

Vision CRM

TSG's Vision CRM is an on-line Customer Relationship Management product, which will dramatically improve our current support workflow.

Vision CRM will provide numerous advantages over the current workflow, with the most significant gain being the centralization, and easy analysis of your support issues.

Internal VISION CRM will facilitate TSG users to create tasks for OTG, ADMIN, VISION TEAM rather than sending emails to OTG/ADMIN/ VISION TEAM and view updates on all the requested items. TSG users can still create sub-tasks for OTG, Admin and VISION TEAM if there is already a task for any request; they do not need to create redundant tasks.

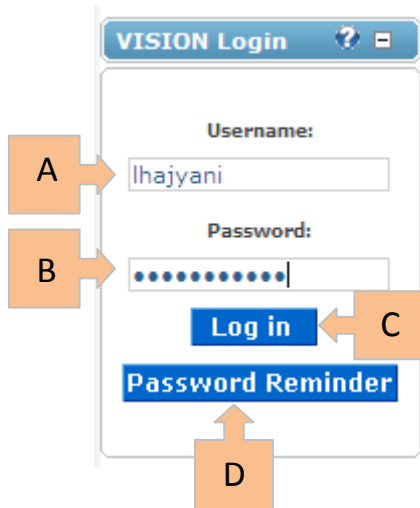
**Author: VISION CRM Team
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Registration

TSG users who are already on VISION need not to register again. They can use VISION CRM using their VISION credentials.

Login

Go to <http://tsgintranetp/VISION/crmvision> (internal link) OR <http://vision.shamsgroup.com/> (external link). Login to the portal using the VISION username/password



Overview:

- **Username:**
User will type the username provided by the TSG Customer Support.
Usernames in VISION CRM are always combination of first initial of the First name and Last name. For example:
First Name: John
Last Name: Tran
Username: jtran
- **Password:**
User will type the password provided by the TSG Customer Support
- **Login:**
Click **Log in** to visit VISION CRM
- **Password Reminder:**
If the user forgets the password, he/she can click **Password Reminder** after entering the username to receive an email with the password

Password and Profile Update

Overview:

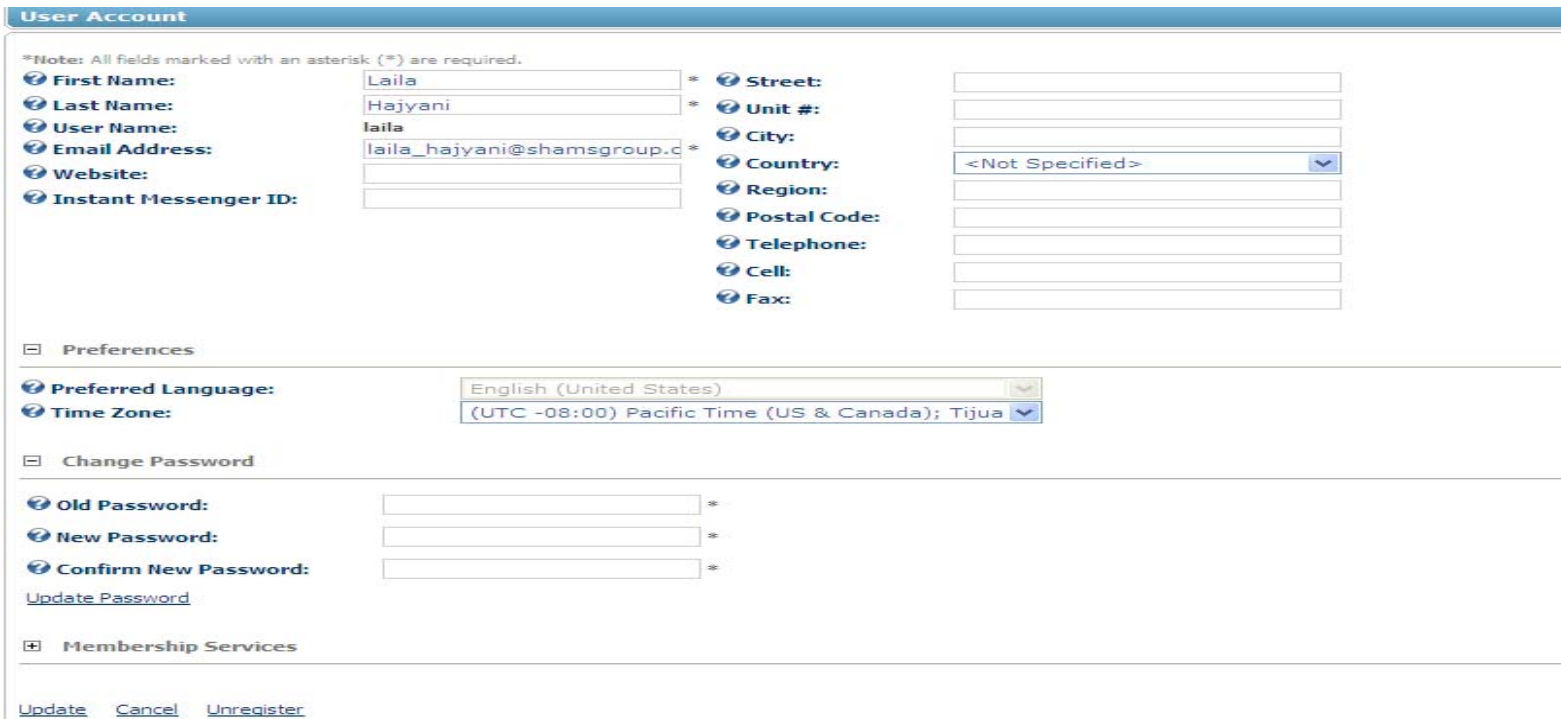
The user can update the Password and the Profile by clicking on his/her name displayed on the top right corner of any page



