TSE Notes User Manual

"Organize your notes with ease"

Version: 1.1.3-x

Author: Perry Cameron

Date: July 2025

Introduction

Purpose:

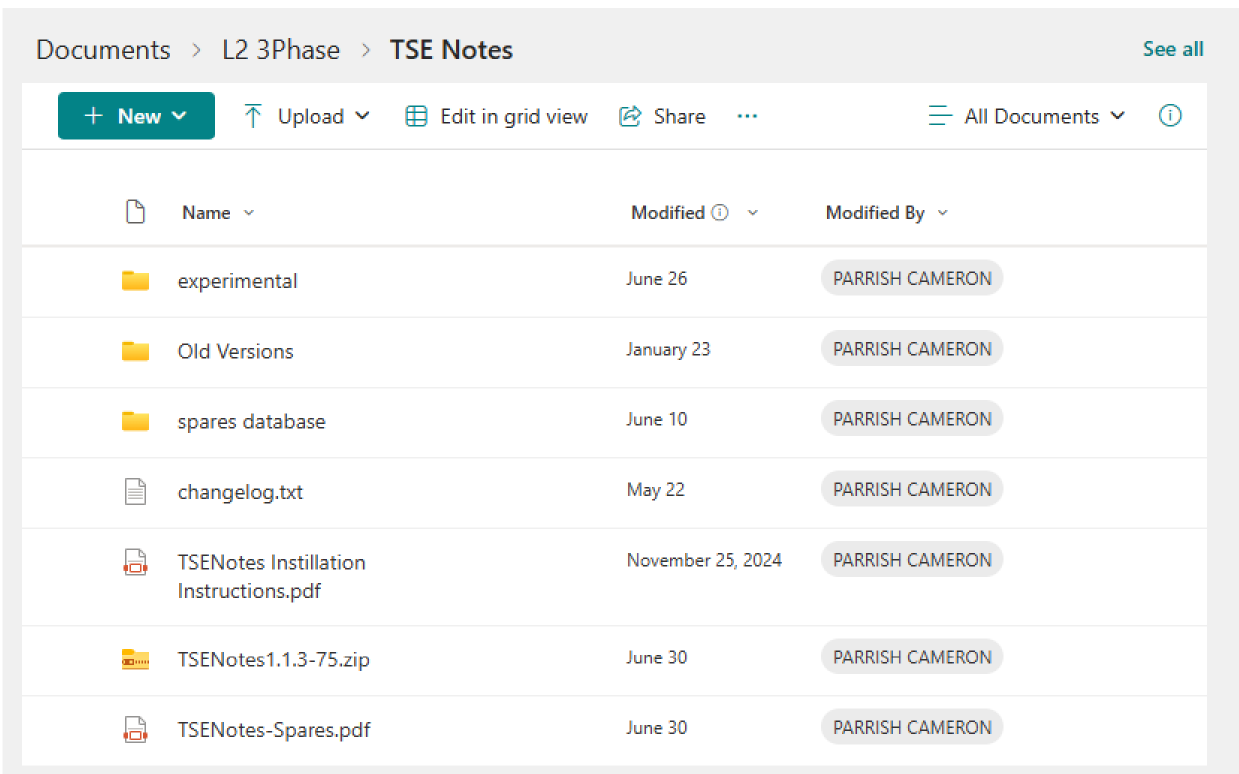
TSE Notes is an application designed to streamline note-taking and case management for technical service teams, addressing the inefficiencies of using Notepad for disorganized note storage and manual folder systems. As detailed in the project's README (https://github.com/PerryCameron/TSE-Notes/blob/main/README.md), TSE Notes provides a structured interface for capturing essential case details, including case number, work order, equipment model and serial number, contact information (name, email, phone number), service plan, issue description, required parts, and shipping details. With a single button click, the app formats this information into both text and HTML, copying it to the clipboard for seamless integration into BFO, a Salesforce-like platform, ensuring uniform, professional-looking notes across the team. By offering a searchable, organized system, TSE Notes simplifies note-taking, storage, and transfer, enhancing efficiency and consistency for agents managing technical service cases.

Benefits:

- **Structured Note-Taking**: Replaces disorganized Notepad use with a streamlined interface for capturing case details like case numbers, equipment information, and contact details, ensuring consistency and organization.
- **Searchable Database**: Eliminates manual folder systems by providing a searchable platform for easy access to stored notes, improving retrieval efficiency.
- **Spell-Checking Feature**: Ensures professional, error-free notes with built-in spell-checking, enhancing the quality of documentation.
- **Integrated Parts Database**: Allows quick access to accurate part information, reducing errors and speeding up note creation.
- **Uniform Formatting**: Generates consistent text and HTML templates with a single click, copied to the clipboard for seamless integration into BFO, ensuring professional and uniform documentation across the team.
- **Enhanced Efficiency**: Simplifies note creation, storage, and transfer, saving time and improving overall case management productivity.

