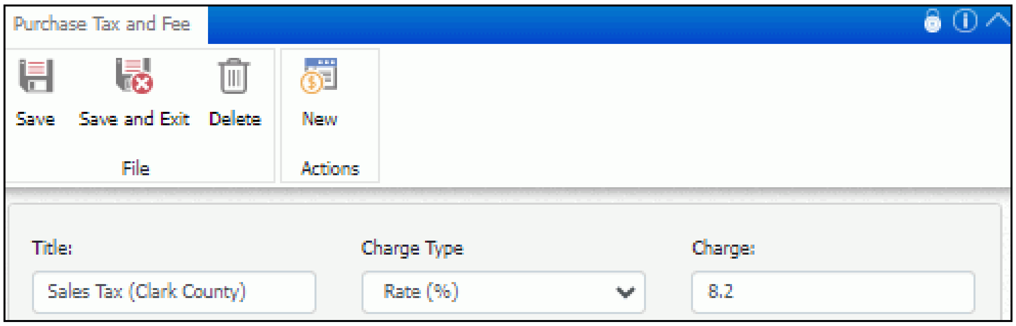
Using the iSupport® Tax, Product, and Purchase Screens

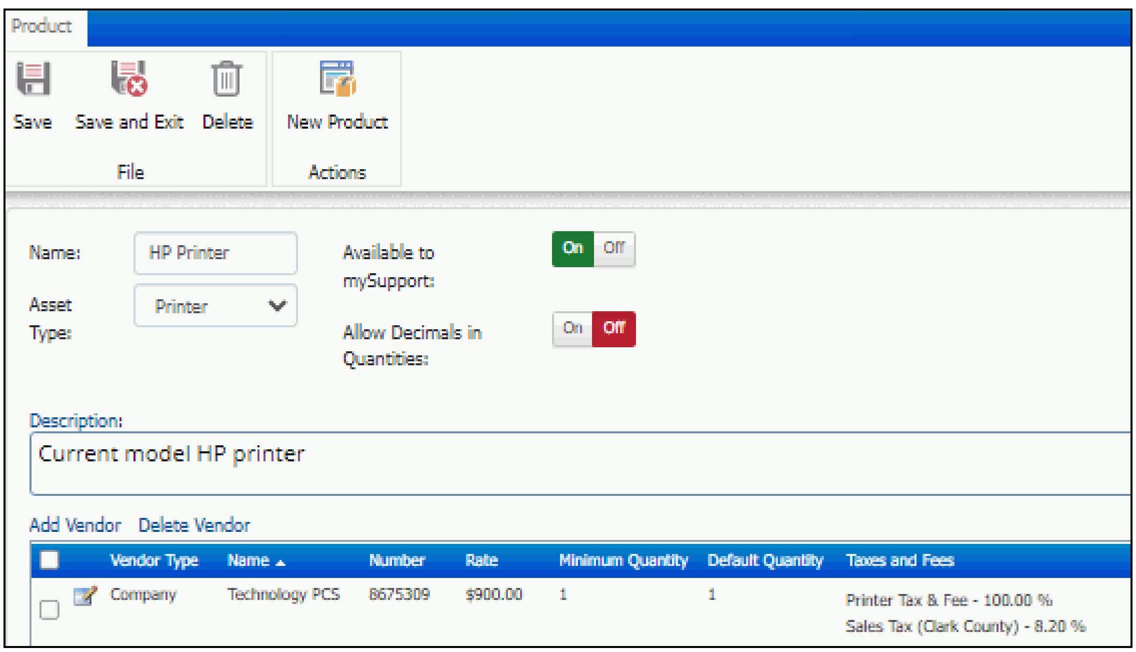
Using the Purchase Tax and Fee Screen

If applicable, use the Purchase Tax and Fee option on the Desktop Create menu to create Tax and Fee records for use in Product records, and ultimately, in purchase requests. You can set the charge type as a rate percentage, a per line item charge, or a per order charge (same fee charged regardless of the quantity specified for a line item).



Using the Product Screen

Use the Product screen to create Product records for use in purchase requests. To access the Product entry screen, select Product on the Desktop Create menu. (This option appears if you have permission in your Support Representative Profile record.)



Name - Enter the name of the product. This name will appear for selection in the Purchase Request screen.

Asset Type - Select the predefined asset type that applies to the product. Count tracking can be enabled for asset types; this will cause Unit Count, Unit Label, Unit Cost, and Unit List Price fields to appear in the Asset screen if the type is selected. If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Available to mySupport - Select to enable the product to be available for selection for purchase requests submitted via the mySupport portal.

Allow Decimals in Quantities - Select to enable users to enter a decimal point in the Quantity field in the Purchase Request screen.

Description - Enter a description for the product.

Adding Vendors

Select the Add Vendor link to create a list of vendors that can be selected for the product in the Purchase Request screen. You'll select customers, companies, and support representatives that have been designated as vendors, and enter a rate to appear by default in the Purchase Request screen. The rate will be multiplied by the quantity entered in the Purchase Request screen.

Vendor Type - Select the type of vendor: support representative, customer, or company.

Name - Select a support representative, customer, or company for the product. Support representatives are designated as vendors in the Support Representative Profile screen, customers are designated in the Customer Profile screen, and companies are designated in the Company screen.

Number - Enter a number (free text) identifying the line item.

Rate - Enter the cost to be multiplied by the entry in the Quantity field in the Purchase Request screen; the result will be included in the Amount field for the purchase request line item.

Minimum Quantity - Enter the minimum amount to be used for validation of the ordered quantity for a line item when it is added to a purchase request.

Default Quantity - Enter the amount to automatically populate the ordered quantity for a line item when it is added to a purchase request.

