AWCape Customer Support System

Using the Customer Portal

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Table of Contents

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 for Sage 300 People & Premier Payroll

erpservices@awcape.co.za for Sage 300cloud (Accpac), Sage Intacct and Sage CRM

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

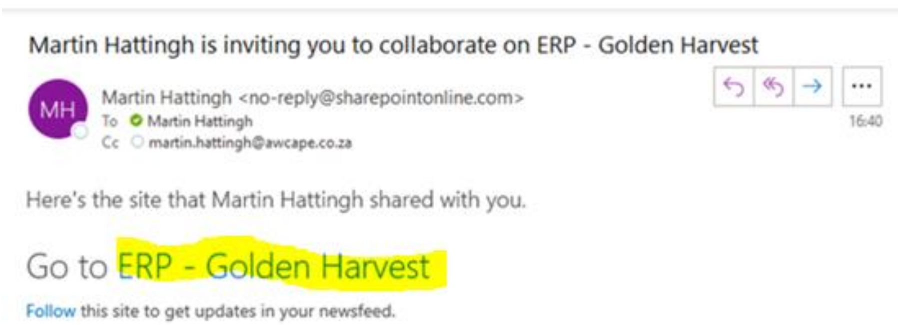
This document provides a short overview of the AWCape Customer Portal with specific reference to the two most important facets of the system – namely Time Sheets and Issues Logs.

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

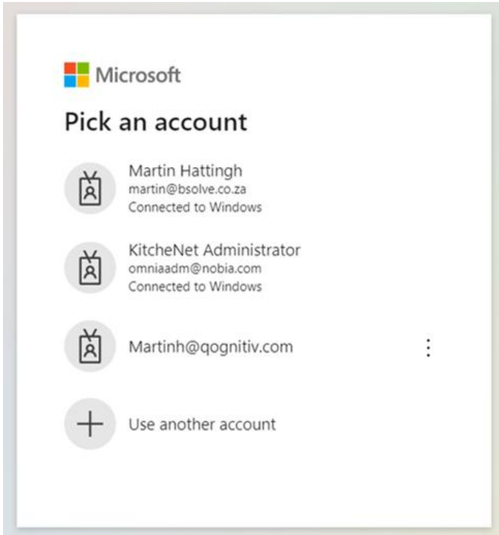
HOW TO LOG INTO THE PORTAL

Initial logging onto the AWCape Customer portal

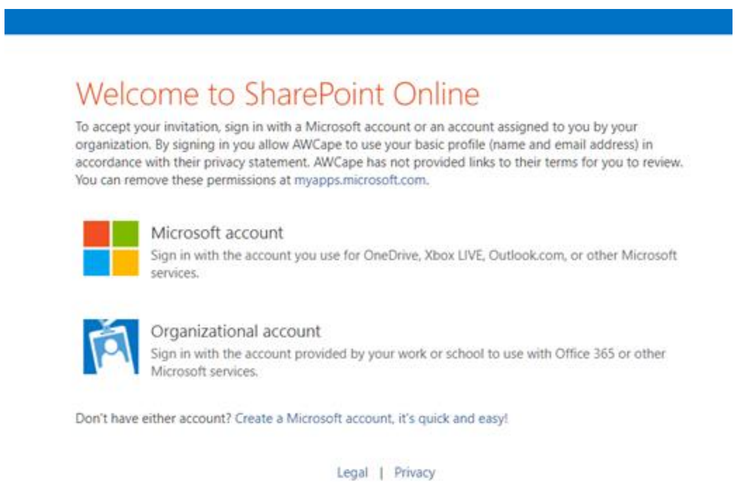
When completing the AWCape SLA you provided the e-mail addresses of the users that you would like to access the AWCape Customer Portal. Each user will receive an e-mail as the below sample that will allow them to register a login with their own e-mail and password. Simply click on the provided link showing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

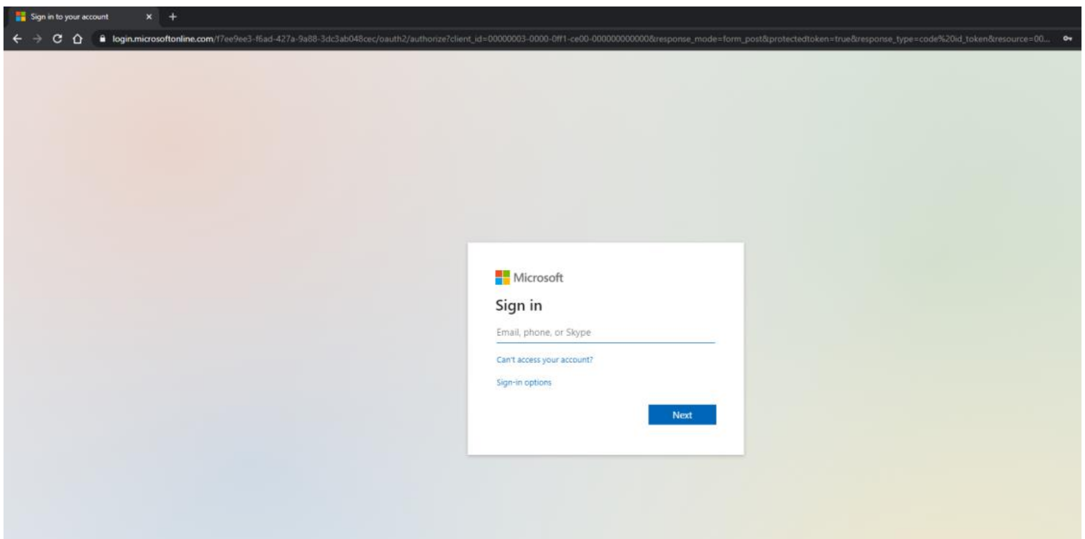
Step 1 – Log on to Customer Portal

Navigate to https://awcape365.sharepoint.com/ ”Client specific URL detail”/SitePages/Home.aspx

