

Troubleshooting Steps for Support

02/09/2024 6:15 pm EST

1. Identify the issue. This includes not just reading what the customer wrote, but understanding it, and why it is a problem for them. Note that customers do not always report what their actual problem is. Sometimes they report a symptom, or what they THINK the cause of their issue is. Make sure you understand not just what they are reporting, but WHY they are reporting it. You may have to ask them many questions to get to the bottom of it, and that's okay. Asking makes them feel respected and helps you identify better workarounds.
2. Gather all the information the customer has collected themselves on the issue. Remember customers sometimes collect irrelevant information that they think is related. So not everything they present to you may be helpful.
3. Make sure you know how the system is supposed to work before going further with the issue. Walk through it in a test environment. You can do this before or during your call with the customer. If on the call, just let them know you are testing the intended functionality. If testing this begins to take too long, or you aren't able to figure out what the system is supposed to do, let the customer know you are going to research it further and then contact them back.
4. Once you know how the system is supposed to work, walk through the issue with the customer to see what it is doing that is wrong.
5. Take lots of screenshots.
6. Begin to test the situation to find out why the issue is happening. For example, change something and then try again and see if the issue still occurs. Things to check for:
 - Does this issue happen all the time?
 - Does the issue happen to all users?
 - Does the issue happen to all customers/jobs/tickets/batches/etc. or just the one you are working on?
 - Does it happen to more than one but not all? If so, what do the ones that have the error have in common?

7. If you can fix it, fix it. If you can't fix it, take screenshots and let them know you will do more research and get back to them.
8. Document everything you have seen and tested in the case notes. This will help data support and/or development continue to research the issue. If it is resolved, it will help a future rep to resolve the same issue.
9. Always put yourself in their shoes at the end of the call. Ask yourself, "If I were them would I feel my issue was being properly addressed?"

Additional Tips

- When you know where information comes from in the software you can get closer to finding out the problem. For example, the job costing screen pulls from the job's GL. So if the job costing is wrong, that means there is something wrong with the GL. If you find the entry that is wrong in the GL, you may see, for example, that the entry is for a receipt. You could then look up that receipt. If you find a part on the receipt that is wrong, you can look up that part. You can keep drilling deeper and deeper until you find the source of the problem. This is just one example, the more you know about where the software gets its values from, the deeper you will be able to drill down in your research. If you don't know where the software is getting a particular value, run some tests to see. If you guess as to where it is coming from, change the value there and see if it has an effect.
- Make the customer feel respected, but don't immediately trust what they say. Sometimes they are mistaken, and sadly, sometimes they try to cover up something they have done. If they say an invoice is wrong for example, instead of assuming that is true, open the invoice and have them show you exactly what is wrong.
- Remember they contacted us because they don't understand how to fix their issue. Just because they may be speaking confidently or forcefully, doesn't mean they know what they are talking about. If you don't understand what they are trying to explain, it could be because they aren't explaining it well. Continue to ask questions until you fully understand what they are trying to communicate.
- If a customer asks you a question you don't know the answer to, it's okay to tell them you don't know but that you will research it for them.
- Before asking for help with an issue, go into the testing environment and walk through it as far as you can. When you get to a stopping point, then ask your teammates for help. If you ask for help before you have walked through the issue it may be harder to fully understand the answer to your question.
- Before submitting a case as a feature request, make sure you fully understand what is being requested, and why the customer is requesting it. Try to find the customer a workaround for their issue that does not require a software change, because there is no guarantee their request will be implemented, and even if it is, it will take a

while to get in place. Check the setup tables in case there is already a setting that can help the customer achieve what they are trying to do.

- If the customer gets an answer they do not like, and you are unsure about the answer yourself, come and talk to your teammates. If a customer gets an answer they do not like, and you are sure it is the correct answer, explain the answer again, and take the time to make sure they understand why this is the case. Telling them no when they don't understand why makes them feel like their issue is not resolved. Telling them no, and explaining why the answer has to be no, does make them feel the issue was addressed.
- Sometimes a customer will assert that another support rep told them something different than what you've just told them. Usually, this is because they misunderstood what the other support rep was saying. Sometimes it is because your teammate did not fully understand their issue, sometimes it is because you do not fully understand their issue, and sometimes no one ever told them that, they just want it to be true. It's important not to assume they were or were not, told the wrong thing. I always tell the customer that it sounds like there was a misunderstanding, and then I ask them to explain the issue again just to make sure I am not the one misunderstanding. Then track down their prior case and/or the person they spoke to, to get the details. There may be more to the story you need to know. Also remember that whether there was a misunderstanding in the past or not, what is important is that they get the help they need now.