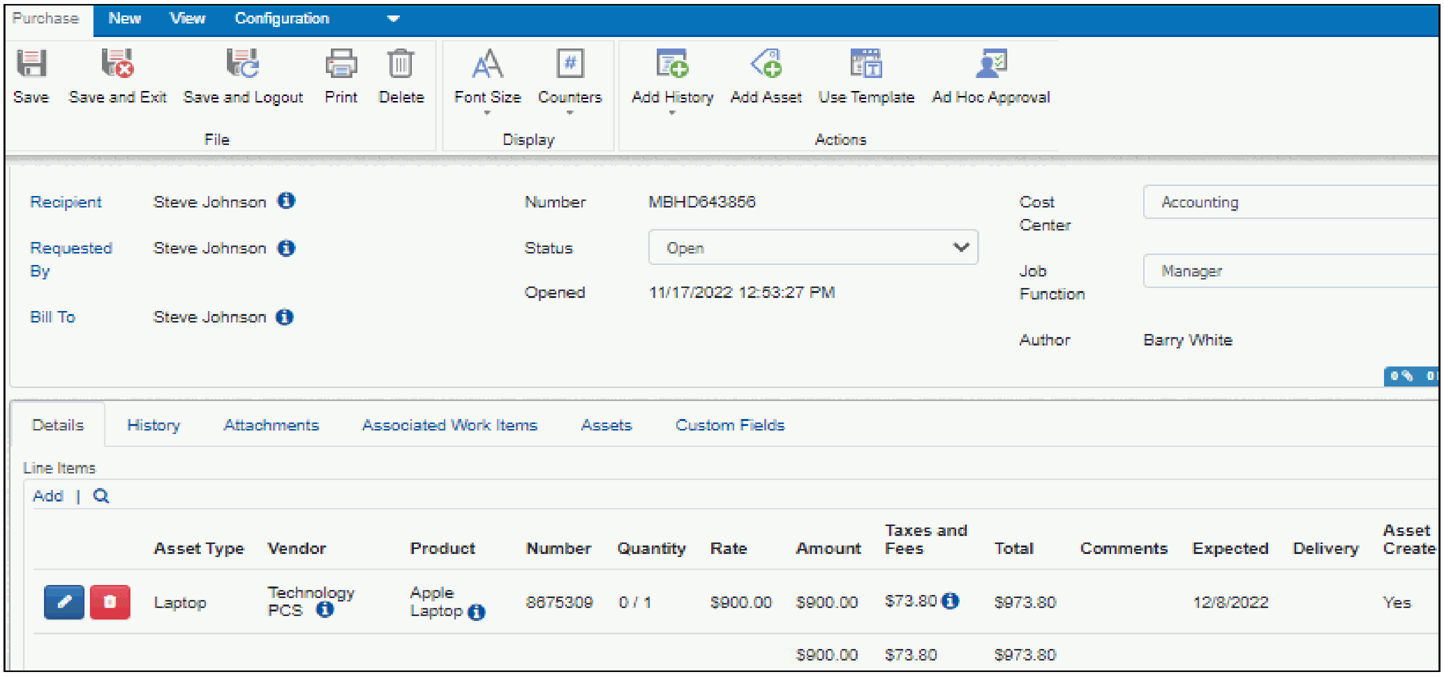
Taxes and Fees - Select the applicable tax and/or fee for the line item. These are set up in the Purchase Tax and Fee screen; the charge type can be a rate percentage, a per line item charge, or a per order charge (same fee charged regardless of the quantity specified for a line item).

Using the Purchase Request Screen

Purchasing functionality can be controlled via approval cycles and support representative permissions, and can include work history charges, custom fields, attachments, and cost center and job function fields for reporting. Asset records can be created from purchase orders when items are received. You can create templates for frequent purchase requests.

Note: The fields and layout in the Purchase Request screen are set up in the Configuration module. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration. The following sections contain information on **all** purchasing functionality.

An example of the Purchase Request screen is shown below; complete the following fields on the Details tab.



Recipient - Select a customer or support representative who will receive the products on the purchase request. If a cost center (and job function if configured) is associated with a customer or company in his/her Customer Profile record, it will appear in the Cost Center and Job Function fields.

Requested By - Select the customer or support representative who requested the products on the purchase request. Purchase order event notifications may be configured to be sent to the person selected in this field.

Bill To - Select the customer or support representative to be billed for the purchase request. Purchase order event notifications may be configured to be sent to the person selected in this field.

<custom number label> - A custom number field may be configured; the number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. If configured, the field may be read-only after you enter the number and save the record.

Status - Select the status of the purchase request: Open or Closed. Custom labels can be configured for the Open and Closed status levels.

Request Number - Enter a number for the purchase request.

Cost Center - If cost centers have been defined in the Configuration module, select a cost center for the purchase request.

Job Function - If job functions have been defined in the Configuration module, select a job function for the purchase request.

Short Description - Enter a description of the purchase request.

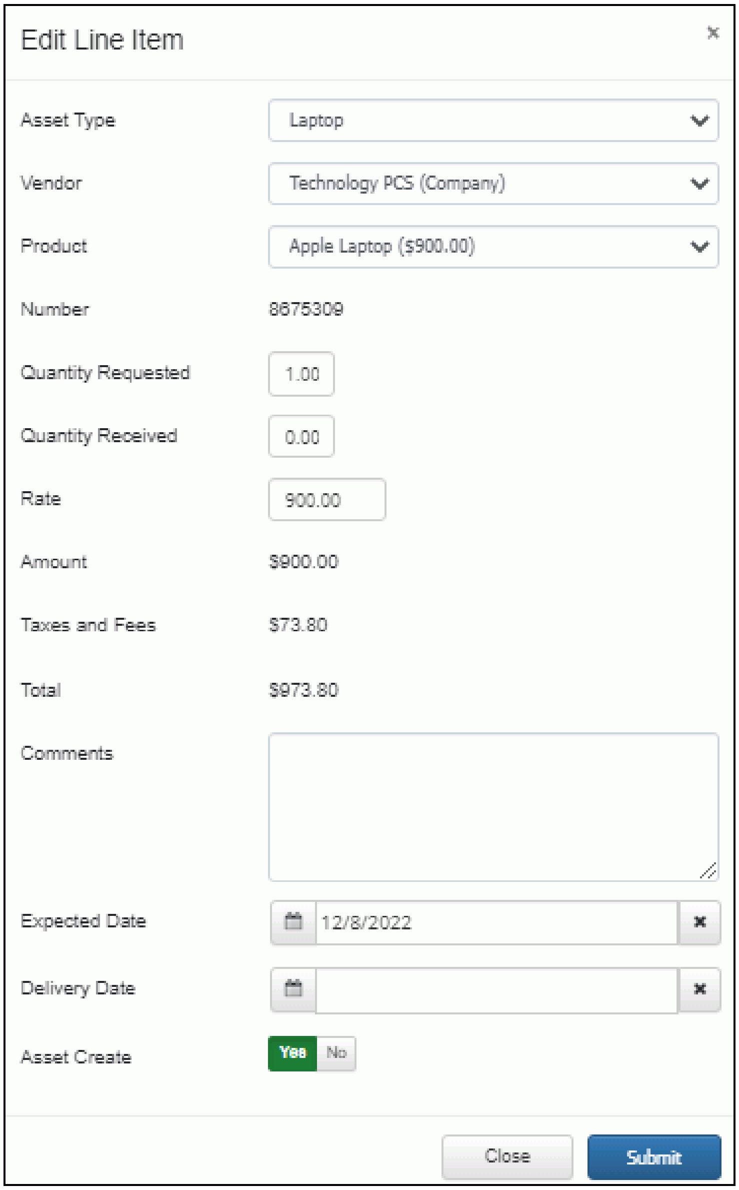
Comments - Enter any additional information regarding the purchase request.

Entering Line Items

Predefined asset types with associated vendors and products appear in the product treeview on the left drag applicable product(s) to the frame on the right for inclusion as a purchase request line item. Vendors are associated with products in the Customer Profile, Company, Support Representative, and Product screens.

Count tracking can be enabled for asset types; if a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Select the Add link to add an item to the request and use the following dialog to enter line item specifics.



