

## ***DigitalRoute Support Web User Guide***

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## Table of Contents

<b>1</b>	<b>Outline</b>	<b>3</b>
1.1	Prerequisites .....	3
1.2	Other documentation .....	3
1.3	Start Salesforce .....	3
<b>2</b>	<b>Case handling</b>	<b>3</b>
2.1	Register a Case .....	4
2.2	Case Statuses and SLA.....	8
2.3	Notifications .....	9
2.4	Case closure .....	9
2.5	2.5 Data retention periods .....	10

# 1 Outline

This document describes the DigitalRoute specific setup of the Salesforce CRM application. It must be read carefully before issuing Support cases in the Salesforce application.

## 1.1 Prerequisites

To be able to access the Salesforce application the case reporter has to:

- Have a username and password. Contact [support@digitalroute.com](mailto:support@digitalroute.com) if a new account is needed or if you have forgotten your username/password.
- Use a supported browser, please verify that your browser and browser version are listed in the following location:

[https://releasenotes.docs.salesforce.com/en-us/summer19/release-notes/rn\\_supported\\_browsers.htm](https://releasenotes.docs.salesforce.com/en-us/summer19/release-notes/rn_supported_browsers.htm)

## 1.2 Other documentation

More information about your company's specific support agreement can be found in the following documents delivered or agreed on with DigitalRoute.

- Software Support Agreement
- Product descriptions

## 1.3 Start Salesforce

The portal for the DigitalRoute support web application is located at:

<https://emea.salesforce.com/sserv/login.jsp?orgId=00D2000000070ZX>

# 2 Case handling

After a successful login, the following tabs are available in Salesforce

- Home
  - Start page with a list of your open cases and some news
- Find Solution
  - This is a knowledgebase, you can search for keywords or browse for solutions
- Log a Case
  - Under this tab you create new help requests
- View Cases
  - This tab contains a full list of all cases both open or closed and paused.
- Logout
  - Select this one if you wish to leave the portal.

## 2.1 Register a Case

Fill in the template as detailed as possible. The more information about the problem you can provide the quicker DigitalRoute Support will be able to find the problem and provide a solution.

All fields marked with a \* are mandatory.

Salesforce field	Description
Major Product Version *	The Major version of MZ, you can find this from the Desktop in the help/about or simply by typing mzsh version on command line. For example, 8.0
Detailed Product Version *	The Detailed Product Version is the full version of MZ including ER tags, SP and FR releases, you find this the same way as for the Major version For example, 8.0.7.2 or 5.0f.4
Type *	<p>Choose the appropriate Case Type for your request:</p> <p><b>IR – Incident Report</b> An unplanned interruption in a MediationZone implementation or a reduction in the quality of a MediationZone implementation that is within the scope of the support agreement.</p> <p><b>PR – Problem Report</b> A request to analyze and conclude on the cause for one or several incidents.</p> <p><b>HR – HelpDesk Request</b> Typically, questions regarding MediationZone in general or administrative requests, can be outside the scope of the Support Agreement</p> <p><b>AS – Additional Support</b> An issue or request outside the scope of the Support Agreement, e.g Configuration Support</p> <p><b>CR – Change Request</b> A request for a change in MediationZone as a product or in the configuration. Outside the scope of the Support Agreement</p>

	<p><b>DTK – Development Toolkit</b></p> <p>For issues found when working with the DTK or for issues with agents developed in the DTK (generally not available for all customers/partners)</p>
<p>Priority *</p>	<p>Choose the Priority/Severity for the issue. The descriptions below are the default definitions used by DigitalRoute. Your specific Support Agreement may have different definitions.</p> <p><b>1 – Critical</b></p> <p>Product defect that severely impacts your operations. This priority is applicable for production environments only, do not use it for dev or test systems.</p> <p>Examples on issues: System outage, critical functionality not available, corruption of data or repeated loss of data, repeated software failures resulting in frequent interruptions of service</p> <p><b>2 - Major</b></p> <p>Product defect causing your system to operate in restricted fashion. Workaround is available, or functionality loss is not critical for system operation</p> <p>Examples: degraded performance, incorrect behavior with minor impact to your operation</p> <p><b>3 - Minor</b></p> <p>Product defect casing little or no loss of service, including cosmetic errors or defects where the impact to your operations is minor.</p> <p>Examples: Documentation errors requiring correction or clarification, usability issues.</p> <p><b>Emergency Level</b></p> <p>Request for 24*7 Emergency Support. Only applicable if Emergency Support are included in your Support Agreement</p> <p><b>N/A – Not Applicable</b></p> <p>If the case does not apply to any of the above priorities. This field is set by default to the lowest priority.</p> <p><b>Incident Report</b></p>

	If you have this priority type in your contract you are entitled to select this priority. It is used when a Root Cause Analysis has been requested.
Problem Area *	<p>Select the Problem Area that fit your issue the best.</p> <p><b>Agents</b> Issue is related to one of the MediationZone agents</p> <p><b>Configuration/Tools</b> Issue is related to the Configuration or Tools in Meditationzone. Typically found in the Configuration / Tools menus in the Desktop</p> <p><b>Pico runtime errors</b> Issue is related to one of the Pico instances or the connectivity between them</p> <p><b>System</b> Issue is found on a MeditationZone system level</p>
Component *	Each Problem Area contains a number of Components (content of this field depends on the Problem Area chosen). Select the component that fits the issue best.
Case Environment *	Choose where the case originates: <b>Production</b> or <b>Development/Test</b> environment
Subject *	Add a one-line description about the problem
Details	Add log messages and other system generated information in this field.
Description *	<p>Describe the problem you encountered as detailed as possible.</p> <p><u>Note</u> If you want to include extensive text in the case, for example a log file or similar you should not paste this into the description field, there are a cap on the number of available characters so you risk losing information or may not be able to save the help request. Instead, please attach large files or convert large text masses to a text file. The attachment button will be available when the case has been submitted</p> <p>The size limit for attachment is 25Mb each, you may upload several attachments.</p>

Foreign Id	Case Id from other case management systems not used by DigitalRoute.
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Table 1. Fields in the self-service portal

## 2.2 Case Statuses and SLA

Status codes are used to tell who (DigitalRoute Support or the case reporter) has the responsibility to respond to the case and whether the SLA clock are active or paused.

