

Supporting Customers with Web Portal: *Managing Success with Incidents (Trouble Tickets)*

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xTuple HQ
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Two Faces of CRM Incidents

- ▶ xTuple Client

- ▶ Internal Facing
- ▶ Company Only
- ▶ Work Flow Management

- ▶ Web Portal

- ▶ Public Facing
- ▶ Customer Experience
- ▶ Self-service Portal



xTuple Client

The image displays two screenshots of the xTuple ERP system. The top screenshot shows the desktop interface for 'Corporate Relationship Management' with a list of incidents and a detailed view for incident #20135. The bottom screenshot shows a mobile app view of the same incident.

Desktop Interface - Incident List:

Number	Created	Account	Status	Updated	Assigned To	Owner	Summary
20975	7/31/13						
21031	8/7/13						
21032	8/7/13						
21173	8/16/13						
21186	8/19/13						
21260	8/22/13						
20934	8/22/13						
20935	7/25/13						
20948	7/29/13						
20967	7/31/13						
20976	7/31/13						
20980	8/1/13						
21017	8/6/13						
21018	8/6/13						
21041	8/8/13						
21106	8/13/13						
21185	8/19/13						
21208	8/20/13						
21255	8/21/13						
21256	8/21/13						
20986	8/1/13						
20987	8/5/13						
20988	8/2/13						
21000	8/5/13						
21001	8/5/13						
21012	8/6/13						
21013	8/6/13						
21021	8/6/13						
21022	8/6/13						
21023	8/6/13						
21024	8/6/13						
21025	8/6/13						
21028	8/7/13						
21038	8/7/13						
21040	8/7/13						
21046	8/7/13						
21058	8/8/13						
21095	8/13/13						
21142	8/15/13						
21215	8/20/13						

Desktop Interface - Incident #20135 Details:

Incident #: 20135
Description: VAT improvement
Category: Features
Status: Confirmed
Severity: [dropdown]
Priority: [dropdown]
Resolution: [dropdown]

CRM Account: READYTECH (Ready Technology (UK) Limited)
Owner: dcsint (Alta du Toit)
Assigned To: [dropdown]

Contact: Daniel Pocock
Phone: [dropdown]
Alternate: [dropdown]
Email: daniel@pocock.com.au
Web: [dropdown]

Project: [dropdown]

VAT support should be identical for most European countries and appeal to many users
Expanded VAT localization - forms for UK, EU, CA, AU

Mobile App View - Incident #20135 - VAT improvement:

OVERVIEW

- Number: 20135
- Description: VAT improvement
- Public:
- Account: READYTECH (Ready Technology (UK) Lims)
- Contact: Daniel Pocock (daniel@pocock.com.au)
- Category: Features

STATUS

- Status: Confirmed
- Priority: None

HISTORY

- desant: Incident Added (4/21/2013)
- schurch: Characteristic Kickstart Added "True" (4/22/2013)
- plyler: Status Changed: New -> Confirmed (4/23/2013)
- ned: Description Updated: "VAT support should b..." -> "VAT su..." (6/28/2013)
- jrpegnat: Characteristic Time Estimate Added "???" (7/1/2013)

COMMENTS

- 4/21/2013 2:32 PM dcsint Comment: This was suggested on 3/22/2013 and commented on under the kickstart project.
- pocock: VAT support should be identical for most European countries and appeal to many users. ned commented: Re: VAT, what exactly are you looking for that's not there currently? We are working on some dedicated documentation around this functionality, but it's certainly in use around the world today. Here is a link to the original spec for the work that was implemented: <http://www.xtuple.org/EnhancedTaxInternationalization>
- pocock replied: I can see that there is a lot of flexibility in the system, but what smaller users expect is something that "just works" very quickly. In practice, this would probably mean that there would be some setup wizard where they choose their country and it pre-configures all the VAT rates and necessary reports. For the UK authorities (HMRC), there is a standard VAT reporting form with 9 boxes. All the basic accounting software packages have the ability to print a report matching those boxes. Australia's GST is extremely similar. I've just installed PostBooks yesterday. I found the...