The screenshot shows the Vision CRM interface. At the top left is the TSG logo (The Shams Group). In the center is the Vision CRM logo. At the top right, the user's name "Laila Hajyani" and a "Logout" link are visible, with an orange arrow labeled "A" pointing to the name. Below the header is a navigation bar with links: Home, Open Support Issues, Closed Support Issues, Tasks WOC, and Client Support Issues. A blue bar labeled "Tasks Waiting on Client" contains a search form with fields for Date, ID, Product, and Owner, along with a search icon and a red 'X' icon. Below the search form is a table with the following columns: C, ID, Product, Owner, Priority, Status, Subject, and Received Date.

Features:

- A. **Profile and Password Update:** User can click on the Display name to get to the Profile and Password Update Page



The screenshot shows the "User Account" profile update page. It includes a note: "*Note: All fields marked with an asterisk (*) are required." The form is divided into two columns of fields. The left column contains: First Name (Laila), Last Name (Hajyani), User Name (laila), Email Address (laila_hajyani@shamsgroup.c), Website, and Instant Messenger ID. The right column contains: Street, Unit #, City, Country (set to "<Not Specified>"), Region, Postal Code, Telephone, Cell, and Fax. Below these fields is a "Preferences" section with "Preferred Language" (English (United States)) and "Time Zone" ((UTC -08:00) Pacific Time (US & Canada); Tigua). A "Change Password" section has fields for Old Password, New Password, and Confirm New Password, with an "Update Password" link. At the bottom is a "Membership Services" section with "Update", "Cancel", and "Unregister" links.

- **Password Update:** The user can click on the Display Name to get to the Profile and Password page. To update the password, user must enter the current password, new password and confirm password. As the user clicks on [Update Password](#) , the password gets updated
- **Profile Update:** The user can click on the Display Name to get to the Profile and Password page. To update any field in the Profile, user can edit the existing information and click [Update](#) . TSG Customer Support will inform the user as soon as TSG Dictionaries are updated with the updated profile.

Create Intranet Support Issue

Overview:

Internal Users can create a task for IntranetSupport using this Form. If there is already a task for an Issue/request or can be worked as a sub-task on any other task, user must not create a redundant task. Any requests that the users currently sends out via email to IntranetSupport must be created using this Form.

[Home](#) [Create Issue](#) [Create Internal Issue](#) [Open Support Issues](#) [Closed Support Issues](#) [Client Support Issues](#) [Help](#) [FAQ](#)

[Create Intranet Support Issue](#)
[Create OTG Issue](#)
[Create Admin Issue](#)

Create Admin Issue

Task Details

Priority: Low Normal High Severe

Start Date:

Subject:

Description:

Additional Contact Details

Contact: Name:

Phone: Email:

	Name	Phone	Email
<input checked="" type="checkbox"/>	Laila Hajyani-TSG	462	Laila_Hajyani@shamsgroup.com

Attachment Details

User must add a Priority, Subject, Description and Attachments (optional) and click on either or and the task gets auto-assigned to the appropriate group.

