



# **AWCape Customer Support System**

## **Using the Customer Portal**



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## INTRODUCTION

AWCape's Customer Portal, hosted on SharePoint, is a key ingredient to AWCape's implementation success and on-going support, allowing customers to:

1. log support issues,
2. access Time Sheets and Bulk Hour Vouchers
3. monitor progress with Projects & Assignments
4. view project and general documents

This portal which sends alerts to relevant AWCape staff when issues are logged, or feedback-alerts to customers providing feedback and response on logged issues and allows AWCape to render service levels of the highest standard to ensure optimum customer satisfaction.

The rule for AWCape staff is: ***"if it happens, it must be on the Customer Portal"***. We trust you will appreciate that priority services (as per SLA) are guaranteed only if logged through the AWCape Customer Portal and when mails are cc'd to:

[hrpayrollservices@awcape.co.za](mailto:hrpayrollservices@awcape.co.za) for Sage 300 People & Premier Payroll

[erpserives@awcape.co.za](mailto:erpserives@awcape.co.za) for Sage 300cloud (Accpac), Sage Intacct and Sage CRM

[awcloudservices@awcape.co.za](mailto:awcloudservices@awcape.co.za) for AWCape Managed Cloud Services

The use of the AWCape Customer Portal is free to all AWCape Customers however, telephone and/or remote support within agreed response times can only be supplied to customers subscribing to a service level agreement (SLA). A unique ID will be assigned to your company that will identify you on the AWCape portal as well as an ID to be used when assigned tasks, project and assignments:

- For ERP clients as SLA ERP "Client name" for example SLA ERP Cape Nature
- For HR & Payroll clients as SLA PAY "Client name" for example SLA PAY Cape Nature

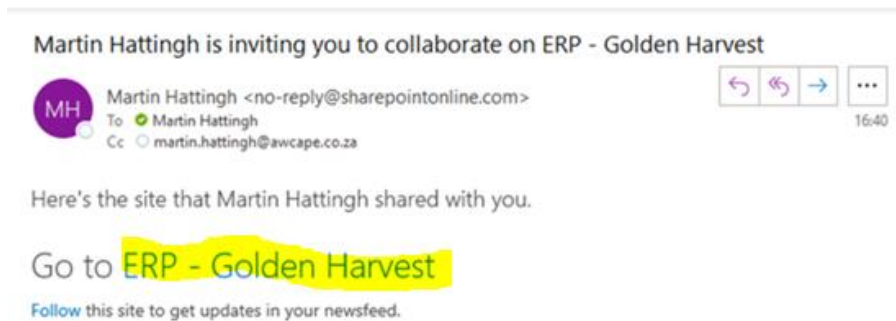
This document provides a short overview of the AWCape Customer Portal with specific reference to the two most important facets of the system – namely Time Sheets and Issues Logs.

Please note that this document is applicable for users of Internet Explorer 8 or later.

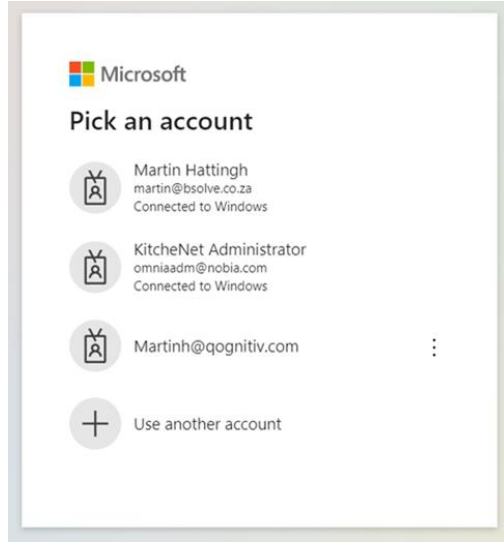
## HOW TO LOG INTO THE PORTAL

### Initial logging onto the AWCape Customer portal

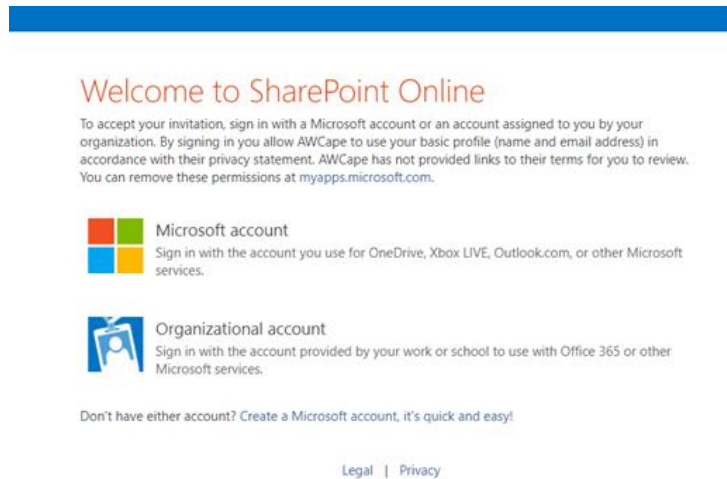
When completing the AWCape SLA you provided the e-mail addresses of the users that you would like to access the AWCape Customer Portal. Each user will receive an e-mail as the below sample that will allow them to register a login with their own e-mail and password. Simply click on the provided link showing the company name in blue in the below example:



If the users already have their own Microsoft 365 account, they can simply sign in by choosing one of the options presented for login as per the example below:



If the user **DON'T** have a Microsoft account, a wizard will take the user through the account creation process to create a personal Microsoft account with a user name and password:



Once you are logged into the AWCape portal please make sure to save the link on your browser as a favourite.

Going forward, the user will log into the portal each time with either their existing or newly created Microsoft account to the AWCape portal. For steps how to navigate to the section below: **HOW TO ADD BOOKMARKS FOR AWCAPE CUSTOMER SUPPORT SYSTEM IN GOOGLE CHROME ON DESKTOP**

