

Orchestra Support

Task Overview

Orchestra Support 2/9/2021



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What is/is not changing

You may have heard that Orchestra Software & Encompass Technologies have merged! Together, we are building a connected supply chain, and are hard at work creating a single source of truth for operations, data, and decision-making.

What's changing with Support? You will now be sending in your support needs through a different vehicle. You will still be able to log in to support.orchestrated.com, view support articles, and submit your issues and/or questions. The underlayment is what's changing. Orchestra has been utilizing ZenDesk for the past 8 years, and we will now be utilizing Encompass Technologies, as of February 22nd.

While some things will look & feel a little different, you will still be connected to our fantastic Support team to get you the answers you need. There is one terminology change that we do want to call out early on. That is, **tickets will now be classified as tasks**. Tasks are how we will be communicating back and forth with you, just like we did with tickets.

How to access Orchestra Support

Navigate to <u>support.orchestrated.com</u> (this link will automatically redirect you to our new <u>Support landing page</u> built on Encompass).





How to view support articles

Click on any of the tiles located on the Support landing page to be directed to our knowledge base. Articles have been updated to be PDFs, so you can easily download and save to your local if you so choose.





How to submit a task

1. Click *Submit a Task* button from the Support landing page*

f y 🖸 💩 in		My activities	Submit a request	SIGN IN
ORCHESTRATED				
Can't fine	d what you're looking fo	or?		
	Let us help you!			
	SUBMIT A TASK			
ORCHESTRATED HELP CEN	ITER			

2. *Your first time submitting a task will ask you to log-in & reset your password. You will be directed to a new-for-you log-in screen. Here, enter your email and then you will be prompted to reset your password (click the information icon to see pw requirements):

≜ k	SarahB			
- P				
a	••••••			
	Sign In			
	R	eset Password		
	Continue With			
	G			

3. Once you've logged in, you will be taken to the Orchestrated Submit a Task page

	VIEW UPEN TASKS
	If this is an emergency, please call (877) 683-2648
? Sele	ct your Organization or Company
	•
? * W	nat type of Request is this?
	•
🙆 Atta	ch a file (image, .pdf, .docx, mp4) to assist with investigation into this issue or click Follow
Up t	o submit your task.
Brov	vse or Drag and Drop
👩 Atta	ch another file
Brov	or Drag and Drop
Atta	ch a third file
Brow	vse or Drag and Drop

- **4. Select your Organization or Company**: Choose your correct Organization/Company (if you belong to more than one, you will be able to choose the company which relates to the task you are about to submit)
- 5. What type of Request is this? Choose Support Task
- 6. Please enter a title or short description: What is this task about?
- 7. Provide a summary of your question, project or issue. Please include any relevant examples such as Invoice Number, Product ID, etc.: Fill this out with all the juicy details. The more, the better!
- 8. Select the Business Impact: Select the impact that best fits this task:

Business Impact	Definition
1 - Critical	An error that causes Orchestrated to be down or functioning at a significantly reduced capacity. This severely impacts your business operations and no procedural workaround exists. Orchestra will promptly allocate additional resources to your request. Please have a dedicated representative available immediately to work on the issue with the first available technician.
2 - Major	A critical component of Orchestrated is unavailable or not functioning as designed. There is a major impact on portions of your business operations and no reasonable workaround exists. Orchestra will allocate additional resources if necessary, to the resolution of your ticket. Please have a dedicated representative available same day to work on this request.
3 - Normal	An error that causes partial or non-critical loss of functionality within Orchestrated products and services. This has a limited business impact, where a small number of users are affected.
4 - Minor	An error that causes a minor impact on the use of Orchestrated, impacting only one of your users.
5 - Low	A request for a new feature, documentation, or an explanation of product functionality.

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- **9.** Is this on a Mobile Application? Select Yes or No
 - a. If Yes, choose Orchestrated App from the Mobile Application dropdown
 - **b.** Then choose the correct Orchestrated App from the additional dropdown
- **10. What is the topic that most closely matches your issue?** Choose Orchestrated from the dropdown
- **11.** Attach a file (image, .pdf, .docx, mp4) to assist with investigation into this issue or click Follow up to submit your task: Attach up to 3 files
- **12.** Click **Submit** to submit your task

Browse or Drag and Drop	
Att Message	×
Br Thank you for submitting a Task. A su be contacting you during business ho	upport analyst will ours. ∂
Orchestra S	Support Hours:
Monday to Frida	ay, 6AM to 5PM PST
Can't find what	you're looking for?
Let us	s help you!
	Submit

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How to view & comment on your open tasks

You will now have full transparency into seeing all tasks that have been submitted by yourself and all other Support users at your organization. This transparency will aid in allowing you to see what's going on, if another user is experiencing a similar issue, and if there is already a task in motion. Let's dig in!