Create OTG Issue

Overview:

Internal User can create a task for OTG Department using this Form. If there is already a task for an Issue/request or can be worked as a sub-task on any other task, user must not create a redundant task. Any requests that the user currently sends out via email to OTG must be created using this Form.

[Home](#) [Create Issue](#) [Create Internal Issue](#) [Open Support Issues](#) [Closed Support Issues](#) [Client Support Issues](#) [Help](#) [FAQ](#)

- Create Intranet Support Issue
- Create OTG Issue**
- Create Admin Issue

Create OTG Issue

Task Details

Priority: Low Normal High Severe

Start Date:

Subject:

Description:

Additional Contact Details

Contact: Name:

Phone: Email:

	Name	Phone	Email
<input checked="" type="checkbox"/>	Laila Hajyani-TSG	462	Laila_Hajyani@shamsgroup.com

Attachment Details

User must add a Priority, Subject, Description and Attachments (optional) and click on either or and the task gets auto-assigned to the appropriate group.

Create Admin Issue

Overview:

Internal Users can create a task for Administration Department using this Form. If there is already a task for an Issue/request or can be worked as a sub-task on any other task, user must not create a redundant task. Any requests that the users currently sends out via email to Admin must be created using this Form.

[Home](#) [Create Issue](#) [Create Internal Issue](#) [Open Support Issues](#) [Closed Support Issues](#) [Client Support Issues](#) [Help](#) [FAQ](#)

- Create Intranet Support Issue
- Create OTG Issue
- Create Admin Issue**

Create Admin Issue

Task Details

Priority: Low Normal High Severe

Start Date:

Subject:

Description:

Additional Contact Details

Contact: Name:

Phone: Email:

	Name	Phone	Email
<input checked="" type="checkbox"/>	Laila Hajyani-TSG	462	Laila_Hajyani@shamsgroup.com

Attachment Details

User must add a Priority, Subject, Description and Attachments (optional) and click on either or and the task gets auto-assigned to the appropriate group.

Create SI Issue/Request

Overview:

Internal Users can create a task for System Implementation using this Form. If there is already a task for an Issue/request or can be worked as a sub-task on any other task, user must not create a redundant task. Any requests that the users currently sends out via email to IntranetSupport must be created using this Form.

Home TMT Create Issue Create Internal Issue Open Support Issues Closed Support Issues Tasks WOC Client Support Issues

- Create OTG Issue
- Create Admin Issue
- Create Intranet Issue
- Create SI Issue/Request**

Create SI Issue/Request

Task Details

Client:

Priority: Low Normal High Severe

Task Date:

Subject:

Description:

Additional Contact Details

Contact: Name:

Phone: Email:

Name	Phone	Email


Attachment Details

User must add a Priority, Subject, Description and Attachments (optional) and click on either or and the task gets auto-assigned to the appropriate group.


Open Support Issues

Overview:

The Open Support Task queue shows: All open tasks created/reported by the user using VISION CRM. If a user creates a task for OTG or Admin using the appropriate Create Issue forms, the user will see those tasks in his/her Open Support Issues and Closed Support Issues.







- **Task ID:**
TSG Customer Support generated Issue ID for the request
- **Product:**
This Product has the reported issue
- **Owner :**
This client contact reported the issue
- **Priority:**
This represents the severity of the task. VISION CRM has four priorities Severe, High, Normal and Low
- **Status:**
This represents the status of the task. VISION CRM has five statuses
 1. **Pending:** TSG Customer Support is allocating resources for the issue
 2. **Working:** TSG Technical Team is looking into the issue
 3. **Waiting on Client (WOC):** TSG is waiting on the client for some requirements
 4. **Completed:** The issue has been resolved by TSG Technical Team and is waiting on the client to clear it
 5. **Closed:** When the Client confirms that the issue is resolved by email or by clicking , the task is closed. Once the task closes, it goes into the Closed Support Issues queue
- **Subject:**
Subject of reported issue
- **Completion Date:**

This date only shows if the task is completed, and is waiting on clearance from client

- **Received Date:**
Date the Issue was reported
- **Close:**
To clear the task, click 