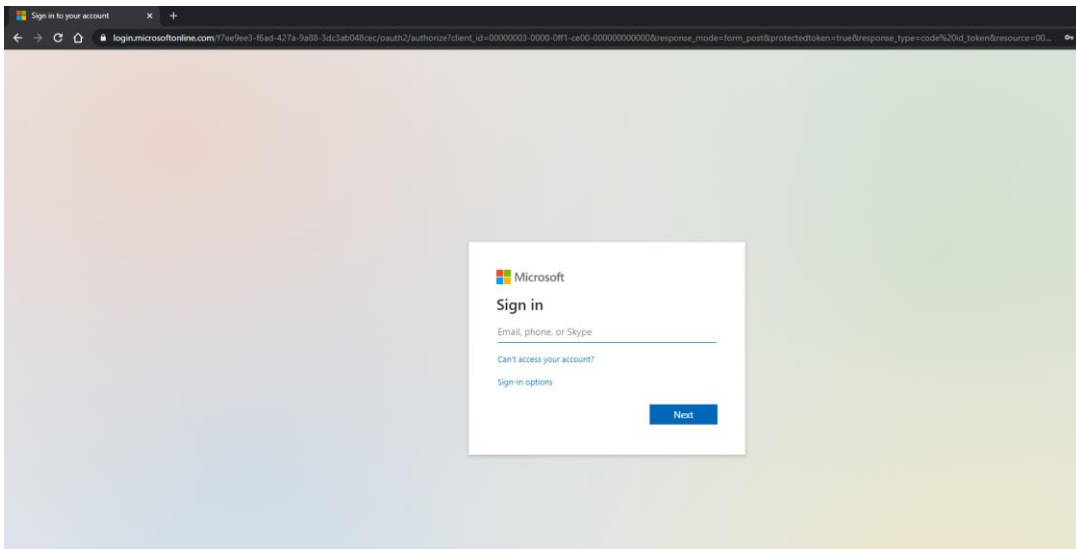
**Step 1 – Log on to Customer Portal**

Navigate to <https://awcape365.sharepoint.com/> "**Client specific URL detail**"/SitePages/Home.aspx

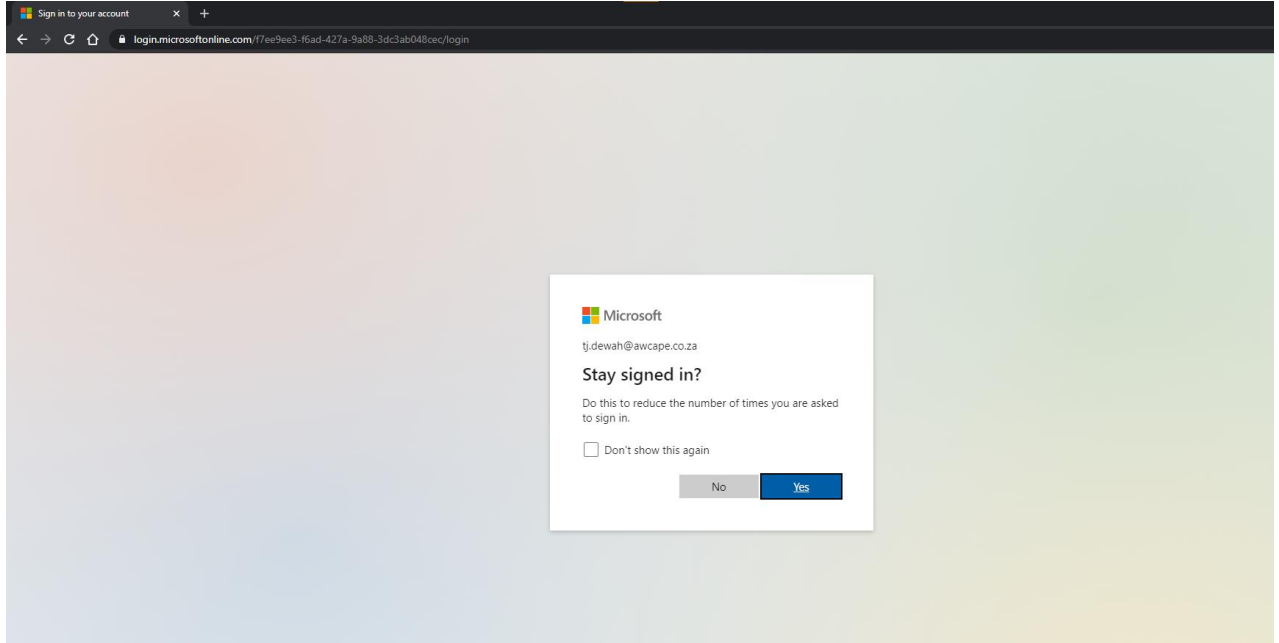
Example:

[https://awcape365.sharepoint.com/ERP-Golden Harvest/SitePages/Home.aspx](https://awcape365.sharepoint.com/ERP-Golden%20Harvest/SitePages/Home.aspx)

**Step 2 - Login**



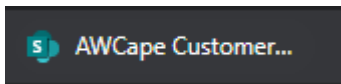
Enter your username and password for your personal Microsoft accounts that was used during initial logging in.



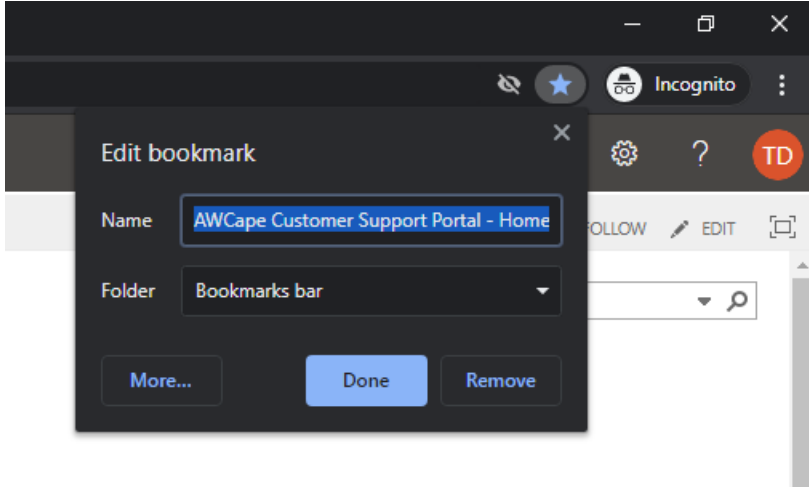
You have the option to “Stay signed in” which will remember the username and password when you click “Yes”

## HOW TO ADD BOOKMARKS FOR AWCAPe CUSTOMER SUPPORT SYSTEM IN GOOGLE CHROME ON DESKTOP

1. Open Google Chrome on your Mac or PC and navigate to the web page you want to bookmark.
2. Click the star on the right edge of the address bar. A bookmark will be automatically created.



3. A pop-up box will appear where you can customize the bookmark. You can rename the bookmark (website URLs are often quite long, so it can be helpful to shorten the name for readability) and choose which bookmark folder in which to store it. If you want to create a new bookmarks folder, click "More..."

