, double-click it.

## Creating a link between two Support Cases

You may need to link two support cases together for one of the following reasons:

- You receive duplicate support requests from the same person.
- You have a number of support requests that are similar and you want to make them easier to manage.

To create a link between two support cases do the following:

1. Take note of the support request ticket ID that you want to link to.
2. From within the support request you want to link *from*, click **Link Tickets** in the Main Menu.
3. In the *Ticket is a* field, select *Support Request*.

Record Linking (cerberus)

Set a specific ticket to search for by selecting the ticket type then providing the Ticket ID.

Ticket is a  Ticket ID is  [Find Ticket ID](#)

Or Set Search Criteria by selecting the Record Type you are searching for, then providing 1 or more field values to search on.

Record Type to Link to:

Business Area:  Product Line:

Part Number:  Product Family:

Company Name:  Status:

Details:  Product Issue Type:

Date Opened:   Contact Report Type:

Results

Note: Double Clicking an item from the Results window will open the record and close the Record Linking form.

Product Issue ID	Status	Summary	Part Number	Description	Type	Trouble Maker

Matching Records 0

4. In the *Ticket ID is* field, enter the support request ticket ID (only the number is required).

5. Click **Find Ticket ID**.
6. The support request appears in the *Results* table. Highlight the ticket and then click **Link**. This links the selected ticket to the current ticket.

*Note* – You can use the above process to link support cases to other ticket types.

## Removing an incorrect link between two support cases

You can only unlink tickets that have been manually linked. Tickets that are created from within another ticket have links automatically created between them. You can not unlink these tickets.

1. From within the support request, select the *Email / Attachments / Links* tab.
2. From the *Linked Records* table, set the *Filter By* field to *All (Except Email)*. Click **Refresh** to view all tickets associated with the case.
3. Highlight the support case you want to unlink and then click **Unlink**.

*Note* – You can use the above process to unlink support cases from other ticket types.

# Appendix

## Customer Product Issue (ISSUE) Process

Customer Product Issue (ISSUE) is a “Contact Form” replacement, and has been in use since January 2004. ISSUE is a Remedy form used as a vehicle for escalating both perceived and real problems with a product or service from Technical Support to QA and Service Technologies groups.

Even though ISSUE can be created from scratch, it usually starts as an SPRT.

Based on either customer request or Technical Support judgement, from Problem Solution tab, SPRT can be flagged as either:

- *Product Issue = Potential*
- Product Issue = Yes.

If a Support Technician suspects that the problem has deeper roots than an ordinary support issue, SPRT should be flagged as *Product Issue = Potential*. All SPRTs flagged as such will be reviewed by the Global TSS group once a week, and a call will be made to either reject them or re-flag them as *Product Issue = Yes*.

Email / Attachments / Links	Audit	Case History
<b>Problem Solution</b>	Contact Details	Product
Case Summary This is content of case Summary field		<input type="checkbox"/> Attachments <input type="checkbox"/> Knowledge Base

Product Issue: Potential

If a customer requests, or if a Support Technician knows of multiple SPRTs with the same problem, or can replicate a problem but can not find a solution, SPRT can be immediately flagged as *Product Issue = Yes*.

The screenshot shows a software interface with a blue header and a white content area. The header has three tabs: 'Email / Attachments / Links', 'Audit', and 'Case History'. Below the header, there are two sub-tabs: 'Problem Solution' (selected) and 'Product'. The 'Problem Solution' sub-tab contains a 'Case Summary' field with the text 'This is content of case Summary field'. To the right of the 'Case Summary' field is a 'Product Issue' dropdown menu set to 'Yes'. Below the dropdown menu are two checkboxes: 'Attachments' and 'Knowledge Base', both of which are unchecked.

QA and Service Technologies groups review SPRTs flagged as *Product Issue = Yes* once a day. Based on their findings, they can do one of the following:

### Reject the flag

The SPRT owner receives an email advising that the problem described in SPRT does not constitute an ISSUE. In this case, manually change the *Product Issue = Yes* flag to *Product Issue = Rejected*

### Create an ISSUE

If a problem justifies opening an ISSUE, the SPRT owner receives an email advising that ISSUE0000xxxx has been created and who is the owner of the ISSUE.

### SPRT is linked to the ISSUE

Once the problem is resolved by the ISSUE owner, the SPRT owner will be notified of the resolution. The SPRT owner then notifies the customer who submitted the originating SPRT. The loop is closed.

### Using ISSUE forms as a support tool

Tech Support can search all ISSUE forms currently existing in Remedy.

## Case Types and Case Reasons

The available *Type Case* and their associated *Type Reason* options available on the support form are shown below. A case can have more than one *ISSUE*, so select the *Case Reason* and *Case Type* that best fit the most dominant problem.

<b>Type Case</b>	<b>Associated Type Reason</b>
Duplicate	Multiple Requests
Enhancement Request	Improvement to Existing New Functionality
Logistics (or Sale Order)	DOA/OOBF request Finished Goods Order Pricing Inquiry Sales Order Inquiry Service Parts Order
On-site Support	Scheduled Troubleshooting Unscheduled
Partners Website	Account Request Content Issue Login Issue

Type Case	Associated Type Reason
Product Failure - Hardware	Antenna Battery Battery Charger Bluetooth Cable / Harness / Hose Drive / Motor EDM External Radio GSM Phone Housing I/O Ports Infra Red (IR) Internal Radio Keyboard / Button Laser Beam Lights (LED) Network On Machine Sensor Optics PCB Screen Display Tracker Transport Case Unidentified WiFi
Product Failure - SW / FW	Corrupt Data Data Conversion Data Import / Export Data Upload / Download Installation Error SW / FW Issue



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<b>Type Case</b>	<b>Associated Type Reason</b>
Product Registration System	Change Contact Details Data Validation Incorrect registration Login Password Request Product Registered to Another User System Failure Update / Reissue Install Code User Understanding
Sales Lead	Marine Demo CD Sales Enquiry Terramodel Demo CD
Training	Breeze Access Problem Breeze Account Request CT Evaluations / Rosters CT Program Inquiry Customer Training Inquiry
Undefined	Undefined
User Understanding - Hardware	Interface to 3rd Party Product Operation Setup and Configuration

<b>Type Case</b>	<b>Associated Type Reason</b>
User Understanding - SW / FW	3rd Party Data Formats CAD Coordinate Systems Data Collection Data Processing Import / Export Installation Reporting Roading Setup and configuration Site / DTM
Warranty / Part Number Inquiry	Code Generation Request Expired Warranty Period Part Number Inquiry - Sales Part Part Number Inquiry - Service Part Procedure Inquiry Update / Reissue Code Warranty Certificate Request Warranty Inquiry