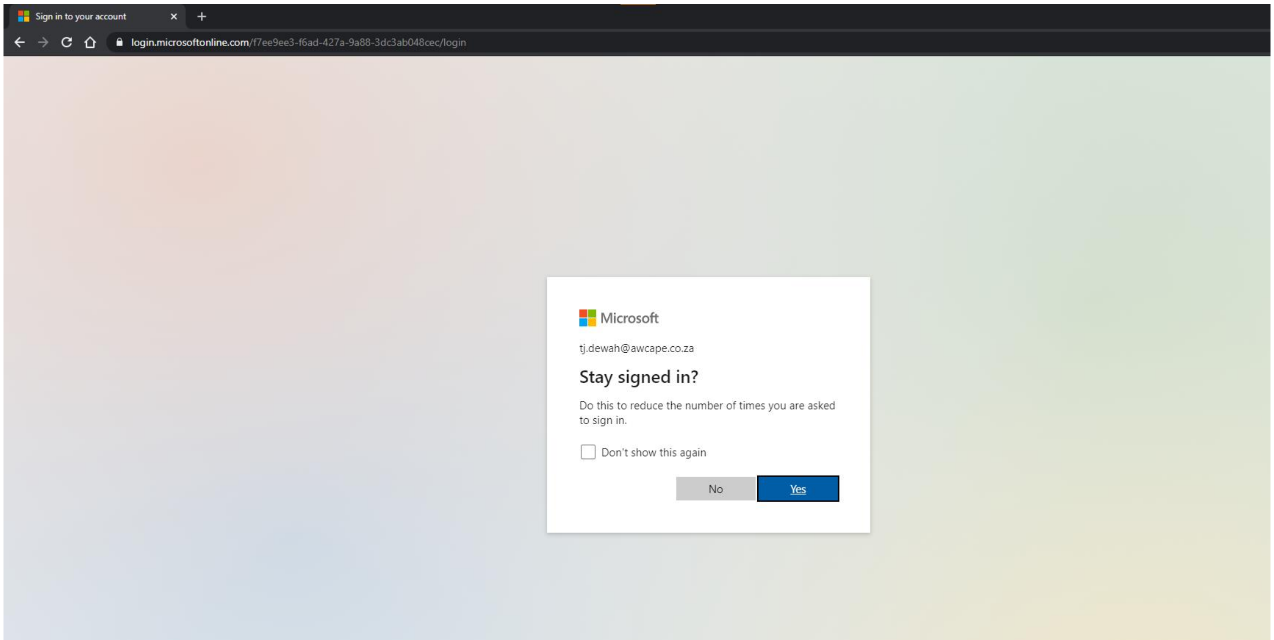
Example:

https://awcape365.sharepoint.com/ERP-Golden Harvest/SitePages/Home.aspx

Step 2 - Login



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



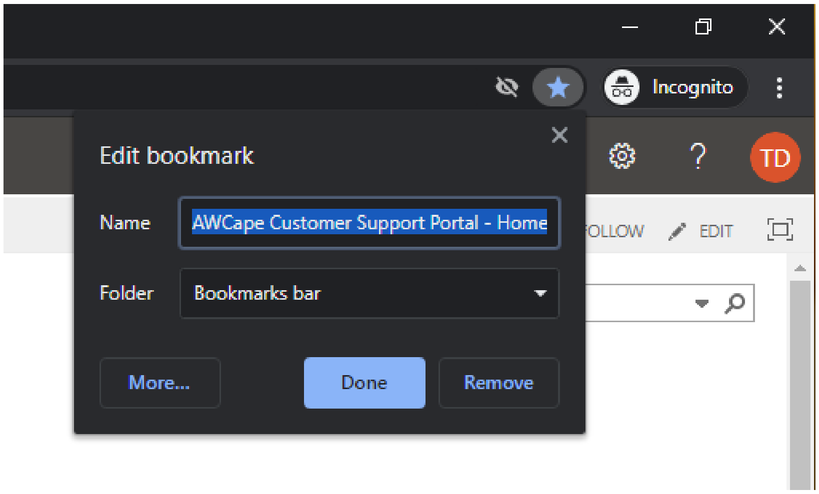
You have the option to “Stay signed in” which will remember the username and password when you click “Yes”

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.

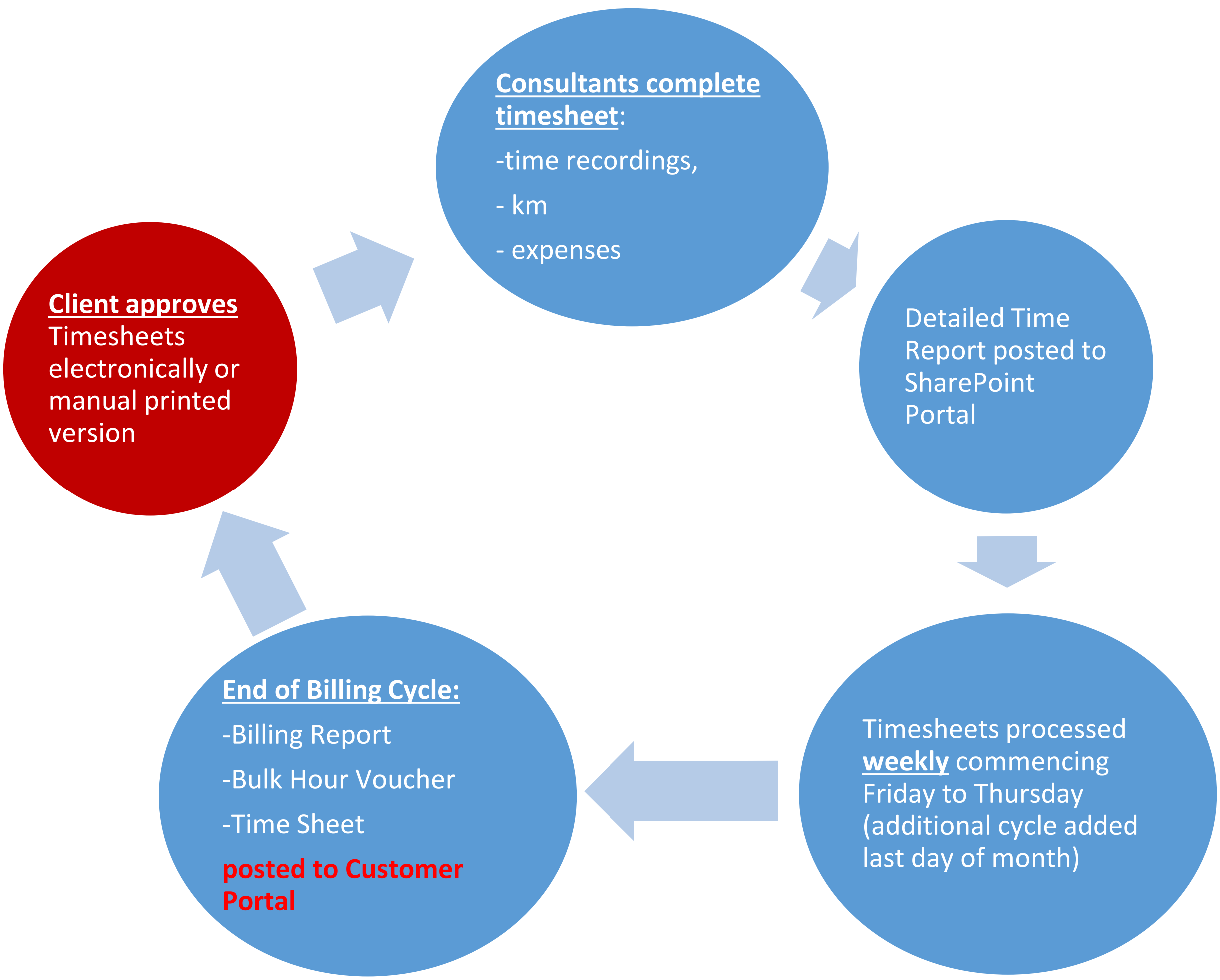
3. A pop-up box will appear where you can customize the bookmark. You can rename the bookmark (website URLs are often quite long, so it can be helpful to shorten the name for readability) and choose which bookmark folder in which to store it. If you want to create a new bookmarks folder, click "More..."


