

Application Support Training

Basic support principles

Basic support principles

Following are the basic support principles that we follow

01

Classify the request

02

Replicate the issue

03

Gather evidence

04

Escalate the issue

Classify the request

1. Distinguish between an issue and a feature request. Aka

- something is not working vs something is not working exactly as I want it to

2. Gather information about instance

Where exactly is the issue happening?

On premise installation / cloud installation?

3. Gather information about user

What user account is in play?

What OS is the user using?

What browser is the user using?

Classify the request

4. Gather information about the affected document

What document type is affected?

What is the ID of the affected document?

5. Assign importance

Is the user still able to use the system?

Are there multiple users affected?

Replicate the issue

- Using your account try to replicate the problem the user is having. Follow the steps the user is describing. If you CANNOT replicate the problem, connect with the user and try the steps on an assisted remote session with the user directly
- Note down the exact steps that allowed you (or the user) to replicate the issue, including what account you have replicated this on. This is important even if you were able to resolve the issue yourself (for future reference)
- Try to isolate the issue - remove unnecessary steps from the replication scenario and note down the minimum actions that you need to take to replicate the issue

Gather evidence

While working on a ticket, try to provide as much information into the ticket as possible:

- Get a screenshot(s) of the issue. Make sure that the entire browser window is visible
- Record a short video of the issue if screenshot is not enough
- Gather logs from the browser console (F12 - console). Provide them in a text format (not a picture), ideally in HAR format
- Provide ID of affected document / user

Escalate the request

Before escalating the issue to a higher support level, please keep the following in mind:

- Go through all previous steps and make sure to have all the necessary information ready in the ticket
- Summarize the issue as simply as possible in your own words. Do not just forward the message from the customer, as that is often confusing

Escalate the request

Before escalating the issue to a higher support level, please keep the following in mind:

- Make the effort to try and resolve the issue yourself. Utilize the product documentation to search for the related topics. Search for similar tickets and their resolution
- If you could not find the information about the problem anywhere, highlight it in the ticket, so that documentation can be updated accordingly for future reference

Replying to customer

Basic rules

- Provide a link to a relevant section of a documentation on <https://help.circularo.com/>
- Inform the user that the ticket is being escalated to higher level of support
- Inform the user, that you need their participation to collect all the necessary information to resolve their problem. Refusing to cooperate merits closing the ticket
- While closing the ticket, inform the user that the ticket can be reopened in case of further issues

Handling no-replies

The following is generally automated by our help center software. We follow the rules as mentioned below:

- If no reply from a customer is received after 3 days, send a reminder email, that we have not received a reply on the ticket yet and inform the customer that we will be forced to close the ticket if no information is provided
- After 1 week of no reply from the customer, close the ticket and inform the customer that he can reopen the ticket at any time

Handling new feature request

- If the ticket is classified as a new feature request, inform the customer that we are tracking the request, but there will be no immediate action taken on the ticket, as there is nothing inherently wrong with the system
- Let the customer know that this feature will be considered for new releases of the product and that they will be informed as soon as the feature is available via an email including information about the new version
- Describe the request clearly in the ticket, flag it as new feature request and escalate it

Escalating the request

Report an issue

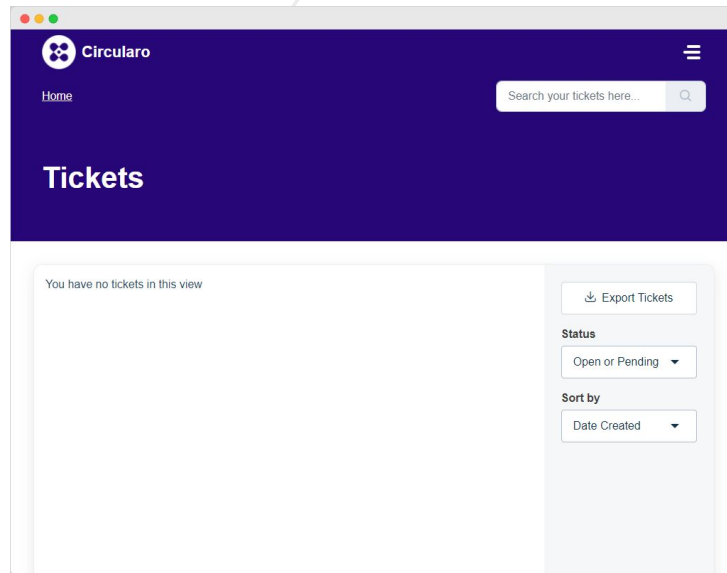
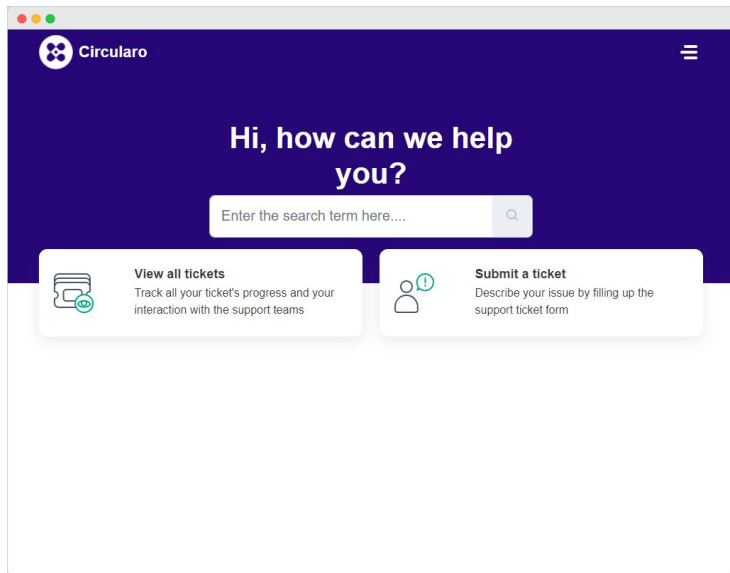
You can escalate the request to Circularo support by the following means:

Helpdesk system: <https://support.circularo.com/>

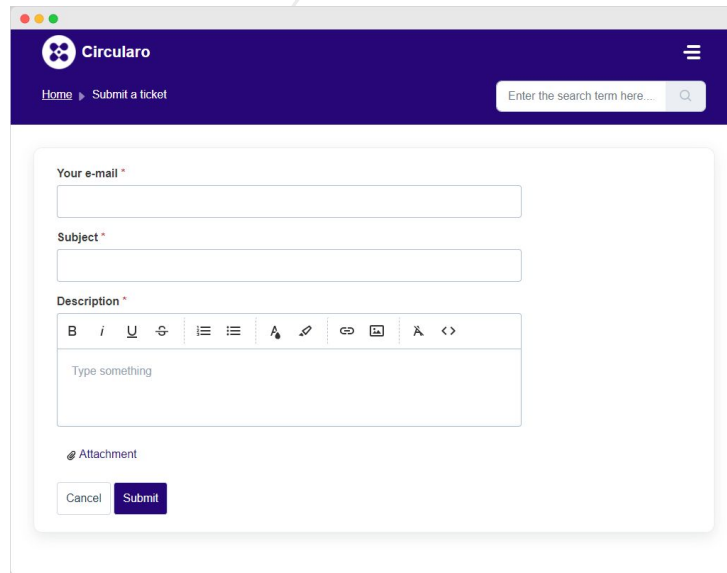
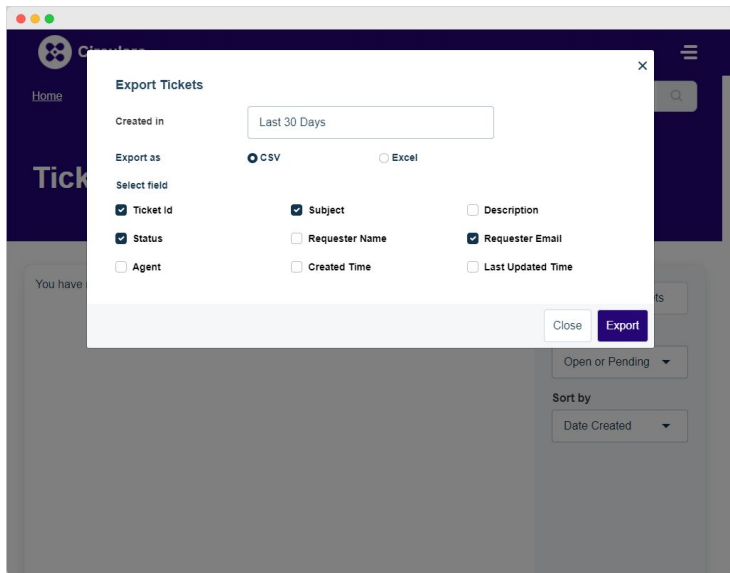
Email: support@circularo.com

Support portal

The look of the support portal



The look of the support portal



Creating a ticket

- Click in the 'Submit a ticket' button
- Fill in the 'Subject' field with the relevant information
- Fill in the 'Description' field
- Attach any relevant screenshots, recordings, HAR files as part of the ticket
- Finally, click the 'Submit' button

Support portal

- Administrator users are able to see all tickets regarding their organization (even if a regular user sends a ticket by themselves)
- Tickets can be created either in the support portal itself, or by sending an email to support@circularo.com and then viewed in the portal
- Tickets can be filtered by their status and even exported in a .csv format
- The URL of the portal: <https://support.circularo.com/>

References & useful links

[Circularo help page](#)

[Circularo user guide](#)

[Circularo developers page](#)

[Circularo SaaS Support policy](#)

[Circularo Terms & Conditions](#)

[Circularo FAQs](#)

[Circularo video tutorials](#)



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