Installation

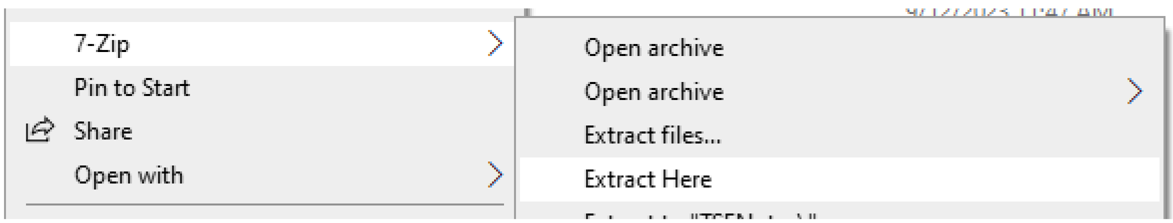
TSE Notes is a portable application. It comes in a zip file and all you need to do is move it to the correct location and unzip it.



It can be found in our L2 Documents in the folder [TSE Notes]

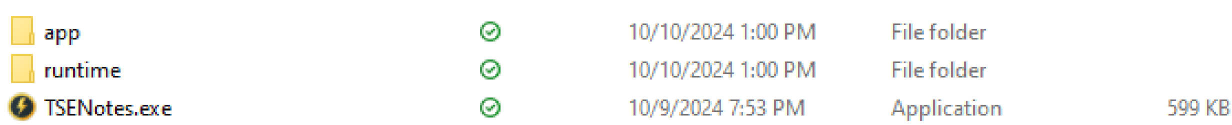
Instillation Steps:

1) Download the zip file and move it to your home directory: C:\Users\sesa123456
2) (Skip this step if you are installing for the first time)
   If you have previously installed TSE Notes you will need to delete the old directory C:\Users\sesa123456\TSENotes **or** C:\Users\sesa123456\TSENotesX.X.X
3) With the zip file in your home directory use 7-zip or the built in windows zipper to extract the zip file
   With 7-zip it will extract it to TSENotes

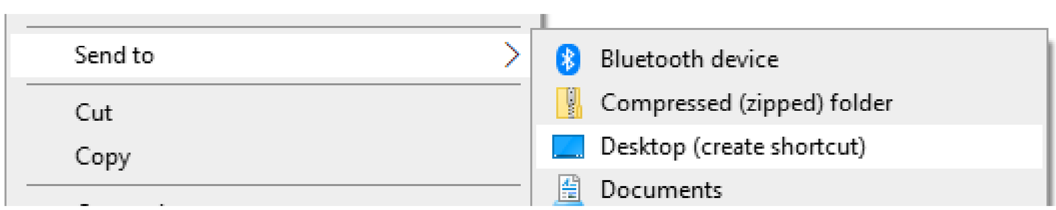


(With Windows zipper it will extract it to TSENotes.x.x.x)

4) This will create the folder TSENotes, click on the folder to go inside and you will see:



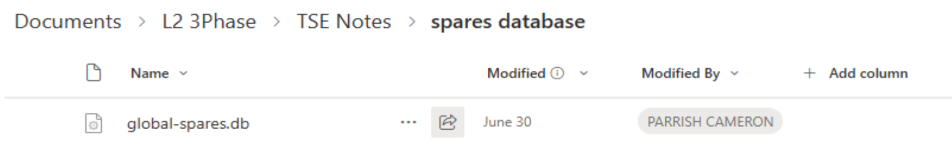
You can double click TSENotes.exe to start the application. It is also a good idea to right click on the file and create a short cut on your desktop



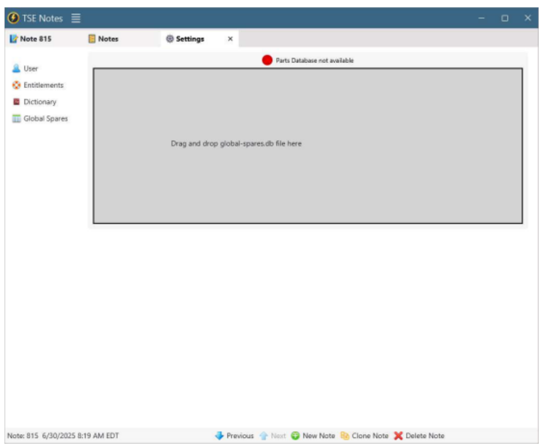
5) Once you double click on TSENotes.exe the app will launch for the first time and automatically create your database. The database will be created in your one-drive folder in the sub-folder TSENotes. If the one drive is not working correctly on your computer, it will create the directory in the folder C:\Users\sesa123456\TSENotes. Your database file will be called notes.db

Linking the parts database for the first time:

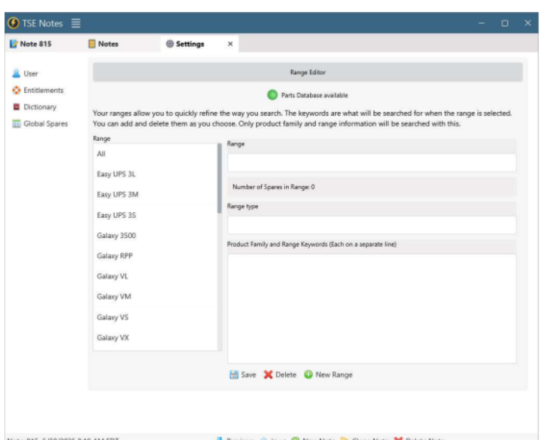
1) Download the database [global-spares.db]



2) With TSE Notes Running: Go to the taskbar menu click on file > settings, then click on Global Spares and you will see the following screen.



