Filling Out the Box

appropriate section hyperlinks included here

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Explanation

Our Streak Goals are to inform the company what is happening in support as well as document for ourselves for future use.
The essential cells to be filled out are **Support Type , Action , Property, and Billing Company** .

For the Support Type and Action we are focusing on what the actual issue/reason was and what **you did to resolve it**

For the other columns, **Property/Feature**, we are focusing on the equipment and or that was affected and/or was the root problem. So if you programmed, *what did you program?* If you troubleshot, *what did you troubleshoot **and** what was the issue?*

PLEASE READ THROUGH THE ENTIRE LIST OF FEATURES IN THE DROP BOX BEFORE ADDING NEW ONES AND TAG ME IN IT
We are trying to avoid the duplicate situation that we have with the former support tags. Please also utilize the "Tab" descriptions rather than "Web Portal".

Any extra descriptions needed should be added to brief description.

Support Type

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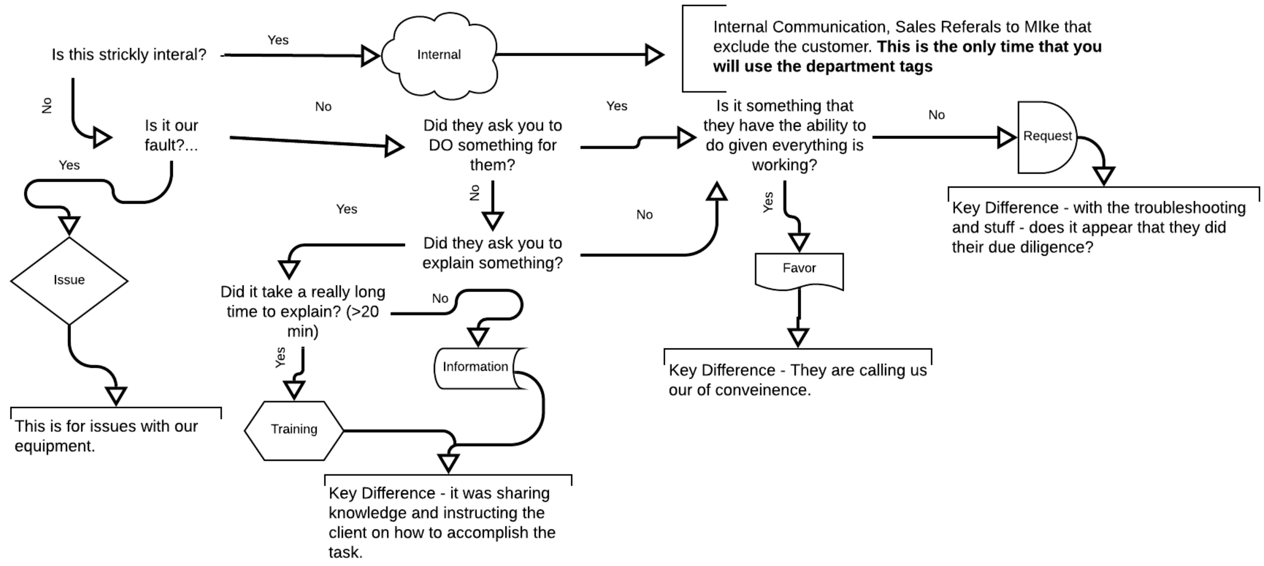
The **Support Type** is dividing the work into catagories that describes one of our 5 main functions.

1. **Internal** - We are often a pivotal person who ensures that information gets to the right place.
2. **Information/ Training** A huge part of what we do is education about the product, its use, its installation, and so much more. We are submetering tutors/teachers. There is a disctintion based off of the time restraint so that we know how frequently we are getting long calls.
3. **Favors** - We get calls from distressed and busy people who want to use our expertise to obtain a time advantage and have not done much troubleshooting.
4. **Request** - This is getting reserved for things that only we can do such as Transfers, checking telit (advanced troubleshooting)
5. **Issue** - Mostly self explanatory but issues can use anything that is already in the boxes to describe the problem

NextCentury | Support Tags



Brief Description || Property Name || Person w/ Company (phone number)

Actions

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The **Actions** is where you will describe what you did. There is a list of preferred options. This section is a little more diverse and requires you to make a judgement call because rarely do our interactions fall completely into one catagory. What ever the bulk of your interaction was. *If you feel like you have something that doesn't fit into a catagory or want to put more than one, tag me in the box.*

Requires Product and/or Feature

- **Programming** is for any time you have done programming. Adding a TR, RE, RR, GW, property, IMR, meter type, Etc.

  Examples: Property, TR201, GW301, RR301, 3rd Part Equipment, Backdate Reads, Editing User Permissions (Add User- this combination is understood to be editing permissions)
- **Troubleshooting** is for any time you are helping to diagnose the problem (with multiple steps)

  Examples: GW301 > Cellular, GW301 (GW201) > Firewall
- **Status** is for when you are providing the status for something but not troubleshooting. Examples; is the Gateway online, did the transceiver check-in, is the property on cellular, etc.