The screenshot shows a support ticket management interface. At the top, there is a header bar with 'Open Support Issues [18]' and a status bar showing 'Working: 1' and 'Completed: 17'. Below the header are several filter fields: Date, ID, Product, Owner, Status, and a search icon. The main area is a table with columns: ID, Product, Owner, Priority, Status, subject, Completed Date, Date, and Close. The table contains 20 rows of tickets. Callouts A through M point to various elements: A points to the Product filter, B points to the Date column, C points to the Close column, D points to the Open Support Issues count, E points to the Product filter, F points to the Owner filter, G points to the Status filter, H points to the search icon, J points to the subject column, K points to the Working/Completed status bar, L points to the ID column, and M points to the Close column.

ID	Product	Owner	Priority	Status	subject	Completed Date	Date	Close
TSG-3080	Galactica POS	N/A	Normal	Completed	Unable to sca	06/03/2008 17:04		
TSG-2011	ETranscriptor	N/A	Normal	Completed	Add New Doc	05/28/2008 12:25	05/24/2008 09:46	
TSG-58	ETranscriptor	N/A	Normal	Completed	Punx pages aren't configured proper ...	05/29/2008 14:42	05/19/2008 13:32	
TSG-1211		N/A	Normal	Working	TSG Database- User getting Peachtre ..		05/13/2008 12:52	
TSG-2284	EHR	N/A	Normal	Completed	EHR- PDFprint functionality not pri ...	08/12/2008 03:19	05/13/2008 11:47	
TSG-2013	System Migration	Nabeel Shahid-SSS	Normal	Completed	TSG Intranet- TSG LIVE, DNNPMGP datab	05/30/2008 16:09	04/30/2008 06:20	
TSG-2486	TSG Intranet	N/A	Normal	Completed	ISISA Logs research	09/08/2008 15:57	04/25/2008 11:19	
TSG-2603	Admin	N/A	Normal	Completed	RE: istermimp is down due to blue s ...	09/23/2008 09:57	12/11/2007 11:20	
TSG-2026	ETranscriptor Dashboard Client	N/A	Normal	Completed	ETranscriptor - Change code to sort ...	08/20/2008 10:59	10/17/2007 08:11	
TSG-2531	ETranWebPortal	N/A	Normal	Completed	ETranWebPortal 1.0.8 (question #7)- ..	09/04/2008 10:29	10/02/2007 02:51	
TSG-2608	E-Page	N/A	Normal	Completed	SMTP Site Paging Support	09/12/2008 08:48	10/01/2007 23:32	
TSG-2024	ETranscriptor Dashboard Client	N/A	Normal	Completed	ETranscriptorClient- Error (Error=5 ...	08/14/2008 18:41	08/02/2007 06:49	
TSG-2058	HIS	N/A	Normal	Completed	Care2x : Bug Fixing(if bills are p ...	09/10/2008 10:21	04/11/2007 09:06	
TSG-2056	HIS	N/A	Normal	Completed	Care2x : Modify the Search Query to ...	09/10/2008 10:22	03/12/2007 10:14	
TSG-2163	WINTRAN INTERFACE	Zia Shams	Normal	Completed	ADT - Issue with Discharge Summary P .	06/02/2008 13:12	12/11/2006 16:22	
TSG-2524	SQL Databases	N/A	Normal	Completed	Project On Administration of ETranP ...	08/29/2008 09:45	10/11/2006 08:35	
TSG-2078	Galaxy Relationships	N/A	Normal	Completed	SMRMC - Galaxy Weekly Checks	08/15/2008 16:38	06/23/2006 06:55	

Features:

A. Task Count:

Shows the number of tasks in the queue

B. Legend:

Shows the count with color codes for Pending Tasks, Working Tasks, Waiting on Client (WOC) Tasks and Completed Tasks

 Pending: 10  WOC: 6  Working: 11  Completed: 15

C. **Help:**


Displays help about the module

D. **Date Filter:**

User can apply the Received Date filter by selecting the following options:

Date : Time : From : To :

- This Week
- Last Week
- This Month
- Last Month
- Interval

- a) **This Week:** Shows all tasks received in the current week
- b) **Last Week:** Shows all tasks received last week
- c) **This Month:** Shows all tasks received in the current month
- d) **Last Month:** Shows all tasks received last month
- e) **Interval:** Click  icon to open up the calendar and select the date/time interval to filter for tasks received during that interval