The following codes are in use:

Status	Description	SLA Affected
NEW	Customer has submitted the case to DigitalRoute Support	Response time starts
OPEN	A DigitalRoute Support engineer has started to work on the case	Response time closes, Restoration time and Resolution time starts
AWAITING INFORMATION	More information from you is expected and DigitalRoute Support are not working on the case for the moment	Restoration time and Resolution time are paused until status OPEN is set
ON-HOLD	DigitalRoute Support and the customer has agreed on that the case will not be worked on for a period of time	Restoration time and Resolution time are paused until status OPEN is set
FIXED	DigitalRoute Support consider the case fixed	Restoration time and Resolution time are paused until status OPEN is set
CLOSED	You have acknowledged the case as fixed and that the case can be closed	Restoration time and Resolution time are closed

Table 2, status codes

Note that the Restoration time SLA will close if/when a workaround has been provided to the customer. This means it can close already in status AWAITING INFORMATION.



The following flow chart show the iteration between the different statuses.

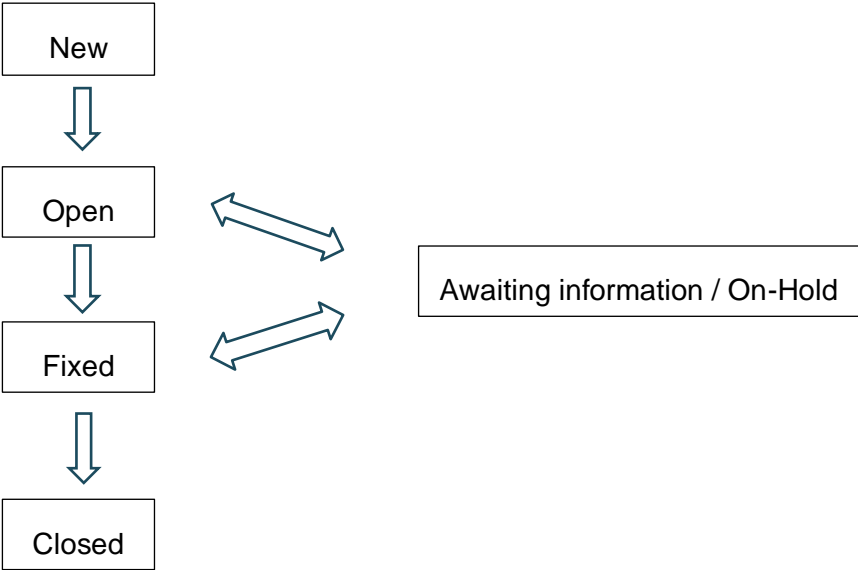


Image 1. Flow chart.

DigitalRoute are working on the case when the status is set to NEW or OPEN. DigitalRoute may submit requests for additional information when seen as needed, the status will be changed to AWAITING INFORMATION if so is done. This means DigitalRoute Support need additional information from the case reporter in order to proceed with the case. When the information has been provided the status will be changed to open again

### 2.3 Notifications

All changes to the case done by DigitalRoute Support will generate an email notification to the case reporter. The notification will instruct the case reporter to log on to the Salesforce application and review the latest update.

All comments in the case, written by the case reporter and Digitalroute Support, will be saved in the comments section in the case.

### 2.4 Case closure

Cases detected to be idle (meaning the status Awaiting Information) for 7 days will be acted on, a reminder notification will be sent to the case reporter warning that after two weeks of inactivity the case will be closed automatically. After 14 days and if no new comments have been logged by the case reporter the case is closed.

The warning and the automatic close of cases will be noted as case comments. Automatically closed cases cannot be reopened, if the case reporter feels this was done before the issue was resolved the case reported has to create a new case on the same subject and refer to the old, closed case.

If the case reporter feel that the case has been resolved and are content the case reporter is free to inform the support agent in a case comment and request the case to be closed.

If the case reporter know that it will take more that 14 days to answer the latest request from the support agent, the case reporter should inform the support agent about this and request the case to be set to either one of the statuses On Hold or Fixed.

Cases in the status Fixed are monitored to 30 days, 7 days prior to the retention period has passed a notification is sent to the case reporter asking for more input. If the case reporter fails to reply withing the 7 days, the case is closed.

Cases in the status On Hold, when a case is set to this status by the support agent and the case reporter should agree on a date for follow up. When the agreed-on follow-up date has passed a reminder is sent to the case reporter asking for information. If no action is taken on the case withing 14 days after the reminder the case is closed.

## 2.5 Data retention periods

DigitalRoute use the following rules for data retention.

- A closed case is cleaned from all comments 24 months after it has been closed.
- The case contact details are deleted 24 months after the case was created, as long as it is not open and have been closed for at least two months.
- Up on case closure all attachments are deleted. If the case has open issues reported to DigitalRoute product development but the case has been closed in the support portal, the attachments are kept for as long as ethe the case is open with Digitalroute product development.
- Every second year all contacts from your account get an individual question sent to them through our survey tool QuestionPro asking for consent to stay as a contact. If a contact fails to respond after the initial survey and a reminder the contact will be removed from our records.

Please note that failure to respond on this survey will mean loss of access to the support portal.