FranConnect Support Administration Guide

About This Guide

The FranConnect **Support** module allows you to access Trouble Tickets, Frequently Asked Questions, and Contact Information details. You can create and submit Trouble Tickets to different departments for solving issues, or view existing tickets.

This FranConnect product manual contains a comprehensive description of the user experience and administration screens of the *FranConnect Support module.*

Contents

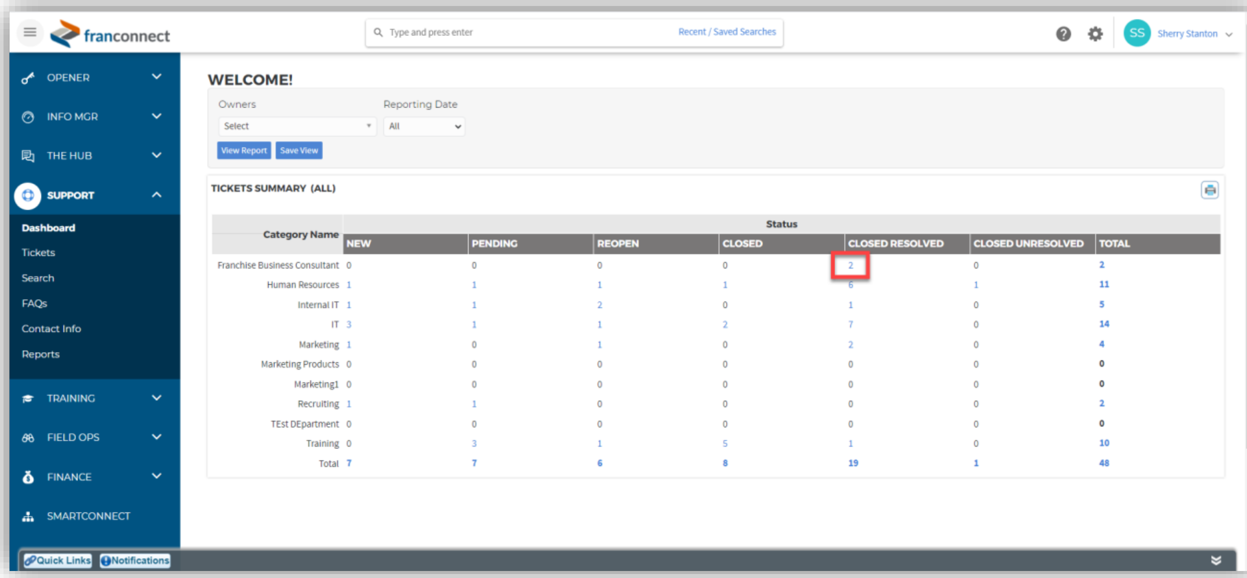
The User Experience

Support Pages

Support Page	Description
Dashboard	The Dashboard offers a summary of support tickets in tabular format, by Department name. Tickets are separated by their status, with the ability to drill through any ticket count to see the tickets in that category.
Tickets	A list of tickets, searchable by whether they are reported, locked or archived. Includes the ability to create a new ticket.
Search	A comprehensive support ticket search form that accepts a wide range of criteria. When the search form is used, the resulting locations are presented in the Task Search page, filtered to match the search criteria.
FAQs	A list of Frequently Asked Questions, which can be organized by categories, and searched by words in the question or the answer.
Contact Info	A listing of support contacts, by department.
Reports	Get reports of tickets, by owner and status, department and status, or by timeline.

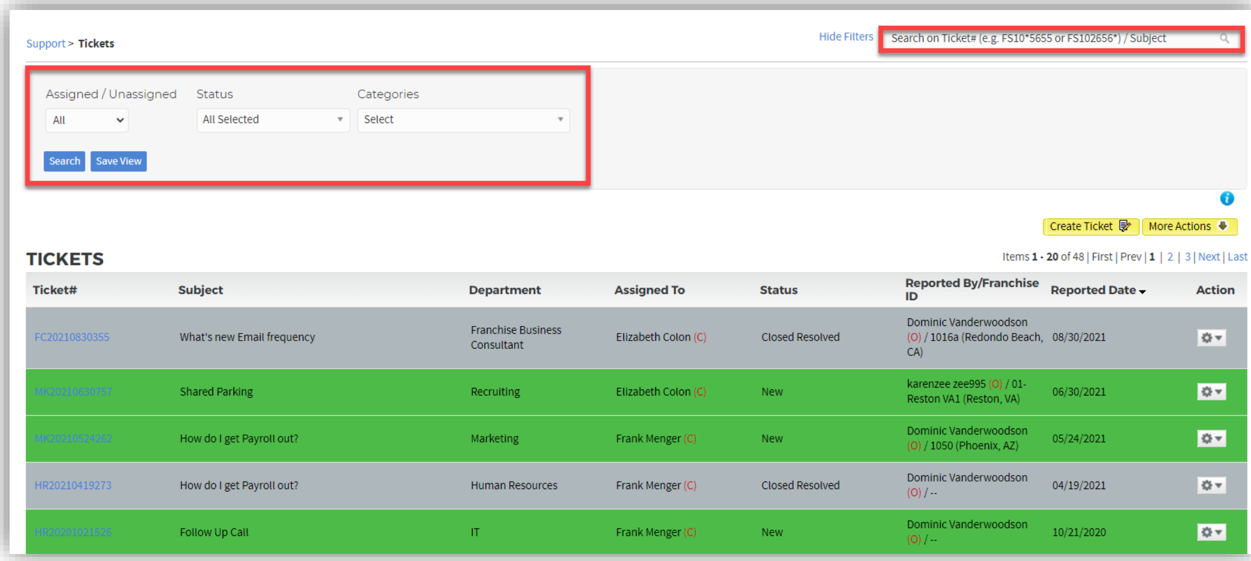
Viewing the Dashboard

The Support Dashboard is a tabular representation of tickets by department and status. Click on the number representing the tickets in a status for a department to see a list of those tickets. Franchisee users see the tickets that they have submitted. Corporate users see all tickets submitted.



Viewing Trouble Tickets

The Tickets page lists trouble tickets, and can be filtered by assignment, status, or department. They can also be searched by ticket number or key words in the ticket subject.