E. **ID Filter:**

User can type the Task ID provided by TSG Customer Support to search for a particular Issue. You do not have to enter the full Task ID, you can provide a partial ID in the ID filter to narrow down the results

F. **Product Filter:**

User can filter by the product to narrow down the search results

G. **Owner:**

User can filter all tasks by the reported user

H. **Status:**

Filter by Task status is also available

I. **Apply Filter:**

To apply a filter click 

J. **Clear Filter:**

To clear a filter click 


K. Column Sort:

Click the column header to sort results by the column

L. Task Communication / Task History:

Click on  to view the task history

M. Clear Task:

To clear a task click on  in the column named "Close." This will close the task, confirming that the user is satisfied with the resolution

Close Support Issues

Overview:

The Closed Support Task queue shows: All closed tasks created/reported by the user using VISION CRM. If a user creates a task for OTG or Admin using the appropriate Create Issue forms, the user will see those tasks in his/her Open Support Issues and Closed Support Issues.

All tasks/issues reported by the client and closed in last 30 days.

- **Task ID:**
This is the Issue ID TSG Customer Support generated for the request
- **Product:**
This Product has the reported issue
- **Owner :**
This client contact reported the issue
- **Priority:**
This represents the severity of the task. VISION CRM has four priorities Severe, High, Normal and Low
- **Subject:**
Subject of reported issue
- **Completion Date:**
This date only shows up if the task is completed, and is waiting on clearance from the client
- **Received Date:**
Date the task was received
- **Closed By:**
This field lists the name of the user who closed the task
- **Closed Date:**
Displays the date/time, the task was closed


The screenshot shows a web application interface for 'Closed Support Issues [58]'. The interface includes a header bar with a title and a search bar. Below the header is a table with columns: ID, Product, Owner, Priority, Subject, Completed Date, Received Date, Closed By, and Closed Date. The table contains 15 rows of support tickets. Callouts A through J point to specific UI elements: A points to the task count '58', B points to the help icon, C points to the date filter dropdown, D points to the ID filter input, E points to the product filter dropdown, F points to the owner filter dropdown, G points to the search button, H points to the search results, I points to the table header, and J points to the table rows.

ID	Product	Owner	Priority	Subject	Completed Date	Received Date	Closed By	Closed Date
TSG-7815		N/A	High	Rebuild CentroD1		09/06/2008 12:49		09/17/2008 00:00
TSG-7179		N/A	High	Folder Creation on \\TMTSQL\FTPSITE		08/26/2008 12:44	System Message	09/16/2008 09:23
TSG-11853	Alerts POC	Muhammad Javed-SSS	Normal	Test task by IS	11/20/2008 06:40	11/20/2008 06:39	Muhammad Javed-SSS	11/20/2008 06:42
TSG-1393	Intranet	N/A	Normal	TSG Intranet- Project Status Histor		06/28/2007 07:24	Laila Hajyani-TSG	09/26/2008 08:50
TSG-8812	VISION	Muhammad Adnan Masood-SSS	Normal	Vision-Enhancements QA/test	09/25/2008 12:14	09/25/2008 11:00	System Message	09/25/2008 12:14
TSG-7160		N/A	Normal	Surf Control Rules Modifications		08/26/2008 11:34		09/18/2008 00:00
TSG-7091		N/A	Normal	New IC setup (Pamela Cook)		08/25/2008 15:05		09/17/2008 00:00
TSG-6818		N/A	Normal	Testing environment for security te		08/19/2008 14:51		09/17/2008 00:00
TSG-6861		N/A	Normal	Surf Control Rules Adjustment		08/20/2008 10:09		09/17/2008 00:00
TSG-7280		N/A	Normal	Bad Laptop Screen		08/27/2008 16:14		09/17/2008 00:00
TSG-3876		N/A	Normal	TMTSQL FTPSITE issue		06/18/2008 17:41		09/17/2008 00:00
TSG-7679		N/A	Normal	Convert Word to PDF		09/04/2008 06:28		09/17/2008 00:00
TSG-7716		N/A	Normal	TSGDATABASE imaging issue on Shahna		09/04/2008 14:19		09/17/2008 00:00
TSG-7342		N/A	Normal	TSGIntranetP System Backup		08/28/2008 11:15		09/17/2008 00:00
TSG-7460		N/A	Normal	Surf Control service issue		08/30/2008 13:05		09/17/2008 00:00
TSG-7534		N/A	Normal	Spyware on Shuja's laptop		09/02/2008 09:12	System Message	09/16/2008 09:23
TSG-7550		N/A	Normal	Anita's outlook Issue		09/02/2008 10:40	System Message	09/16/2008 09:23

