

MANAGING DESK TICKETS

The following are the primary responsibilities of a Tech Support specialist when managing Desk tickets.

1. The tech support team needs to respond to the desk tickets within 24hrs from the time of ticket creation.
2. Collaborate with the ticket reporter to gather more information that can aid in understanding the problem, as they are the ones raising the issue. This collaboration will help the support and development teams in resolving the issue.
3. Troubleshoot the issue; replicating the problem is an effective method for identifying the root cause. The tech support specialist is required to conduct a thorough investigation of the problem, identify its underlying cause, and replicate it before escalating the issue to the assigned development team.
4. Some reported issues can be resolved directly by the support team. In such cases, ensure to provide the appropriate solution for the issue and confirm with the reporter that the problem has been resolved with the given solution before closing the ticket.
5. If the issue is confirmed as a bug after troubleshooting, it should be forwarded to the development team. Additionally, a bug/hotfix ticket must be created if necessary.
6. The support team must consistently provide progress updates to the reporter regarding their reported issues until they are resolved or the fix is completed.
7. Upon closing the ticket or identifying a solution to the problem, the tech support team must create documentation outlining the steps to resolve that specific issue. This article will be published in the knowledge base channel for future reference in case that the problem recurs.

TECH SUPPORT - DESK TICKET COMMUNICATION FORMATS

1. The initial response is to acknowledge the ticket.

"Hi [Recipient's Name],

Thank you for contacting us and providing the details. We will thoroughly investigate your report and, if necessary, collaborate with the assigned developer.

Please be assured that our team is actively working to resolve the issue as quickly as possible. We will keep you informed of our progress.

Best regards"

2. Request further details from the reporter, such as a screenshot or recording depicting the issue.

"Hi [Recipient's Name],

Could you please provide a screenshot or recording of the issue? This will help us assist you more effectively.

Thank you."

3. Inform the reporter of the results of your investigation as well as the root causes for the problem. You can then offer a direct solution to resolve the issue if no code fix is needed.

- Sample Issue #1: Client is unable to electronically sign his/her tax forms because Zoho apps are not working.

"Hi [Recipient's Name],

Upon checking Zoho is currently undergoing system maintenance, which may affect the functionality of their services. For proper assistance, kindly redirect any inquiries about this matter to Danielle, as it relates more to tax questions rather than IT issues.

If you have any other technical concerns, please feel free to reach out to us.

Thank you."

- Sample Issue #2: Member has two Cost of Good Sold (COGS) categories per the General Ledger, but only one appears on the chart of accounts.

“Hi [Recipient’s Name],

I'm currently seeing 2 Cost of Goods Sold categories both in Setup page and Chart of Accounts. But, both are on different ledgers. I advise to merge these 2 categories by moving 1 category to the other ledger. After moving, you may merge these 2 categories. May I know what ledger the COGS category should be? So that we can assist you in merging. Thank you.”

- Sample Issue #3: The Guide is unable to view the connected bank on the reconciliation page.

“Hi [Recipient’s Name],

When checking the Ledgers and Accounts Setup of the account, it seems that only "Chase Bank Bus Complete Chk 4412" is active for reconciliation. It is also displaying in the Reconcile Page. Kindly see attached screenshots. Let me know if you need any other assistance. Thank you.”

- Sample Issue #4: The client is unable to log into their portal, they run into a loading spinner every time they try to login.

“Hi [Recipient’s Name],

Thank you for providing the details. After replicating the issue, it appears to be functioning correctly on my end. Please ask the client to try clearing their browser's cache, then log out and log back in again. This often helps in resolving such errors. Please let me know if the issue persists, and I'll be more than happy to assist further. Thank you.”

- Sample Issue #5: The client is experiencing difficulty connecting their bank account, despite following the instructions to enter the code received via text message for validation.

“Hi [Recipient’s Name],

When checking the member's bank in the backend, it seems that it has a FAILED connection status. There was a problem in validating the member's credentials. Can the member try to fix his connection again by clicking the gear icon and run through the verification process?

If the issue still persist, I advise to disconnect/remove the Huntington Bank connection and reconnect it. Let me know if you need any other assistance. Thank you.”

4. If the reported issue is identified as a bug that needs to be fixed by a developer, it is important to update the reported on the progress of the fix.

- Sample Issue: When a new user is still completing the walkthrough, the pop-up message to generate the tax checklist overlaps with the terms and conditions window.

“Hi [Recipient’s Name],

Thank you for contacting us with the details. We have escalated this issue to the assigned developer and created a bug ticket to address the problem. Our team is actively working to resolve the problem as quickly as possible.

We will keep you informed of our progress. Thank you.”

5. Always communicate with the reporter before closing the ticket, once the issue has been resolved.

“Hi [Recipient’s Name],

We are pleased to inform you that the issue you reported in Ticket #[Ticket #] regarding [Short Description] has been successfully resolved. As a result, we will be closing this ticket.

If you experience any further issues or have additional questions, please feel free to reach out to us. Thank you.”