Incognito
Edit bookmark
Name
AWCape Customer Support Portal - Home
Folder
Bookmarks bar
More...
Done
Remove
EDIT
TD

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.

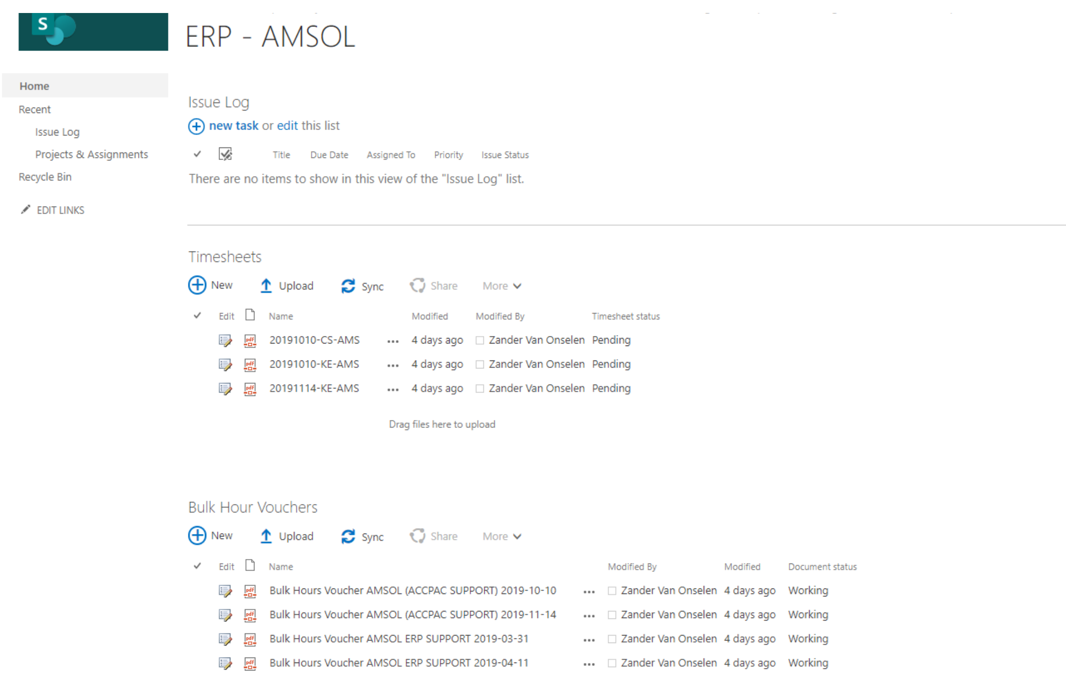
Step 1 – Log on to Customer Portal

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

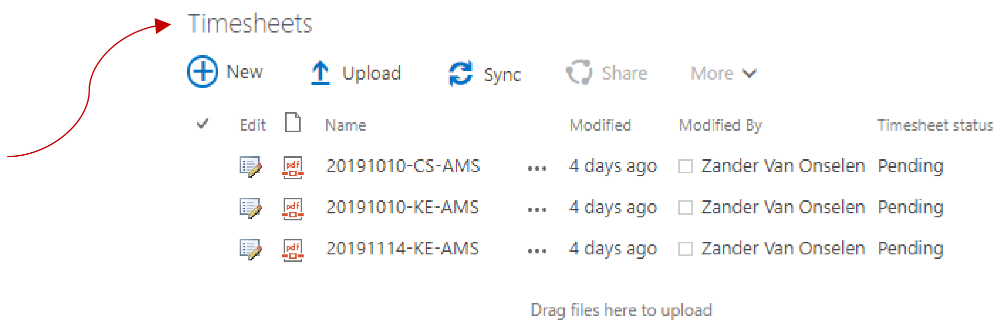
Step 2 - Login

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

The Customer Portal will be displayed.



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:

<table>
<tr><th>EDIT</th><th>NAME</th><th>MODIFIED</th><th>MODIFIED BY</th><th colspan="3">STATUS</th></tr>
<tr><td rowspan="3">This icon allows the client to edit the Time Sheet</td><td rowspan="3">Time Sheet Name is in the format YYYYMMDD-YYY where:
YYYYMMDD – the date of the Monday start for the week.</td><td rowspan="3">Date the file was last modified</td><td rowspan="3">Last person that accessed and modified or uploaded the file</td><td>Pending: Time Sheet loaded with no further action</td><td>Invoiced: Time Sheet invoiced. Pending approval</td><td>Invoiced & Paid: Invoice generated paid</td></tr>
<tr><td>Credited: Used when time has to be credited</td><td colspan="2">Credited & Paid:
The Credit Note processed</td></tr>
<tr><td>Queried: Client queried the Time Sheet.
Queries addressed promptly by AWCape Services Division</td><td colspan="2">Signed Off: Client has approved the Time Sheet</td></tr>
</table>

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

Business Efficiency

Work Rate	R -
Travel Rate	R -

Client Contact	Kgomotso Sekhabisa
Time Sheet #	20150630-KA-SAH
Client	SAHRA
Consultant	Kaashiefa Anthony
Invoice Type	(All)
Project Code1	(All)

Comments

To approve electronically,log into your dedicated customer portal through www.awcape.co.za,click on Timesheets and approve or query with reason if applicable.To appove manually,please print,sign,scan and return to admin@awcape.co.za

PO No.