3) Drag and drop spares database into the gray square. You should then get the following screen



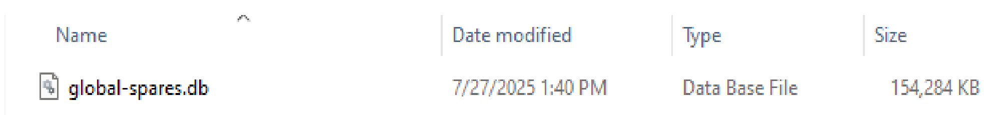
4) You are finished, you can close the settings tab and now use TSE Notes as normal

Upgrading the parts database

1) If your parts database has already been linked you can upgrade it by first downloading the newest version in the spares database folder: [global-spares.db]

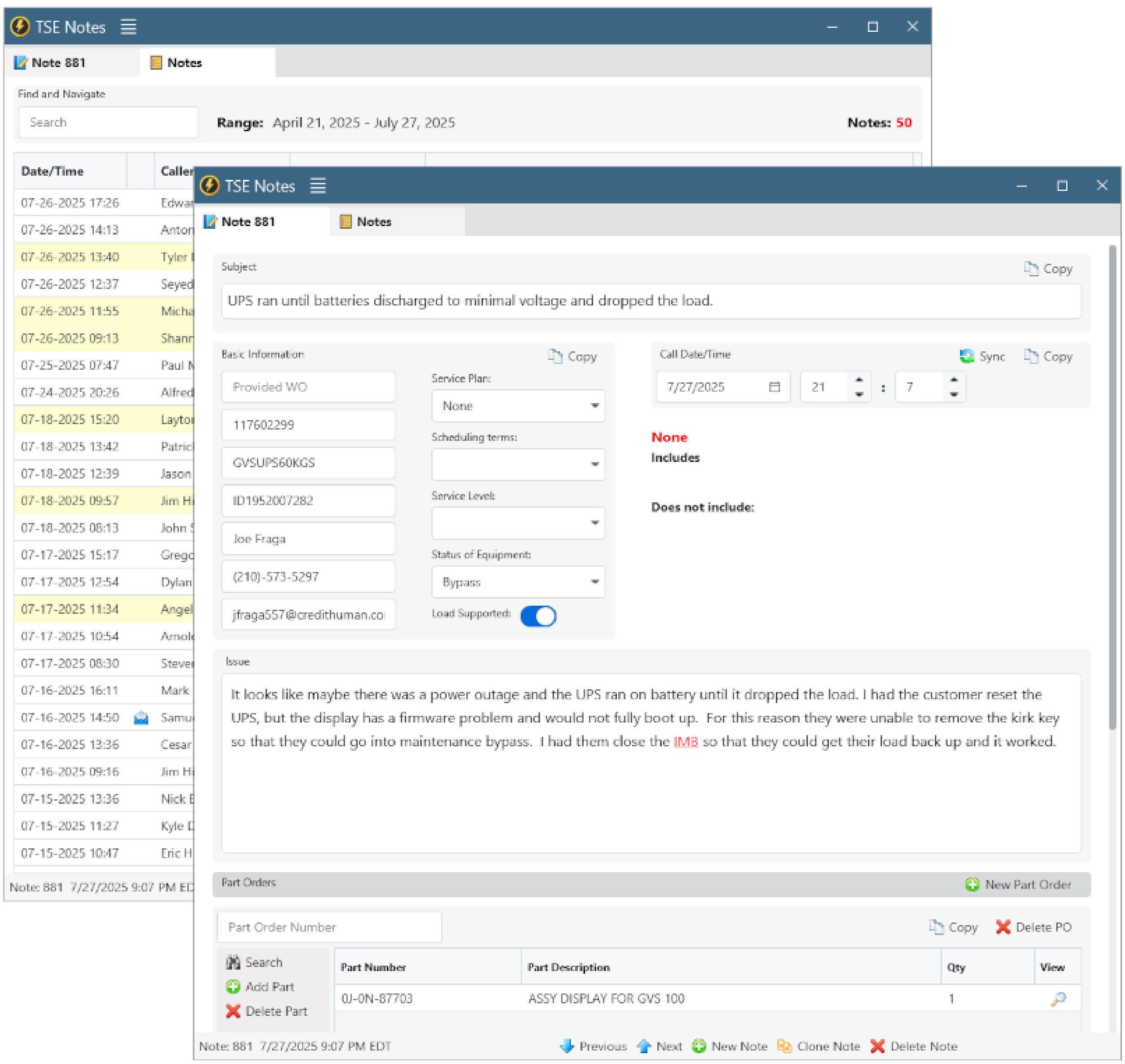
2) Go to the home folder for TSE Notes. This will be C:\Users\sesaXXXXX\TSENotes. Inside this folder you will see the sub-folder global_spares.