Features:

- A. **Task Count:**
Shows the number of tasks in the queue
- B. **Help:**
Displays help about the module
- C. **Date Filter:**
User can apply Received Date filter or Close Date filter by selecting the following options:

Date : Time : From : To :
 Date : Time : From : To :

- a) **This Week:** Shows all tasks received/closed in the current week
- b) **Last Week:** Shows all tasks received/closed last week
- c) **This Month:** Shows all tasks received/closed in the current month
- d) **Last Month:** Shows all tasks received/closed last month
- e) **Interval:** Click  icon to open up the calendar and select the date/time interval to filter for tasks received/closed during that interval

D. ID Filter:

User can type the Task ID provided by TSG Customer Support to search for a particular Issue. You do not have to enter the full Task ID, you can provide a partial ID in the ID filter to narrow down the results

E. Product Filter:

User can filter by the product to narrow down the search results

F. Owner:

User can filter all tasks by the reported user

G. Apply Filter:

To apply a filter click 

H. Clear Filter:

To clear a filter click 

I. Column Sort:

Click the column header to sort results by the column

J. Task Communication / Task History:

Click on  to view the task history

Task Communication

Overview:

This view shows all details for the selected Task, and it provides a way to communicate with TSG. All communication between the Client and TSG is displayed.

The screenshot displays the 'Task Communication' interface. At the top, a task summary bar includes fields for 'TSG-116632', 'Product', 'Client: The Shams Group', 'Task Date: 10/10/2008 07:41', and 'Status: Pending'. Below this, the 'Last Communication' section shows an email from 'Muhammad Javed-SS5' dated '12/16/2008 07:45'. The email body contains a 'Reply' section with a text area and an 'Attachment Details' section with 'Browse...' and 'Upload' buttons. At the bottom, the 'Task Communication History' section lists previous communications, including one from 'Muhammad Azeem-SS5' on '10/10/2008 07:41'. Callout boxes A through K point to specific UI elements: A (Client field), B (Product field), C (Status field), D (Reply text area), E (Reply button), F (Update/Send button), G (Clear button), H (Attachment Details section), I (Expand/Collapse buttons), J (Attachment input field), and K (Task Communication History section).

Features:

A. Task Details:

Displays the task summary, which includes Task ID, Task Subject, Product, Issue reported for, Client Name, Task create date, Current Status of the Task and Description (This is usually the client email received by TSG Customer Support)

B. Last Communication:

Displays the last communication for the logged in user, or the last posted communication in the Task

C. Date/Time of Communication:

Displays the Date/Time of the communication

D. Recipients:

Displays the default recipients of the communication, if the logged in user sends a communication to TSG


E. Reply:

Logged in user can type the response here and post the communication by clicking Update/Send

F. Update/Send:

Click on  to post the communication



G. Clear:

Click  to clear the Reply Box



H. Task Communication History:

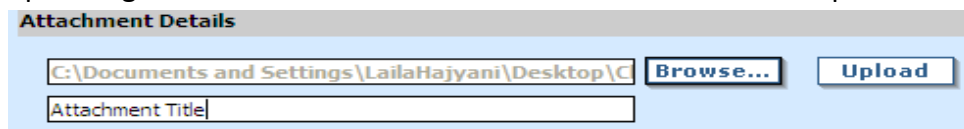
Displays all communications between the Client and TSG

I. Expand All/Collapse All:



By default, the communication in Task Communication History is minimized to show limited characters. Click  to expand all communications and click  to restore the default.

J. Attachment Details:

Browse the file, add attachment title (optional) and click . User must add a response and click  to send the communication. Please note that uploading attachments will not send the attachment to the recipients.




