

How to get the best Tech Support from CAL



How to get the best Tech Support from CAL



Tech Support Overview

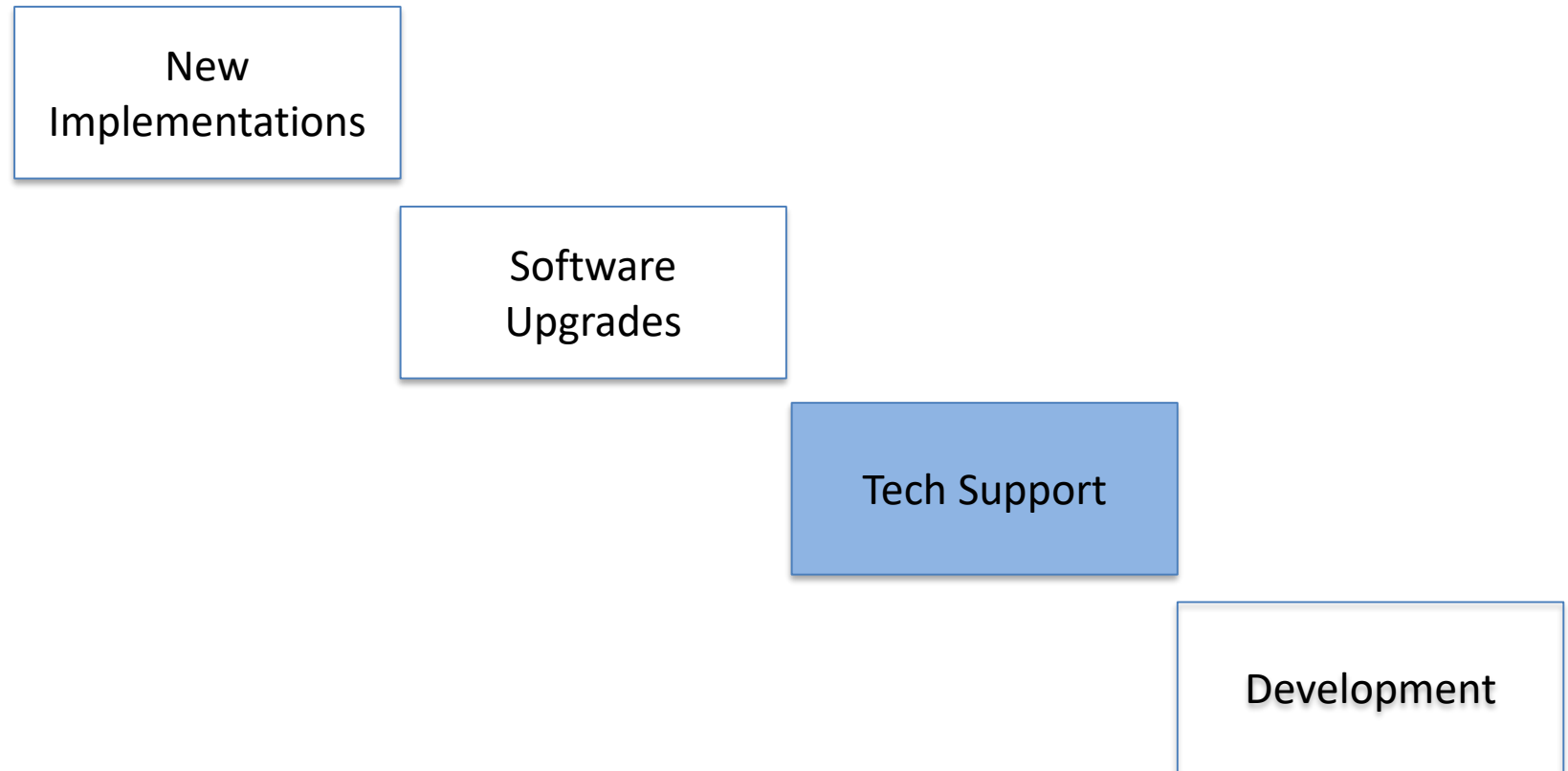
- Tech Support team and structure
- Tech Support availability
- Methods to get Tech Support
- Setting Support Case priorities
- How CAL manages Tech Support
- How to help us – help you
- Customer Portal - New Tech Support capabilities
- Recap and questions

Tech Support Overview

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Tech Support team and structure

- How CAL is organized...