3) Inside the global_spares folder you will see the file global-spares.db. This is your parts database. You can delete it and replace it with the newer version you recently downloaded. (If you have made edits to your original parts database, you can save them by making a change set. See the section about change sets)



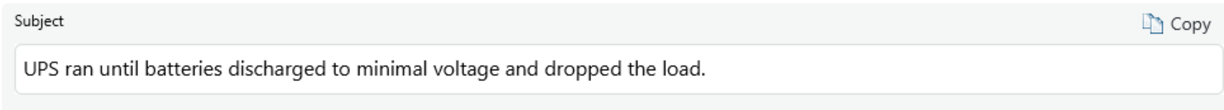
Getting Started

There are two main tabs in TSE Notes. There is the Note tab which contains all the information about a single note, and the Notes List tab which contains a list of all the notes you have taken.

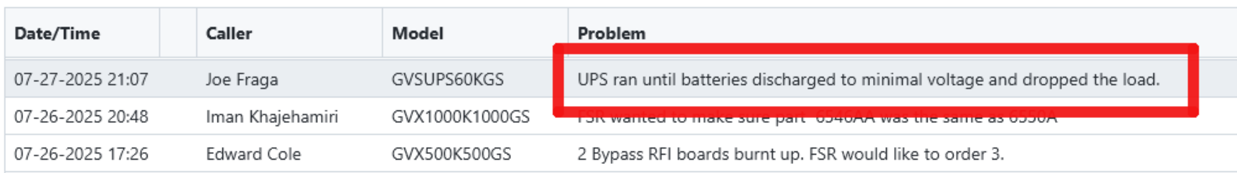


Notes Tab – Subject line

The first second of the notes tab is the subject line

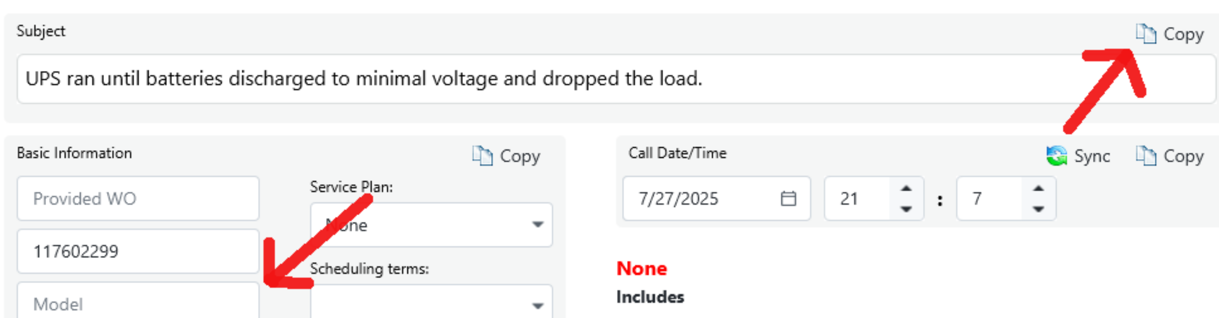


This is the one field that is also located in the Notes List tab. (hint) if the subject is entered in the notes list tab you must hit enter for it to accept.



The purpose of this is to provide a way for you to know what the note is about in your notes list view and to provide a subject in BFO

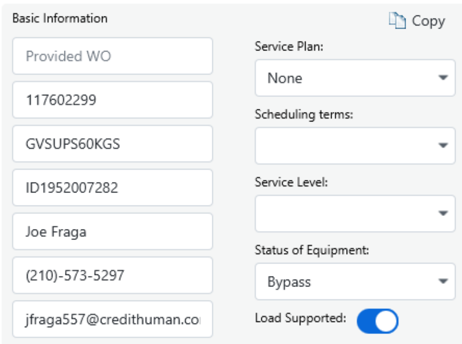
(hint) if you have the model filled out as well as the subject, hitting the copy button will produce an output of "Model – subject"



In this case if the model were filled out with: GVSUPS60KGS then the output of copy would look like:

GVSUPS60KGS - UPS ran until batteries discharged to minimal voltage and dropped the load.

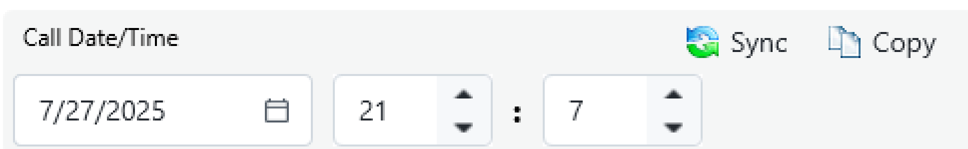
Notes Tab – Basic Information



The basic information section is where information about work order, case number, the caller, the entitlements as well as equipment model number and serial are kept. (hint) When given a work order number just type in the numbers, TSE Notes will then fill the WO- in the front for you. The service plan has several options, which can be customized in the settings menu.