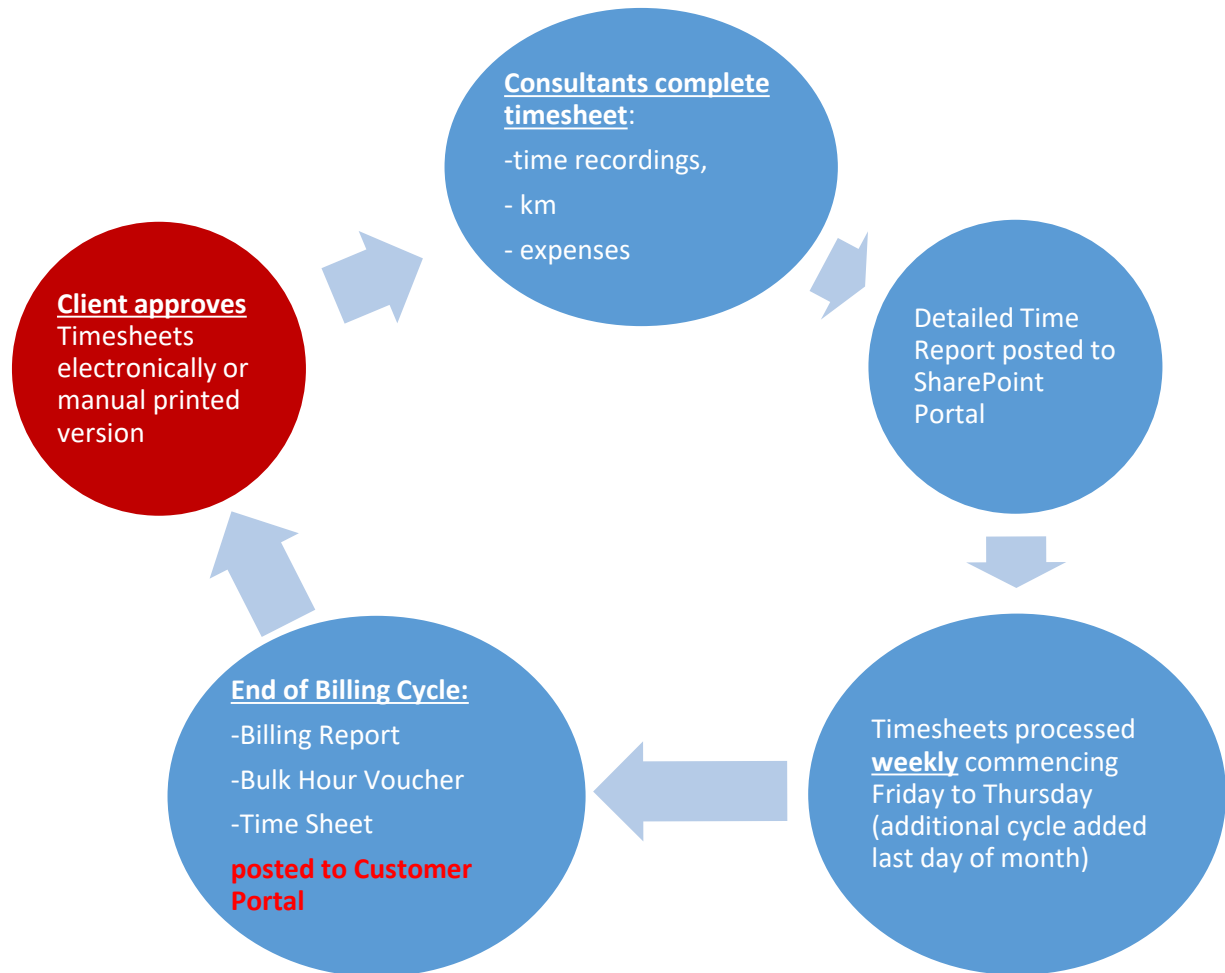




## TIME SHEETS

This section covers the process of recording time spent on tasks for a client and the approval process for work done by AWCape consultants.

Whenever a consultant provides support to the client and/or works on the clients' system – whether on site or by remote access – the consultant will record the time spent and, where applicable, the travel time and travel kilometres. The consultant records this on the AWCape Customer Portal on a **daily basis**.



AWCape consultants will complete detailed time sheets and all the time recordings for all consultants for a particular billing week will be included in a Detail Time Report, which will be posted weekly to the SharePoint Portal Time Sheets.

Time sheets are processed on a weekly cycle commencing every Friday through to the following Thursday with an additional cycle occurring on the last day of each month. The detailed Time Sheets and, if applicable, the Customer Billing Report and Bulk Hour Voucher will be posted to the customer’s dedicated portal on the Monday following the end of the billing cycle.

The client must approve each Time Sheet. This can be done electronically, as described below, or the client may request AWCape to email printed Time Sheets for manual sign off.

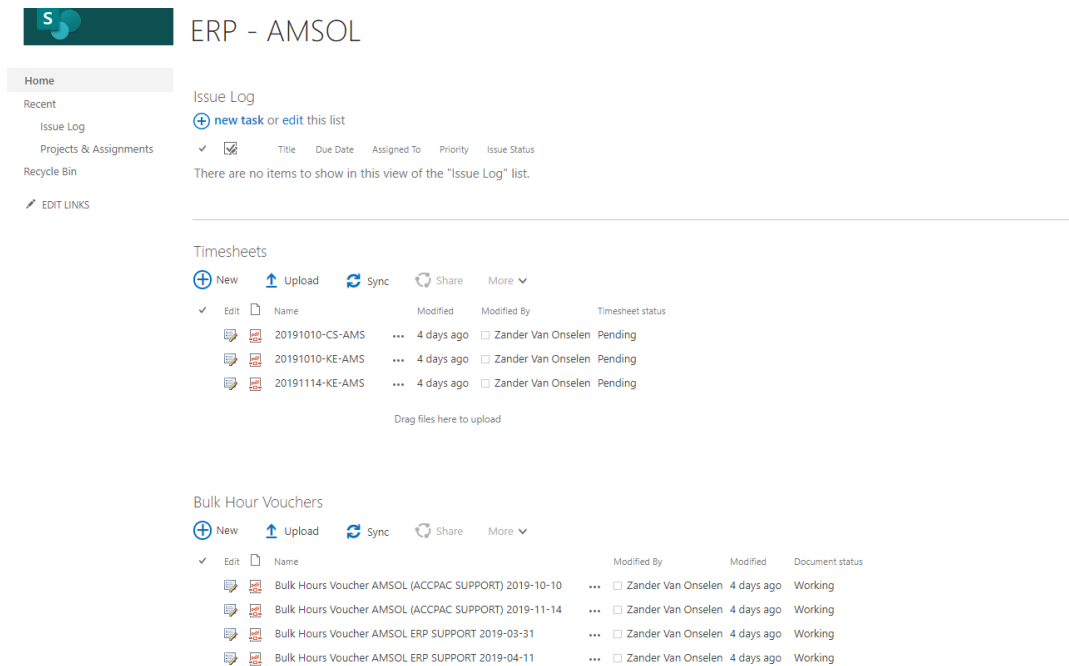
**Step 1 – Log on to Customer Portal**

Navigate to [https://awcape365.sharepoint.com/\"Client specific URL detail\"/SitePages/Home.aspx](https://awcape365.sharepoint.com/\)

**Step 2 - Login**

Login with the login credential that was registered during the initial logging in to the AWCape portal.