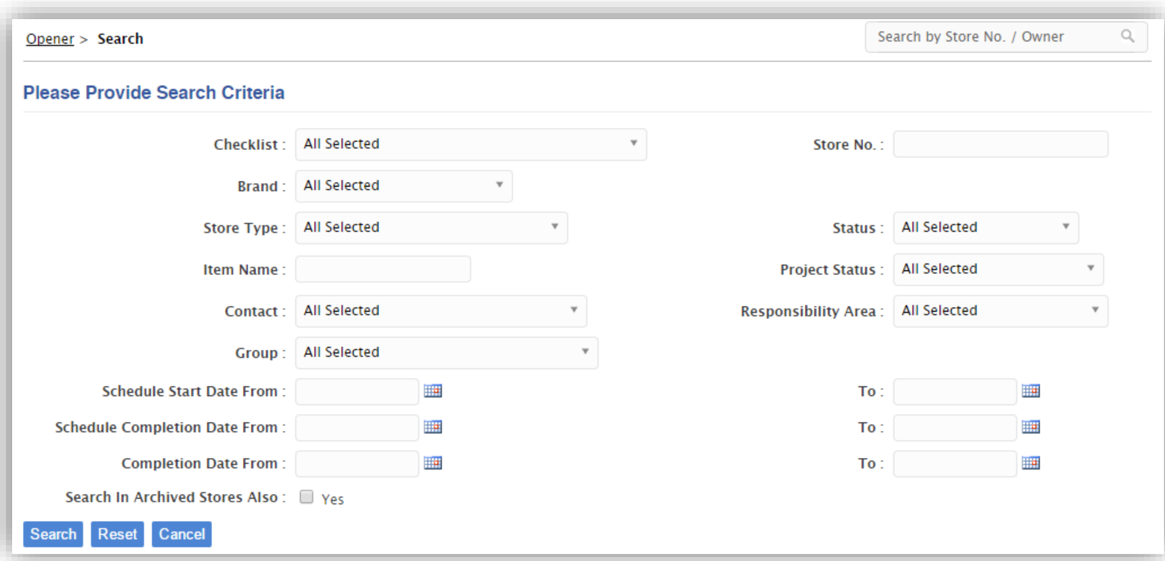
You can view tickets with only certain statuses, such as locked tickets, reported tickets, or archived tickets, through the **More Actions** button. You can sort tickets by clicking on any header in the list.

You can open a ticket and view detail by clicking on the hyperlinked ticket number, or update its status, assign an owner, archive or lock a ticket in the Action Wheel.

You can enter a new ticket by clicking on the **Create Ticket** button.

Searching Trouble Tickets

You can search for trouble tickets by a wide range of criteria through the **Search** page of the Support tab. Set the criteria and click the Search button to view a list of tasks that meet the criteria.

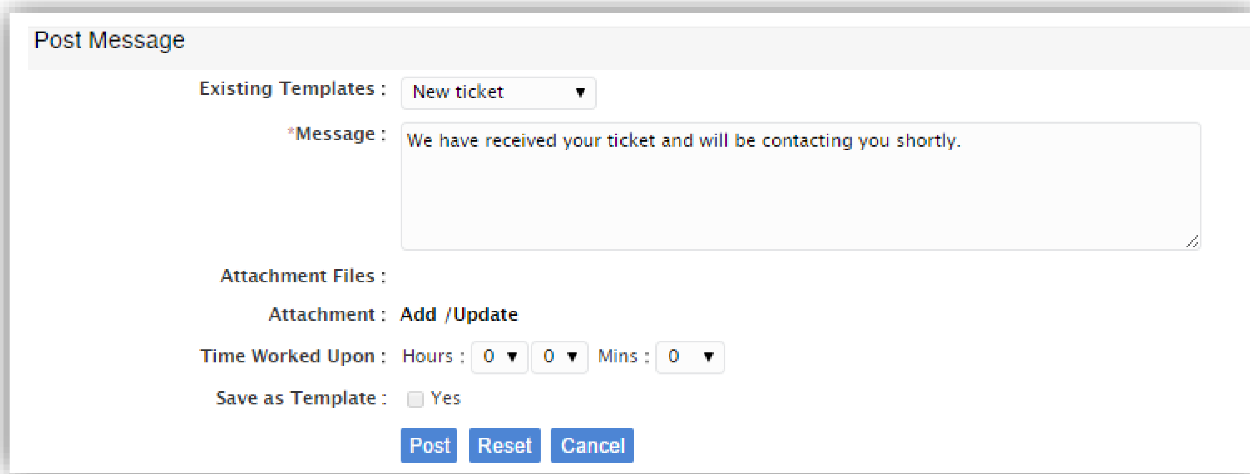


Posting a message to a Trouble Ticket

In responding to a ticket, you may need to post a message back to the submitter, and to others solving the ticket. To respond to a ticket, open that ticket from the list and go to the Post Message section of the page.

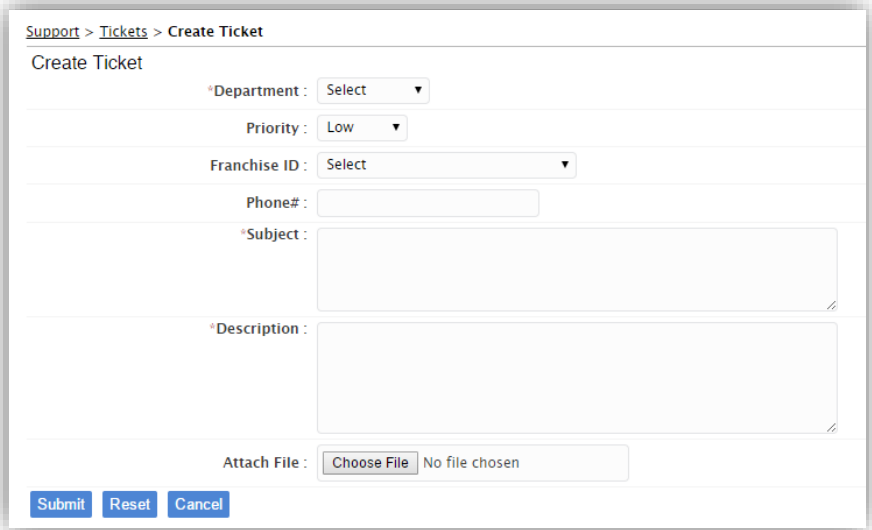
You can choose to simply type a solution message, attaching supporting docs if appropriate.
If the answer is simply a status message, or is an answerto a commonly-asked question, you can begin with an **Existing Template.** Select the template, and text associated with it will fill the Message field. You can then alter the message field to customize the remainder of the reply.

