

Hesabu ERP Support Manual

Customer support

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Documentation version 1.0, published 17 November 2026. The screens in your own workspace may differ slightly depending on your plan and settings.

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- **Logging and resolving customer issues**
- **Service levels and response targets**
- **Warranty claims and maintenance visits**

Customer support

Log customer issues, set response targets, resolve them and handle warranty claims.

Customer support

Logging and resolving customer issues

Record a customer's problem, assign it, reply and close it.

Beginner · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Customer Support** add-on, which any plan can add. Contact us to add it.

Overview

An **Issue** is a record of a customer's problem or question, from the first report to the solution. Keeping them in one place means nothing is forgotten, and you can see what customers complain about most.

Prerequisites

Customers created. **Issue Types** set up (search for it), such as *Billing*, *Delivery* or *Product fault*. The Support Team role for staff.

Steps

Log an issue

1. Search for **Issue** and click **Add Issue**.
2. Enter a clear **Subject**, choose the **Customer**, the **Issue Type** and the **Priority**.
3. Describe the problem in the **Details**. Attach screenshots or photos.
4. Save. The status is *Open*.

Issues from email

If an incoming email account is connected for support, emails to it create issues automatically, and replies are linked to the same issue. See Email and regional settings.

Work on the issue

1. Assign it to a team member in the sidebar. They are notified.
2. Reply to the customer from the issue by using **Communication** (email), or add an internal comment.
3. Change the **Status** as it moves: *Open*, *Replied*, *On Hold*, *Resolved*.

Resolve and close

1. When fixed, click **Resolved** (or set the status), and write a **Resolution Details** note.
2. Resolved issues may close automatically after a set number of days, or you can click **Close**.
3. If the customer says it is not fixed, **Re-open** it.

Practical example

A customer reports that a delivered printer jams. The support officer logs it as *Product fault*, high priority, assigns it to the technician, and replies with a diagnosis the same day. The technician visits, replaces a part, and the issue is closed with a resolution note.

Important notes

- Reply to every issue, even if it is only to say you are working on it.
- Use the same issue for follow-ups, not a new one each time.
- Review open issues every day. See Service levels and response targets.

Common mistakes

- Vague subjects such as "Problem".
- Closing without a resolution note.

Next steps

Read Service levels and response targets.

Related documentation

- Service levels and response targets
- Warranty claims and maintenance visits
- To Do, assignments and mentions

Customer support

Service levels and response targets

Set how fast you will respond and resolve, and be warned before you miss a target.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Customer Support** add-on, which any plan can add. Contact us to add it.

Overview

A **Service Level Agreement (SLA)** is your promise about response and resolution times, such as "reply within 4 hours and fix within 2 days for high priority". Hesabu ERP tracks each issue against it and shows if you are late.

Prerequisites

A **Holiday List** (search for it), so weekends and public holidays are not counted against you. The issue types and priorities you use.

Steps

1. Search for **Service Level Agreement** and click **Add Service Level Agreement**.
2. Enter a name. Optionally tick **Default Service Level Agreement**, or choose an **Entity Type** (*Customer*, *Customer Group* or *Territory*) and the **Entity**.
3. In **Working Hours**, add a row for each working day with its **Start Time** and **End Time**.
4. In the **Priorities** table, enter for each priority the **First Response Time** and the **Resolution Time**.
5. Choose the **Holiday List**.
6. Tick **Enabled** and save. First turn on **Track Service Level Agreement** in **Support Settings**.
7. Create a test issue. The **Response By** and **Resolution By** dates appear on it.

Be alerted

Create a **Notification** that emails the team lead when an issue is close to its target. See Workflows and notifications.

See how you are doing

Open the **First Response Time for Issues** report, and the **Issue Analytics** report.

Practical example

Standard Support: 8:00 to 17:00, Monday to Friday. High priority issues need a reply within 2 hours and a fix within 8. An issue raised at 16:00 on Friday has its first response due at 9:00 on Monday, not 18:00 on Friday.

Important notes

- Promise only what you can deliver. A missed SLA is worse than a longer one.
- Set longer targets for low priority issues.
- Premium customers can have their own SLA.

Common mistakes

- Forgetting the holiday list.
- Giving every issue the highest priority.

Next steps

Read Warranty claims and maintenance visits.

Related documentation

- Logging and resolving customer issues
- Workflows and notifications
- Leave types, allocations and applications

Customer support

Warranty claims and maintenance visits

Handle products under warranty and record service visits to customers.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Customer Support** add-on, which any plan can add. Contact us to add it.

Overview

Customers who bought a product with a warranty may bring it back for repair. A **Warranty Claim** records the claim, and a **Maintenance Visit** records a technician's visit to a customer.

Prerequisites

Products you sell with serial numbers, if you want automatic warranty checks. See Batches and serial numbers. Set the **Warranty Period (in days)** on the item.

Steps

Warranty claim

1. Search for **Warranty Claim** and click **Add Warranty Claim**.
2. Choose the **Customer** and the **Serial No**. The system shows the warranty status and expiry.
3. Describe the **Issue** and any **Resolution** later.
4. Save. Update the **Status** from *Open* to *Closed* once resolved.

Maintenance visit

1. Search for **Maintenance Visit** and click **Add Maintenance Visit**.
2. Choose the **Customer**, the **Maintenance Type** (*Scheduled*, *Unscheduled* or *Breakdown*) and the **Maintenance Date**.
3. In **Purposes**, add the item serviced, the **Work Done** and the technician.
4. Mark the **Completion Status**, then submit.

Scheduled servicing

For customers on service contracts, create a **Maintenance Schedule** listing the items and how often they are serviced. It generates visits and reminders.

Practical example

A customer returns a generator three months after buying it. The support team enters its serial number in a warranty claim, sees it is within the 12-month warranty, and books a visit. The technician replaces a part and records it under *Work Done*.

Important notes

- Check the warranty terms and expiry before promising free repair.
- Keep the replaced parts and costs on the record, so you can claim back from the supplier.
- Charge for work outside the warranty with a normal sales invoice. See Creating a sales invoice.

Common mistakes

- Selling products without serial numbers, so warranty cannot be verified.
- Not closing claims once repaired.

Next steps

Return to Logging and resolving customer issues.

Related documentation

- Logging and resolving customer issues
- Batches and serial numbers
- Moving and maintaining assets

Support

Call or WhatsApp 0117 801 786.
Support requests: https://www.hesabuerp.co.ke/support.html
Website: https://www.hesabuerp.co.ke
Online documentation: https://www.hesabuerp.co.ke/documentation/

When you contact us, please give your workspace address and a short description of what you were doing. A screenshot helps.