**The Customer Portal will be displayed.**



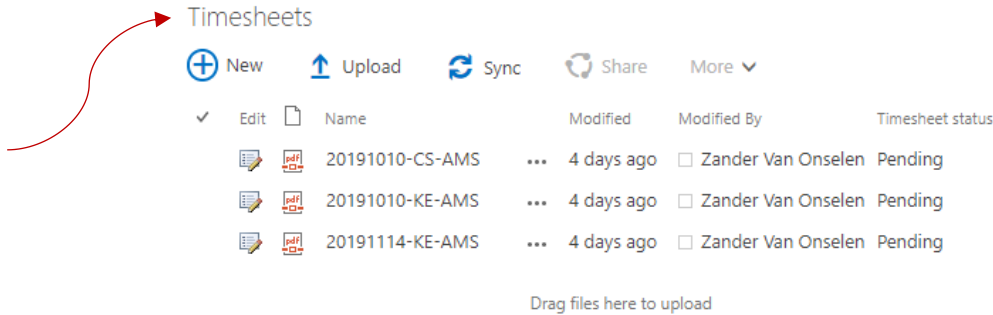
The screenshot displays the AWCape Customer Portal interface. At the top left, there is a navigation menu with options: Home, Recent, Issue Log, Projects & Assignments, Recycle Bin, and EDIT LINKS. The main content area is titled "ERP - AMSOL" and contains three sections:

- Issue Log:** Includes a "new task or edit this list" button and a table with columns: Title, Due Date, Assigned To, Priority, and Issue Status. A message states: "There are no items to show in this view of the 'Issue Log' list."
- Timesheets:** Includes buttons for New, Upload, Sync, Share, and More. It features a table with columns: Edit, Name, Modified, Modified By, and Timesheet status. The table lists three items:
 

| Edit | Name            | Modified   | Modified By        | Timesheet status |
|------|-----------------|------------|--------------------|------------------|
|      | 20191010-CS-AMS | 4 days ago | Zander Van Onselen | Pending          |
|      | 20191010-KE-AMS | 4 days ago | Zander Van Onselen | Pending          |
|      | 20191114-KE-AMS | 4 days ago | Zander Van Onselen | Pending          |
- Bulk Hour Vouchers:** Includes buttons for New, Upload, Sync, Share, and More. It features a table with columns: Edit, Name, Modified By, Modified, and Document status. The table lists four items:
 

| Edit | Name   | Modified By        | Modified   | Document status |
|------|--|--------------------|------------|-----------------|
|      | Bulk Hours Voucher AMSOL (ACCPAC SUPPORT) 2019-10-10 | Zander Van Onselen | 4 days ago | Working         |
|      | Bulk Hours Voucher AMSOL (ACCPAC SUPPORT) 2019-11-14 | Zander Van Onselen | 4 days ago | Working         |
|      | Bulk Hours Voucher AMSOL ERP SUPPORT 2019-03-31      | Zander Van Onselen | 4 days ago | Working         |
|      | Bulk Hours Voucher AMSOL ERP SUPPORT 2019-04-11      | Zander Van Onselen | 4 days ago | Working         |

**Step 3 – Navigate to the Time Sheet section**



The Time Sheets shown are the ones that have not been Signed Off. To view the Signed Off Timesheets as well simply double click on the word Timesheet in the heading.

**The columns displayed are:**

| <u>EDIT</u>  | <u>NAME</u>  | <u>MODIFIED</u>                 | <u>MODIFIED BY</u>  | <u>STATUS</u>   |   |  |
|--|--|---------------------------------|---|---|---|--|
| This icon allows the client to edit the Time Sheet | Time Sheet Name is in the format YYYYMMDD-YY where:<br><br>YYYYMMDD – the date of the Monday start for the week. | Date the file was last modified | Last person that accessed and modified or uploaded the file | <b>Pending:</b><br>Time Sheet loaded with no further action   | <b>Invoiced:</b><br>Time Sheet invoiced. Pending approval | <b>Invoiced &amp; Paid:</b> Invoice generated paid |
|  |  |                                 |   | <b>Credited:</b><br>Used when time has to be credited   | <b>Credited &amp; Paid:</b><br>The Credit Note processed  |  |
|  |  |                                 |   | <b>Queried:</b> Client queried the Time Sheet.<br><br><b>Queries addressed promptly by AWCape Services Division</b> | <b>Signed Off:</b> Client has approved the Time Sheet     |  |

**Step 4 – Review Time Sheets**

To review a Time Sheet simply click on the Time Sheet Name from the menu. The selected Time Sheet is displayed.

Timesheets

New   
 Upload   
 Sync   
 Share   
 More ▼

| ✓ | Edit | Name            | Modified   | Modified By        | Timesheet status |
|---|------|-----------------|------------|--------------------|------------------|
|   |      | 20191010-CS-AMS | 4 days ago | Zander Van Onselen | Pending          |
|   |      | 20191010-KE-AMS | 4 days ago | Zander Van Onselen | Pending          |
|   |      | 20191114-KE-AMS | 4 days ago | Zander Van Onselen | Pending          |

Drag files here to upload

**Old format timesheets**

## Consultant Time Sheet

|                |                    |  |
|----------------|--------------------|--|
| Client Contact | Kgomotso Sekhabisa | Comments   |
| Time Sheet #   | 20150630-KA-SAH    | To approve electronically, log into your dedicated customer portal through <a href="http://www.awcape.co.za">www.awcape.co.za</a> , click on Timesheets and approve or query with reason if applicable. To approve manually, please print, sign, scan and return to <a href="mailto:admin@awcape.co.za">admin@awcape.co.za</a> |
| Client         | SAHRA              |  |
| Consultant     | Kaashiefa Anthony  |  |
| Invoice Type   | (All)              |  |
| Project Code1  | (All)              |  |

|             |   |   |
|-------------|---|---|
| Work Rate   | R | - |
| Travel Rate | R | - |

|                     |  |  |            |              |             |                    |             |
|---------------------|--|--|------------|--------------|-------------|--------------------|-------------|
| Project Description | Item Codes                                     | Work Description   | Date       | Time / Hours | Travel / KM | Time Cost          | Travel Cost |
| Accpac Ad Hoc       | 10-01*Miscellaneous - Ad-hoc Support - On Site | Meteing with Kgomotso to discuss Invoice and Statement templates | 2015/06/29 | 1.0          | 0.0         | Paid by Bulk Hours | R -         |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
|                     |  |  |            |              |             | R                  | -           |
| Sub Totals          |  |  |            |              |             | R                  | -           |
| TOTAL HOURS         |  |  |            |              |             | 1.0                | -           |

**New format timesheets**

11/11/2019

Detailed Reports – AWCape – Harvest

Your trial contains sample data to help you explore! [Remove Samples](#) or [Upgrade Now](#)