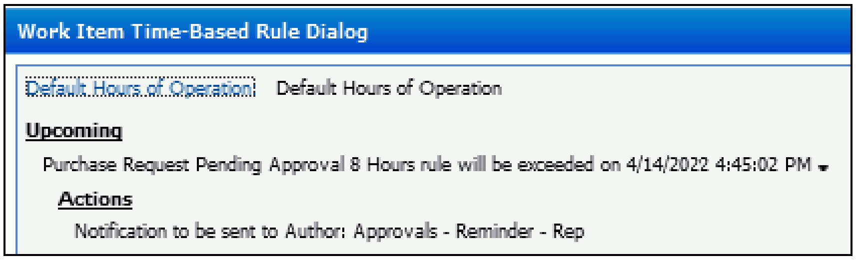
Taxes and fees are set up in the Purchase Tax and Fee screen; the charge type can be a rate percentage, a per line item charge, or a per order charge (same fee charged regardless of the quantity specified for a line item).

In the **Asset Create** field, select Yes to create Asset records when line items are received. If a customer is the recipient on the order and the asset type uses the Owner field, those records will be populated with the customer. A link to the purchase order will be included in the History section of the Asset record and a link to the newly created Asset records will be included in the History section of the purchase order.

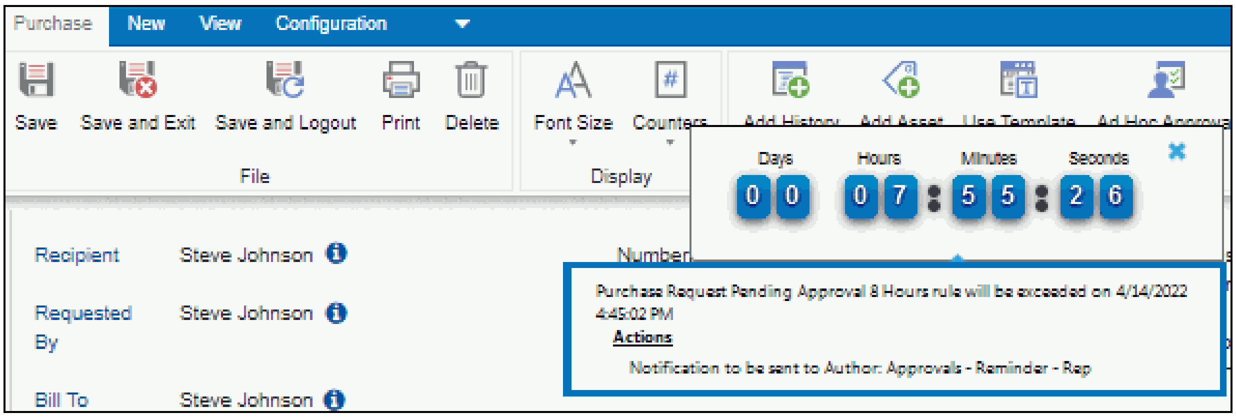
Viewing Rule Information

Rules can be configured to automatically perform actions when conditions are met upon save of a record or after a certain time interval. Actions can include changing purchase request/order field values, sending notifications, initiating an approval cycle, and posting data to a web application. Rules are included in rule groups that are applied to purchase requests through customers, companies, and purchase templates; a default rule group will apply if none are applicable. When a change is saved, the matching rule group is first determined and then all rules in that matching rule group are evaluated. If a rule’s conditions are met, its actions are performed. The online help contains more information on rules.

Select the name of the rule group in the Rule Group field to display the Time-Based Rule dialog with actions that will be and have been taken by any time-based rules in the current rule group. The Hours of Operation link displays the time frames in which the rule group is in effect. Note that entries will include the term "fulfilled" if a rule is invalidated or reset due to a change in rule configuration. Time frames reflect the assignee's support center time zone; the actual action dates and times will depend on execution of the Time-Based Rule agent.



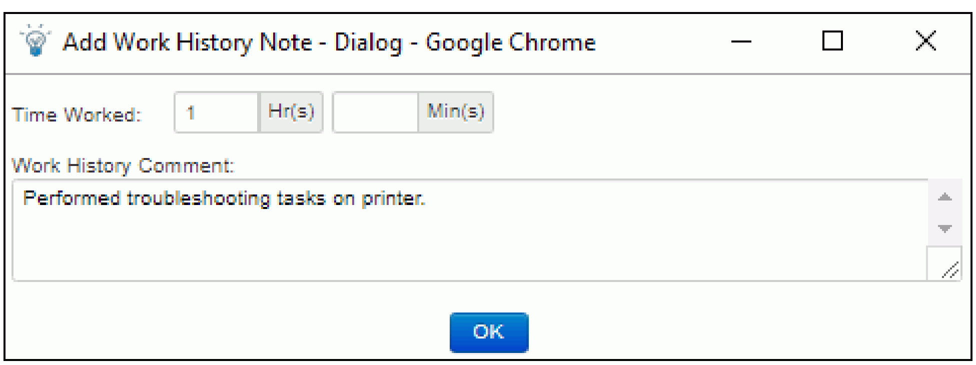
Select Countdown to display a dialog containing a countdown clock in the upper right corner with the time remaining until the next action. If a pending time-based rule has not been exceeded, a blue countdown clock will appear; if the time-based rule has been exceeded, a red countdown clock will and the numbers will increment to display the amount of time that has passed since the time at which the rule was last exceeded. You can use the Show Seconds on Countdown field in the Desktop Preferences screen to control display of the Seconds portion of the countdown clock.



To display all actions that have been performed by rules, use the Rule option in the History field.

Entering and Viewing Work History

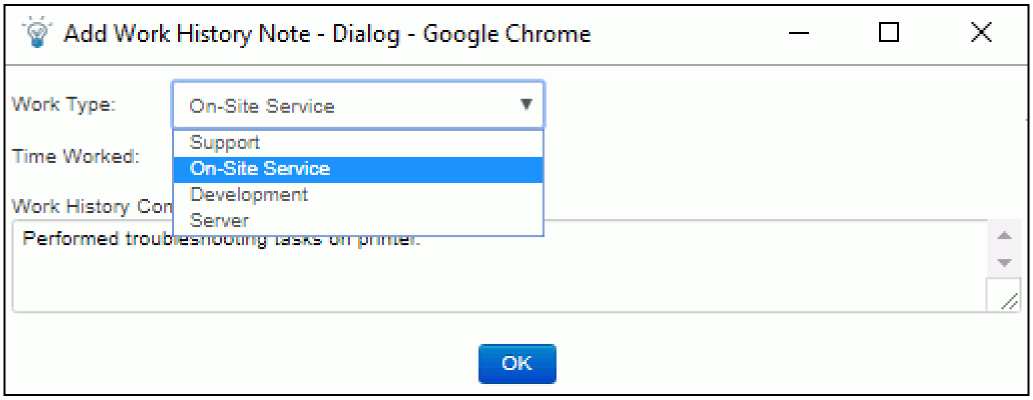
To enter information on any activities related to the purchase request, select Work History or Add History in the History field. For example, you can document customer contacts or conversations with customers or support staff. If configured, you may be required to make an entry in the Time Worked field after entering work history.