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 -
						R -	R -
					Sub Totals	R -	R -
			TOTAL HOURS	1.0		R -	

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
23.00
23.00 Uninvoiced Billable

1 Client	**Test SharePoint**
1 Project	**Sage 300 People Payroll Implementation Sharepoint**
Tasks	**All Tasks**
Team	**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	2.00
Test SharePoint	[SP_TEST] Sage 300 People Payroll Implementation Sharepoint	2015 Needs Analysis	N/A	Zander van Onselen	4.00
12/11/2019					6.00
Test SharePoint	[SP_TEST] Sage 300 People Payroll Implementation Sharepoint	2020 Technical Install	N/A	Zander van Onselen	4.00
Test SharePoint	[SP_TEST] Sage 300 People Payroll Implementation Sharepoint	2025 Setup Company Rule Parameters	N/A	Zander van Onselen	2.00

Step 5 – Update Time Sheets

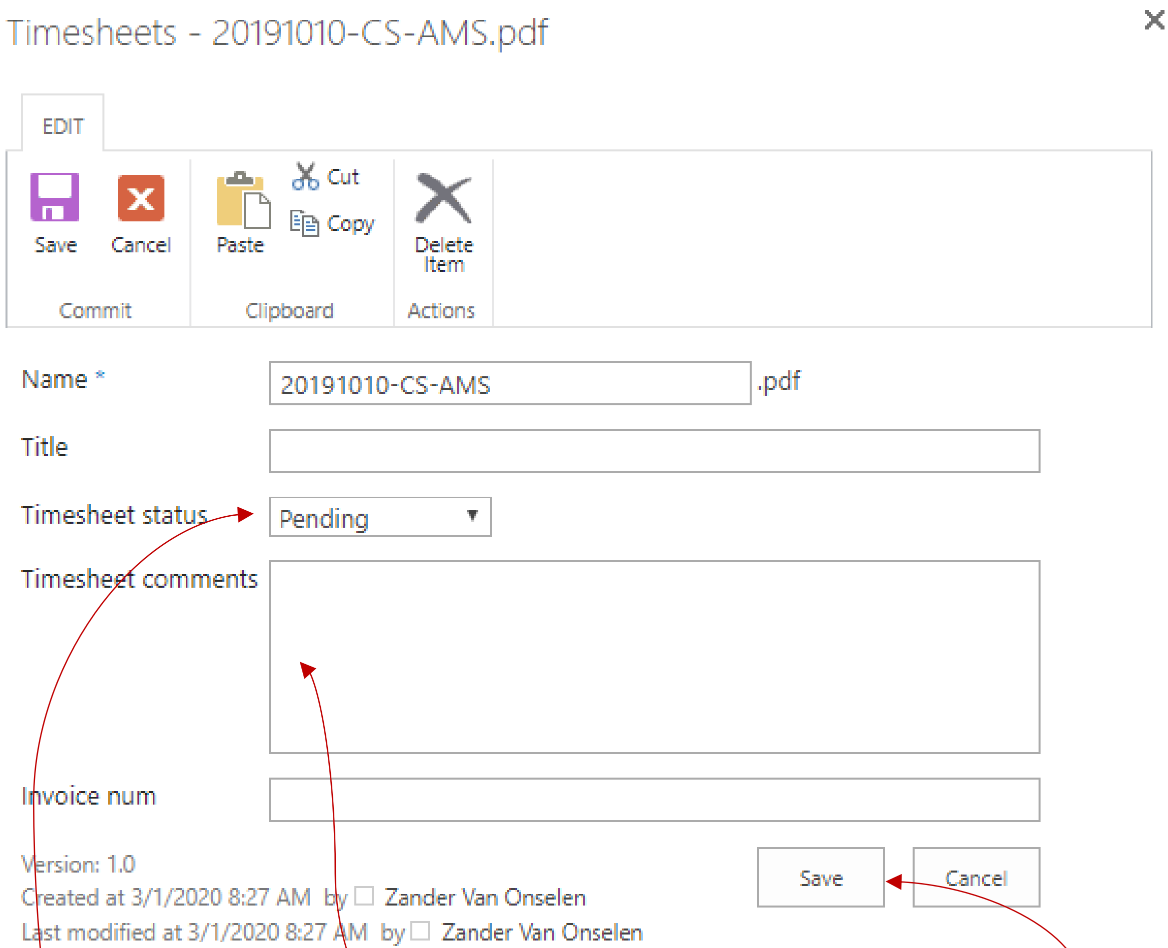
To approve and/or query a Time Sheet click on the Edit button in front of the relevant Time Sheet. This will open the review screen.

Timesheets

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



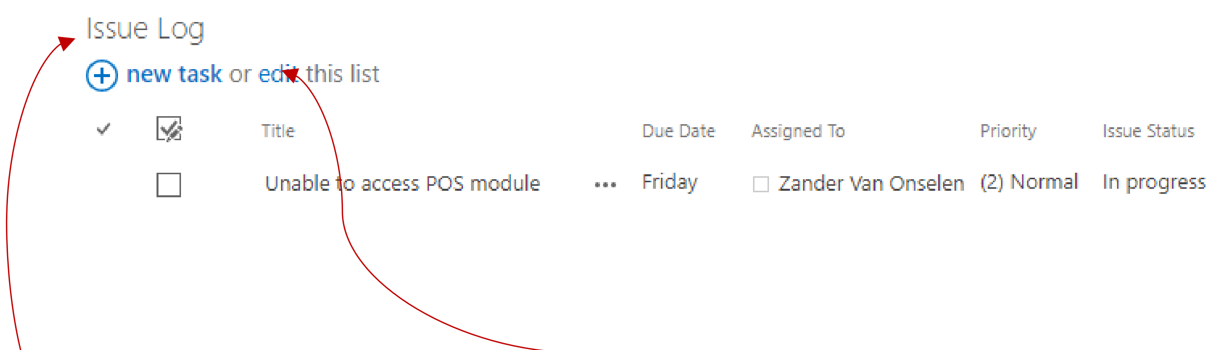
Click on the Status drop down list to change to either Queried or Signed Off.	If you query a Time Sheet please enter the reason for the query in the Comments box to assist AWCape in providing a prompt response.	Having made the change click on the Save button (either top left or bottom right).