**Detailed Time Report: 11/11/2019 – 17/11/2019**

|  |  |   |
|--|--|---|
| Total Hours<br><b>23.00</b><br>23.00 Uninvoiced Billable | 1 Client<br>1 Project<br>Tasks<br>Team | Test SharePoint<br>Sage 300 People Payroll Implementation Sharepoint<br>All Tasks<br>Everyone |
|--|--|---|

| Client          | Project   | Task                               | Roles | Person             | Hours                |
|-----------------|---|------------------------------------|-------|--------------------|----------------------|
| 11/11/2019      |   |                                    |       |                    | 6.00                 |
| Test SharePoint | [SP_TEST] Sage 300 People Payroll Implementation Sharepoint | 2010 Kick-off Meeting              | N/A   | Zander van Onselen | <a href="#">2.00</a> |
| Test SharePoint | [SP_TEST] Sage 300 People Payroll Implementation Sharepoint | 2015 Needs Analysis                | N/A   | Zander van Onselen | <a href="#">4.00</a> |
| 12/11/2019      |   |                                    |       |                    | 6.00                 |
| Test SharePoint | [SP_TEST] Sage 300 People Payroll Implementation Sharepoint | 2020 Technical Install             | N/A   | Zander van Onselen | <a href="#">4.00</a> |
| Test SharePoint | [SP_TEST] Sage 300 People Payroll Implementation Sharepoint | 2025 Setup Company Rule Parameters | N/A   | Zander van Onselen | <a href="#">2.00</a> |

**Step 5 – Update Time Sheets**

To approve and/or query a Time Sheet click on the **Edit button** in front of the relevant Time Sheet. This will open the review screen.

Timesheets

|                                     |                 |                |   |                  |
|-------------------------------------|-----------------|----------------|---|------------------|
|                                     |                 |                |   | More ▾           |
| <input checked="" type="checkbox"/> | Name            | Modified       | Modified By                                 | Timesheet status |
|                                     | 20191010-CS-AMS | ... 4 days ago | <input type="checkbox"/> Zander Van Onselen | Pending          |
|                                     | 20191010-KE-AMS | ... 4 days ago | <input type="checkbox"/> Zander Van Onselen | Pending          |
|                                     | 20191114-KE-AMS | ... 4 days ago | <input type="checkbox"/> Zander Van Onselen | Pending          |

Drag files here to upload

### Timesheets - 20191010-CS-AMS.pdf



EDIT

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Name \* 20191010-CS-AMS .pdf

Title

Timesheet status Pending

Timesheet comments

Invoice num

Version: 1.0  
Created at 3/1/2020 8:27 AM by  Zander Van Onselen  
Last modified at 3/1/2020 8:27 AM by  Zander Van Onselen

Save Cancel

Click on the Status drop down list to change to either Queried or Signed Off.

If you query a Time Sheet please enter the reason for the query in the Comments box to assist AWCape in providing a prompt response.

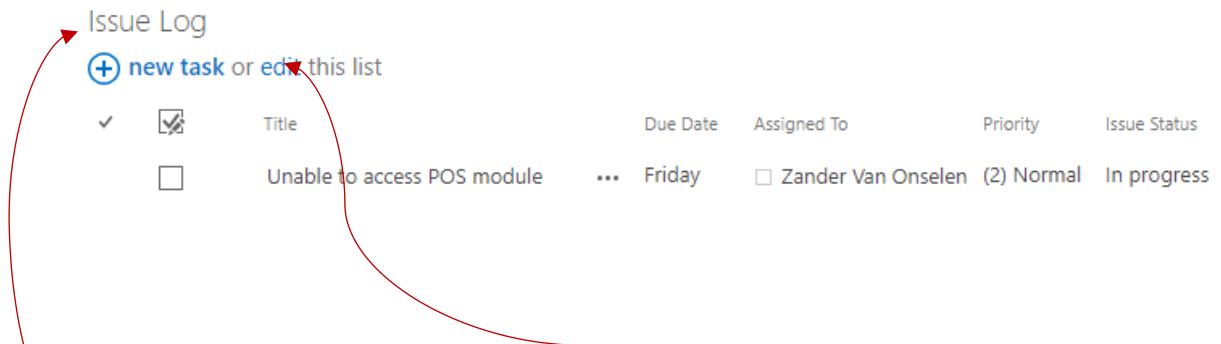
Having made the change click on the Save button (either top left or bottom right).

## ADDING/CLEARING ISSUES

This section details the process of recording an issue and the steps each issue will go through prior to it being closed.

### Step 1 – Log on to the Portal


Log on to the portal as described in the previous section and navigate to the Issues Log section.



The Issues shown are the ones that have not been Closed by the client.

To view the Closed Issues as well, double click on the word Issues Log in the heading

**The columns displayed are:**

| <u>Issue ID</u>                            |  | <u>Title</u>                      | <u>Due Date</u>  | <u>Assigned to</u>   | <u>Priority</u>     | <u>Issue Status</u>  |   |
|--|---|-----------------------------------|--|--|---------------------|--|---|
| Each Issue is assigned a sequential number | Indicates that there is an attachment for this issue                              | The main description of the issue | The estimated date for completion of work on the issue | Who the issue is currently assigned to. For Signoff the task will be assigned to the client:<br><br>- For ERP clients as SLA ERP "Client name" and for HR & Payroll clients SLA PAY "Client name". | High, Normal or Low | <b>Not Started:</b><br>No action taken   | <b>In Progress:</b><br>Work has started   |
|  |   |                                   |  |  |                     | <b>Action Required:</b><br>Review comments. Assigned person to take action           | <b>On Hold:</b><br>Temporarily no action to take  |
|  |   |                                   |  |  |                     | <b>Replenish Voucher:</b><br>Voucher hrs low. Replenish to continue                  | <b>AWCape QC:</b><br>AWCape personnel to do a quality check   |
|  |   |                                   |  |  |                     | <b>Customer QC:</b><br>Client to do quality check and confirm in happy with the work | <b>Resolved:</b><br>Resolved by the AWCape consultant<br><br><b>Closed:</b><br>The client has tested the issue and is satisfied with the result. Only to be closed by initiator of the task |

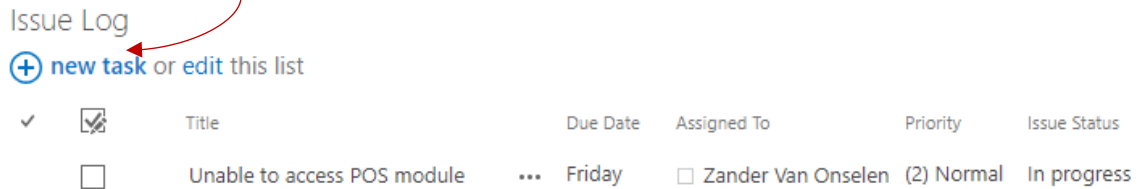
**Step 2 – Log a New Issue**

The customer should log every issue that requires the attention of an AWCape consultant.