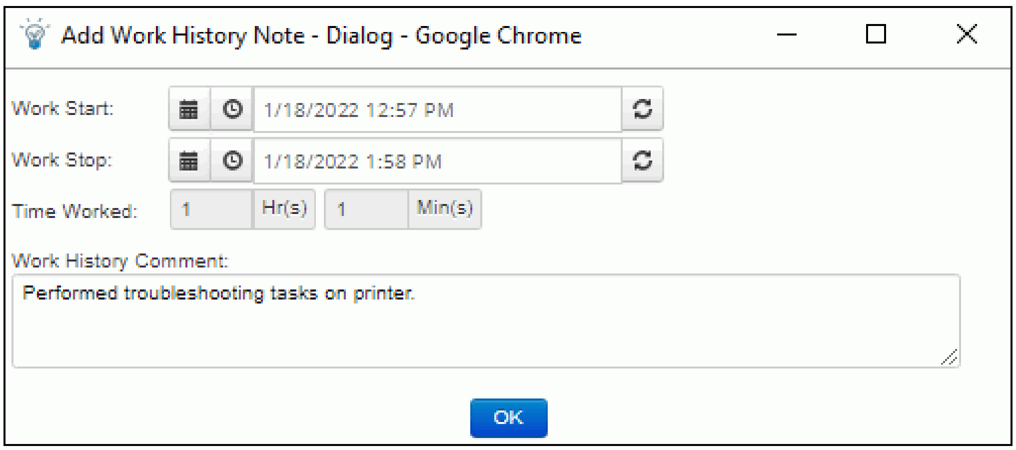
If an hours-based service contract is in effect, you can select the Apply to Service Contract checkbox to apply the amount entered in the Time Worked field to the contract.

The following options may be configured:

- A Work Type field may be included with options for describing the type of worked performed.



- Work Start and Work Stop fields may be included.

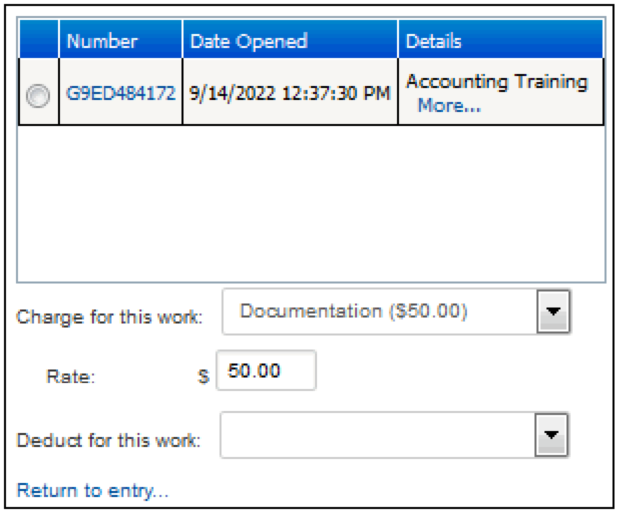


  The Work Start field defaults to the date and time when you load the work item. For example, if you open a new request at 1:00 PM, work with the customer for 30 minutes, and then select the Add Work history option or save and display the Save dialog, the Work Start would be set to 1:00 PM and the Work Stop would be set to 1:30 PM. This Time Worked field would show the 30 minutes of time worked reflected by the gap.

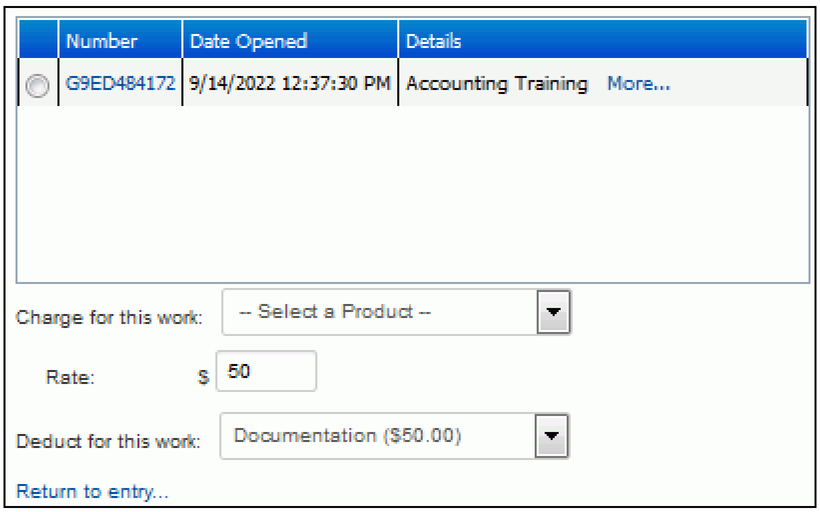
  The Work Stop field defaults to the current time, but there will be at least a one minute gap between the Start and Stop times. You can type directly in the Work Start and Work Stop fields or use the calendar and clock icons to select the date and time; the difference will populate automatically. The refresh icon will set the date and time to the current date and time (but the Work Stop date and time will adjust to be at least one minute past the Work Start date and time).

- A Charge for Work link will appear if you are designated as a vendor in your Support Representative Profile record. You can:
  - **Add a separate line item charge** to the purchase order (increasing the total amount). Choose the product from the selected purchase order in the Charge For This Work field. (Only decimal-enabled products will

appear in this list.) In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog.



- **Use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order. (Only decimal-enabled products will appear in this list.)



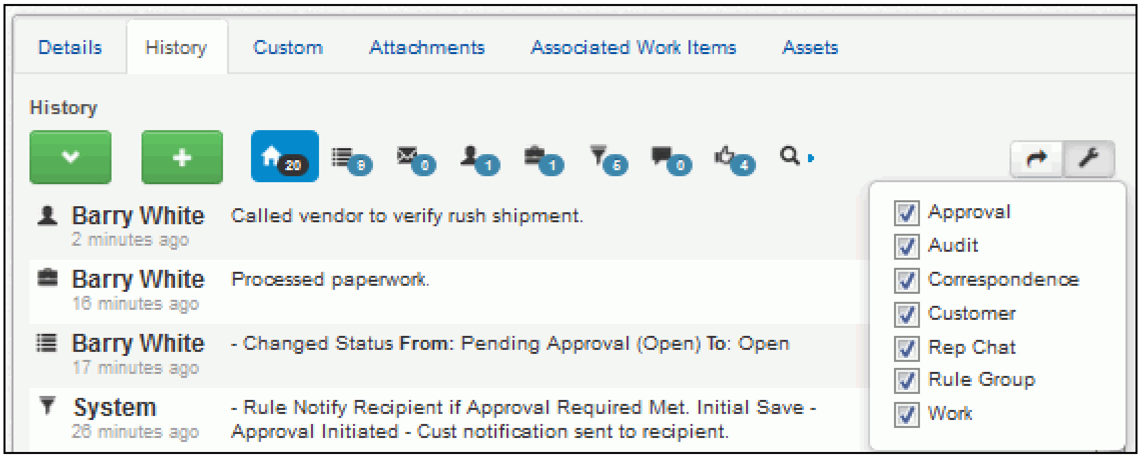
Using the Customer Work History Field

If set up during configuration, the Customer Work History can be can be set up to include editable contents of the Work History field. After selecting OK in the Work History dialog, the Edit Customer Work History Note dialog will appear. Depending on how it is configured, it may be blank for you to enter comments or it may include the contents of the Work History field. You may or may not be able to edit the text. This information will be labeled “Work History” on the mySupport portal purchase request fields.

