

Logging and resolving customer issues

Customer support

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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