There will also be times when an issue will be logged by an AWCape consultant – for example, working on the clients’ site the consultant has identified something that needs attention.

To log a new issue simply click on “new task” at the top of the Issues list.



The form contains the following fields and callouts:

- Title \***: Text box containing 'Unable to access POS module'. Callout: 'Title with short reference to issue'.
- Description**: Text area containing 'Description for the issue goes here'. Callout: 'Clear description on the issue experienced.'
- Priority**: Dropdown menu showing '(2) Normal'. Callout: 'Priority level (Specifies required response time) Low – 7 days Medium – 2 days High – 4 hours \*Please refer to the SLA for our policy on the priority levels.'
- Assigned To**: Text box containing 'Zander Van Onselen x'. Callout: 'Assigned To with name of consultant to whom this issue needs to be directed (if unsure, assign to Service Administrator who will then assign accordingly as required). On completion the task will be assigned to the Company Name\*'
- Start Date**: Text box with a calendar icon.
- Due Date \***: Text box containing '13/12/2019' with a calendar icon. Callout: 'Due Date – date the issue should be solved by.'
- Issue Status**: Dropdown menu showing 'In progress'. Callout: 'Issue Status - The status of the issue. Status'
- Follow-up Comments**: Text area.

At the bottom, there is a log of actions: '2:46 PM by Martin Hattingh' and '2019 11:01 AM by Zander Van Onselen', along with 'Save' and 'Cancel' buttons.

\*Please note that each SLA client is assigned a unique ID that will be used when assigning a task, project or assignment. The format of this ID is derived as follows:

- For ERP clients as SLA ERP “Client name”
- For HR & Payroll clients SLA PAY “Client name”.

Sample: SLA PAY Amsol

| <u>Issue Status Options</u>  |  |
|--|--|
| <b>Not Started:</b><br>No action taken   | <b>In Progress:</b><br>Work has started  |
| <b>Action Required:</b><br>Review comments. Assigned person to take action           | <b>On Hold:</b><br>Temporarily no action to take   |
| <b>Replenish Voucher:</b><br>Voucher hrs low. Replenish to continue                  | <b>AWCape QC:</b><br>AWCape personnel to do a quality check  |
| <b>Customer QC:</b><br>Client to do quality check and confirm in happy with the work | <b>Resolved:</b><br>Resolved by the AWCape consultant  |
|  | <b>Closed:</b><br>The client has tested the issue and is satisfied with the result. Only to be closed by initiator of the task |

### Step 3 – Updating an Issue

As work is done on this issue the person doing the work will add comments and update the as necessary.

To edit an item, click on the title, which will open the issue logged and edit accordingly.

Issue Log

[+ new task](#) or [edit this list](#)

| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Title                       | Due Date | Assigned To                                 | Priority   | Issue Status |
|-------------------------------------|-------------------------------------|-----------------------------|----------|---|------------|--------------|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Unable to access POS module | Friday   | <input type="checkbox"/> Zander Van Onselen | (2) Normal | In progress  |

SharePoint

BROWSE EDIT

Save Cancel Paste Copy Cut Delete Item Attach File Spelling

Commit Clipboard Actions Spelling

Home Notebook Documents

Title \* Unable to access POS module

Description Description for the issue goes here

Attach screenshots or documents regarding the error if available

The same information that is captured when recording a new issue can now be edited and updated.

When editing an issue do not change the *basic information*.

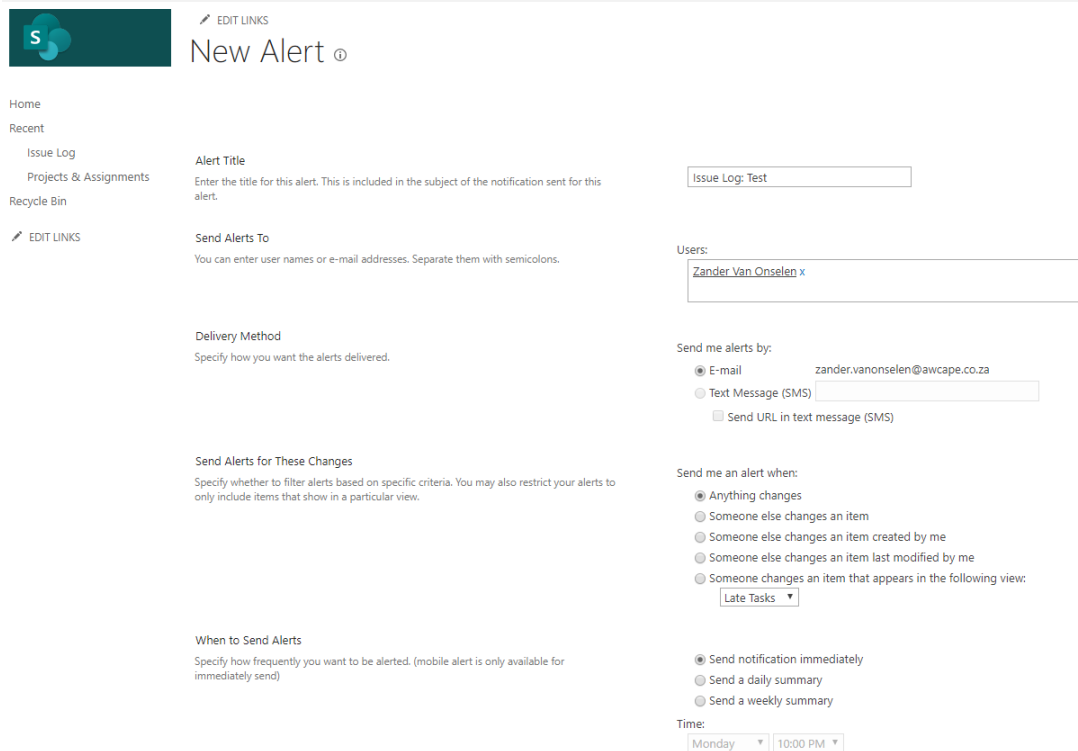
Changes should be limited to:

| <u>Due Date</u>  | <u>Assigned to</u>  | <u>Priority</u>     | <u>Issue Status</u>  |   | <u>Follow Up Comments</u>   |
|--|---|---------------------|--|---|---|
| The estimated date for completion of work on the issue | Assigned To with name of consultant to whom this issue needs to be directed (if unsure, assign to Service Administrator who will then assign accordingly as required). For Signoff the task will be assigned to the client:<br><br>- For ERP clients as SLA ERP "Client name" and for HR & Payroll clients SLA PAY "Client name". | High, Normal or Low | <b>Not Started:</b><br>No action taken   | <b>In Progress:</b><br>Work has started   | Follow up comments explaining what has been done to date since previous update and why the issue has been updated |
|  |   |                     | <b>Action Required:</b><br>Review comments. Assigned person to take action           | <b>On Hold:</b><br>Temporarily no action to take  |   |
|  |   |                     | <b>Replenish Voucher:</b><br>Voucher hrs low. Replenish to continue                  | <b>AWCape QC:</b><br>AWCape personnel to do a quality check   |   |
|  |   |                     | <b>Customer QC:</b><br>Client to do quality check and confirm in happy with the work | <b>Resolved:</b><br>Resolved by the AWCape consultant<br><br><b>Closed:</b><br>The client has tested the issue and is satisfied with the result. Only to be closed by initiator of the task |   |