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:

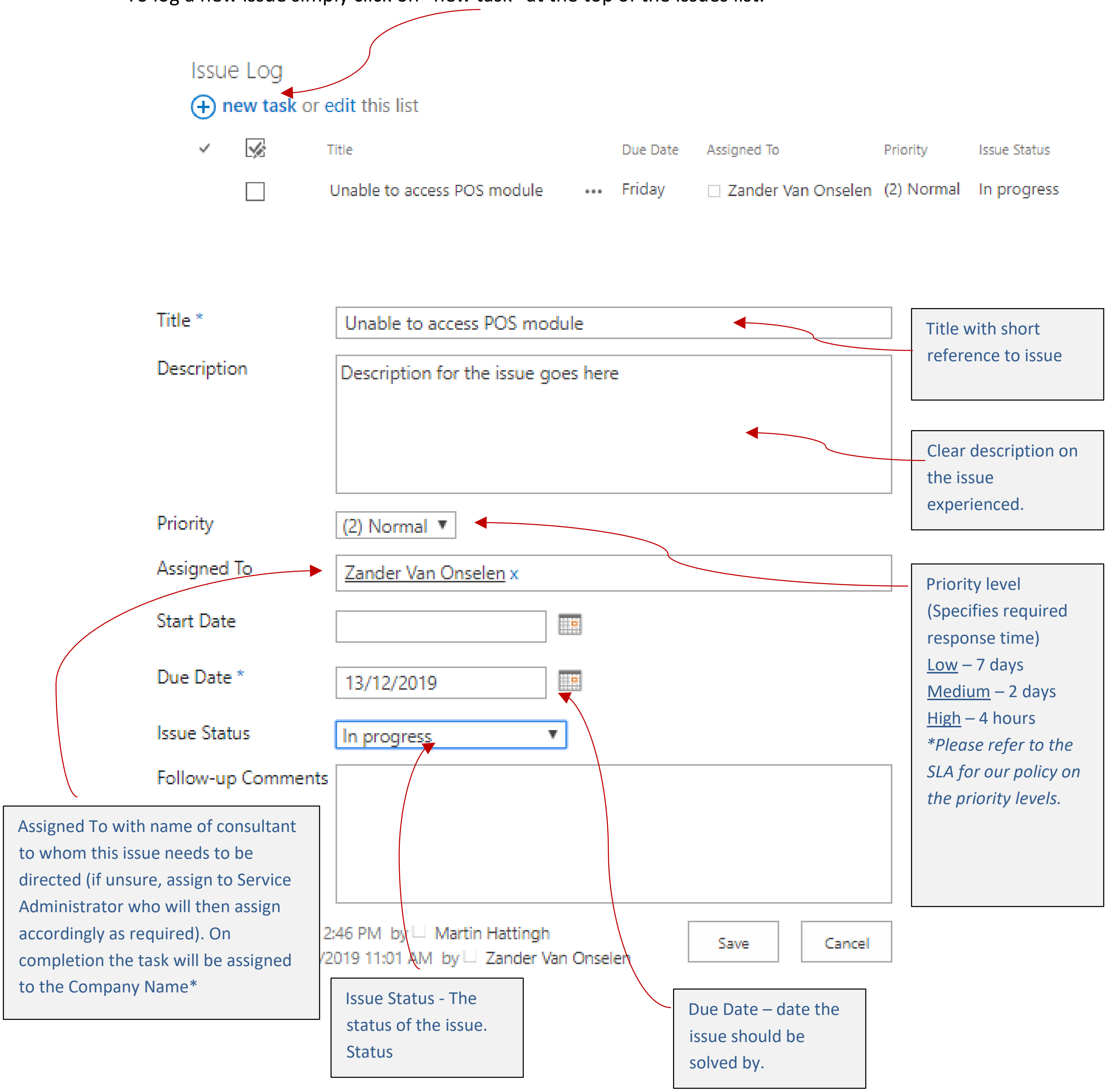
<table>
<tr><th>Issue ID</th><th></th><th>Title</th><th>Due Date</th><th>Assigned to</th><th>Priority</th><th colspan="2">Issue Status</th></tr>
<tr><td rowspan="5">Each Issue is assigned a sequential number</td><td rowspan="5">Indicates that there is an attachment for this issue</td><td rowspan="5">The main description of the issue</td><td rowspan="5">The estimated date for completion of work on the issue</td><td rowspan="5">Who the issue is currently assigned to. For Signoff the task will be assigned to the client:
- For ERP clients as SLA ERP “Client name” and for HR & Payroll clients SLA PAY “Client name”.</td><td rowspan="5">High, Normal or Low</td><td>Not Started:
No action taken</td><td>In Progress:
Work has started</td></tr>
<tr><td>Action Required:
Review comments. Assigned person to take action</td><td>On Hold:
Temporarily no action to take</td></tr>
<tr><td>Replenish Voucher:
Voucher hrs low. Replenish to continue</td><td>AWCape QC:
AWCape personnel to do a quality check</td></tr>
<tr><td rowspan="2">Customer QC:
Client to do quality check and confirm in happy with the work</td><td>Resolved:
Resolved by the AWCape consultant</td></tr>
<tr><td>Closed:
The client has tested the issue and is satisfied with the result. Only to be closed by initiator of the task</td></tr>
</table>

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.



*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”.

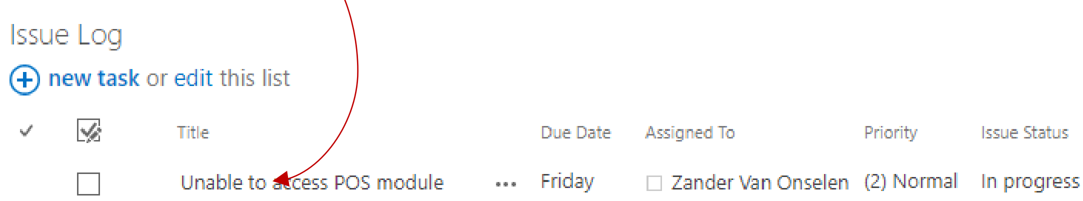
Sample: SLA PAY Amsol

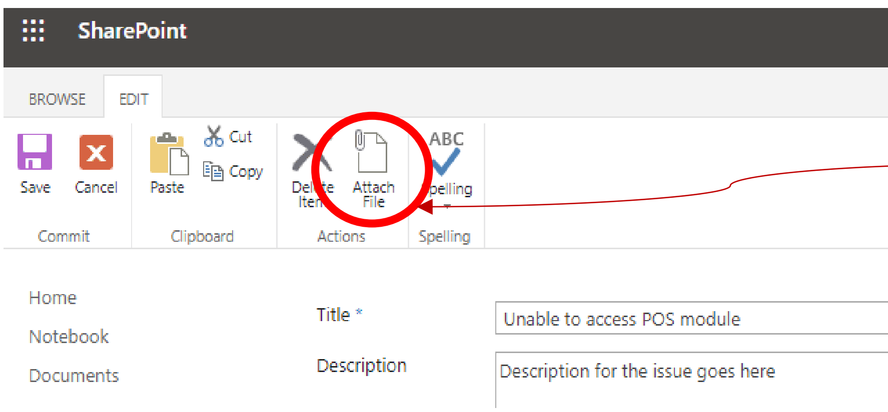
Issue Status Options	
Not Started: No action taken	**In Progress:** Work has started
Action Required: Review comments. Assigned person to take action	**On Hold:** Temporarily no action to take
Replenish Voucher: Voucher hrs low. Replenish to continue	**AWCape QC:** AWCape personnel to do a quality check
Customer QC: Client to do quality check and confirm in happy with the work	**Resolved:** Resolved by the AWCape consultant
	Closed: 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.





