ClearOne
Advantage

Quick Reference Guide for Chat/Phone Portal Troubleshooting

Purpose:
This guide provides a structured approach for agents to troubleshoot client issues related to chat and portal functionality.

Agent Checklist:
1. **Identify User Type**: Ask the client whether they are using a phone or a desktop/laptop computer.
2. **Determine Phone Carrier** (if applicable): For mobile users, inquire about their mobile carrier to help identify potential connectivity issues.
3. **Clear Cache and Cookies**: Guide the client on how to clear their browser's cache and cookies as this can resolve many common issues.
4. **Check for Plugins or Pop-Up Blockers**: Ask if the client has any plugins, extensions, or pop-up blockers that might be interfering with their experience.

Step-by-Step Troubleshooting Process

Step 1: Basic Login Support
  ➢ Confirm the client is using the correct **username and password**.
  ➢ If they can't log in:
  ➢ Guide them to click **"Forgot Username or Password?"** on the login screen.
  ➢ Walk them through resetting their credentials

Step 2: Clear Browser Cache & Cookies
Instructions:
  ➢ **Chrome (Desktop):**
    Settings > Privacy & Security > Clear browsing data > Select "Cookies and other site data" + "Cached images and files" > Clear data.
  ➢ **Safari (iPhone):**
    Settings > Safari > Clear History and Website Data
  ➢ **Chrome (Android):**
    Settings > Privacy > Clear Browsing Data

Step 3: Try Another Browser or Device
- ➢ If they're on a **mobile phone**, ask them to try from a **desktop or laptop**.
- ➢ If they're on a **desktop**, ask them to try a different browser (e.g., switch from Safari to Chrome or Firefox).

Step 4: Account Lockouts
If the client:
- ➢ Has tried multiple times with no success
- ➢ Received an error about being locked out
- ➢ **Manually unlock the account** in the admin portal by following this SOP
- ➢ **See the Client Portal Login & Reset SOP below:**
  - o Client Portal Login & Reset

**Online Support Team:
- ➢ **Chat Support:** Please use the following Macro to assist the client
- ➢ **Macro Name:** Troubleshooting
- ➢ **Trouble Shooting Steps**
  - o **Step 1: Basic Login Support**
    - • Confirm the client is using the correct **username and password**.
    - • If they can't log in:
    - • Guide them to click **"Forgot Username or Password?"** on the login screen.
    - • Walk them through resetting their credentials

Conclusion:
Using this QRG will help ensure a consistent and thorough troubleshooting process, leading to more effective resolutions for client issues.