**Step 4 – Other Options**

From that same drop down list the following options are available:

| <a href="#">View Item</a>              | <a href="#">Version History</a>              | <a href="#">Alert me</a>   | <a href="#">Delete Item</a>                            |
|--|--|--|--|
| To simply view the details of the item | To obtain a full version history of the item | <p>The system standards are that every update or change to an Issue will be immediately emailed to selected AWCape personnel and to selected client personnel.</p> <p>This screen can be used to change the standards for this specific issue and to select, for example:</p> <ul style="list-style-type: none"> <li>• a daily or</li> <li>• weekly status of the issue</li> </ul> | Items entered in error can be deleted from the portal. |



**New Alert**

Home  
Recent  
Issue Log  
Projects & Assignments  
Recycle Bin  
EDIT LINKS

**Alert Title**  
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

**Issue Log:** Test

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

**Users:**  
Zander Van Onselen x

**Delivery Method**  
Specify how you want the alerts delivered.

**Send me alerts by:**  
 E-mail zander.vanonselen@awcape.co.za  
 Text Message (SMS)  
 Send URL in text message (SMS)

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

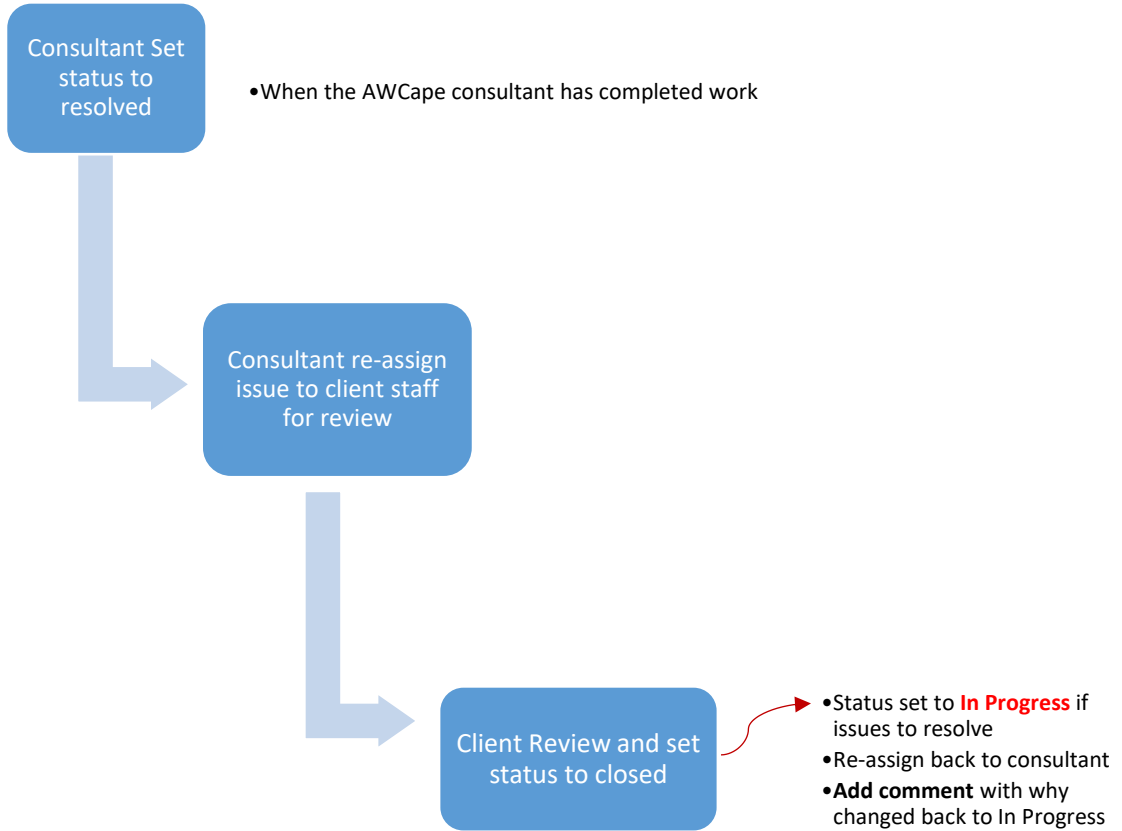
**Send me an alert when:**  
 Anything changes  
 Someone else changes an item  
 Someone else changes an item created by me  
 Someone else changes an item last modified by me  
 Someone changes an item that appears in the following view: Late Tasks

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

**Send notification immediately**  
 Send notification immediately  
 Send a daily summary  
 Send a weekly summary

**Time:**  
Monday 10:00 PM

**Step 5 – Closing an Issue**



## OTHER FEATURES

This section covers the other features of **Customer Portal** that are available.

### General Documents

The General Documents section contains a variety of information about:





- the clients' site and
- installation.

For example, there will always be:

- Software List: which shows what software the client has installed and when the license is due for renewal.
- Free Training Days document: which will reflect the free training days accumulated and used (clients using SLA only).
- Copies of contracts signed between AWCape and the client.

#### General Documents

⊕ New   ↑ Upload   ↻ Sync   🔄 Share   More ▾

| ✓   | Edit  | Name   | Modified       | Modified By                                 | Document status |
|---|---|--|----------------|---|-----------------|
|  |  | African Marine Solutions Client Software Register (2019) | ... 4 days ago | <input type="checkbox"/> Zander Van Onselen | Working         |
|  |  | SLA - AMSOL signed 20July2018                            | ... 4 days ago | <input type="checkbox"/> Zander Van Onselen | Working         |

Drag files here to upload

## Project Documents

This section will contain the latest documents pertaining to the projects in progress with the client.





Within this section each project will have its own folder containing all project specific relevant documents including but not limited to:

- signed proposal,
- project schedules,
- meeting minutes, etc.

If a major project is in progress the **Project Plan** will be shown together with a **Customer Billing Report** which shows:

- the originally budgeted hours,
- the hours used to date and
- the hours still available for completion of the project.

### Project Documents

 New    Upload    Sync    Share   More 

 Edit  Name   Modified   Modified By   Document status

Drag files here to upload




### Project & Assignments

This section will contain logged tasks of smaller assignments requested by client for a designated date as planned.