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:

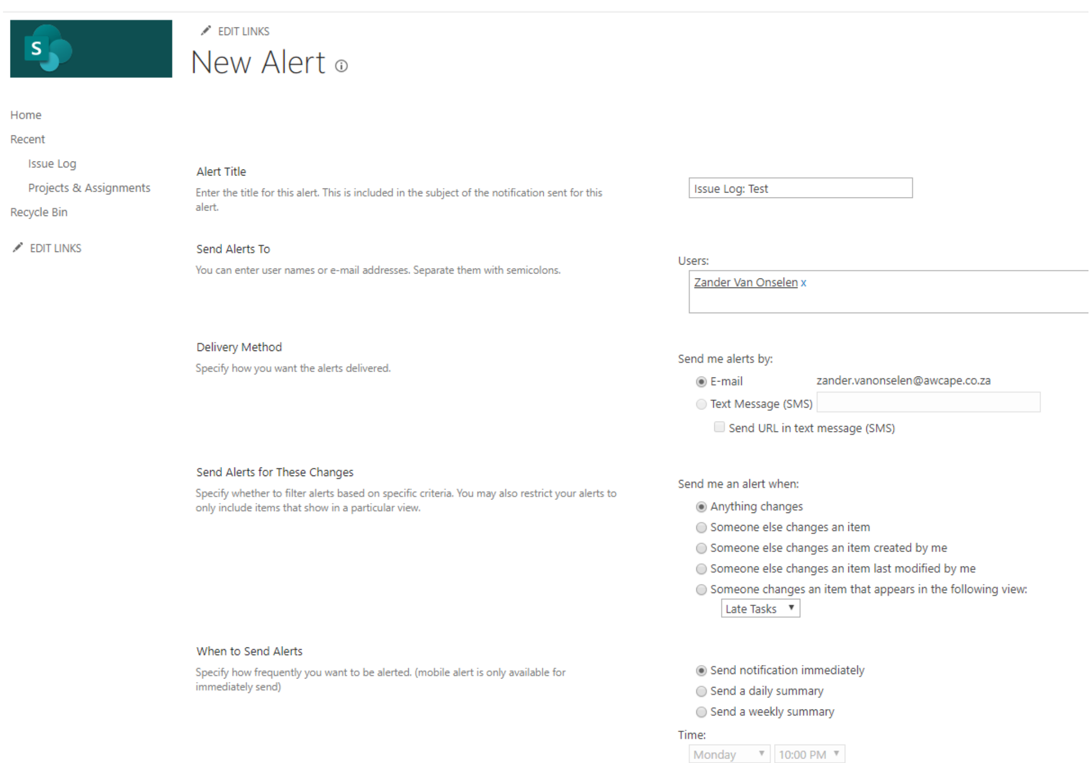
<table>
<tr><th>Due Date</th><th>Assigned to</th><th>Priority</th><th colspan="2">Issue Status</th><th>Follow Up Comments</th></tr>
<tr><td rowspan="5">The estimated date for completion of work on the issue</td><td rowspan="5">Assigned To with name of consultant to whom this issue needs to be directed (if unsure, assign to Service Administrator who will then assign accordingly as required). For Signoff the task will be assigned to the client:

- For ERP clients as SLA ERP “Client name” and for HR & Payroll clients SLA PAY “Client name”.</td><td rowspan="5">High, Normal or Low</td><td>Not Started:
No action taken</td><td>In Progress:
Work has started</td><td rowspan="5">Follow up comments explaining what has been done to date since previous update and why the issue has been updated</td></tr>
<tr><td>Action Required:
Review comments. Assigned person to take action</td><td>On Hold:
Temporarily no action to take</td></tr>
<tr><td>Replenish Voucher:
Voucher hrs low. Replenish to continue</td><td>AWCape QC:
AWCape personnel to do a quality check</td></tr>
<tr><td rowspan="2">Customer QC:
Client to do quality check and confirm in happy with the work</td><td>Resolved:
Resolved by the AWCape consultant</td></tr>
<tr><td>Closed:
The client has tested the issue and is satisfied with the result. Only to be closed by initiator of the task</td></tr>
</table>