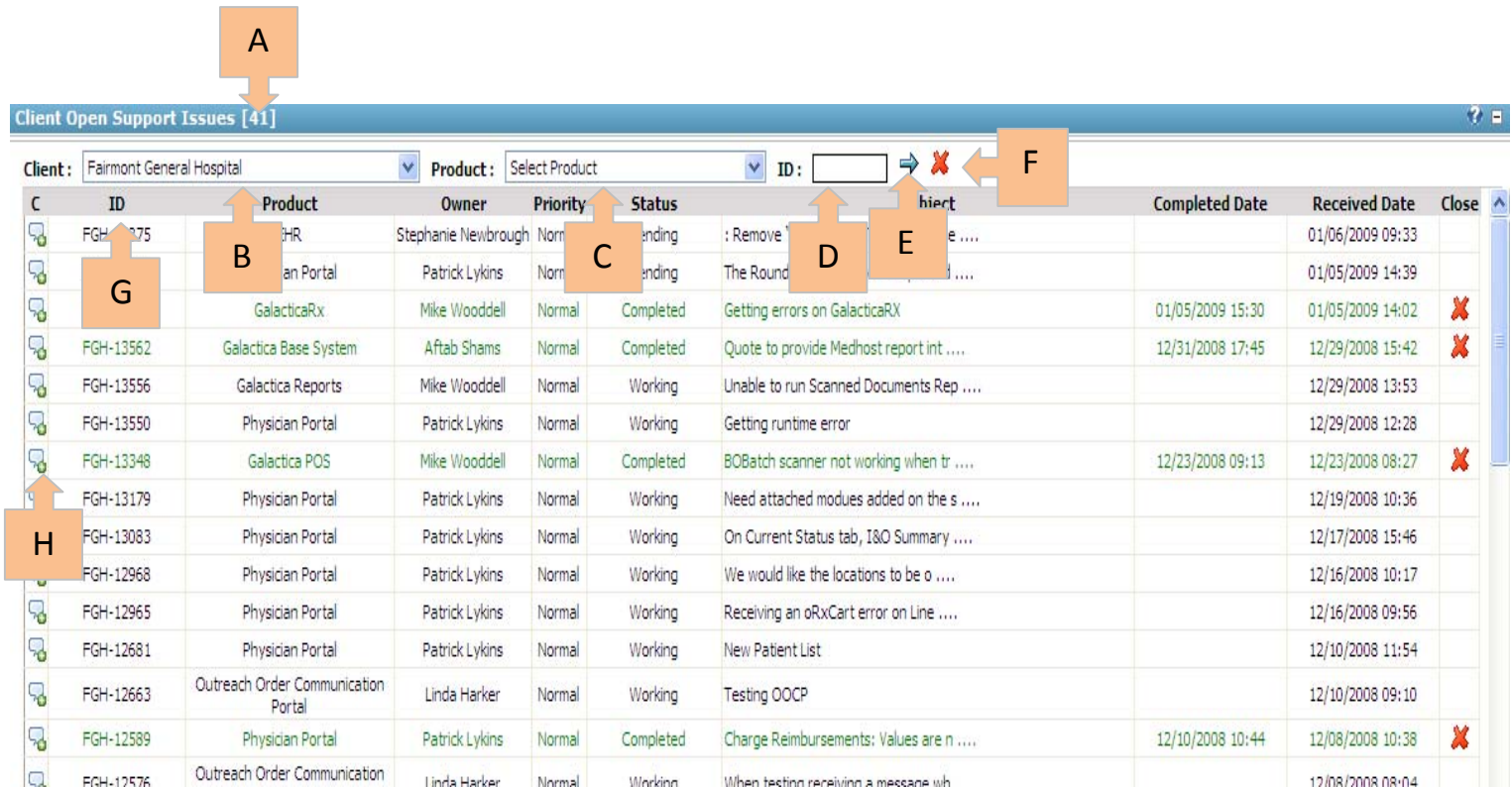
The image shows a screenshot of the 'Attachment Details' form. It has a title bar 'Attachment Details' in a grey box. Below it, there is a text input field containing the file path 'C:\Documents and Settings\LailaHajyani\Desktop\C'. To the right of this field are two buttons: 'Browse...' and 'Upload'. Below the file path field is another text input field labeled 'Attachment Title'.

K. View Attachments: If there are any attachments with the communication, user will see  icon. Click on  to view attachments. User must make sure that the pop-up blocker is off and the VISION CRM website is added to the trusted sites.