WORLD'S #1 OPEN SOURCE ERP

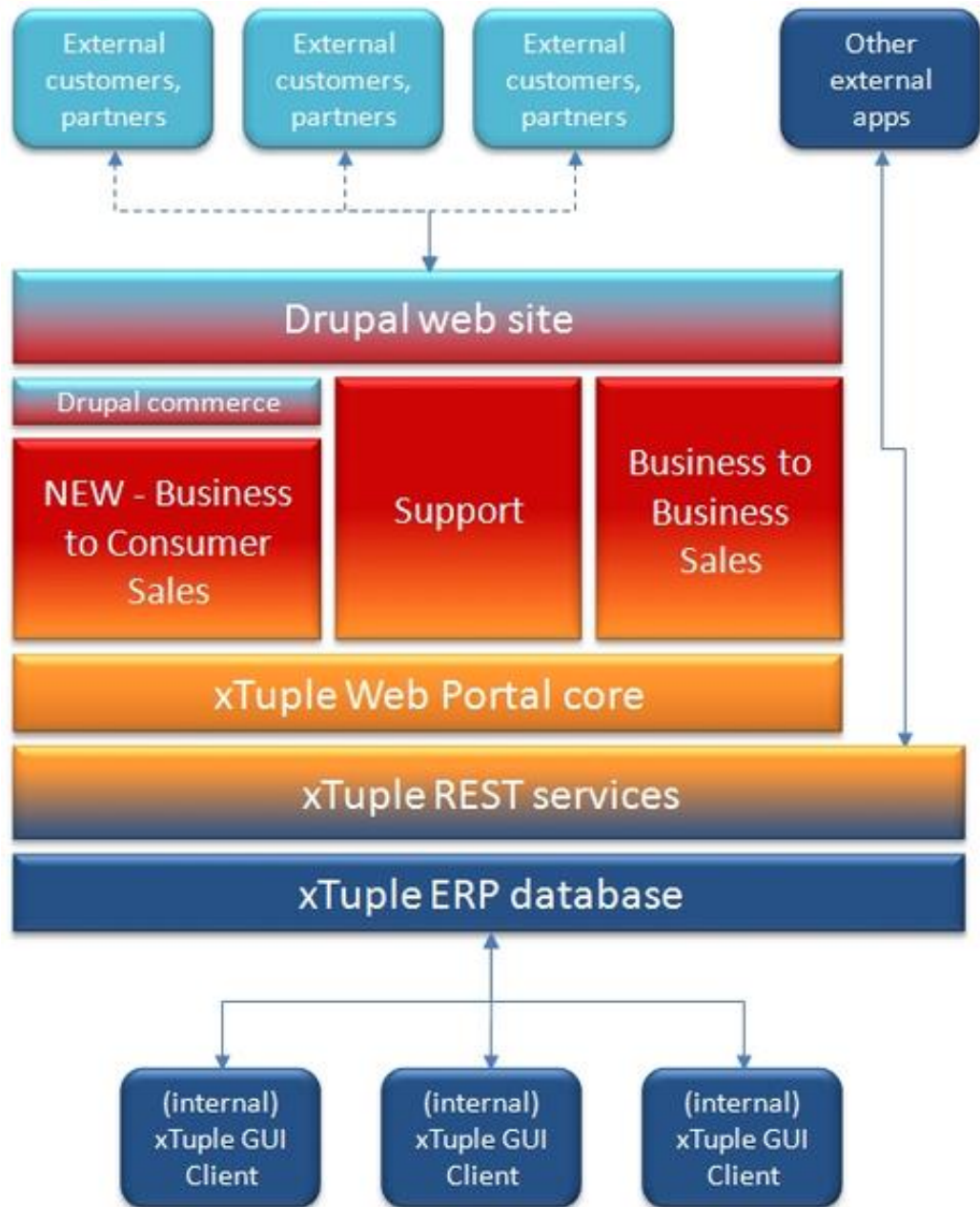
www.xTuple.com

xTuple Web Portal

- ▶ Manage Customer Success
- ▶ Promote Self Service
- ▶ Increase Your Accountability



Architecture Overview





Collaborate with Customers



Q & A



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