

Interacting with Tech Support

Scope:

This document was created to ensure excellent customer support experiences by providing best practices for interacting with tech support.

Objectives:

Upon review of this document, partners will:

1. Be able to communicate their issue to tech support effectively.
2. Be able to open a support ticket and include all pertinent information.
3. Have correct expectations about some processes that require waiting on support.

Before Opening a Ticket:

There are a couple things you can do to avoid having to open a ticket in the first place. The most important of which would be to check the knowledge base for articles pertaining to the issue at hand. Our knowledge base has information on most issues and processes you could encounter which makes it a great first step.

Next, check your partner portal for existing tickets on the device. These tickets could be related to the issue at hand. For example, if you open a ticket to clear up space on your appliance, and you have a current ticket opened by another tech about offsite sync being out of date, the solution would most likely be to resolve the sync issue. This will subsequently resolve the storage concern as sync files can fill up a device if they cannot make it offsite.

Opening a Ticket:

Once you have determined that a ticket is in fact needed, here are some actions you can take to ensure an excellent support experience for everyone involved.

The first thing we recommend would be gathering information about the protected server(s). This includes:

- **What are the hardware specifications?**
- **What does the networking environment look like?**
- **What is the production server's primary function? (SQL, Exchange, file server, etc..).**

Additionally, we want to hear some of your troubleshooting;

- **What has changed in the environment?**
- **Have you seen something previously that could contribute/explain the issue at hand?**
- **How can we replicate the issue?**

These observations can substantially decrease ticket duration, and ensure an effective, and permanent solution to the problem.

Expectations Within a Ticket:

The cornerstone of any successful support experience is proper expectations for the end-user, partner, and Datto tech support.

Issue Priority:

First, we want to hear your expectations around priority of the issue. When opening a ticket you are asked what level of priority the ticket holds. Below are

the levels of priority, and their definitions pulled from Datto's SLA:

Emergency - This priority is used for an issue that directly impacts business function and hinders normal operation such as a server being down. A Technical Support Expert will respond to an emergency email within one hour.

Urgent - Issues that directly impact business function and hinder normal operation during normal business hours such as a server being down are urgent. A Technical Support Expert will respond within one hour.

High - Issues that impact business, but do not hinder normal operation such as a Datto device being down or a device having no space available for additional backup. A Technical Support Expert will respond within four hours.

Normal - Issues that do not impact normal business function, but cause problems with backups such as failed backups or error messages. A Technical Support Expert will respond within six hours.

Low - Issues that do not impact business or backup function or do not have a time constraint, but may cause problems in the future, such as warning messages. A Technical Support Expert will respond within ten hours.

These are the standards we will hold ourselves to regardless of the situation. If you need more frequent updates, or more eyes on the issue 24/7, we are more than happy to accommodate. With that being said, you will need to make these expectations clear as early as possible so we can schedule techs accordingly.

Support Environment:

It is also important to keep in mind how tickets are assigned at Datto. When a ticket is opened, it will be assigned based on it's priority, time it was entered, and nature of the ticket to the best tech on shift.

Note: You can check your assigned tech's shift in their signature in the ticket updates, or emailed ticket response alerts.

If you would like to have the ticket monitored by someone who's shift aligns with

your own, your technician will be happy to hand it off as needed. Additionally, if you are having trouble communicating with your tech via ticket updates, feel free to reach out over the phone. If your assigned technician is off shift, any other technician should be able to assist, or get you to someone who can.

Internal Process Time:

Sometimes, your assigned technician will have to work with one of our other departments to get a specific process accomplished. This can include offsite prune forms, offsite data migrations, and offsite virtualization requests. In these instances, we recommend letting your technician be your advocate. If you find that you haven't received an update in a while however, feel free to reach out for a status update. Many of these processes take time, but as soon as they complete, your technician is updated. With that in mind, you can expect an update as soon as the tech knows anything (Within his or her shift of course).

Escalations:

At Datto we have level 1 support technicians, as well as an escalation tier otherwise known as a tier 2. These are technicians who are assigned issues that fall into one of the following categories:

- The ticket has been open for an extended amount of time without a clear resolution.
- The issue at hand is outside of the tier 1s technical expertise.
- The partner is not satisfied with the support or service they are receiving from their assigned technician.

With all of this said, there are tier 1s who are quite senior and can resolve most if not all issues they encounter. If you believe that you have a ticket in need of escalation, do not be afraid to speak up. We will ensure that the appropriate technician has eyes on the problem.

Disaster Recovery Scenarios:

When opening a ticket for a recovery scenario, there are certain pieces of information you can provide to support to expedite getting your client back up and running. We recommend entering the following information into said tickets:

- Which protected system is down?
- What happened to the production system / When was the failure noticed?
- What date/time are you looking to restore from?
- What data / volumes are you looking to restore?
- What is this agent's primary role (Domain Controller, Exchange Server, etc.)?
- What is the source hardware (Server model and hardware configuration)?
- What is the destination hardware (Server model and hardware configuration)?

Every recovery scenario is different, but by ensuring proper communication, we can work together to get ahead of many issues that could arise.

Further Learning:

Datto Knowledge Base: <https://helpdesk.dattobackup.com/hc/en-us>

Datto Academy: <https://academy.dattobackup.com/basictraining>