CAL – Support Team and Structure

- Help Desk Structure
 - CAL handled over 3,500 Support Cases in 2017
 - 95% of support is done by CAL in-house employees
 - Dedicated Help Desk Coordinator
 - Closely matched technical skills
 - Matched customer/business familiarity
 - Use of Case management tools
 - Case status monitoring
 - Daily - by Help Desk Coordinator
 - Weekly - by Tech Support management

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Tech Support availability

- Normal hours of operation
 - 8:30 AM – 6:00PM ET – Monday thru Friday
 - After hours on an as-needed basis
- Support calls after normal hours
 - Usually pre-arranged for specific tasks
 - Leave a voice mail
 - Monitored for emergencies

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Methods to get Tech Support

- Email
- Direct phone call
- New Customer Portal

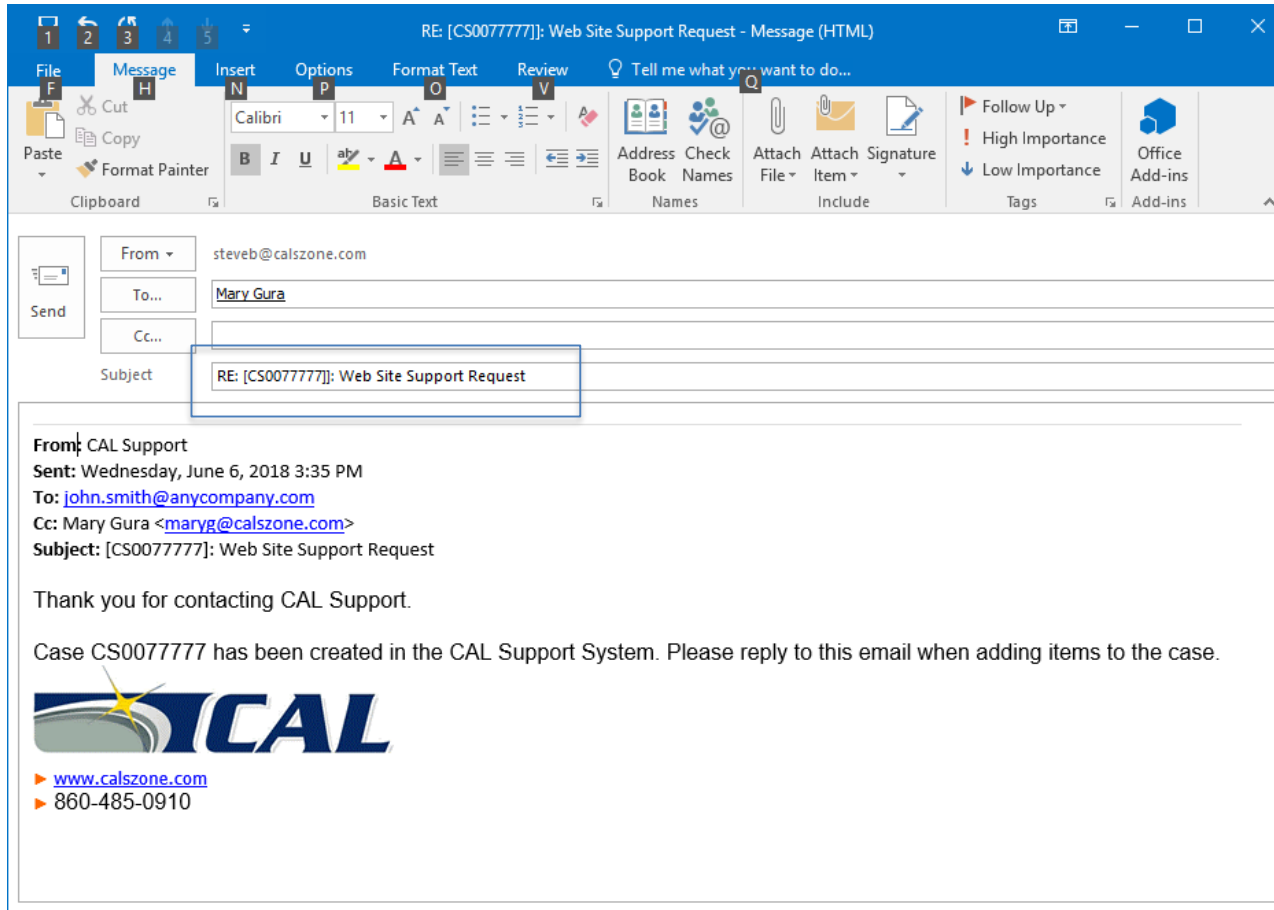
Methods to access Tech Support

- Email

- You can send an email to support@calszone.com
- Will automatically create a Case in our system
- You will receive a email confirmation
 - Assumes your email address is configured in our Case management system
 - Will automatically copy all emails into the Case system under your customer record
 - **Important** – you must include the below information into the email subject line in order to have the Case system automatically add emails to the existing Case record. Otherwise the system will create a new, duplicate Case request.
 - **[CS0077777]: Web Site Support Request**