  Examples: GW301 > Cellular , TR201 > Check-In Time, Password Rest
- **Repeater Layout**
- **Installation Instructions** is for any time you are assisting with the installation process. Examples include wiring, reset sequence information, documentation or link, compatibility questions, etc

  Examples: 3rd Party Meter > Compatibility, TR201 > Wiring, Status, Certifications
- **General Information** This should be used sparingly. This would be almost exclusively used for informational calls where someone just asks a diverse number of questions and none are specific enough.***This can be used when someone calls as asks questions about which billing company they should pick or other information that we do not give out***
- **RF Range** is for things that are due strictly to the RF communication. If someone calls and there is low signal strength you would do that.
- **Documentation** this is when you are providing documentation.
- **Sales** this is when there are questions about sales.
- **Equipment ?s** is for questions that have to do with the features of the equipment and not the installation. It will eventually be changed to Equipment Features. ***To be used sparingly***
- **Feature Suggestion**
- **Montly Technician Feedback** should be nested under the Request Support Type.
- **New Server**
- **Training Invitation** is used when we are solicited for information on how to schedule and set up a training. It is also used if someone is in need of a training and links to sign up for a training have been sent.

Does not require Product and/or Feature

- **Property Transfer**
- **Billing ?s** is for anything related directly to billing. This will eventually be changed to just "Billing" but I went with the most commonly used option for ease of transition.
- **Missed Call** should be nested under Request. **This is used when there is a missed call AND we were unable to talk to them.**
- **Add User**
- **New Company** is for when you add any new company as a billing company, property opperator, manual reader, etc.

Special Situations with Actions.

If you are doing an internal box type your "Action" will be the department that we are internally communicating with. That is the only time these should be used.

- **Hardware Department**
- **Software Department**
- **Accounting Depatment**
- **Sales/Orders Department**

Product and Spillover

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The **Product and features** are to track the eqiupment that is getting called about and will help with future documentation.

Product Options

- GW201
- GW301
- GWL301 (lite)
- EN201
- RE201
- DC301
- RR301
- RR301-TR
- TR201
- M201
- Certification
- Spacer Tubes
- Future Equipment
- 3rd Party Meter
- 3rd Party Equipment
- Property
- API
- .csv
- .sdf Upload
- .bak File
- Billing Tab
- Property Equipment Tab
- Property Details Tab
- Property Alerts Tab
- Property Programming Tab
- Property Users Tab
- Reports Tab
- Manufacture List
- Sandbox
- NEMA Enclosure
- Invoice
- Direct Connect App
- Manual Read App
- Import Reads
- Add User
- Backdate
- Data Hosting
- W9
- Firewall
- v98 Update
- Multiple Utilities
- N/A
- No Physical Equipment Used
- Brandi Look At This
- CR123A Battery
- Mobile App
- Auto-Email(s)
- First Hop
- TRSF-12V
- TRSF-15V
- **New** Server Slowdown

Feature Options

- .bak Upload
- Alerts
- App Download
- Backdate
- Battery
- Cellular
- Certification
- Check-In Time
- Compatibility
- Conversion
- Count Factor
- Dual Meter Input
- Duplicate
- Email Notification
- Ethernet
- Firewall
- IMR
- Invoice
- LED Color Questions
- Live Feed
- Meter Builder Request
- Missing
- Model
- Offline
- Passivation
- Permissions
- Power Cord
- Power Loss
- Properties Page
- Radio Frequency
- Reports
- Reset
- Route Assignment
- Run Time
- WiFi
- Wiring

Property

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If it is NOT property related use **Not Property Related**. If it is about a property which is not yet in our system use **Not Programmed Yet** . If someone is calling about a property where a non-TR Remote Reader is programmed put **Not A NC Property**. This will cause the link to be an error.