Notes Tab – Call Date / Time

The Date/Time section marks the time a note was taken. When you first create a note, it sets the date and time. If a note is created and you end up using it later, you can use the Sync button to bring the date/time to current. You can also manually set the date/time if you need.

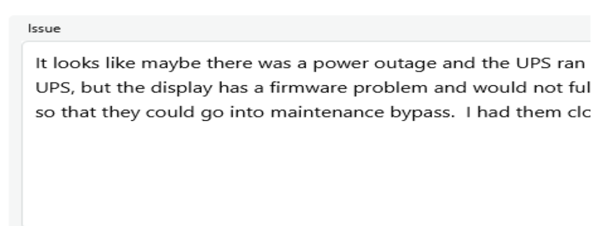


(hint) The copy button gives you a divider as seen below that you can paste

Perry Cameron	7/27/2025 9:07 PM EDT

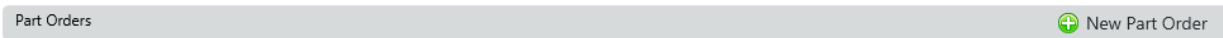
Notes Tab – Issue

This section is where you write the problem. There is no limit on the amount of text you can put in here. There is a spell checker to assist.

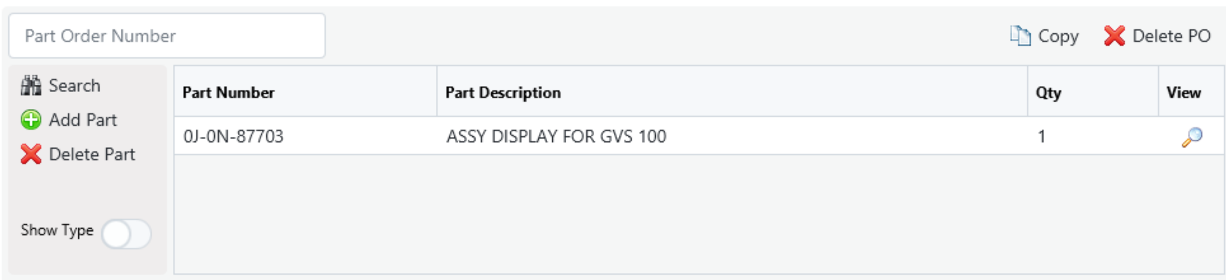


Notes Tab – Part Orders

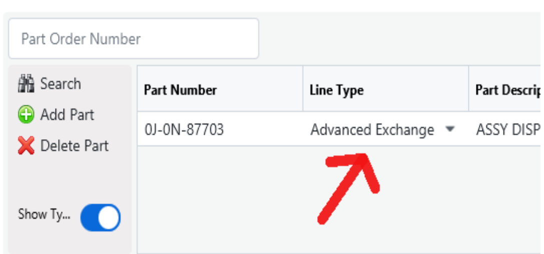
Below is the part order line. By clicking on the green + button you can create a part order (Note: you can create as many part orders as you need)



Once you click the New Part Order button you will see the part order box appear. (In this case a part has already been added).



The part order goes in the Part order number text field in the upper left of the box. The search launches the part finder dialogue (see part finder dialogue section for more information). You can manually add a part with the "Add Part" button and delete a part with the "Delete Part" button. You can also delete the entire part order with the "Delete PO" button.



The Show Type button opens a Line Type Column where you can specify the PO line type. (Hint) This is especially useful for "Return Only" or "Ship Only" lines. Since "Advanced Exchange" is the typical way we make lines, the show type can be left off in those type of part orders.

Notes Tab – Part Orders (Continued)

The part viewer can be launched by clicking on the magnifying glass for the part you want to view. This is useful for quickly making sure you are ordering the correct part.

The copy button puts an HTML table as well as plain text into the clipboard.

(HTML version)

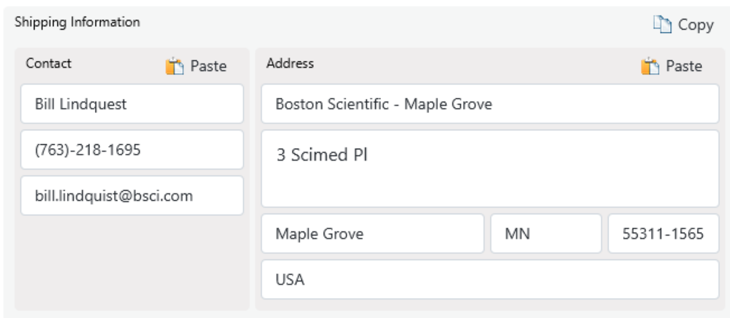
Parts Ordered

Part Order: 02155649		
Part Number	**Description**	**Qty**
SYSW80KFQ	Symmetra PX 80kW Static Switch Module, 208V	1
0J-876-0680	SHIM SSW 80 KVA	1

(Plain Text version)