If no template exists, and you would like to re-use this answer, check the **Save as Template** box before clicking **Post.**



Entering a New Trouble Ticket

To enter a new trouble ticket, click the **Create Ticket** button.



Department: select the department that should take action on the ticket.

Priority: Choose from low, medium or high priority.

Franchise ID: choose the franchise that is submitting the trouble ticket.

Phone #: enter the phone number that the respondent to the ticket should call you at.

Subject: Enter one sentence that summarizes the problem.

Description: Enter a full description of the problem, and if appropriate, the requested action from the respondent.

Attach file: If you have a supporting document or screen shot, you can upload it here.

Closing an Existing Trouble Ticket

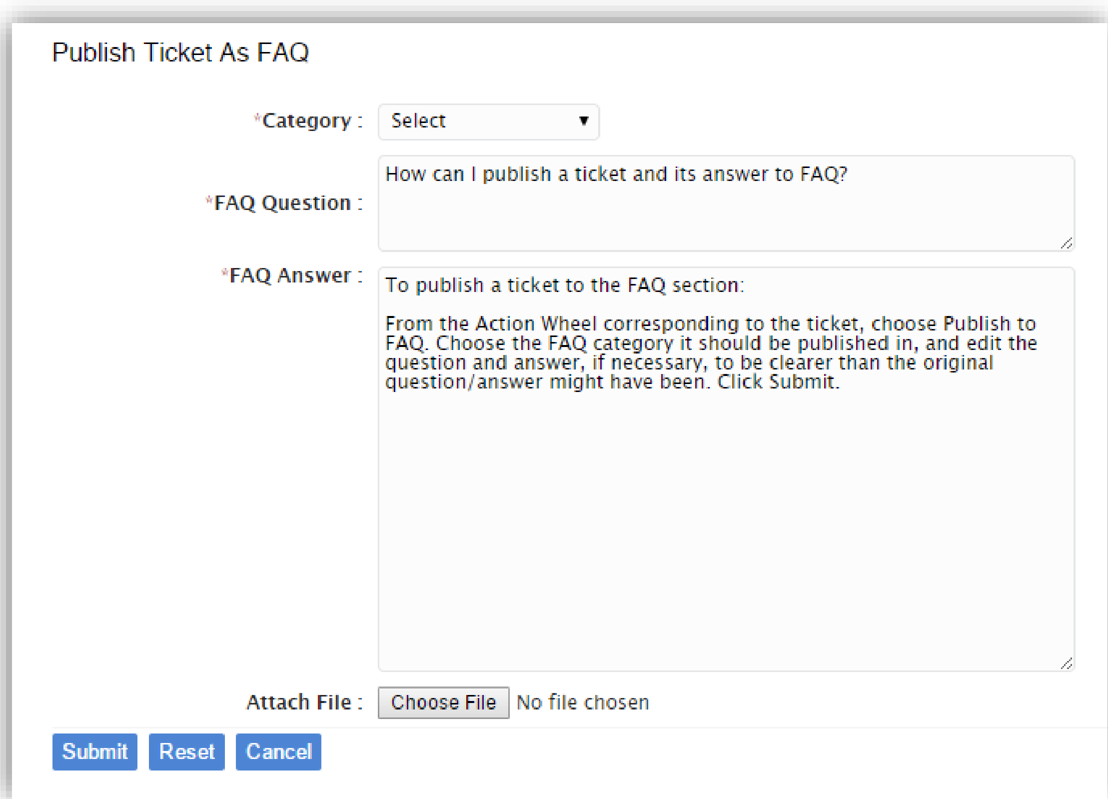
From the Action Wheel corresponding to the trouble ticket that you want to close, Select the **Update Status** option from the Action menu. Chose Close to close the ticket. A confirmation message box appears. Click **Save.**

Click the **OK** button to close the confirmation message.

Publishing a ticket to the FAQ list

When a ticket contains a question and answer that might benefit others than the reporting party, you can choose to publish it to the FAQ screen. To publish a question and answer to the FAQ section:

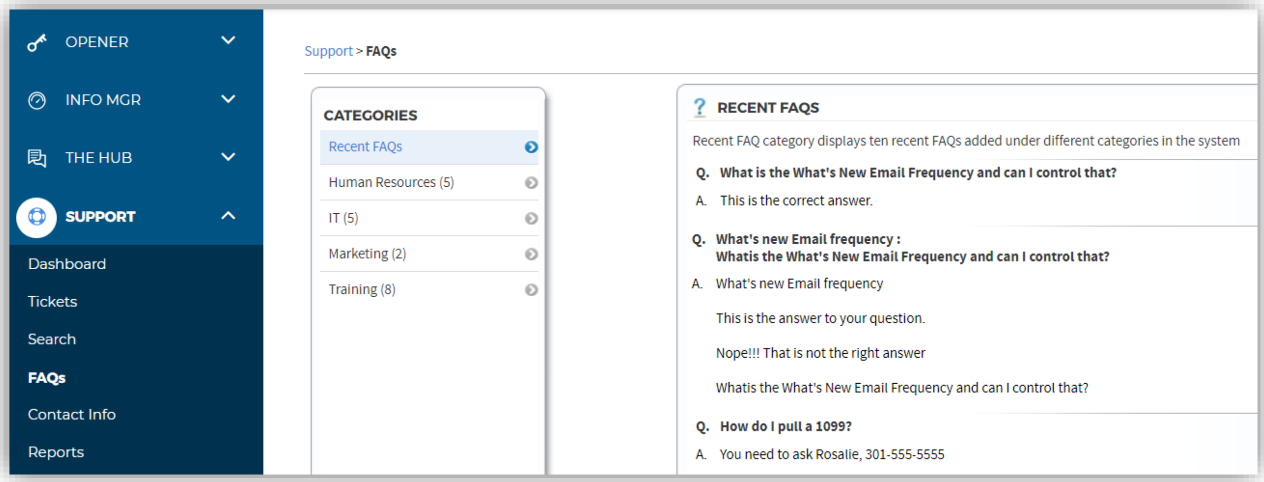
From the Action Wheel corresponding to the ticket, choose **Publish to FAQ**. Choose the FAQ category it should be published in, and edit the question and answer, if necessary, to be clearer than the original question/answer might have been.