If configured, Customer Work History notes will be sent to the customer in an email.

Viewing Work History, Customer Work History, and Audit History

Use the History tab to view notations on all purchase request actions.

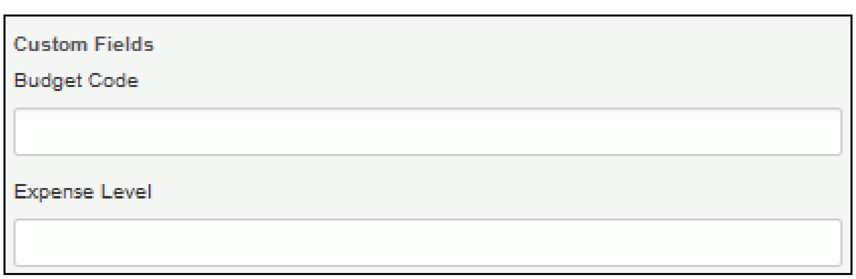


When viewing the History tab, hover over entries with your mouse to filter the view. You can flag work history and correspondence entries via the Mark as Important icon that appears when you hover over those entries with your cursor. Once marked, the icon changes to Unmark as Important for removing the flag.

- The Feed option displays a list of all actions performed on the record; you can filter the content via the Settings icon.
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Work history, chat, and approval entries are not included.
- The Correspondence option displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.
- The Customer option displays customer work history entries (from the Customer Work History dialog that can be configured to appear after the Work History dialog) as well as generic customer audit history entries.
- The Work option displays entries created via Purchase | Add History and Add Work History.
- The Rules option displays actions taken by rules in the rule group when conditions have been met.
- The Chat option displays information on chats initiated via the Awareness feature for the current purchase request.
- The Approvals option displays entries for any approval actions. For more information on approvals, see "Working With Approval Cycles" on page 10.
- The Search option enables you to enter a search string for searching history entries.

Completing Custom Fields

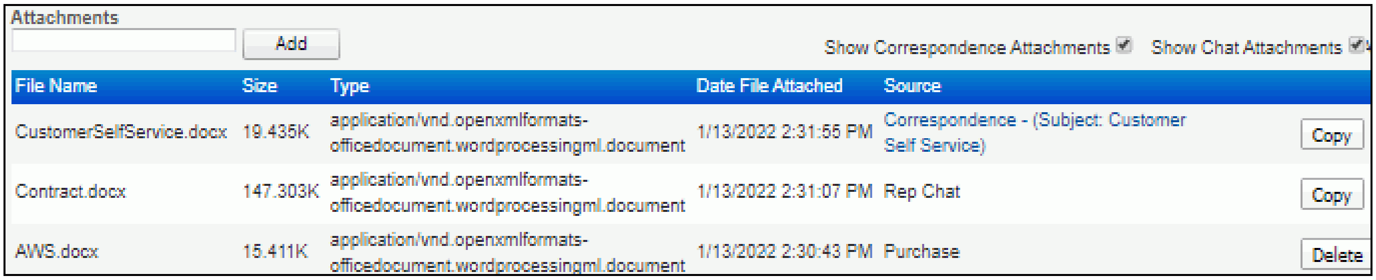
Custom fields may be configured for entering information specific to your company. You may be required to enter information in these fields.



Associating Other Work Items and Files

Attaching Files

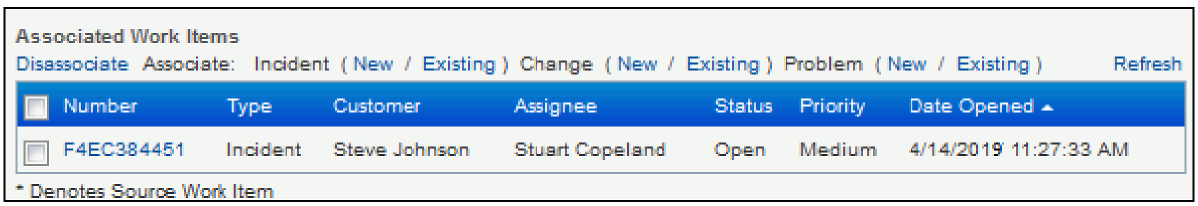
To attach a file to the Purchase Request/Order record, select the Add File button on the Attachments tab and select the file. You can select the Show Correspondence Attachments checkbox to display attachments from all sent or received correspondence (including attachments from any inbound email update) associated with the record. If a chat was initiated while the record was open, use the Show Chat Attachments checkbox to display any files attached during the chat. A Copy button will be included next to correspondence attachments; you can use it to directly associate the attachment to the Purchase Request/Order record.


Attachments
Add
Show Correspondence Attachments Show Chat Attachments

File Name	Size	Type	Date File Attached	Source	
CustomerSelfService.docx	19.435K	application/vnd.openxmlformats-officedocument.wordprocessingml.document	1/13/2022 2:31:55 PM	Correspondence - (Subject: Customer Self Service)	Copy
Contract.docx	147.303K	application/vnd.openxmlformats-officedocument.wordprocessingml.document	1/13/2022 2:31:07 PM	Rep Chat	Copy
AWS.docx	15.411K	application/vnd.openxmlformats-officedocument.wordprocessingml.document	1/13/2022 2:30:43 PM	Purchase	Delete

Associating Incidents, Problems, and Changes

To associate a new or existing Incident, Problem, or Change record (if enabled) with the purchase request, you can use the options on the New menu or the links on the To disassociate an Incident, Problem or Change record, select the record and select the Disassociate link.


Associated Work Items
Disassociate Associate: Incident (New / Existing) Change (New / Existing) Problem (New / Existing) Refresh

Number	Type	Customer	Assignee	Status	Priority	Date Opened
F4EC384451	Incident	Steve Johnson	Stuart Copeland	Open	Medium	4/14/2019 11:27:33 AM

* Denotes Source Work Item

Associating Assets

To associate an existing asset with a purchase request, select Add Asset or the Add link on the Assets tab to display the Select Asset dialog. You can display the customer's assets or all assets. Select the asset(s) related to the purchase request. If the asset has open incidents, problems, or changes associated with it, "Yes" will appear along with the number of open work items. Select the link to display a list of those items.


Assets
Add Remove

Name	Type	Tag Number	Serial Number	Count Used	Unit Label	Unit Cost	Unit Price	Total Cost	Total Price	Open Work Items
SJ Laptop	Laptop	C0293	1092283							Yes (2)

Using Communication Features

Sending an Email From a Purchase Request

To send an email from the Purchase Request screen, select Correspondence.

Using Awareness and Chat Functionality

If configured, the Awareness feature displays Connected Reps and an alert if two or more support representatives have the same record open. You can select it to display the support representative(s) viewing the work item and initiate a chat by selecting their name.

