Bugs

Use this module to describe and track Bugs. When creating a Bug record, you can describe in more detail the problem that caused cases and describe possible ways to fix it in Knowledge Base.

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The described Bugs can be absolutely anything: they can be tied to both the version (model) of a tangible product, and the release of the next version of the software. A user with administrative access has the ability to change the list of available versions. After describing the Bug, you can associate it with the request (in the form of viewing using the subpanel **of the Application**), and with the available version of the product (directly in the Bug editing form).

Note: By default, this module is hidden; to display it you need to contact you're a user with administrative access.

You can create a description of the Bug either directly in the system or import the description from a text file.

Bug Description

1. In the module menu, select **Report Bug.**
2. On the Bug description page, complete the following fields.:
   Subject: Enter the name (short description) of the Bug.

   Priority: From the drop-down list, select a priority that reflects the urgency of solving the problem.

   Status: From the drop-down list, select the status option.

   Type: From the drop-down list, select the type: Bug or feature.

   Source: From the drop-down list, select the source of Bug detection.

   Category: From the drop-down list, select the category to which this Bug may be related.

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Report a bug

3. Click the button **Save** to save the entered information; press the button **Cancel** to return to the list of calls or meetings without saving the entered information. After saving the description of the Bug, you can associate it with new or existing cases, Contacts or Companies.

Bugs List View Actions

You Can access bugs module from side navbar.

- **View Bugs:** Provides a detailed list of all reported bugs, allowing users to track their status, severity, assigned team members, and related project information for efficient issue resolution.
- **Import Bugs:** Allows users to bring in bug records from external sources (like Excel or CSV files) into the system, helping streamline the tracking and management of issues in one centralized location. Refer Leads Import.
- Use Filter for Search of records - **Quick filter and Advanced filters**

Note: Refer Quick filter of Leads.

- **Recently viewed** records displayed in the side nav bar.
- Saved filters list showing inside nav bar as **My Filters**
- **Favorite** records of bugs would be displayed in the side nav bar. (From a detailed view of records, selecting the star beside the title undergoes a record into the favorites list.)
- **Column Chooser** — The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields.

Note: Refer Leads module Column Chooser.

- To sort records on the bugs List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a bug, Use Search engine on top (module should be enabled for search engine)
- Clicking on the pencil icon bug list view page to the display of record edit view.
- Clicking on i icon of the bug leads to the display of additional details popup.

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Bulk Actions

In list view, there are some groups of actions which can be done by selecting group of records are as follows:

- **Mass Update:** Apply changes to multiple bug records at once.
- **Merge:** Combine duplicate or similar bugs records into one.
- **Export:** Download the selected bugs data in a preferred format (.CSV).

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Detail View Actions

Click on the bug subject to view a detailed view of the record.

- **Edit** – Modify the bug's existing information.
- **Duplicate** – Create a new bug by copying current company details.
- **Delete** – Permanently remove the bug from the system.
- **Find Duplicate** – Scan and identify possible duplicate bug entries.
- **View Changelog** – Review the history of changes made to this bug.

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Bug's Activities Management

Tracks and manages all interactions and tasks related to a bug or issue, helping ensure timely follow-ups and accountability.

- **Schedule Meeting**: Allows users to set up meetings with relevant contacts, specifying time, date, and participants to coordinate discussions.
- **Log Call**: Records details of phone calls made or received, including the subject, summary, and contact involved, for reference and tracking.
- **Compose Email**: Enables users to send emails directly from the system, maintaining communication history within the bug or issue context.

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Bug's History Management

Tracks and stores all past interactions, notes, emails, and changes related to a bug, providing a complete audit trail for better traceability and decision-making.

- **Create Note or Attachment**: Add internal notes or upload files related to the bug for documentation and collaboration.
- **Archive Email**: Save a copy of relevant email correspondence to keep a record of communications within the bug history.
- **View Summary**: Display a summarized view of the bug's activity history for quick reference and analysis.

Submodules

Documents

Allows users to upload, store, and manage files related to a bug, such as screenshots, logs, or reports, ensuring all relevant documentation is easily accessible in one place.

Can create a new one or select from existing one.

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Contacts

Displays and manages individuals or stakeholders associated with the bug, enabling effective communication and coordination throughout the issue resolution process.

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Companies

Links related organizations or client companies to the bug, helping track which business entities are affected and facilitating organization-level communication and support.

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Cases

Associates customer service or support cases with the bug, providing context on how the issue impacts users and ensuring alignment between technical teams and customer support.

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Bugs

Lists and manages reported software defects or issues, allowing users to track their status, assign responsibility, set priorities, and monitor resolution progress throughout the development lifecycle.

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Security Groups

Controls access permissions by assigning user groups to the bug, ensuring that only authorized users can view or modify bug details based on their roles and responsibilities.

Can select from existing one.

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