About FAQs

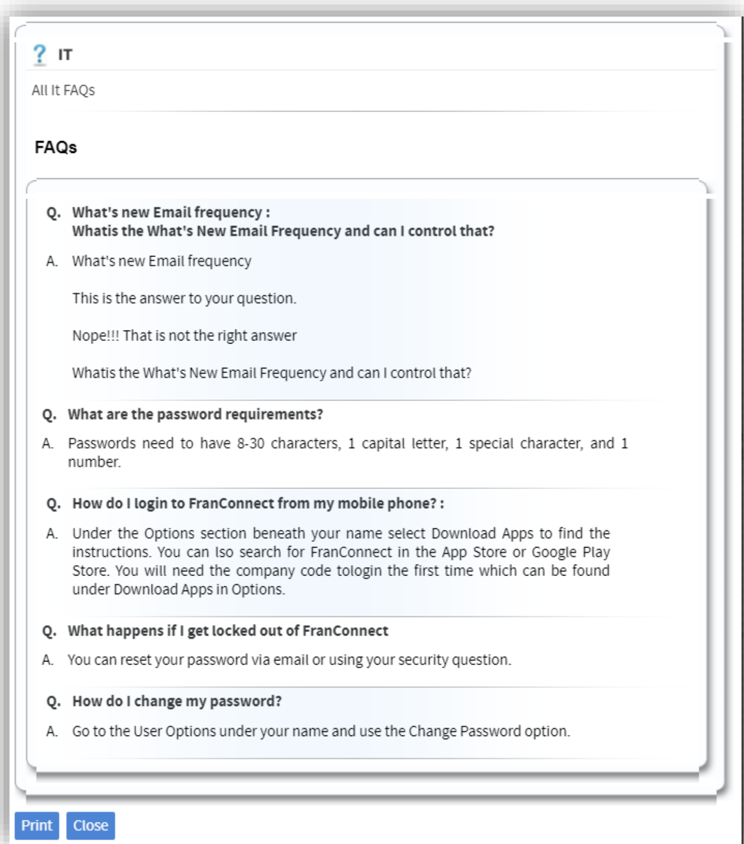
The FAQs (Frequently Asked Questions) feature allows you to view the questions and answers related to trouble tickets. This section lists various Categories of FAQs and their corresponding FAQs. By default, the FAQs page opens up with Recent FAQs posted by the administrator. You can click the Category hyperlink to view the associated FAQs.

Click the **FAQs** link in the section header to open the FAQs homepage as shown below:



Click the hyperlinked category under the **Categories** column to view the associated FAQ(s) and the answer(s).

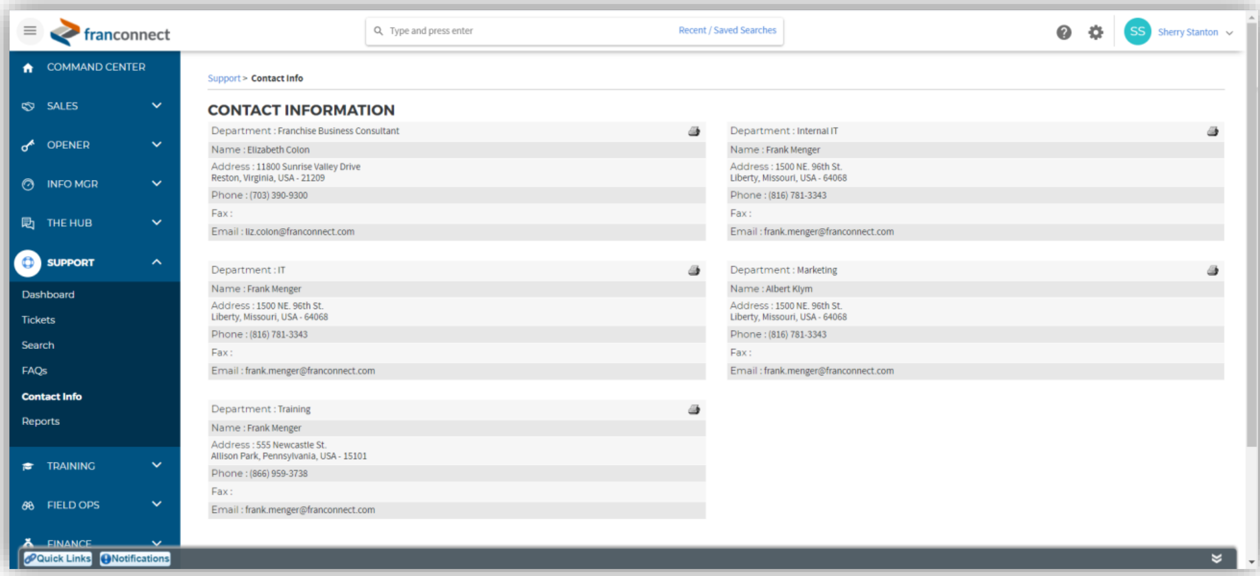
Click the () icon to view details as shown in the figure below:



Click the **Print** button to print the details of the frequently asked question. Click the **Close** button to close the window.