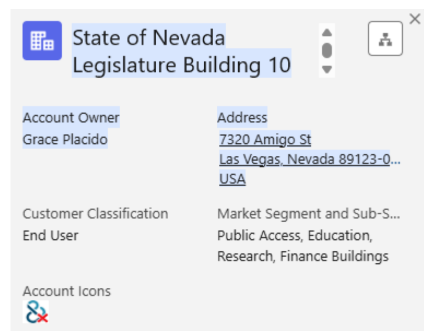
Part Order: 02155649
SYSW80KFQ Symmetra PX 80kW Static Switch Module, 208V Qty. 1
0J-876-0680 SHIM SSW 80 KVA Qty. 1

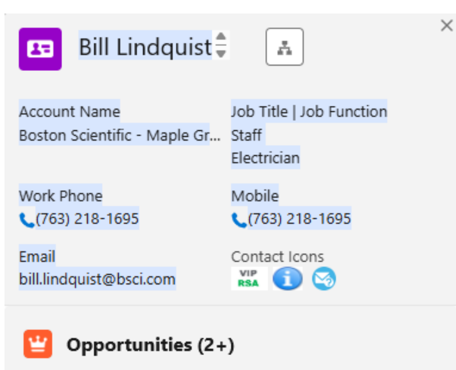
Notes Tab – Shipping Information section



This section is for where we are going to ship the parts and the contact for that shipment.

(hint) in BFO hover your mouse over the "Installed at Account" field. BFO will make an AJAX call to the server and pop up the dialogue to the right. If you select the Account and address and use the hot key combination Ctl-C it will put this text into the clipboard. Then in the address section, click the paste button and it will automatically populate all the address fields.





(hint) in BFO hover your mouse over the Contact fields. BFO will make an AJAX call to the server and pop up the dialogue to the left. If you select the name, phone, and email and hit the hot key combination Ctl-C it will put this text into the clipboard. Then in the contact section hit the paste button and it will automatically populate all the contact fields.

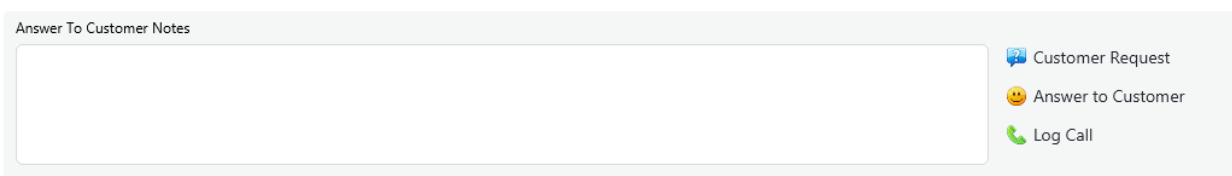
Notes Tab – Related section

The related section is where you put information you want to be printed out in your template. Created Work Order is for the case that **you** created.

Created case is for the case **you** created. It also causes the row to be highlighted in the note list view so you can easily see which cases are yours. It is not printed out in the template.

TEX and Time and Materials are there for documentation and for printing out to your template.

Notes Tab – Answer to Customer Notes section



This is the section where you can put your final notes that you would like to put in the Answer to customer section in BFO, furthermore it has the 3 main copy buttons. Customer Request and Answer to Customer are for those same fields in BFO. Log Call is for logging a call in the Case Feeds.

Notes Tab – Answer to Customer Notes section (continued)

Below is an example of Customer Request in HTML output.

Parrish Cameron 5/27/2025 7:22 AM EDT

Customer Provided Information
WO: WO-13024274
Model: SYCF80KF
S/N: PD0542340194

Call-in person
Name: Gonzalo Zapata
Phone: (401)-363-6886
Email: gonzalo.zapata@se.com

Entitlement: Advantage Ultra
Scheduling Terms: 7x24
Service Level: 4-Hour
Status of the UPS: Bypass
Load Supported: Yes

Issue
Static switch can not communicate to UPS and is inoperable. FSR would like to order a new static switch.

Parts Needed

Part Number	Description	Qty
SYSW80KFQ	Symmetra PX 80kW Static Switch Module, 208V	1
0J-876-0680	SHIM SSW 80 KVA	1

Shipping Contact
Name: Scott James
Email: scott_james@uri.edu
Phone: (401) 874-5153

Shipping Address
URI Computer Ops. - Tyler Hall
Tyler Hall 9 Greenhouse Rd #2
KINGSTON Rhode Island 02881-2018
USA

Below is an example of Answer to Customer in HTML output.

ANSWER TO CUSTOMER
Parrish Cameron 5/27/2025 7:22 AM EDT

Created WO-13034020

Parts Ordered

Part Order: 02155649		
Part Number	**Description**	**Qty**
SYSW80KFQ	Symmetra PX 80kW Static Switch Module, 208V	1
0J-876-0680	SHIM SSW 80 KVA	1

Notes Tab – Answer to Customer Notes section (continued)

Below is an example of Log Call in plain text output.

