



BEST PRACTICES GETTING HELP

12/2020

GETTING HELP

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GETTING HELP

Introduction

From time to time, you will require information technology support for either hardware issues or software issues. The Information technology team in Charlotte offers general support and coordination of support for all our internal and external systems.

Our primary applications that are used by franchisees are QuickBooks (our accounting platform) and RouteStar (our routing and pricing platform).

Before you reach out for help, there are several criteria you must first self-evaluate:

1. have I tried to correct this issue myself first?
2. Is the issue reproducible?
3. Is my local computer up-to-date?
4. Is my local Internet functioning correctly?
5. Have I accessed my resources on EMU?

If the answer to both these questions is yes and you are still unable to resolve your issue, then you need to try to diagnose the issue. Ask yourself questions to determine if the issue is:

- software or hardware related
- printing related (local or cloud)
- connectivity related (local or cloud)
- enhancement request or bug fix required

There will be other instances where you just require assistance, for items such as:

- new user access
- user inactivation
- new computer configuration
- you are trying to figure something out or QB or RSO

Having performed your own local troubleshooting and asking yourself the above questions, you should be able to determine which resource you need to access to resolve your issue or get assistance.

GETTING HELP

General Daily Processing Guidelines

It is important to adhere to this Daily schedule, so that if there are issues that require assistance, we have time to respond:

RSO - DAILY GUIDE				
Monday *	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> • RSO - Post all Invoices and Payments to QuickBooks by End of Day (EOD) • QB – Reconcile Banking Deposits and Bank Account • QB - Run Technician Commission Reports (Bi-Weekly most likely) 	<ul style="list-style-type: none"> • NO RSO or QB Activity 	<ul style="list-style-type: none"> • RSO – New customer setup • RSO – Routing Changes • RSO – Pricing Changes • QB – Customer Cancellations 	<ul style="list-style-type: none"> • RSO - Advance Route Schedule • RSO – Print Route Schedule • RSO - Generate Invoices • RSO - Print Invoices 	<ul style="list-style-type: none"> • RSO - Check in Technicians • RSO - End of Day Report • RSA - Complete all Web Invoices • RSO - Missed Stop Report • C.O.D. check-in • Inventory Reconciliation

RSO – RouteStar Online

RSA – RouteStar APP (technician APP)

QB - QuickBooks

* PREVIOUS WEEK INVOICES

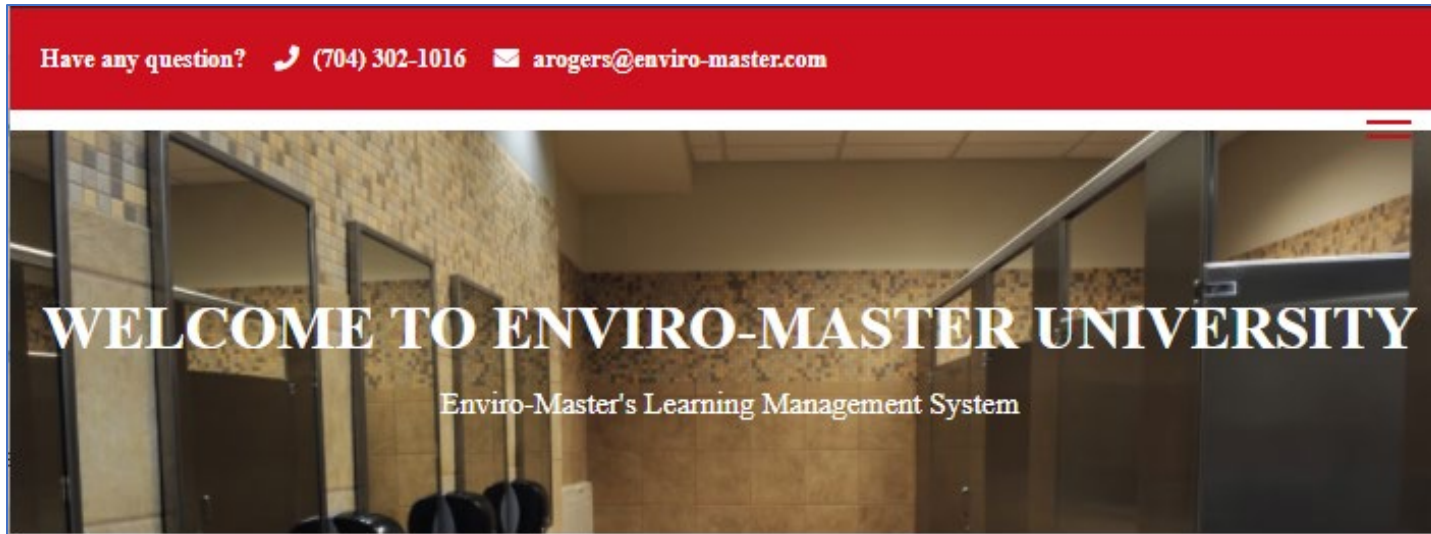
Note: These functions can be carried out any time during the week, but there are 2 rules that must be adhered to:

- Invoices need to be generated / printed by Thursdays, close of business, so that any issues may be dealt with on Friday *(keeping in mind holiday schedules)*
- Current week’s invoices, needs to be posted from RSO to QB the follow week, Monday by close of business *(if there are any syncing issues that you observe, please log a Corporate Help Desk ticket)*

GETTING HELP

Support

Enviro-Master University [EMU]



<https://edu.enviro-master.com/>

University operates: **24 hours / day, 365 days / year.**

When to use this Resources??

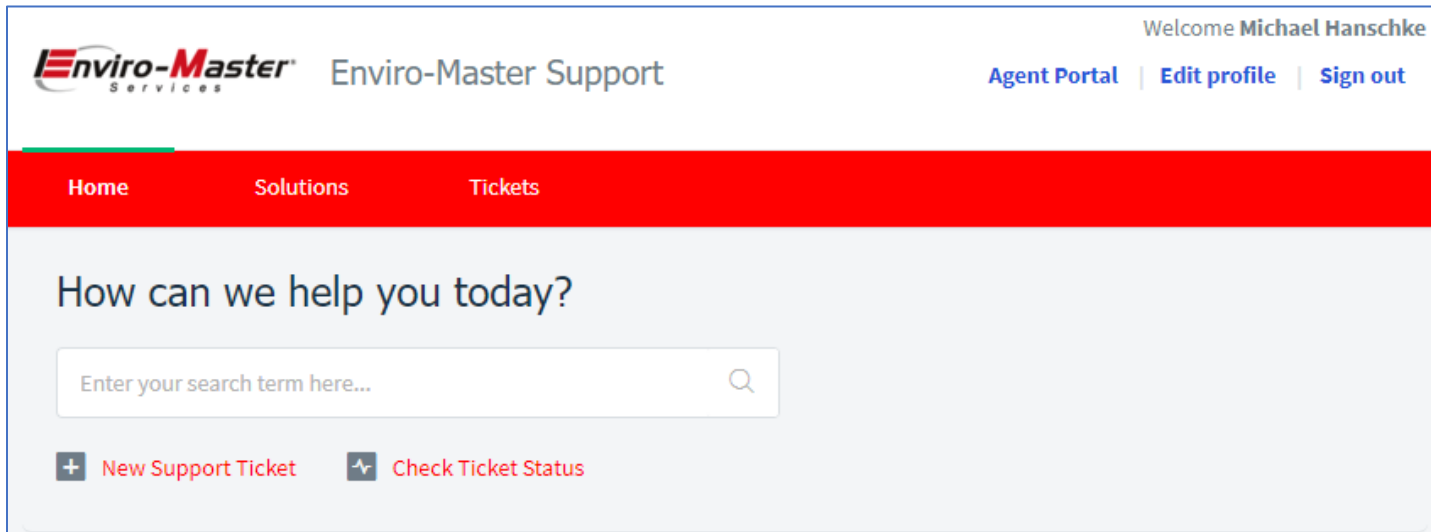
- access video training materials
- FAQ's
- Best Practices
- Etc.

To request access, send an email to: Enviro-Master support@enviromastersupport.freshdesk.com and provide this information:

- Franchise Name
- Full Name
- Email Address
- Job Title

GETTING HELP

General Support [Corporate HELP DESK]



The screenshot shows the Enviro-Master Support Agent Portal. At the top left is the Enviro-Master Services logo and the text "Enviro-Master Support". At the top right, it says "Welcome Michael Hanschke" with links for "Agent Portal", "Edit profile", and "Sign out". Below this is a red navigation bar with "Home", "Solutions", and "Tickets" links. The main content area has the heading "How can we help you today?" followed by a search bar with the placeholder text "Enter your search term here...". Below the search bar are two buttons: "+ New Support Ticket" and "↕ Check Ticket Status".