Creating Microsoft Outlook/Google Calendar Meetings

If configured, New Meeting will appear in the Purchase Request screen for scheduling a Microsoft Office Outlook calendar and/or Google Calendar meeting. You can view the schedules of meeting attendees, create a meeting, and configure a notification to be sent to meeting attendees.

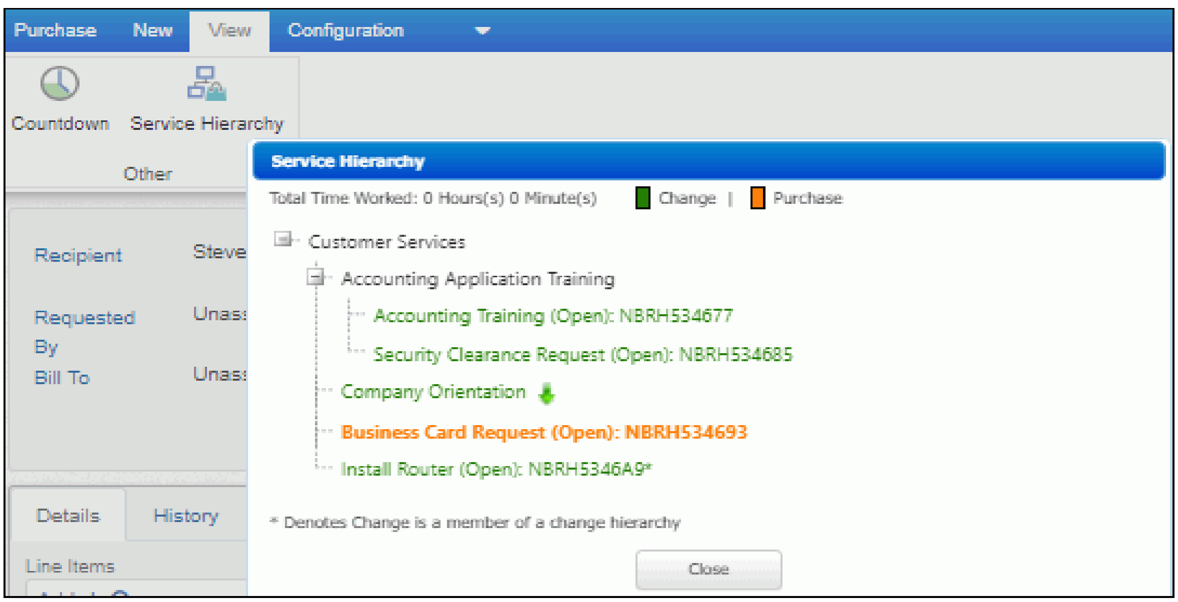
Viewing Purchase Orders Created Via Service Requests

Service Catalog functionality enables customer requests of services, products, policies/procedures, etc. utilizing configured Change and Purchase templates. Requests can be made by support representatives via the Desktop and by customers via the mySupport portal. Note that access to an entire service catalog or individual service catalog entries may be restricted to specific customer and support representative groups.

Service catalogs are entered in the Configuration module; each contains a multi-level list of entries. Entries can contain an associated configuration item, cost, descriptive details, and access to custom fields. A root (top level) entry can also include a header and footer link that can display details. If a purchase template is associated with an entry, the line items from the template will appear as entries.

After a service catalog request is submitted by a customer, a Purchase Order or Change record will be created from the corresponding template and any configuration item specified for the service catalog entry will be associated with it. Custom fields may be completed by the customer or support representative. Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry.

Select View | Service Hierarchy to display all of the selected entries in the service request submission; select a number to open a record.



Items in orange indicate purchase requests; items in green indicate Change records. Any associated cost configured for an entry will be included on the Change or Purchase Order record created from the entry.

The green down arrow icon indicates a closure dependency; the lower level entry must be closed in order for the current entry to be created. A placeholder will appear for an entry with a closure dependency on an open lower level entry. The record will be created from the template placeholder when the lower level record is closed.

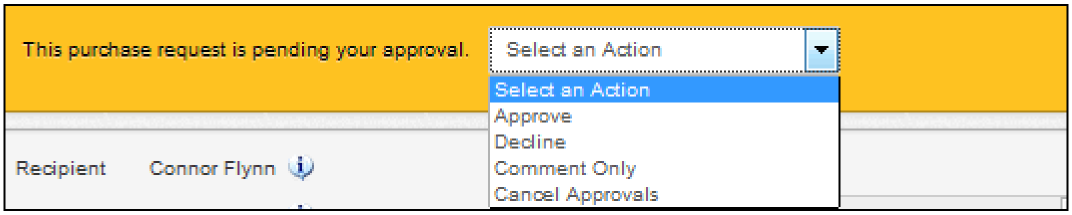
Working With Approval Cycles

Approval cycles require purchase requests to be approved by designated approvers before most functions can be performed. Approval cycles are set up in the Configuration module, configured with serial or concurrent approvers, notifications, and statuses for each stage of the process. Approvers can be support representatives or customers (who specify a verdict via the mySupport portal), and approver delegates can be designated for support representatives and customers. An approval cycle can be associated with a Customer Profile or Company record.

If an approval cycle results in a Decline verdict, no further cycles will apply. If a cycle is completed or cancelled, you can initiate an ad-hoc approval cycle.

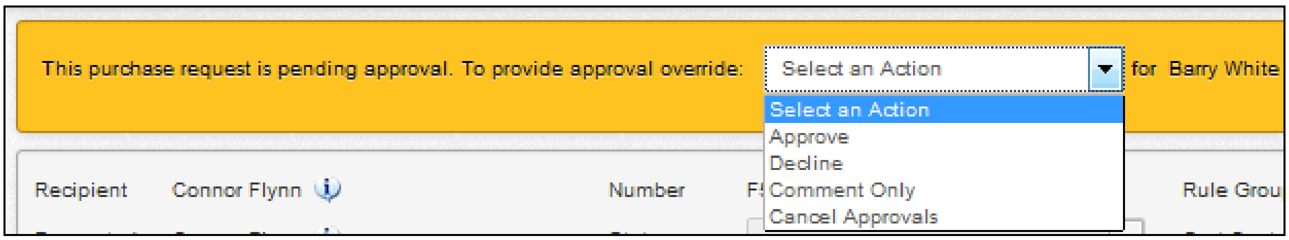
Approval cycles can also be designated as available for you to initiate in the Purchase Request screen on an ad hoc basis if the purchase request is not currently pending approval.

If an approval cycle is in effect, an alert bar will appear at the top of the Purchase Request screen after the purchase request is saved and most of the fields will be disabled. (However, you can send correspondence and update work history.)



Specifying a Verdict

An action dropdown field will appear in the approval alert bar if you are the current approver in the approval cycle or if you have permission to override approvals.