Jose Ramos
Call logged

June 3, 2025 at 12:40 PM

Jose Ramos 6/3/2025 11:30 AM EDT

Customer Provided Information
Case/WO # 116413499 / WO-13045991
Model: SYCF80KF
S/N: PD0542340194

--- Call-in person ---
Name: Michael Berard
Phone: (401)-451-8326
Email: michael.berard@se.com

Entitlement: Advantage Ultra
Scheduling Terms: 7x24
Service Level: 4-Hour
Status of the UPS: Bypass
Load Supported: No

--- Issue ---
UPS is maintenance bypass due to no display UPS status from I/O backplane. Display communication and NMC card was removed, inspected, and tested no change in UPS status. FSR request parts be send to site for replacement and upgrade.

--- Parts Needed ---
Part Order: 02161308
AP9630CH UPS Network Management Card Qty. 1
0J-0P4420 UPS I/O backplane Qty. 1

--- Shipping Contact ---
Name: Scott James
Email: scott_james@uri.edu
Phone: (401) 874-5153

--- Shipping Address ---
URI Computer Ops. - Tyler Hall
Tyler Hall 9 Greenhouse Rd #2
KINGSTON Rhode Island
USA

Created WO-13068870

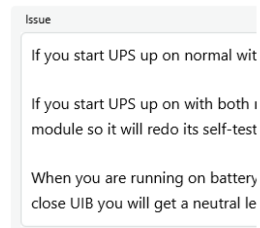
I/O backplane and NMC card has been placed on order with a created follow up WO.

Part Order: 02161308
AP9630CH UPS Network Management Card Qty. 1
0J-0P4420 UPS I/O backplane Qty. 1
View Call

Note List Tab

The note list tab is for easily viewing your notes. The newest note is always at the top. The memory holds 50-100 notes at a time. You can scroll down to get to older notes where they will be automatically loaded into the list. As you scroll down more will be loaded into the list while newer ones will be removed. There is a search feature that searches through your notes except for parts and part orders.

(hint) selecting an email starting with “FSR Request” and using the hot keys Ctl-C to put the text into the system clipboard will auto populate a note if you paste it into the issue section of the note tab.



FSR Request

Team Name: 3Phase Power - Parts Request

FSR Details

First Name: Joseph

Last Name: Miller

Phone: 6502329929

Email: Joe.Miller@se.com

WO: WO-12928033

Customer Details

Name: Miguel Iniguez

Site Name: Cyxtra/CenterSquare

Phone Number: (408) 888-4479

Email: miguel.iniguez@centersquaredc.com

Address:

2401 Walsh Ave

Santa Clara, Ca 95051

Order Details

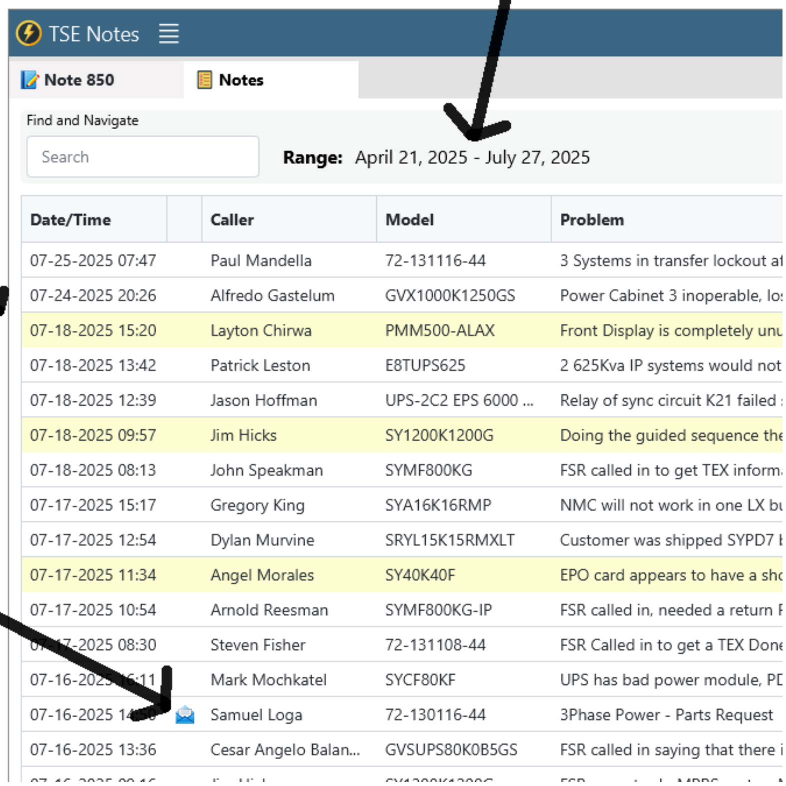
customer requested a t/m quote for two STS fans, total of six fans, fans are making noises he doesnt like

Note List Tab – (continued)

Shows the date range of the notes currently in memory.

Yellow denotes that the case was created by you.