Viewing Contact Info

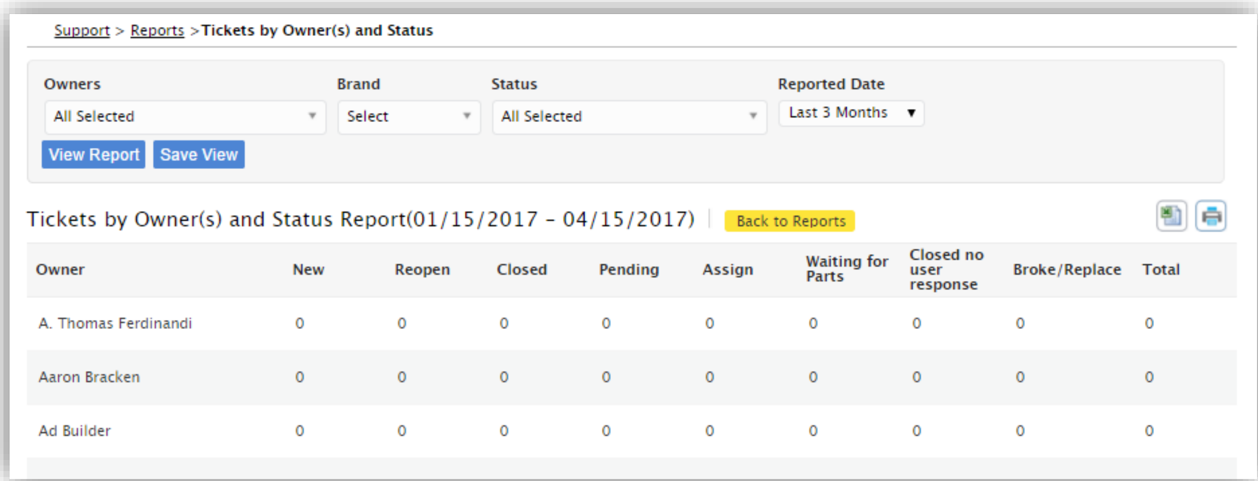
The **Contact Info** page shows the contact information of the designated individuals who handle tickets from various responding departments. Your FranConnect Administrator maintains this information.



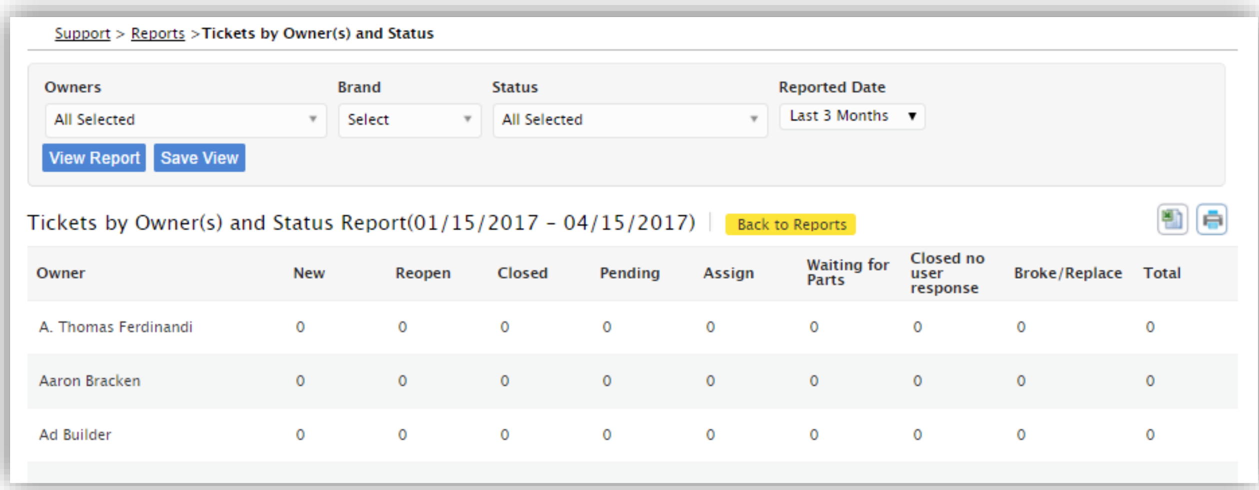
Viewing Reports in the Support Module

There are three different ways to report tickets from the **Reports** page of the Support Module.

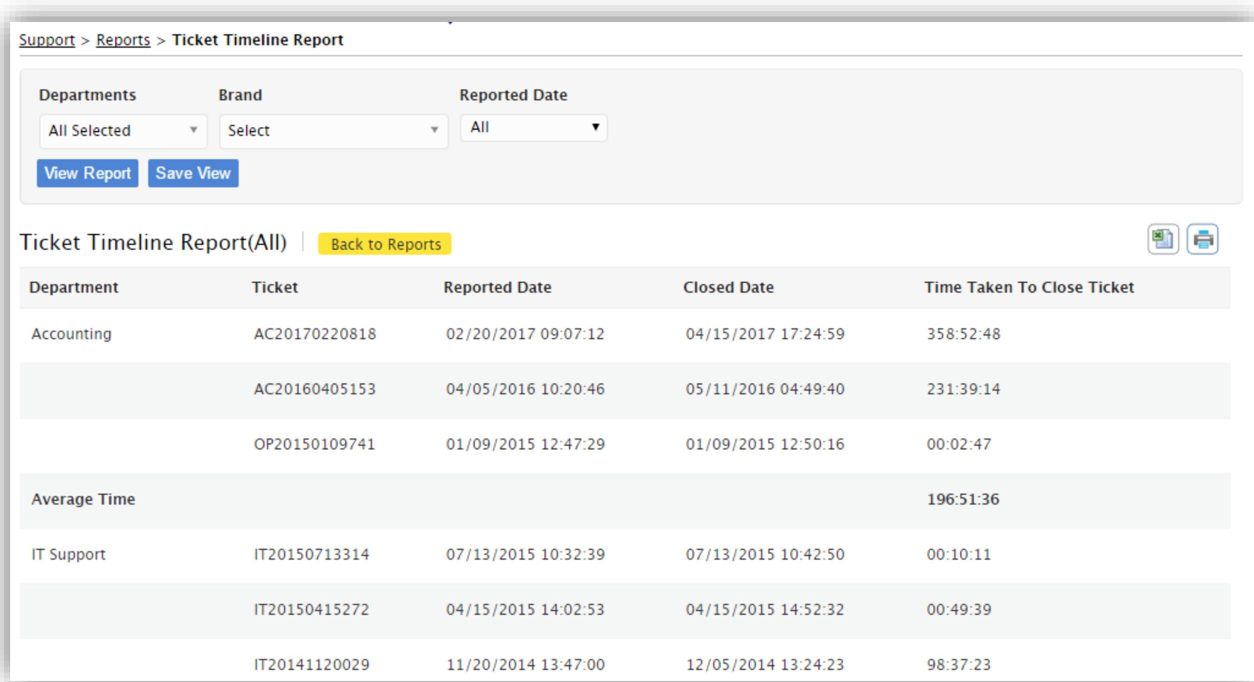
Tickets by Owners and Status lets you view tickets for each ticket owner, broken down by status. Click through the count to see the details of tickets in a status for an owner.