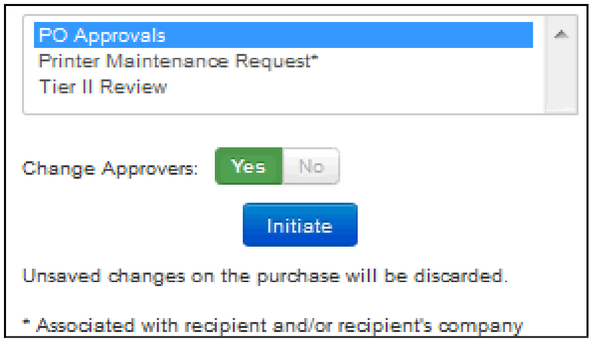
Select one of the following:

- **Approve** to enable the next approver to specify a verdict or, if it is the final approval, complete the cycle.
- **Decline** if you do not wish to enable functionality on the purchase request. An entry will be required in the Comments field. One or more Decline verdicts may be needed to stop the cycle.
- **Comments Only** to enter any comments without approving, declining, or cancelling the cycle. The comments will be included in notifications sent to recipients configured for the approval cycle.
- If you have permissions, you can specify **Cancel Approvals** to cancel the cycle. An entry will be required in the Comments field; the comment will be appended to the text in the Resolution field. An approval cycle can also be cancelled by the customer assigned to the purchase request.

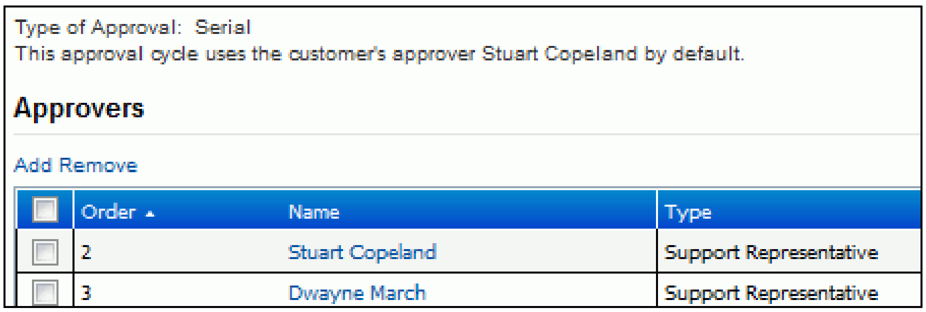
When you specify a verdict, configured notifications will be sent and the status changes to the status designated by the approval cycle if it is a cancellation, final approval, or final decline.

Initiating an Approval Cycle

To initiate an approval cycle in the Purchase Request screen, select Purchase Request | Initiate Ad Hoc Approval after a purchase request has been saved. The following dialog appears with the approval cycles designated as available for ad hoc use. The cycle will be enabled after the Initiate button is selected.

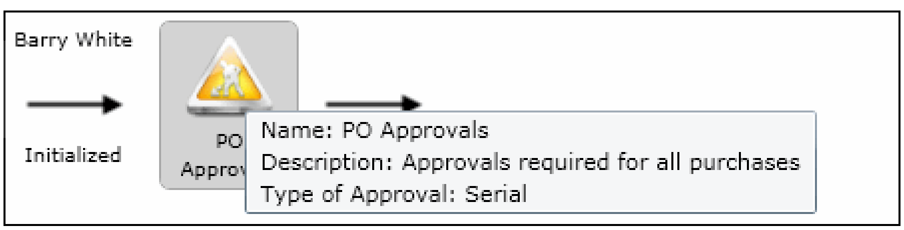


Select the Change Approvers checkbox to display the following dialog for adding or removing the approvers configured for the selected cycle.

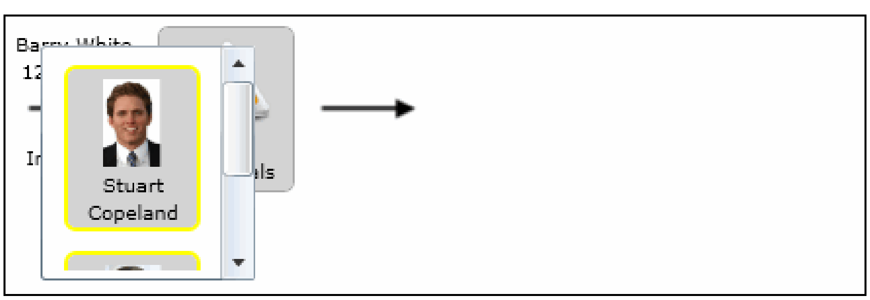


Viewing Approval History

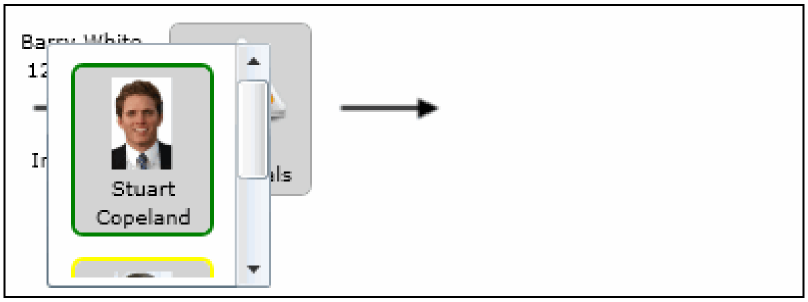
Select the View Approvals link to view a graphic display of the approvers and status of each approval in the approval process.



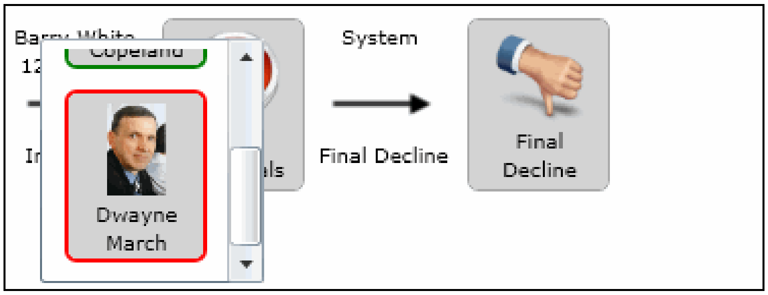
Pictures are associated with support representatives in the Support Representative Profile screen and with customers in the Customer Profile screen; if a support representative is involved in an approval cycle, the associated picture will appear when you select an icon. The picture will be outlined in yellow if the approver is next in the approval process.



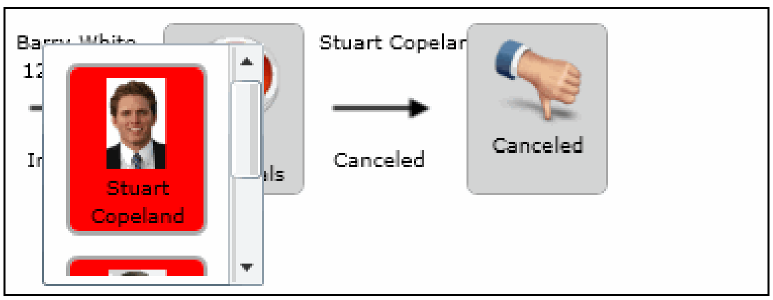
The picture will be outlined in green if the approver specifies an Approve verdict.