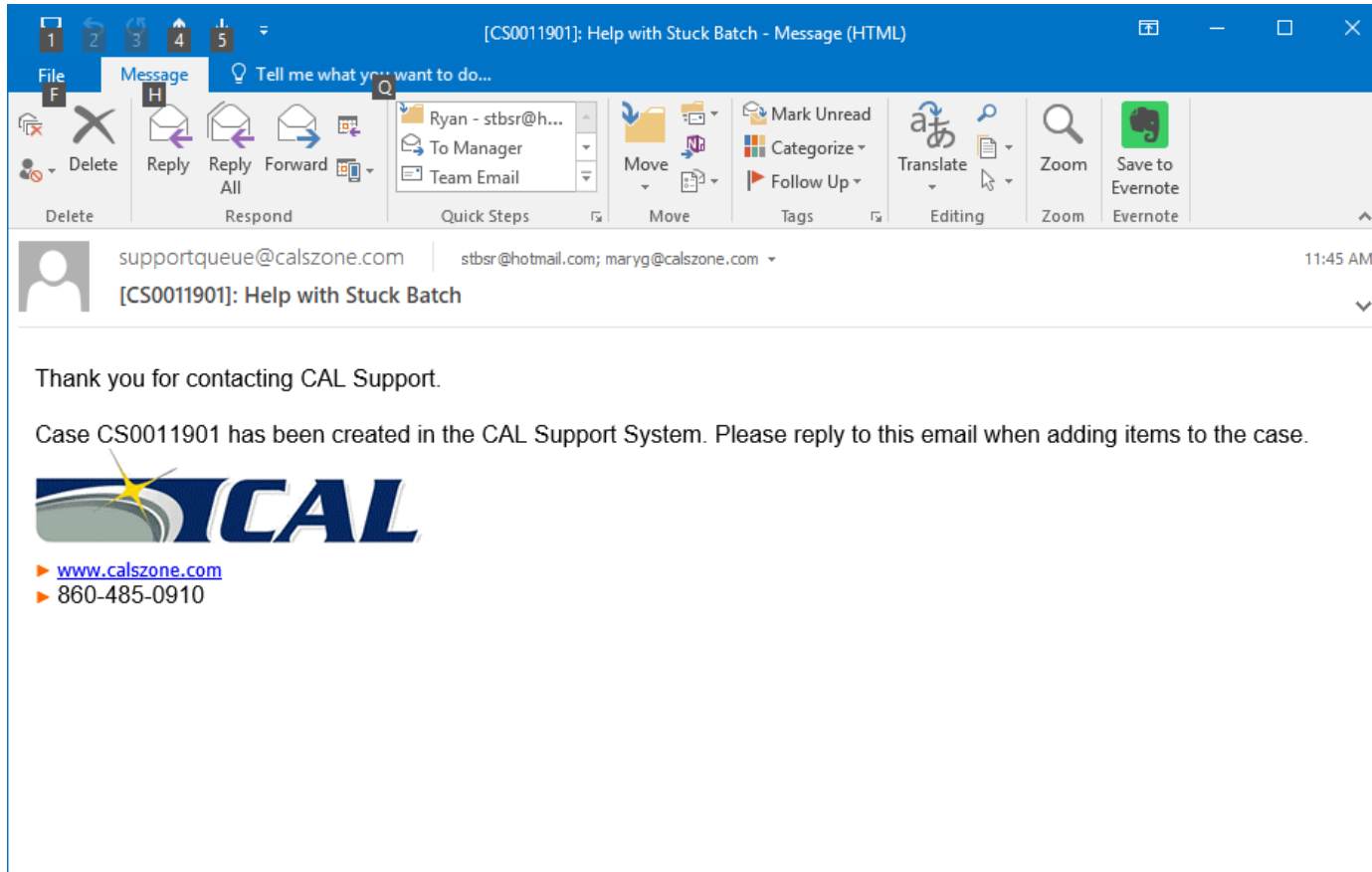
Methods to access Tech Support

- Email continued – Subject line requirement



Methods to access Tech Support

- Email continued – email confirmation



Methods to access Tech Support

- Direct phone call
 - Cal Tech Support – **860-485-0910** OPTION 3
 - You will be connected to our Help Desk Coordinator – Mary Guru – or her backup
 - We will take your call and create a new Case in our system
 - You will receive a confirmation email from our system with the assigned Case ID
 - If you get our voice mail...
 - Leave your name, phone number, a brief description of your need, and let us know if this is a high priority need
 - Voice mails automatically create a Case in our system
 - The voice mail you leave is emailed to our support desk and they will listen carefully to the voice mail and respond
 - We will call you back to get more details if necessary

Methods to access Tech Support

- NEW – CAL Customer Portal
- What are its capabilities
 - View all your account information
 - Establish designated contacts
 - Ability to create support Cases
 - Access to all support Cases, status, communications
 - Access to all billing information
- Availability will be in 3rd quarter 2018

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Setting Support Case priorities

- SLA goals...

Our goal is to provide the responses below based on availability of CAL resources and the determined severity of the support request:

- All Cases, regardless of priority should be acknowledged the same business day, within two hours of receiving the support request.
- All Cases that have been identified as “Normal” should be responded with two business days.
- All Cases that have been identified as “High” priority should be responded within 1 business day.
- All Cases that have been identified as “Emergency” should be responded within two hours.