Tickets by Departments and Status lets you view tickets for each department providing solutions, broken down by status. Click through the count to see the details of tickets in a status for a department.



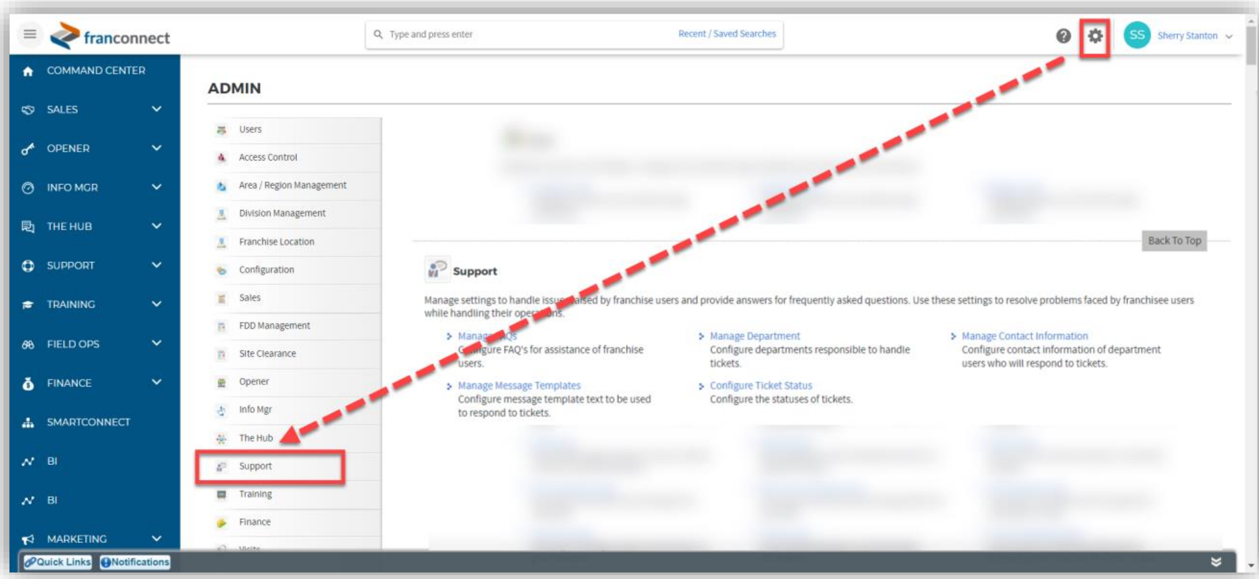
The **Ticket Timeline Report** gives a listing of tickets grouped by department, and sorted by reported date. Also listed is the amount of time it took to close a ticket.



Support Module Administration

Configuring the Support Module

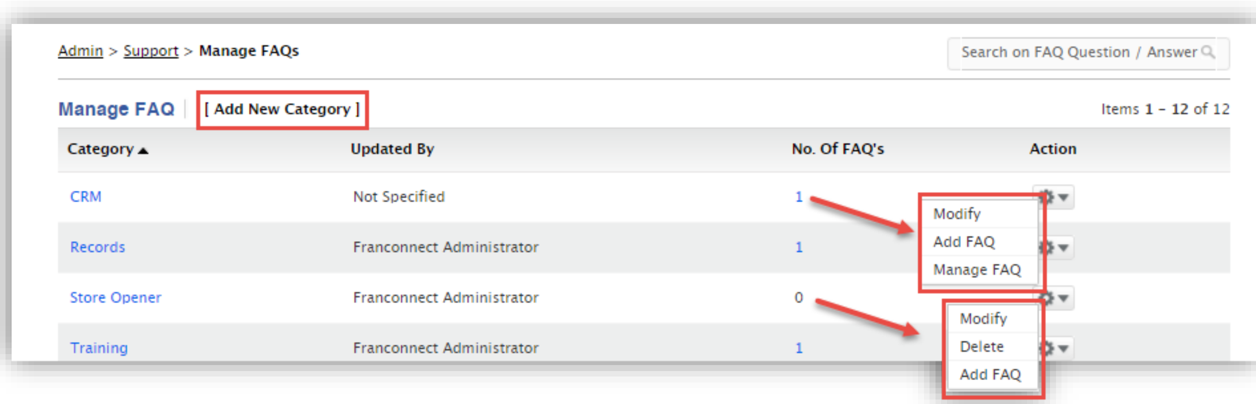
To configure the Support Module for your franchise needs, go to Admin > Support, as shown. Note you must have Corporate Admin privileges to access this area.



Managing FAQs

FAQ Categories

For easier reference, FAQs are grouped into Categories, for example, by department, by module of software, by business use, etc. This is a single-leve hierarchy, so for example you can't have departments and sub-departments. When you open the **Admin > Support > Manage FAQs** page, the default page displayed is the list of categories.



You can Add a new category by clicking the **[Add New Category]** link at the top of the list, and entering the new category's name, and a brief description, and clicking **Add**.

You can **Delete** a category that has no FAQs from the Action Wheel next to the Category name.

You can **Add FAQ** to a category from the Action Wheel next to the Category name. Enter the FAQ question and answer information, and attach any supporting documents that may help answer the question, and click **Add**.

You can modify or delete FAQ entries from a category by choosing **Manage FAQ** from the Action Wheel next to the category.

FAQ Entries

When you choose to Manage FAQ in a category, the question list for that category is displayed, and any existing questions are displayed in a list.

You can add an FAQ entry by clicking **Add FAQ** at the top of the list, entering the question and answer information and any supporting docs, and clicking **Add**.