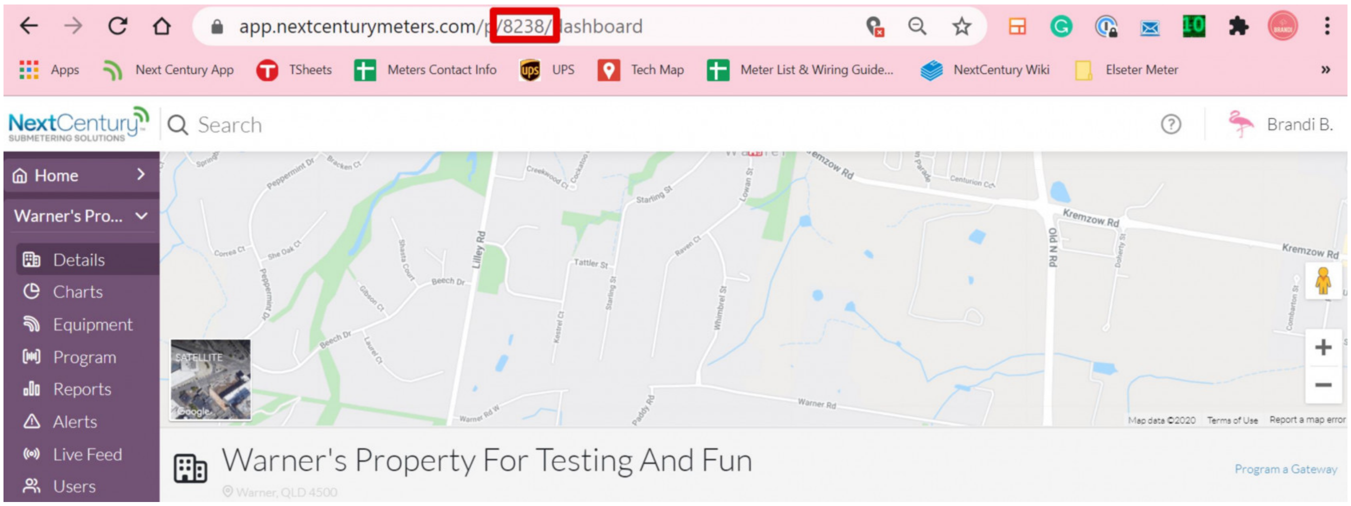
Enter property(ies) is really just about **format** . It is essential that is in the format to be complient because this is what generates the link and will *(hopefully)* be how we create a link between properties that is more efficient.

PropertyName (ID:)

Where the property name does not contain parenthesis. When there are multiple properties that needs to be addressed in a box you will need to separate them by a **double comma ,,**

PropertyName1 (ID: 1) ,, PropertyName2 (ID: 2)

The Property ID number is found in the URL on the NextCentury Web Portal.



It is unqiue and won't change even if the property is transferred, re-named, or if a new Gateway is programmed to it.

Due to extended Loading

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Due to extended loading is to be used when people call in and are needing help because the app or web portal are taking too long to load. There is additional information needed when this happens.

Mobile App

If it is the mobile app giving them problems a check needs to be accompanied by a note that has the following information:

☐ 1. Using WiFi or cellular data and comments on the signal strength. Purpose is to document the situations technicians are in when needing use of the app

☐ 2. Type of phone they have. Purpose is to document if there is a type of phone that has more problems than other (Android vs Apple. Pixel vs Samsung)

☐ 3. Their current location. Are they next to an elevator shaft? A window? In the ceiling? Is it plausible that everything is slow there?

☐ 4. Email address they use to sign into the app. That way we can see if we get this from bigger companies due to loading.

☐ 5. What part of App that is slowing down. Was it slow from the get go? Did they direct connect and then it was slow? Was it the search feature? Did it appear quickly and have inaccurate information?

Web Portal

If it is the web portal giving them problems, a check needs to be accompanied by a note that has the following information:

☐ 1. Is there internet working on other websites (like youtube)? Have them run an internet speed test.

☐ 2. What web browser are they using? Are they using wifi or ethernet?

☐ 3. Get information on any additional symptoms and what aspects of the sight are being slow.

Possible Issue

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Possible issues should be used when there isn't an explicit issue but there were a few things that seemed wonky and you want to note it that way. This is done so that if there are more situations with similar side effects we can go back and compare.

New Contacts

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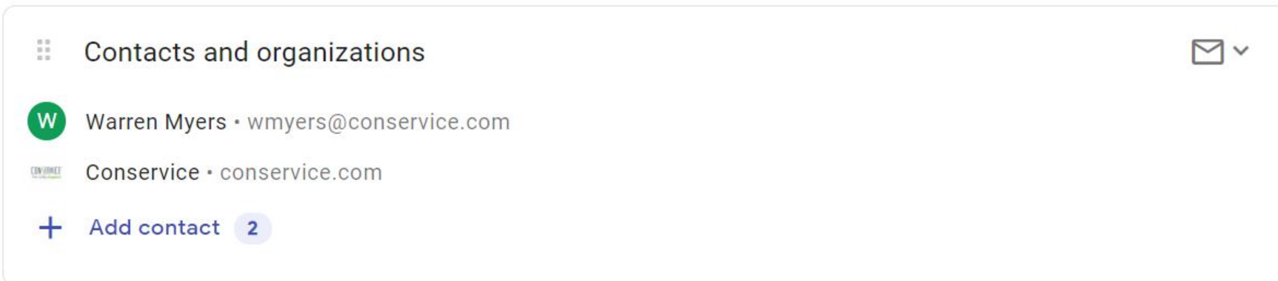
The **Contact field** is required to be filled out. It also needs to include the company that the contact is associated with.

RingCentral is not required to be added for missed calls.



Tips to make sure that the contact is the most up-to-date.

Please search for already added contacts before adding a new one. **We are trying to avoid duplicate contacts.**

1. **Search the contact list first** using the information you know such as the name, number, or email.
   If you are unable to identify the contact that way
2. **Gather more information.** Search your **inbox** and well as the **User List in the Admin tab of the NextCentury website** to see if you can find more information to then search in the contacts section.
3. Be sure to verify that their contact information is as up-to-date as possible (check their email signature).