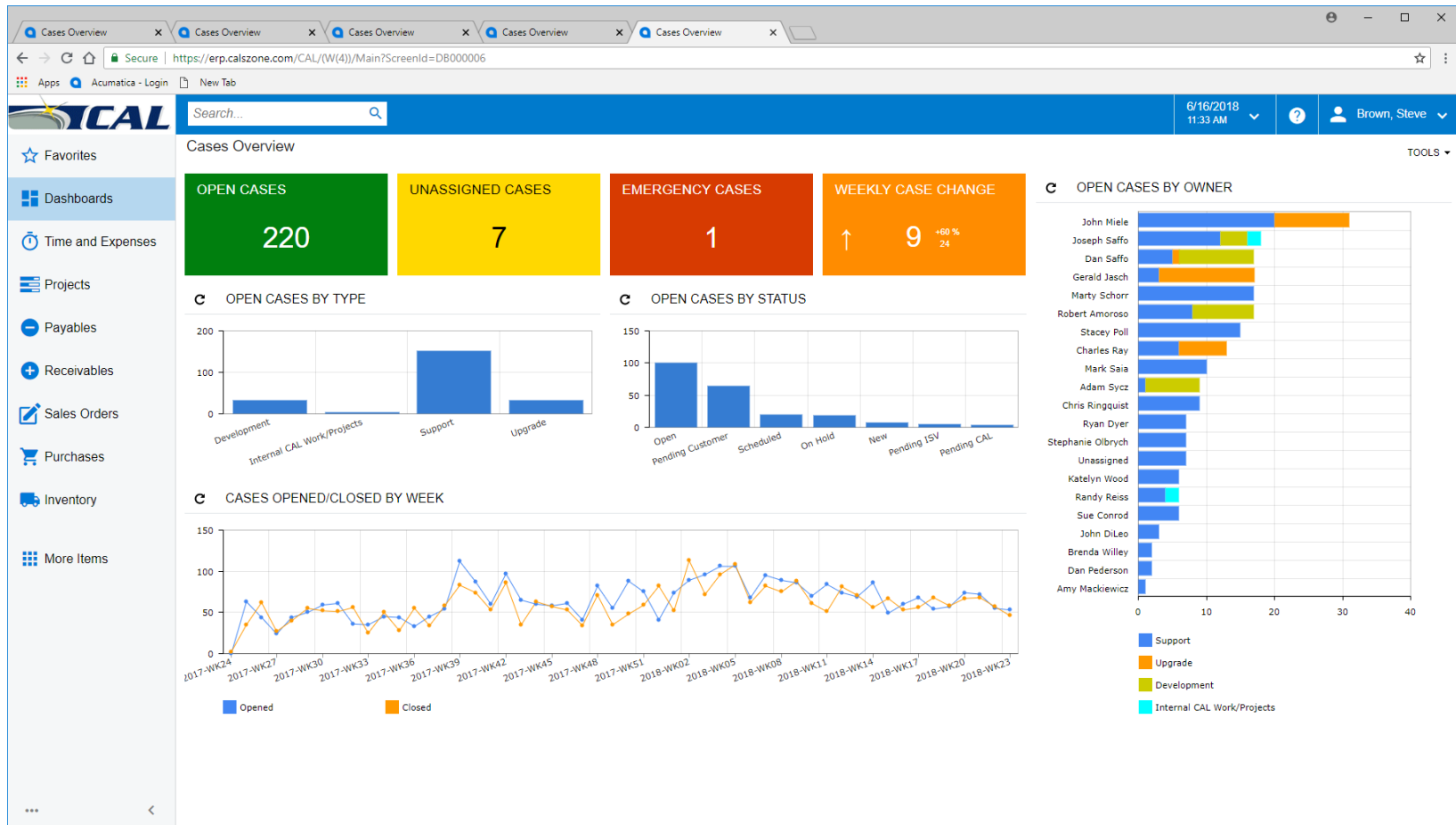
If you are not receiving the service you need – CALL and let us know!

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How CAL manages Tech Support

- Acumatica Case Management Tools...