<http://support.enviro-master.com/support/home> or email direct:
support@enviromastersupport.freshdesk.com

Help Desk operates: **8AM-8PM EST, Monday through Friday**
(5PM EST to 8PM EST monitored for critical issues only)

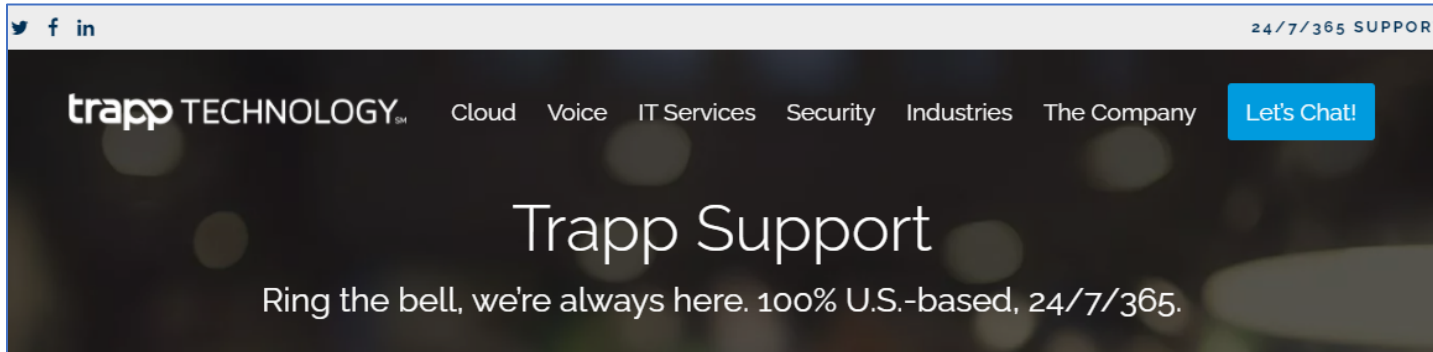
Typical turnaround time is 24 hours, depending on the nature of the request.

When to use this Help Desk?

- RSO syncing issues - stopped or stuck
- EMU requests - Access changes or password resets
- QB - Access changes or password resets
- New computer configuration for EMS systems
- New or inactivation of users (TRAPP)
- general questions – how to
- issues or incident escalation

GETTING HELP

QuickBooks (QB) Support [Trapp Technologies]



<https://livechat.trapptechnology.com/chatbeacon/content/windows/chat.html?accountid=1&siteid=4&queueid=11&theme=slim&popout=true>

Help desk operates: **24 hours / day, 365 days / year.**

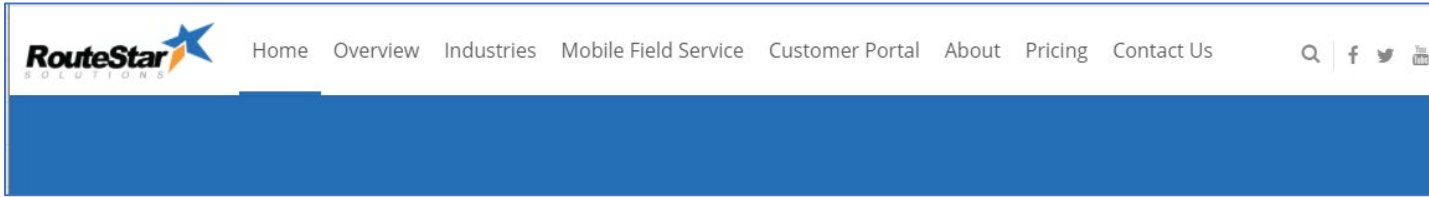
Typical turnaround time is immediate, depending on the nature of the request.

When to use this Help Desk?

- Cannot connect to QuickBooks server
- QuickBooks server is slow
- QB software will not load
- QB software is unresponsive (frozen)
- Remote Desktop printing issues
- any other TRAPP / QB based server related issues.

GETTING HELP

RouteStar Online (RSO) Support [Westrom Software]



RSO support is provided directly by Westrom Software, from within RSO, utilizing the RSO ? Help Feature.

[? Support Request](#)

Help desk operates: **8AM-5PM EST, Monday through Friday**

Typical turnaround time is 24 hours, depending on the nature of the request.

When to use this Help Desk?

- Software issues
- Functionality Questions
- How to Questions
- Enhancement Requests