

General Troubleshooting Tips for Support Cases

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Description of Issue:

What question should be asked when contacting the customer on a new support case?

Resolution:

Below are some general questions and tips to get a resolution for a support case.

General Questions:

What is the version of the application being used?

Is the customer Hosted or on-prem?

When did the problem start?

What changes were made before the problem started?

Does the issue happen for all users or one?

Does the problem occur for any record or just one or some?

Does the problem occur at a certain time of the day?

Does the same problem occur on different workstations for the same user?

Does the problem occur when using the day code to sign in?

General Tips:

If a message is being displayed screenshots are needed. If there is a detail or more information button, copy text from the message the details to get all the info.

If the issue is with a report include a copy of the report and the ReportSQL.txt file.

If the problem is with Sedona-X or SedonaCloud/API2.0, log into the site as HostAdmin and check under Logs for any errors at the time the issue occurred. Screenshots and/or copy the text from each of the sections in the error log and include in the case.

Did you look for similar issues in old cases? Was the case reviewed by other team members for suggestions on the resolution?

Document as much detail as possible. We need to know what you have done in the case to prevent duplication of effort. We don't want to have the customer go through the troubleshooting process over again.

GL Out of Balance Issues

Was the stored procedure to reset totals done?

`exec Reset_Totals`

What reports/Screens are they using to compare values? We need to have copies of the report and screenshots.

What accounts are having the problem?

When was the last time these were in balance?

Depending on the account with the problem, are the default GL accounts defined correctly in the Setup tables?

Have any changes recently been made to account structure or setups? Were new GL accounts added? Were any setup tables changed?

Have new branches been added or have old branches changed?