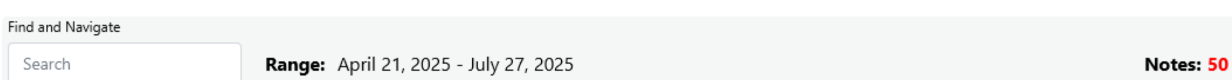
Blue Folder means that the case is an email



Date/Time		Caller	Model	Problem
07-25-2025 07:47		Paul Mandella	72-131116-44	3 Systems in transfer lockout at
07-24-2025 20:26		Alfredo Gastelum	GVX1000K1250GS	Power Cabinet 3 inoperable, lo:
07-18-2025 15:20		Layton Chirwa	PMM500-ALAX	Front Display is completely unu
07-18-2025 13:42		Patrick Leston	E8TUPS625	2 625Kva IP systems would not
07-18-2025 12:39		Jason Hoffman	UPS-2C2 EPS 6000 ...	Relay of sync circuit K21 failed :
07-18-2025 09:57		Jim Hicks	SY1200K1200G	Doing the guided sequence the
07-18-2025 08:13		John Speakman	SYMF800KG	FSR called in to get TEX inform.
07-17-2025 15:17		Gregory King	SYA16K16RMP	NMC will not work in one LX bu
07-17-2025 12:54		Dylan Murvine	SRYL15K15RMXLT	Customer was shipped SYPD7 I
07-17-2025 11:34		Angel Morales	SY40K40F	EPO card appears to have a shc
07-17-2025 10:54		Arnold Reesman	SYMF800KG-IP	FSR called in, needed a return F
07-17-2025 08:30		Steven Fisher	72-131108-44	FSR Called in to get a TEX Done
07-16-202 6:11		Mark Mochkatel	SYCF80KF	UPS has bad power module, PD
07-16-2025 14		Samuel Loga	72-130116-44	3Phase Power - Parts Request
07-16-2025 13:36		Cesar Angelo Balan...	GVSUPS80K0B5GS	FSR called in saying that there i

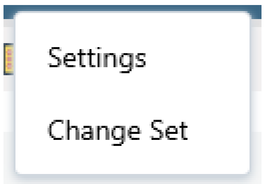
To mark the rows as your cases you must have the “Created Case” field populated in the note tab.

The search field can be used to search through all the notes in your database, not just the ones in memory. The “Notes: 50” you see below represents the number of notes currently in memory.



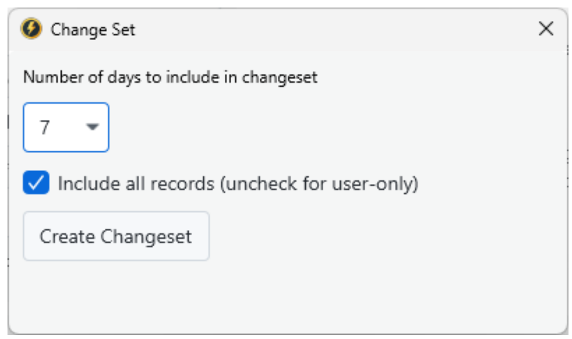
Change Sets

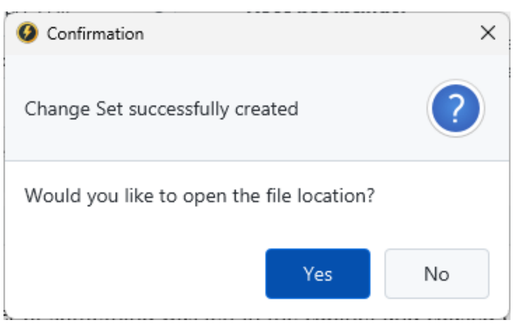
When you make changes to the database, you may want to share those changes with others. In the future TSE Notes will become a P2P network where changes are implemented automatically, but in the meantime, we have change sets. This will grab the changes you have made to the database so that they can be included with the next release of the database.



In the file menu in the top left corner of the app you will find "Change Set"

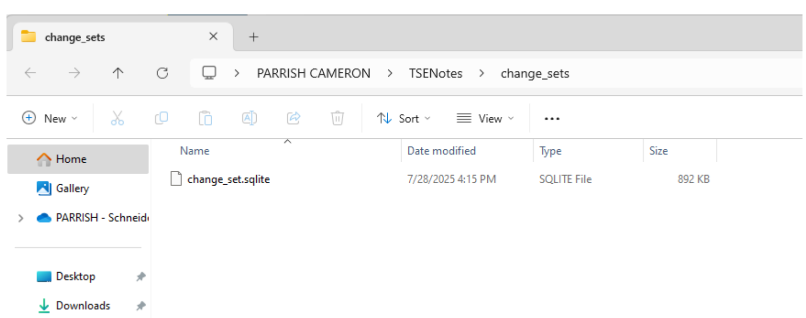
It will pull up this dialogue. Uncheck the include all records, so that it only includes your changes. Click the create changeset button.





You will then be presented with this dialogue. Click Yes and a windows explorer window will pop up with your changeset file.

You can then send this file to me through email or teams so that your changes can be included in the next database release.



Manual is a work in progress.

Needs added

-Settings Menu

-Part Finder / Editor