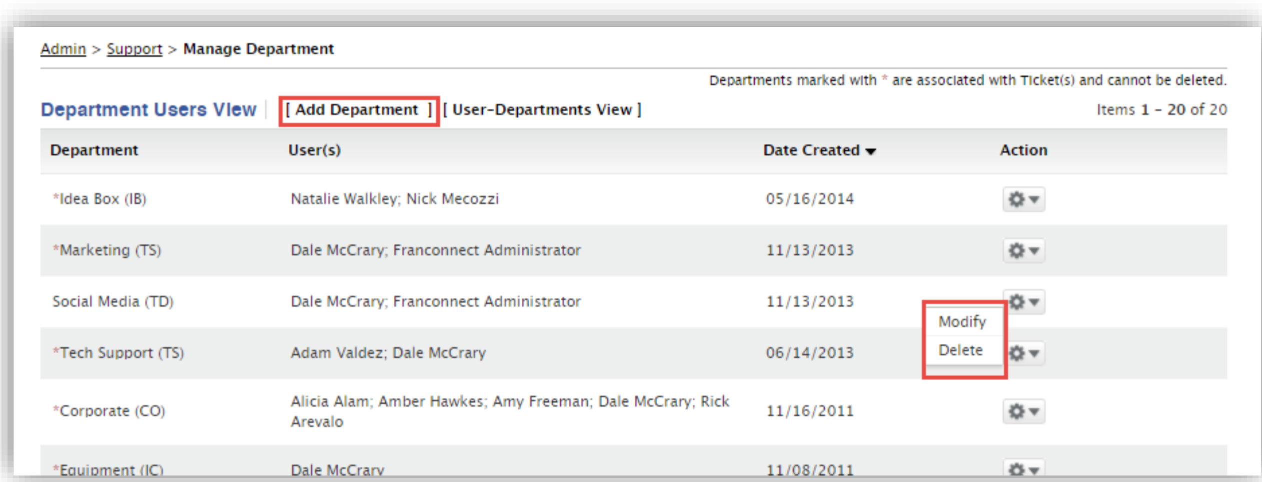
You can edit an FAQ entry by choosing **Modify** from the Action Wheel next to the category, entering the new question and answer information and any supporting docs, and clicking **Save**.

You can remove an FAQ entry by choosing **Delete** from the Action Wheel next to the category.

Managing Departments (Categories)

The **Admin > Support > Manage Department** interface lets you associate users to departments that are responsible for responding to tickets. The information is organized into Departments and Users. The default view in the interface is the list of departments.

You can add a department from the **[Add Department]** link at the top of the list. You can change the department information for any department by clicking **Modify** from the Action Wheel next to any department. For departments not yet associated with support tickets, you can remove the department by clicking **Delete** from the Action Wheel next to the department.

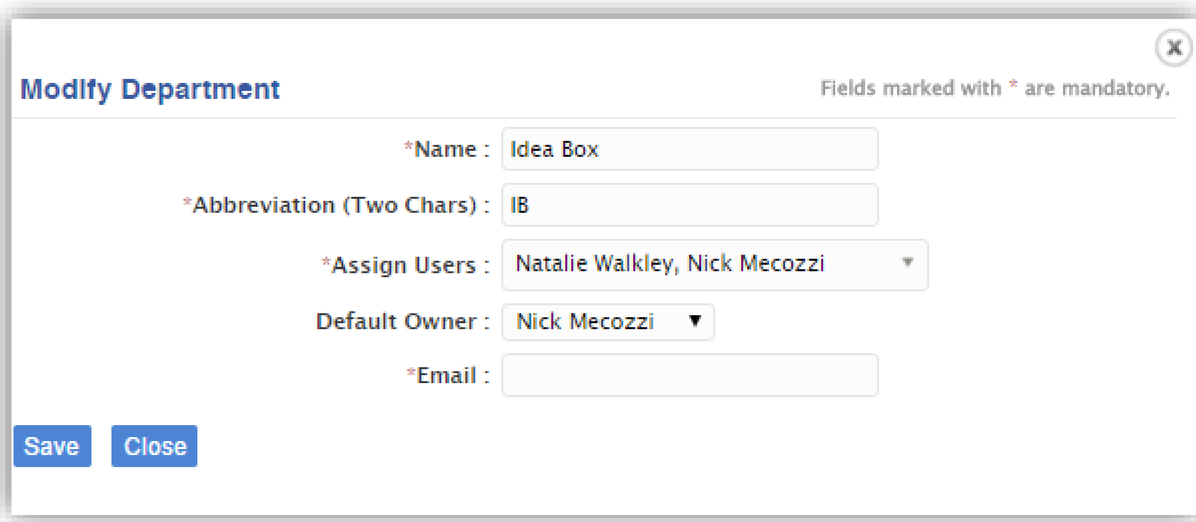


Editing Department Information

Each department must have a name, a two-letter abbreviation, users, and a contact email address. The name, abbreviation, and email information can be entered by typing the information. User information, for the fields “Assign Users” and “Default Owner”, is chosen from drop-down information provided from the FranConnect User list. Using the search pane, locate the users who are in this department and check the boxes associated with them.

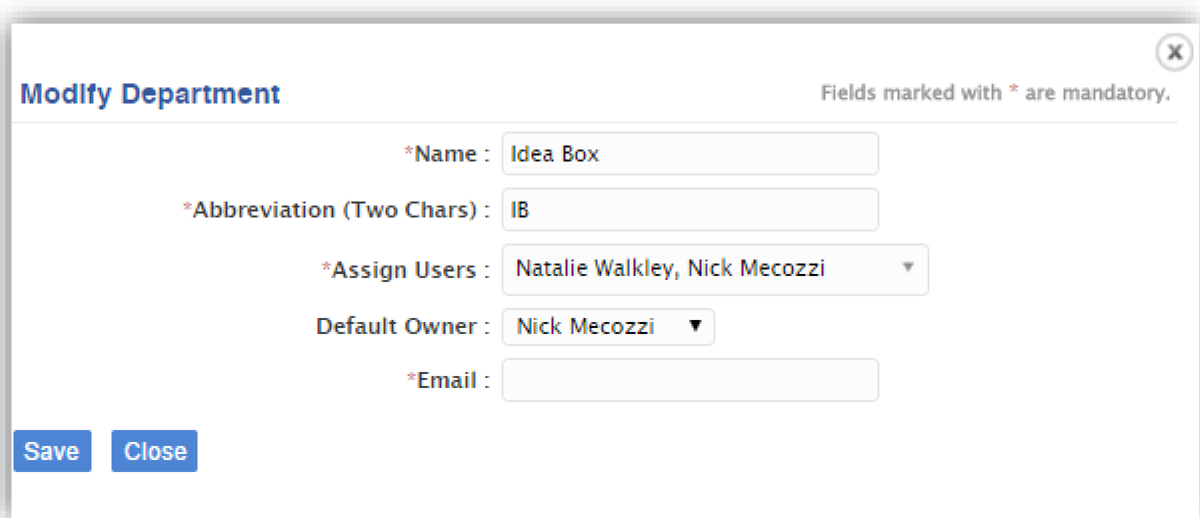
Once users exist in the department, you can choose from that shorter list to assign a default owner.