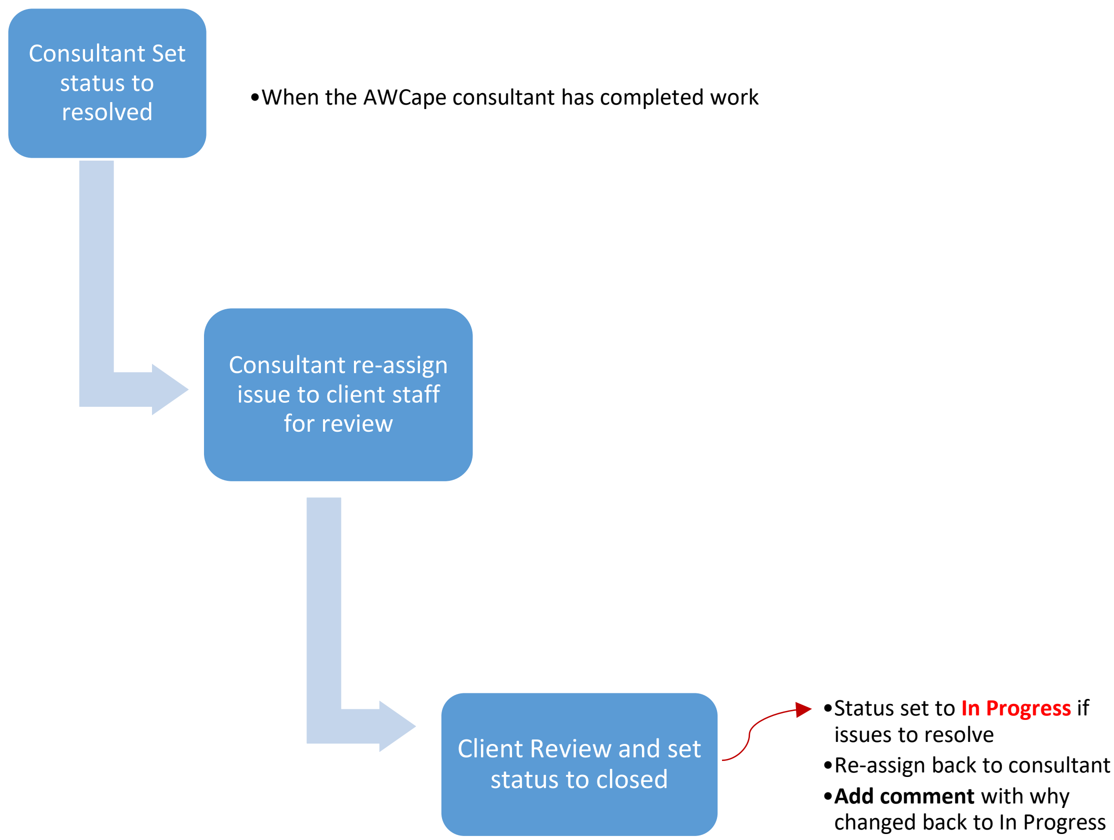
Step 4 – Other Options

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

View Item	Version History	Alert me	Delete Item
To simply view the details of the item	To obtain a full version history of the item	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. This screen can be used to change the standards for this specific issue and to select, for example: • a daily or • weekly status of the issue	Items entered in error can be deleted from the portal.



Step 5 – Closing an Issue



Other Features

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

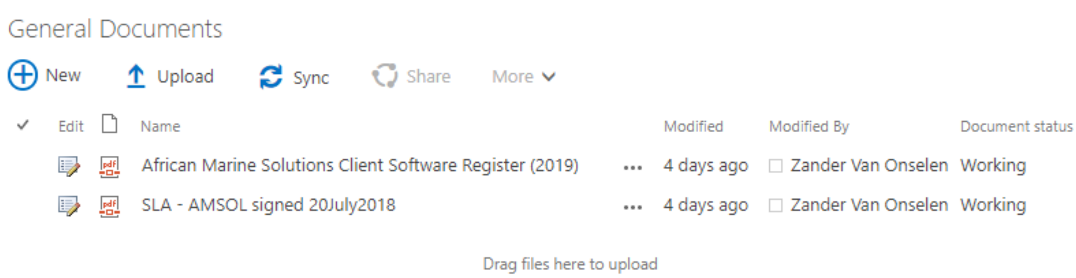
General Documents

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.



Project Documents

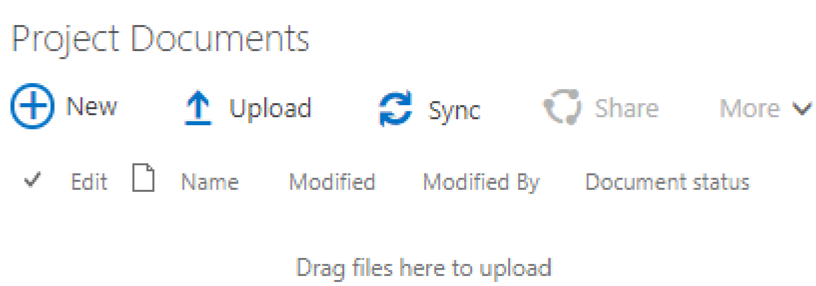
This section will contain the latest documents pertaining to the projects in progress with the client.

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.

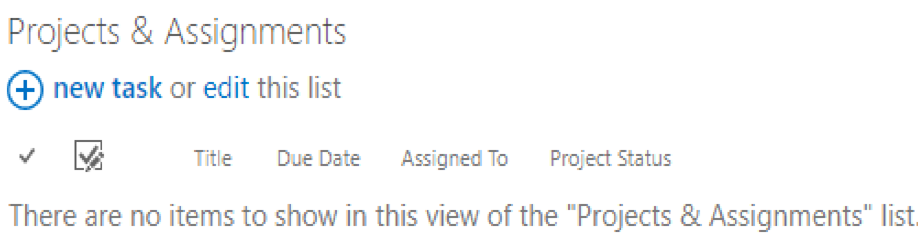


Project & Assignments

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.

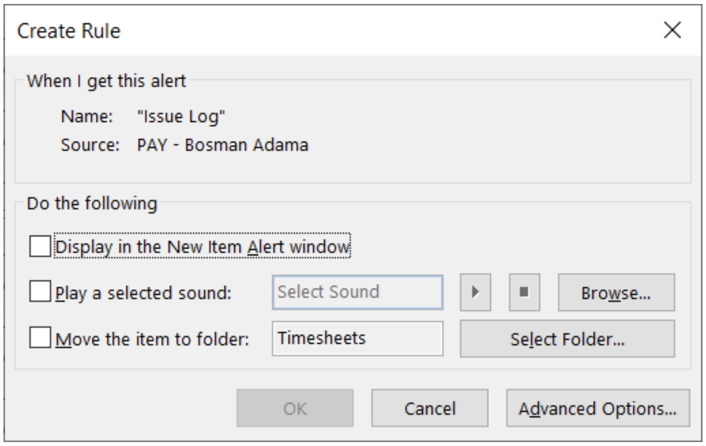


Time estimates pertaining to a project or assignment can be posted to this section to support the quotation function

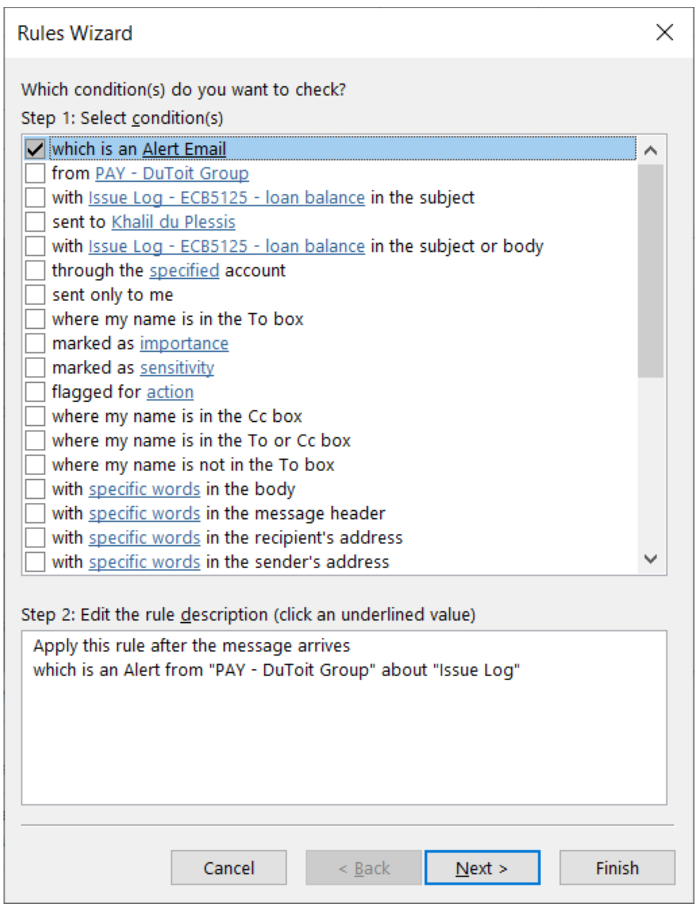
How to route alerts to a group from AWCape Customer Support System in Outlook

All e-mail alert generated are sent to the e-mail address no-reply@sharepointonline.com.