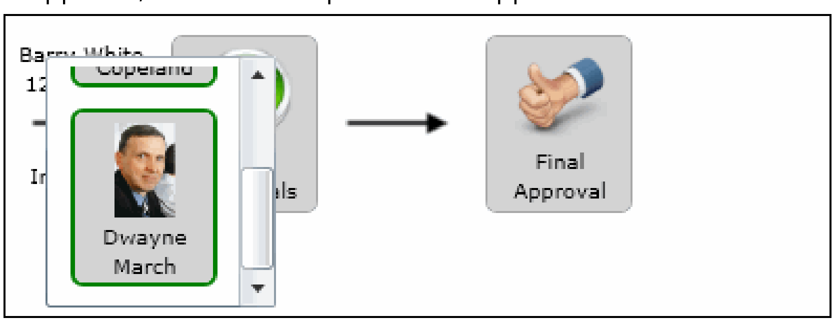
If an approver specifies a Decline verdict, the icons and pictures will appear as shown in the example below.



If an approver cancels the approval process, the icons and pictures will appear as shown in the example below.



If the process results in an approval, the icons and pictures will appear as shown in the example below.



Using Purchase Request Templates

Use templates for purchase requests that occur frequently. If configured, defaults may populate fields in the Purchase Request screen and mySupport portal. Templates can be configured to append or replace the text in the Short Description and/or Comments fields.

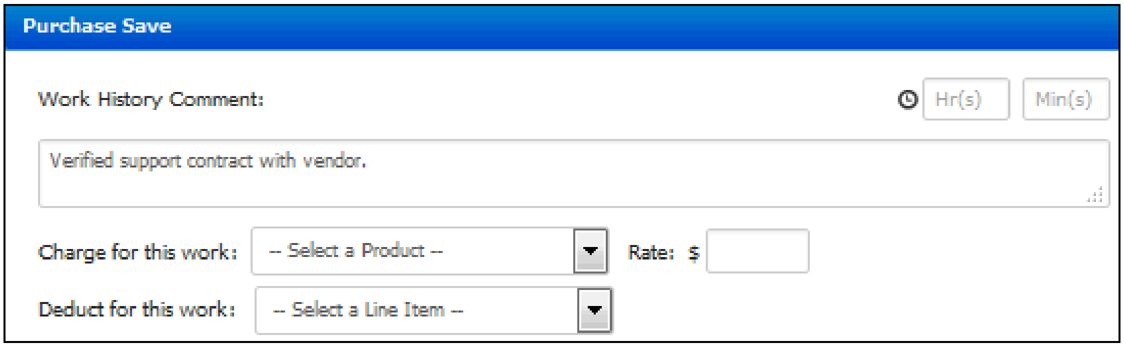
To use a purchase request template, select the Purchase | Use Purchase Request Template icon.

Saving a Purchase Request

Do one of the following:

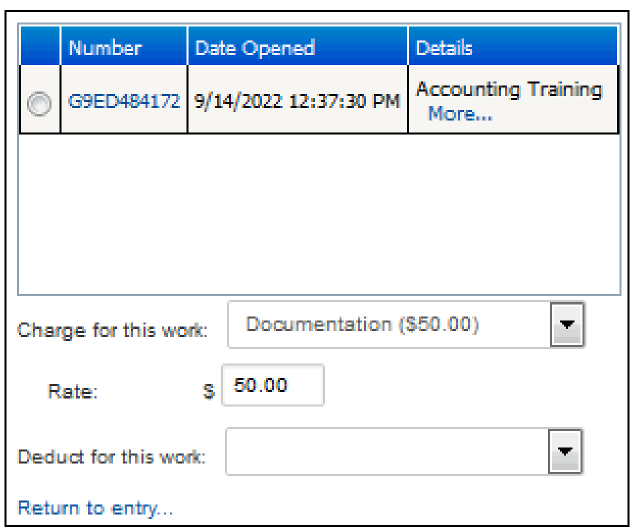
- To save a purchase request without closing the window, select Save from the Selection menu, press Ctrl+S, or select Save.
- To save a purchase request and close the window automatically, select Save and Close from the Selection menu or select Save and Close on the toolbar.
- To save a purchase request and close the current session, select Purchase | Save and Logout This option is enabled in configuration and is typically used when accessing a purchase request via a link in an email.

If configured, the Purchase Save dialog appears:

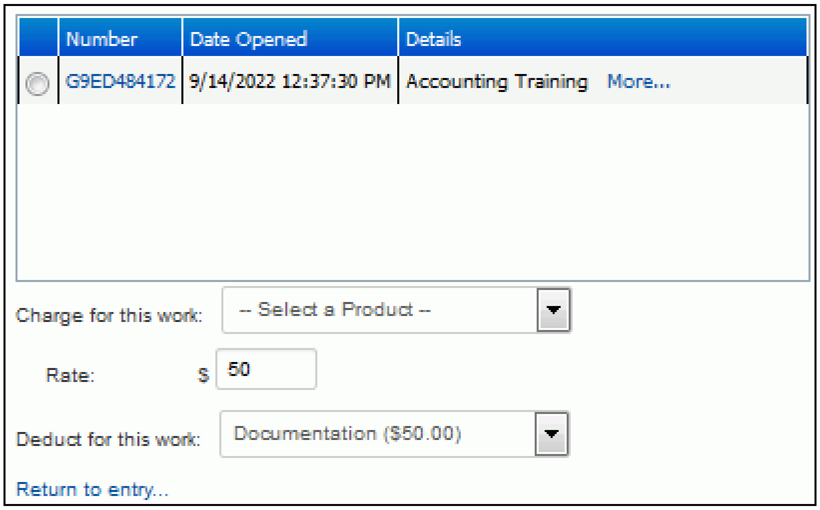


If applicable, enter the hours and minutes you worked on the purchase request in the Time Worked field and enter information on any activities related to the purchase request in the Work History Comment field. (You can also enter this information in the History field.)

- To **add a separate line item charge** to the purchase order (increasing the total amount), choose the product from the selected purchase order in the Charge For This Work field. (Only decimal-enabled products will appear in this list.) In the Rate field, enter the amount to be multiplied by the entry in the Time Worked field in the previous dialog.



- To **use the time worked as an amount received on** an existing line item quantity on a purchase order, in the Deduct For This Work field, choose the line item from the selected purchase order. (Only decimal-enabled products will appear in this list.)



If configured, Work Type and/or Work Start and Work Stop fields may be included in the Save dialog. Options in the Work Type field are specified in configuration.

The Work Start field defaults to the date and time when you load the work item. For example, if you open a new request at 1:00 PM, work with the customer for 30 minutes, and then select the Add Work history option or save and display the Save dialog, the Work Start would be set to 1:00 PM and the Work Stop would be set to 1:30 PM. This Time Worked field would show the 30 minutes of time worked reflected by the gap.

The Work Stop field defaults to the current time, but there will be at least a one minute gap between the Start and Stop times. You can type directly in the Work Start and Work Stop fields or use the calendar and clock icons to select the date and time; the difference will populate automatically. The refresh icon will set the date and time to the current date and time (but the Work Stop date and time will adjust to be at least one minute past the Work Start date and time).