When finished entering department information, click **Save.**



The User-Department View

This view lists all users with the departments they belong to. You can assign a listed user to one or more departments using the **Assign Departments** link to the right of the user record. Click **Save** to save these assignments. The departments associated will now appear in the user's record in the link.



Note: You cannot add or delete users from this screen – add users from the **Admin > Users > Corporate User** interface.

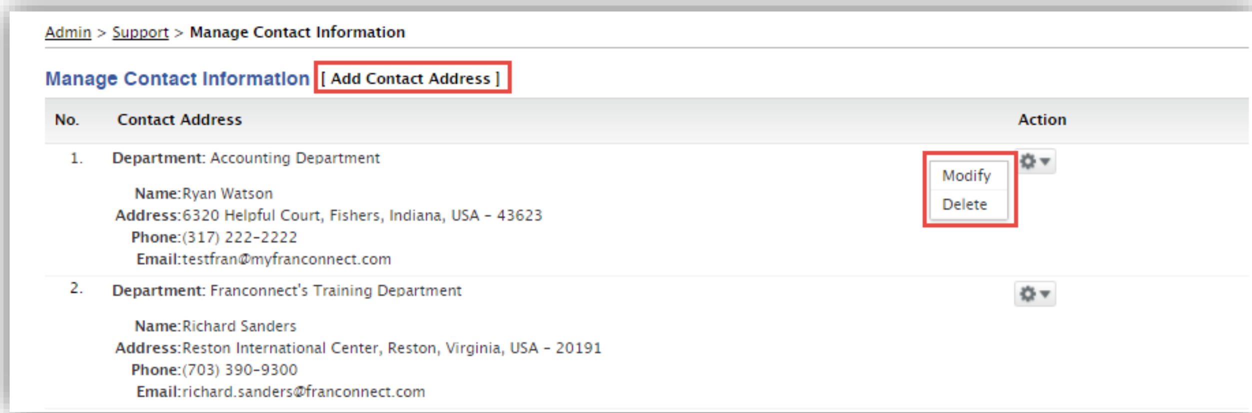
Managing Contact Information

The **Contact Info** page shows the contact information of the designated individuals who handle tickets from various responding departments. This information is maintained in the **Admin > Support > Manage Contact Information** interface.

The default display of this interface is the Manage Contact Information contact list. You can add new contacts to the display by clicking **[Add Contact Address]** at the top of the list, entering the appropriate contact information in the pop-up dialog, and clicking **Add.**

You can change a contact's information from the Action Wheel next to the contact record, by choosing **Modify**, entering the appropriate contact information in the pop-up dialog, and clicking **Save.**

You can remove a contact from the display by choosing **Delete** from the Action Wheel next to the contact record.

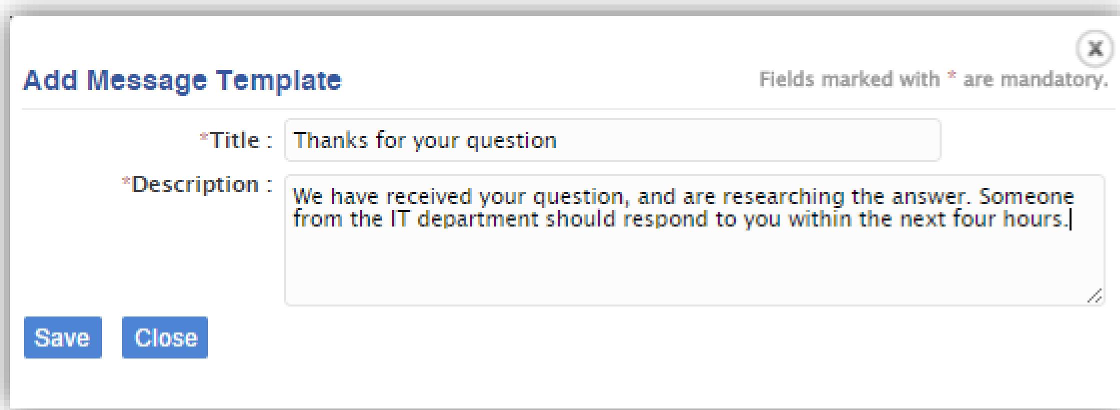


Managing Message Templates

There are some common responses to support tickets that will be used frequently, such as instructions for resetting a password, or the message that you have received and are researching a ticket.

In **Admin > Support > Manage Message Templates**, you can compose pre-written text for use in posting messages to a trouble ticket.

The default display is the list of templates. To add a preset response, click **[Add Message Template].** Enter the title of the template – short but representative of the content, it's for your reference in the selection menu – and the actual text that should appear in the post when you select this. **Note:** during the post, you will have the opportunity to add to/edit this text, so it doesn't have to be comprehensive – it can be a framework for what you will say in the post.



Configuring Ticket Status

As a ticket travels through the process of submission and solution, it may have several statuses. To customize those statuses, use the **Configure Ticket Status.** In the Ticket Status Details dialog, you can **Add Ticket Status** listings from the link at the top right. For existing statuses, you can modify or delete the status by clicking on it to highlight it, and clicking the **Modify** or **Delete** button – note, the only status that cannot be deleted is the mandatory "Closed" status. To change the order that statuses are displayed in the drop-down menu in user ticket screens, move statuses up and down the list using the up and down arrows to the right of the listing. To make the order permanent, click **Change Status Sequence.**