Client Support Issues

Overview:

To view any External Open Support Issues go to Client Support Issues Page. User can select a client and other filters and click  to view results




The screenshot shows a web application window titled "Client Open Support Issues [41]". At the top, there are filters for "Client:" (Fairmont General Hospital), "Product:" (Select Product), and "ID:" (with a search icon and a red X). Below the filters is a table with columns: ID, Product, Owner, Priority, Status, Description, Completed Date, Received Date, and Close. The table contains 15 rows of support issues. Callouts A through H point to specific elements: A points to the window title, B to the Product column, C to the Priority column, D to the Description column, E to the Description column, F to the search icon, G to the ID column, and H to the Close column.

ID	Product	Owner	Priority	Status	Description	Completed Date	Received Date	Close
FGH-1275	HR	Stephanie Newbrough	Normal	Pending	: Remove		01/06/2009 09:33	
FGH-1275	Physician Portal	Patrick Lykins	Normal	Pending	The Round		01/05/2009 14:39	
FGH-13562	GalacticaRx	Mike Wooddell	Normal	Completed	Getting errors on GalacticaRX	01/05/2009 15:30	01/05/2009 14:02	X
FGH-13562	Galactica Base System	Aftab Shams	Normal	Completed	Quote to provide Medhost report int ...	12/31/2008 17:45	12/29/2008 15:42	X
FGH-13556	Galactica Reports	Mike Wooddell	Normal	Working	Unable to run Scanned Documents Rep ...		12/29/2008 13:53	
FGH-13550	Physician Portal	Patrick Lykins	Normal	Working	Getting runtime error		12/29/2008 12:28	
FGH-13348	Galactica POS	Mike Wooddell	Normal	Completed	BOBatch scanner not working when tr ...	12/23/2008 09:13	12/23/2008 08:27	X
FGH-13179	Physician Portal	Patrick Lykins	Normal	Working	Need attached modues added on the s ...		12/19/2008 10:36	
FGH-13083	Physician Portal	Patrick Lykins	Normal	Working	On Current Status tab, I&O Summary ...		12/17/2008 15:46	
FGH-12968	Physician Portal	Patrick Lykins	Normal	Working	We would like the locations to be o ...		12/16/2008 10:17	
FGH-12965	Physician Portal	Patrick Lykins	Normal	Working	Receiving an oRxCart error on Line ...		12/16/2008 09:56	
FGH-12681	Physician Portal	Patrick Lykins	Normal	Working	New Patient List		12/10/2008 11:54	
FGH-12663	Outreach Order Communication Portal	Linda Harker	Normal	Working	Testing OOC		12/10/2008 09:10	
FGH-12589	Physician Portal	Patrick Lykins	Normal	Completed	Charge Reimbursements: Values are n ...	12/10/2008 10:44	12/08/2008 10:38	X
FGH-12576	Outreach Order Communication	Linda Harker	Normal	Working	When testing receiving a message wh		12/08/2008 08:04	

- **Task ID:**
TSG Customer Support generated Issue ID for the request
- **Product:**
This Product has the reported issue
- **Owner :**
This client contact reported the issue
- **Priority:**
This represents the severity of the task. VISION CRM has four priorities Severe, High, Normal and Low

- **Status:**

This represents the status of the task. VISION CRM has five statuses

6. **Pending:** TSG Customer Support is allocating resources for the issue
7. **Working:** TSG Technical Team is looking into the issue
8. **Waiting on Client (WOC):** TSG is waiting on the client for some requirements
9. **Completed:** The issue has been resolved by TSG Technical Team and is waiting on the client to clear it
10. **Closed:** When the Client confirms that the issue is resolved by email or by clicking , the task is closed. Once the task closes, it goes into the Closed Support Issues queue

- **Subject:**

Subject of reported issue


- **Completion Date:**

This date only shows if the task is completed, and is waiting on clearance from client

- **Received Date:**

Date the Issue was reported

- **Close:**


To clear the task, click 

Features:

A. **Task Count:**

Shows the number of tasks in the queue

B. **Client Filter:**

User must select a client and click  to get search results

C. **Product Filter:**

User can filter by the product to narrow down the search results

D. ID Filter:

User can type the Task ID provided by TSG Customer Support to search for a particular Issue. You do not have to enter the full Task ID, you can provide a partial ID in the ID filter to narrow down the results

E. Apply Filter:

To apply a filter click 


F. Clear Filter:

To clear a filter click  or select another client

G. Column Sort:

Click the column header to sort results by the column

H. Task Communication / Task History:

Click on  to view the task history. This page shows what the client sees as the task communication