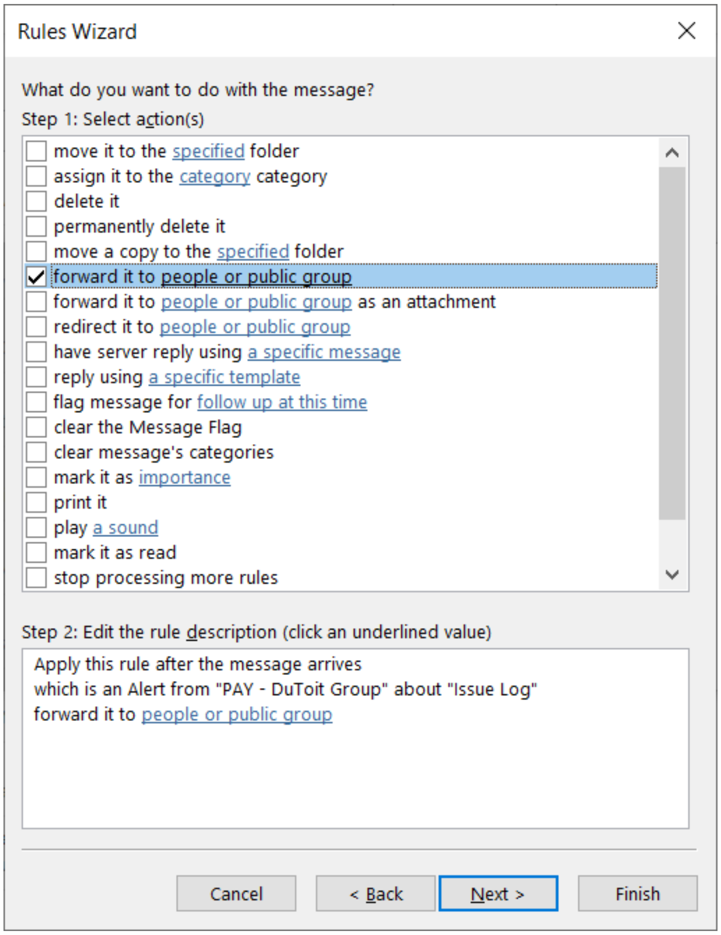
From the primary e-mail address Outlook Menu bar that was selected as the contact for the portal select Rules→ Create Rules:



Select Advanced Options:

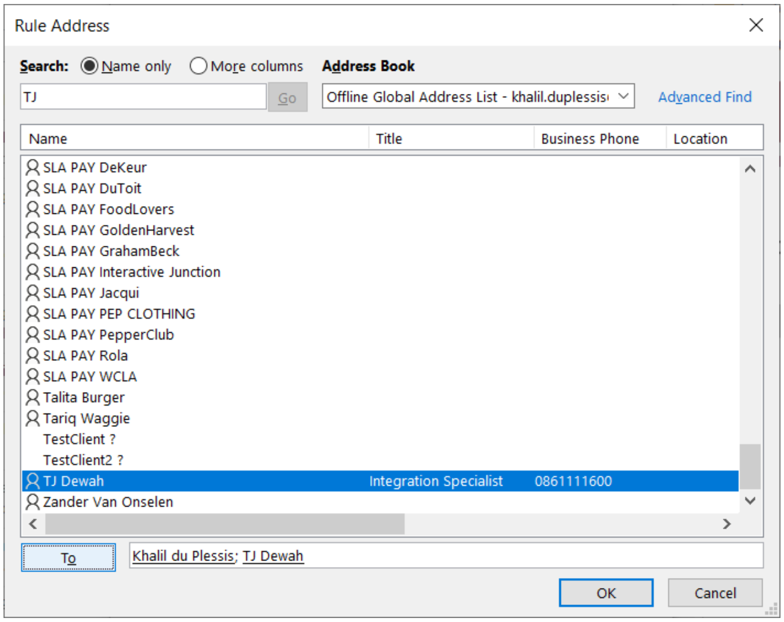


Select Next:



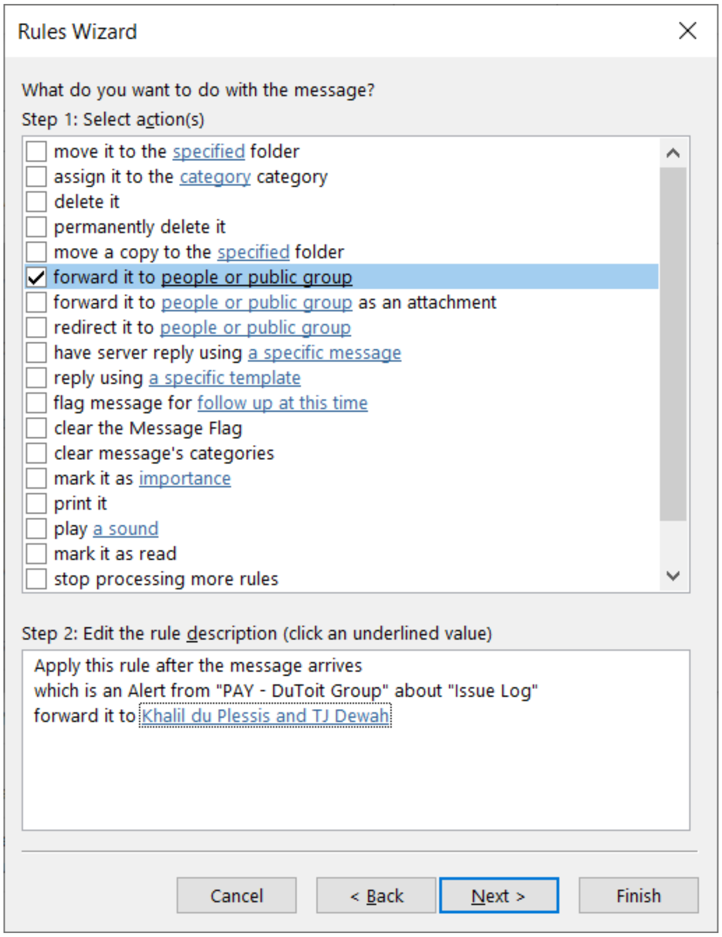
Click on people or public group in Step 2:

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