Getting the best from support

Reporting your **cases** accurately

Communicate with clarity

Complex processes can mean that when changes get made, updates get implemented or when a new person starts, errors and issues may occur.

In order that you can get the best support, quickly and effectively, the team at WinMan ERP has created this checklist to help speed up the process.

Support requests are made by raising a case, which is all pretty straight-forward and easy to do, it's the information provided to investigate your challenges which is critical to finding a prompt resolution.

It's easy when you know what the support team are looking for...

1. Contacting support

When something goes wrong, or is not working as expected, knowing when to raise a case, where to go, who and how to contact WinMan support is key:

- **WHEN?**

  It's time to log a case if any of the following occur

  - Critical process not working
  - Errors display
  - Bugs appear
  - Recurrent issues

- **WHERE?**

  There's a few places you can go to log your case, as described below.

  - Support portal at support.winman.com, for both v8 and Cloud users
  - For Cloud users only, you can use the support hub integral to your Cloud system.
    This provides the same functionality for logging and managing cases as the support portal above.
  - For v8 users only you can submit a case via your local system.
    You can for example click 'send' to support, which displays at the bottom of an error code, generates and sends an email with the error attached.
  - Alternatively, you can send an email to support@winman.com.

- **HOW?**

  Let's take a closer look in the next sections...

2. Structuring your case

Before you send off a case, it's worthwhile speaking to your local system admin or power user to double-check the issue. Many users will route case creation through their main user also, so this tool can be shared with colleagues to help you better understand the issues, prior to submitting them through for support as well...

Read more about the Do's and Don'ts on how to structure your cases:

Do's

- **Subject**
  Enter a succinct and specific subject line, be really specific to the issue you are experiencing

  e.g. 'Error on P&L report load' or 'Price update not showing in SO'

- **External Reference**
  Can be left blank if you don't have one, or if you have your own ticket logging system, the reference can can be entered here to capture and create a link – the information entered here will display in your case summary

- **Public Description**
  Enter the details behind what is happening, again keep it focused on the end goal, what is stopping you achieve what you need to happen?

- **Repro Steps**
  This is a step by step outline of what you actually did to get to the point where you encountered an issue, it's a good idea to replicate the issue yourself and write a bullet point list includingscreenshots, then get a colleague tofollow the steps to see if they get the same issue if they do, it'll be in this box you list them in

  OR add a note to say, see attached document and once the case is created, upload the document that already lists your steps

Don'ts

- **Subject**
  Avoid wording or details in the subject that make viewing the case's nature hard to quickly grasp

  e.g. 'Help' or 'Urgent need' or 'Left blank' or 'your company name'

  As these types of subject slow down the time it takes to prioritise and assign the case

- **External Reference**
  Worry – if you leave it blank. It'll just auto fill a copy of your subject line

- **Public Description**
  Go off topic...
  Your descriptions should briefly cover what you did, why, what your were trying to do, and what actually

  Happened – if you include details that are unrelated this may take the actions taken to support you off track too

- **Repro Steps**
  Guess the steps taken, a crucial step could get missed, which may result in lots of questions OR a longer time to investigate the issue

  Assume it's a standard process, it's likely your system has key customisations to ensure your unique operations can go ahead, be planned and monitored, so finding out if it's a specific functionality to you is really important

Case processing

3. Assigning and resolving your case

Understand how your team assess, assign and process your case, as they follow a structured approach to investigation

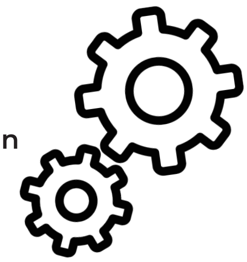
- Once you have submitted your case, you can always go in and modify to add new details, but it's best to include 99% of the details when you first submit

- The case drops into a Support Queue where it is reviewed from a top level toassess and assign a

    - Priority, based on the severity
    - Reason, a top level type, and
    - Category, specific to the module

- You will receive an automatic email to confirm the case has successfully been received.

  Following the initial review, your case is assigned to a support analyst and at this point you will receive another email notification advising you who your support analyst is and when they are due to start working on your case. You support contact will take a deeper dive into the details submitted:



1a. If the complete details to reproduce the issues have been shared, they'll look to replicate the issue

1b. If a solution can be found without further investigation the appropriate advice will be given, which may include recommendation to upgrade

OR

2a. If the details are incomplete or unclear, the support analyst may request a screenshare to go through the issue with you

If a fix or solution is applied, please take the time to retrace your steps and ensure the end outcome you wanted occurs as expected. It's key to do this soon after you have a reply from the support analyst. Let the analyst know and they will action either further investigation OR close your case

Closure will mean a solution has been found, OR if we don't hear from you within 1 week of our communication we will email to advise that your case will be closed. The closing email will ask you to feedback on your experience specific to the case being handled and the service provided by your support contact

Your tips to speed up the process

Be aware of these handy tips to avoid any additional processing...

- Once your case is open, always reply to the most recent reply you have received from support – this will ensure that a second or multiple new cases are not created. This will typically happen when you start a fresh email to support@winman.com

  If this does happen, and we understand that it can happen when you need to update us quickly – your multiple cases will be merged. This action will trigger an email to you that advises that the 'additional' cases have been closed

  NOTE: if your case is still open, the original/most detailed will remain open until a solution is found

- If you have internal discussions ongoing, it's a good idea to remove support@winman.com from the chain, because we'll take the inbound communication to mean you're asking us to do something

- On any screenshots you share, it's a good idea to include the full window so we can quickly see exactly e.g. screen/program where error/issue occurred, action that resulted in error (clicking on Firm), example transaction, i.e. sales order id, error detail (obtained by clicking on the error message)

- Check to see if your issue affects a single item/area or is across your full system

- Whenever there's an error in WinMan, you'll get a prompt box that says something like ''There was an error loading xyz. Contact your system administrator''

  You'll be given two options:

  - Close, OR
  - Advanced' - if you click on Advanced, there is a much more descriptive text of what the error is – it's a good idea to copy this into your case notes as this will give your support team a closer steer on where to look

- If you're on Windows 10 or above, support will use Quick Assist to remotely access your machine OR for a system that's older WinMan will use LogMeIn Rescue which will be accessed via your internet browser

Escalation Process

- If you feel you need to escalate a case then follow our process outlined below to ensure you get the higher level of attention or expertise you need.
- The first point of escalation is to Ghaz Ali, our Support Team Leader.
- Following this it is Jasbir Randhawa, our Head of Support.
- Finally, you can get in touch with the Account Management Team.
  Jonathan Davies is responsible for customers who use our on-premise solution v8, while Jack Hawkins manages those who use WinMan Cloud.

The WinMan team is made up of talented individuals, from in-house software developers focused on the latest technology, to enterprise resource planning experts and implementations consultants.

Our solutions enable you to undertake a digital transformation of the way you run your business. Delivering process improvements and optimisations along the way, designed to support your growth.

Start logging your cases for better support today.

Contact us now to discuss.

All-in-one ERP software solutions.

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