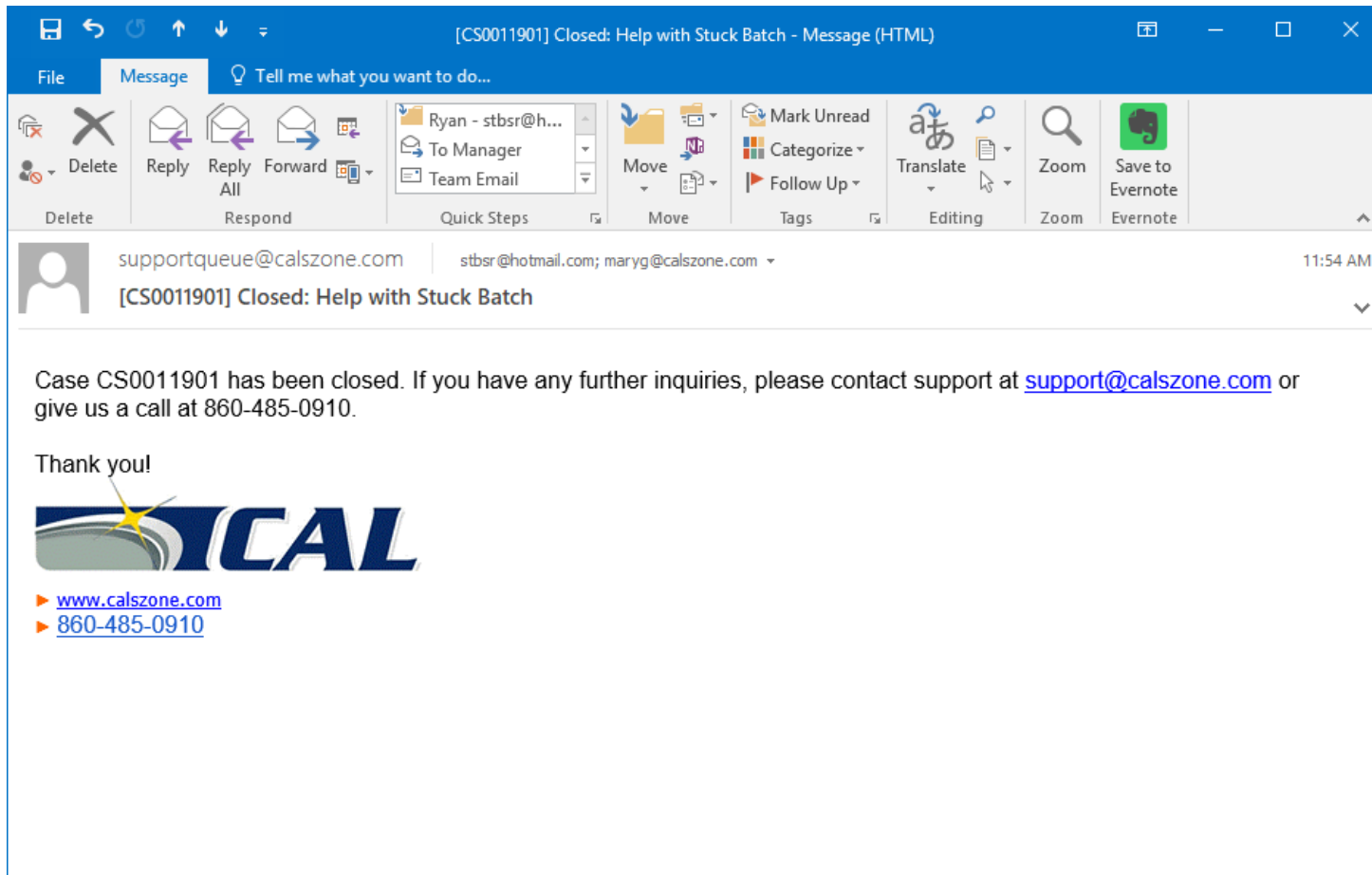


How CAL manages Tech Support

The screenshot displays the 'Cases Inq For Dashboards' page in the CAL Connect Dynamics GP User Event system. The interface includes a search bar, navigation tabs for various case categories, and a detailed table of support cases. The table columns include Case ID, Subject, Status, Date Reported, Owner Name, Class ID, Class Description, Severity, Owner First Name, and Assignment Date. The cases listed are primarily related to financial reporting and system functionality, with most being in 'On Hold' or 'Pending Customer' status.