This will include requested consultations for example

- medical aid updates,
- leave setup changes,
- tax year end submissions, etc.

#### Projects & Assignments

 [new task](#) or [edit this list](#)

Title Due Date Assigned To Project Status

There are no items to show in this view of the "Projects & Assignments" list.

Time estimates pertaining to a project or assignment can be posted to this section to support the quotation function

Time Estimate

## HOW TO ROUTE ALERTS TO A GROUP FROM AWCAPe CUSTOMER SUPPORT SYSTEM IN OUTLOOK

All e-mail alert generated are sent to the e-mail address [no-reply@sharepointonline.com](mailto:no-reply@sharepointonline.com).

From the primary e-mail address Outlook Menu bar that was selected as the contact for the portal select Rules → Create Rules:

Create Rule

When I get this alert

Name: "Issue Log"  
Source: PAY - Bosman Adama

Do the following

- Display in the New Item Alert window
- Play a selected sound:
- Move the item to folder:

OK Cancel Advanced Options...

Select Advanced Options:

Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

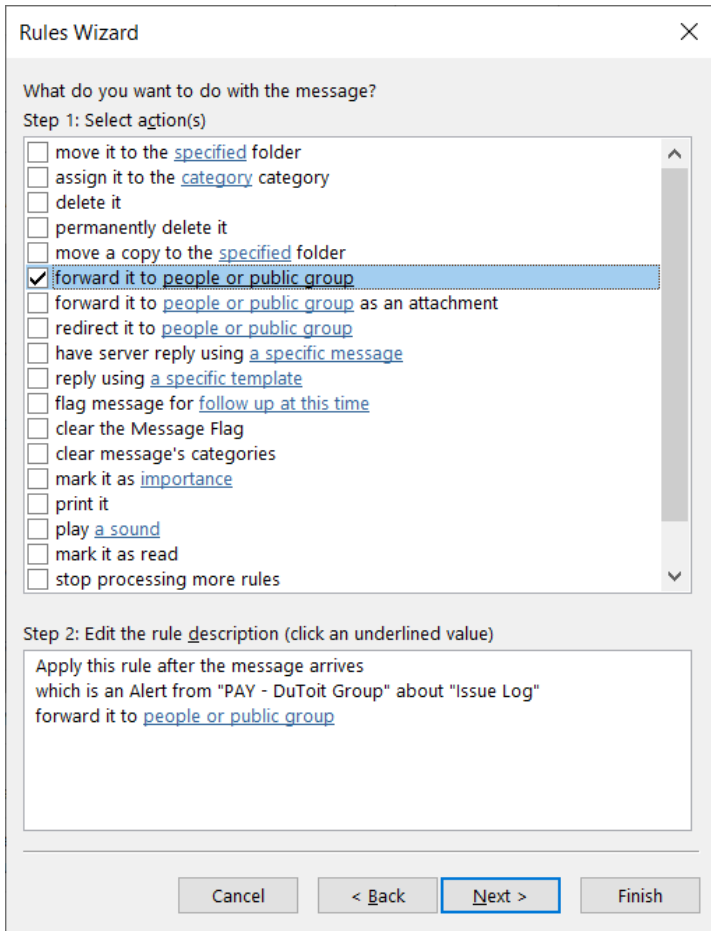
- which is an Alert Email
- from PAY - DuToit Group
- with Issue Log - ECB5125 - loan balance in the subject
- sent to Khalil du Plessis
- with Issue Log - ECB5125 - loan balance in the subject or body
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- with specific words in the body
- with specific words in the message header
- with specific words in the recipient's address
- with specific words in the sender's address

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives  
which is an Alert from "PAY - DuToit Group" about "Issue Log"

Cancel < Back Next > Finish

Select Next:



Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- move it to the [specified](#) folder
- assign it to the [category](#) category
- delete it
- permanently delete it
- move a copy to the [specified](#) folder
- forward it to [people or public group](#)
- forward it to [people or public group](#) as an attachment
- redirect it to [people or public group](#)
- have server reply using [a specific message](#)
- reply using [a specific template](#)
- flag message for [follow up at this time](#)
- clear the Message Flag
- clear message's categories
- mark it as [importance](#)
- print it
- play [a sound](#)
- mark it as read
- stop processing more rules

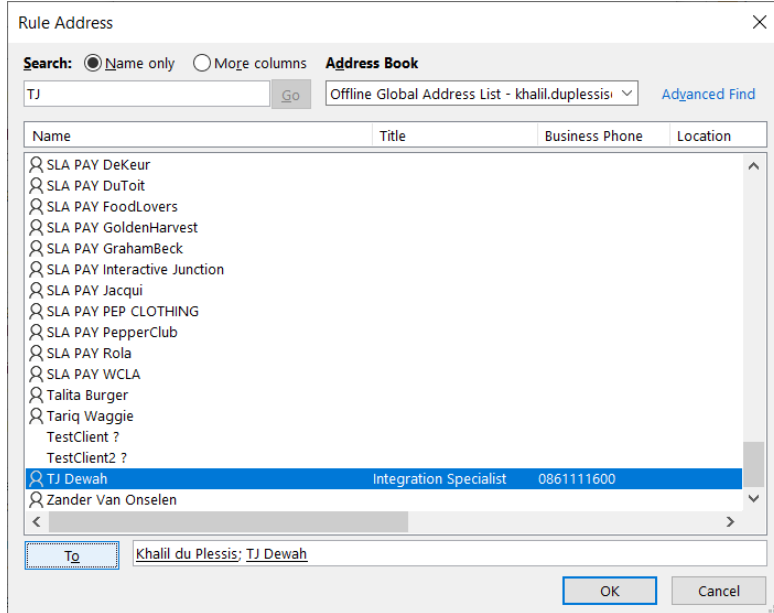
Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives  
which is an Alert from "PAY - DuToit Group" about "Issue Log"  
forward it to [people or public group](#)

Cancel < Back **Next >** Finish

Click on people or public group in Step 2:

Enter e-mail address to forward to:



Click OK.

Then click on Finish:

Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- move it to the [specified](#) folder
- assign it to the [category](#) category
- delete it
- permanently delete it
- move a copy to the [specified](#) folder
- forward it to [people or public group](#)
- forward it to [people or public group](#) as an attachment
- redirect it to [people or public group](#)
- have server reply using [a specific message](#)
- reply using [a specific template](#)
- flag message for [follow up at this time](#)
- clear the Message Flag
- clear message's categories
- mark it as [importance](#)
- print it
- play [a sound](#)
- mark it as read
- stop processing more rules

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives  
which is an Alert from "PAY - DuToit Group" about "Issue Log"  
forward it to [Khalil du Plessis and TJ Dewah](#)

Cancel < Back Next > Finish