

Guide for the support agent

Guides by job role

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Guides by job role

Guide for the support agent

Handle customer issues quickly, meet your response targets and handle warranty claims.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Your role

You are the customer's contact when something goes wrong. You want the problem solved, and the customer to feel heard.

Every day

1. Open the **Issue** list and filter to *Open*, sorted by priority and due time. See Logging and resolving customer issues.
2. Take the oldest and highest priority first. Assign it to yourself.
3. Reply to the customer. A short reply with a clear next step is better than silence. Use **Communication** from the issue so the reply is recorded.
4. Check the **Response By** and **Resolution By** times. See Service levels and response targets.
5. Resolve the issue, write the **Resolution Details**, and mark it resolved.

Warranty and visits

1. For a product problem, search the serial number in a **Warranty Claim** to check the warranty. See Warranty claims and maintenance visits.
2. Book a **Maintenance Visit** if a technician needs to go out.
3. Charge for anything outside the warranty, by a sales invoice.

When you cannot fix it

- Assign it to the right person with a comment explaining what you need. See To Do, assignments and mentions.
- Tell the customer who is handling it, and when to expect an update.

Every week

Look at **Issue Analytics** and the first-response report with your manager. Look for causes that repeat, and suggest fixes.

Good habits

- One issue per problem, with a clear subject.

- Never close an issue without a resolution note.
- Be polite, even if the customer is not.

Who to ask

Your support manager for escalations, and the storekeeper or technician for parts and visits.

Related documentation

- Logging and resolving customer issues
- Service levels and response targets
- Warranty claims and maintenance visits
- To Do, assignments and mentions