Case ID	Subject	Status	Date Reported	Owner Name	Class ID	Class Description	Severity	Owner First Name	Assignment Date
CS0008651	FW: Cash flow analysis MR	On Hold	12/1/2016 7:35 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	9/23/2017
CS0008900	GP File to Bank	Pending Customer	6/5/2017 5:31 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	9/23/2017
CS0009934	FW: Currencies in GP	On Hold	12/12/2017 3:30 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	12/12/2017
CS0010784	Web Site Support Request	On Hold	2/21/2018 1:45 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	2/21/2018
CS0010797	Management Reporter Training	On Hold	2/22/2018 12:53 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	2/22/2018
CS0011430	(Related to case 10784)Error message when selecting checkbook for...	On Hold	4/25/2018 8:55 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	4/25/2018
CS0011431	(Related to Case 10784) RE: Error message when selecting checkbo...	On Hold	4/25/2018 9:45 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	4/25/2018
CS0011608	GP Dynamics training	Pending Customer	5/15/2018 6:53 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	5/16/2018
CS0011696	remittance	Pending Customer	5/24/2018 11:33 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	5/24/2018
CS0011820	Problem with Webster Bank Rec	Pending Customer	6/7/2018 11:58 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/7/2018
CS0011821	Migration from quick Books	Pending Customer	6/7/2018 5:12 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/7/2018
CS0011847	Request for GP email to be set up	Pending Customer	6/11/2018 5:10 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/11/2018
CS0011849	Check Remittance	Pending CAL	6/12/2018 8:57 AM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/12/2018
CS0011860	RE: Need help to troubleshoot AP missing invoice	Pending CAL	6/12/2018 9:02 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/12/2018
CS0011867	Monthly Rec not balancing with Bank.	Pending Customer	6/13/2018 12:24 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/13/2018
CS0011878	Web Site Support Request	Pending Customer	6/14/2018 1:23 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/14/2018
CS0011884	Management Reporter	Open	6/14/2018 9:33 PM	Marty Schorr	SUPPORT	Support	Medium	Marty	6/15/2018

How CAL manages Tech Support



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How to help us – help you

- Have available security / user credential information
- Please take our requests for more information seriously
- A “screen shot” is a huge help, if you can get it
- Be prepared to explain all the steps you were going through that caused the issue
- For initial support requests, please go through our support help desk rather than contacting a support person directly

How to help us – help you

Connection / security information



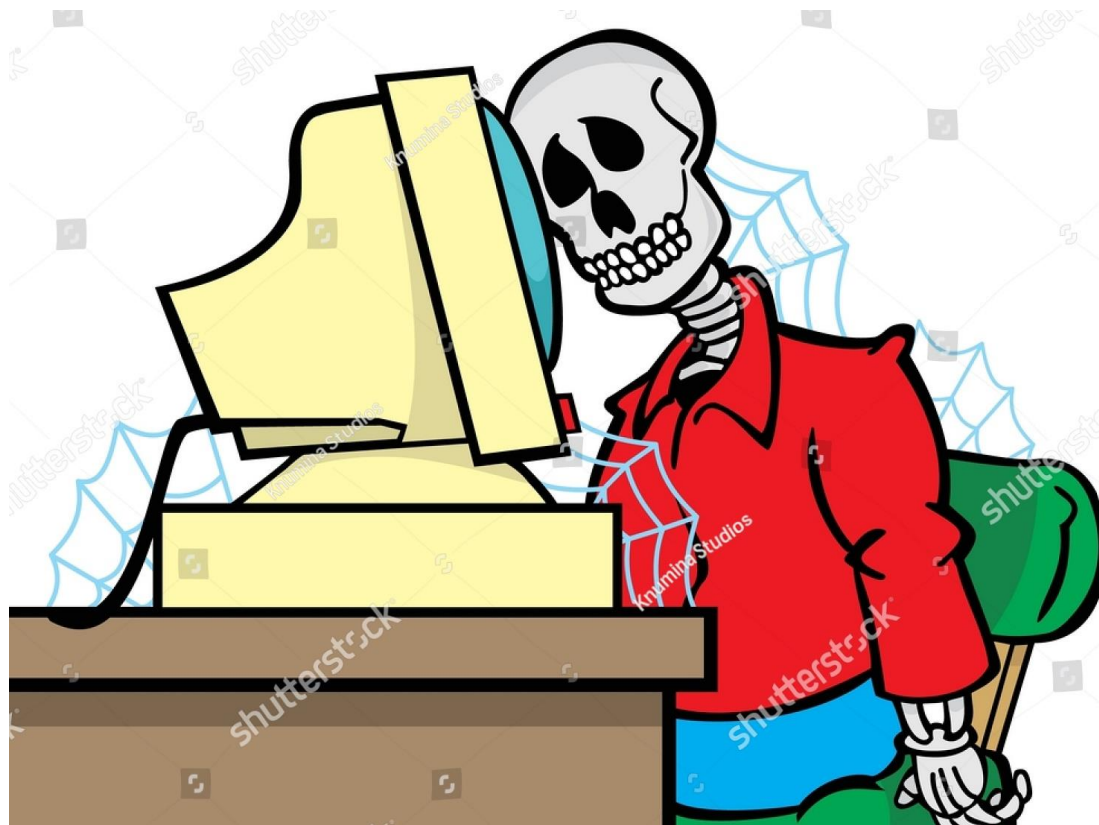
“Username and password, please.”

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How to help us – help you

Waiting for you to call us back...



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Screen shots are invaluable

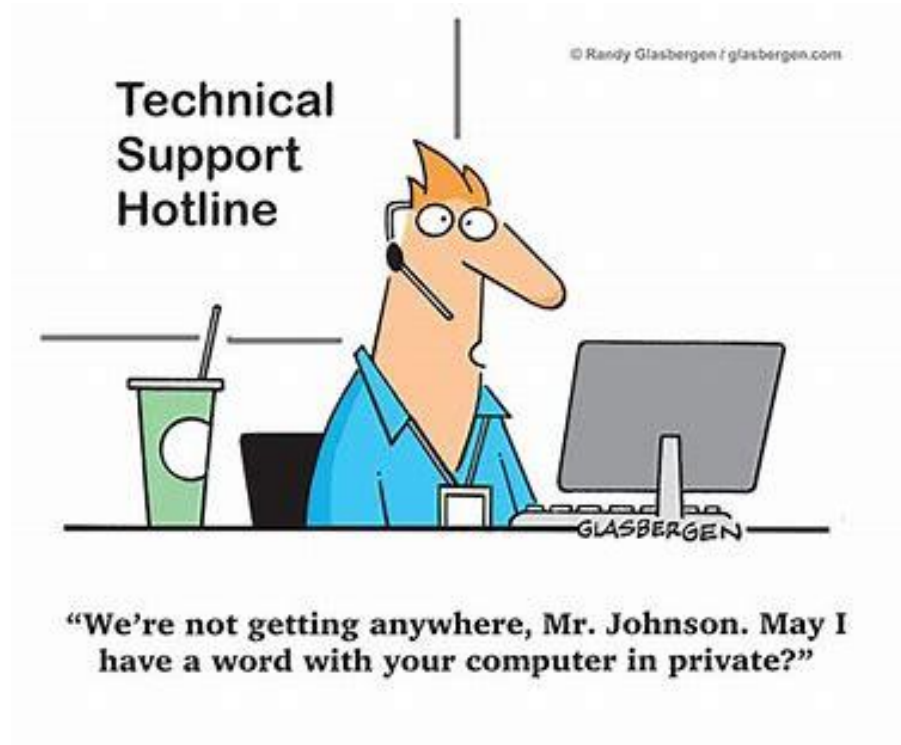


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- For initial support requests, please go through our support help desk rather than contacting a support person directly
 - So we can assign a point person
 - Ensure a Case is created to track all information
 - Have history of Cases so we can better serve you

How to help us – help you

Explain ALL details...



How to help us – help you

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How to help us – help you

We need to assign a designated “point” person...



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Recap and questions

- Recap of CAL Tech Support
- How can we better serve you?
- Questions