 Once you've submitted your task, you will be taken to what's called your Tasks table. This is a view of all open/active tasks for your organization. The most recent task that was submitted will appear at the top of the list (that should be the task you just submitted!)

						Search			٩		
☆	Tas	sks	View 🗸	Columns 🕶	Sub Tables	Add Tasks 🕒 Save Report 🔍 < Share	🛓 Export				
			Task ID	Unread	Customer	Task	Assign To	Objective Type	Objective	Status 🔻	Featu
¥	(dat)	Ē (339084	HuiChang	<u>1 Pioneer</u> Distributing	Print Manifest/Invoices: Users receiving 404 Error when attempting to Print	John Walker (Product Manager) (Logistics Team)	Bug	<u>Default</u>	Assigned	<u>Logist</u> <u>Manif</u> e
÷	A	Ū 8	339318	Alexander	<u>1 Pioneer</u> Distributing	Issue with Forecasting	John Walker (Product Manager) (Logistics Team)	<u>How To</u>	<u>Default</u>	<u>Assigned</u>	<u>Logist</u> Forec
÷	Ø	<u> </u>	339309	Alexander	<u>1 Pioneer</u> Distributing	Orchestra Support - Feedback	Chris Gehring (Senior Analyst) (OCloud)	How To	<u>Create a</u> <u>Support Task</u> <u>v2021</u>	<u>Submit for</u> Follow Up	<u>Orche</u> Orche
÷	(data)	Ū :	765830	Ross	<u>1 Pioneer</u> <u>Distributing</u>	Loves not getting all products in the pricing files	Ross Eisenhauer (Analyst) (Invoicing)	How To	<u>Default</u>	Assigned	<u>Invoic</u> 832/8
÷	"	Ē (339099	Ronnie	<u>1 Pioneer</u> Distributing	New Task Created by Ronnie	Ronnie Dukes (Distributor Implementations Manager)	How To	<u>Default</u>	Assigned	<u>Unass</u> <u>Unass</u>

2. If you'd like to drill into your task to see more detail, click the 'View' arrow icon at the left

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3. From the 'View' task screen, you'll see the task details thread including timestamps and who last made a note on your task. If you need to add more detail yourself, simply click **Add Task Details**

)			Task ID T	Unread	d Customer	Task	Assign To	Objective Type	Objective	Sta
,	4 1	Î	839309) SarahB	<u>1 Pioneer</u> Distributing	Orchestra Support - Feedback	Peg Ray (Program Ma	nager) (R&D) How To	<u>Create a Support Task</u> <u>v2021</u>	<u>Sub</u> Up
	T	ask	Details Tasl	→ View	v Hide 🖸 Add Task Detail	Task Details			Time Created Created By	
	÷	A	Ŵ	8973796	Assigned to Peg by	SarahB		2/9/	/2021 1:03 PM SarahB	
	>	A	Ŵ	8973274	Assigned to Chris by	/ Alexander		2/9/2	021 11:54 AM Alexander	
	→	(and the second s	Ŵ	8973216	UserName : sarahel Phone : Email : sarahelis15@	is 9gmail.com		2/9/2	021 11:47 AM sarahelis	
					Section = Default Section Value = 0 Select your Organi	zation or Company = Pior	neer Distributing			

4. From within the Task Details screen:

		Search		_	🕱 🗣 🕠 sarah
Save Changes	Attach Files Notify Browse or Drag and Drop	☆ Task 839309	Use	rs <u>Task</u>	C Details
Customer	1 Pioneer Distributing			arahB 2/09/2021	Assigned to Peg by SarahB
Assign To Peg Ray (Progra	m Manager) (R&D)	Here is where my other question/update goes for this task		3:03:12 Alexander 02/09/2021 1:54:15	Assigned to Chris by Alexander
Event ID	· · · · · · · · · · · · · · · · · · ·	u.		arahelis 2/09/2021 1:47:56	UserName : sarahelis Phone : Email : sarahelis15@gmail.com
Objective Type	Create a Support Task v2021			arahelis 2/09/2021 1:47:56	Section = Default Section Value = 0 Select your Organization or Compan Distributing
Previous Assign To	Chris				What type of Request is this? = Supp Issue Subject or Title = Orchestra Sup Feedback Provide a summary of your question issue. Please include any relevant e:
Required Start Date	False 2/9/2021				as Invoice Number, Product ID, etc. for adding feedback to a completed Ta Business Impact = Low What is the topic that most closely r

- a. Add additional questions/updates to the blank text box
- **b.** Attach additional screenshots/files by clicking Attach Files
- c. See the task details thread on the right-hand side for easy reference

o onches



5. If you need to CC someone else or notify multiple people on this task:

		_			~
Save Changes Attach File: Notify	A Task 839309	•	Users Ta	e k Details	
Unread SarahB	Title: Orchestra Support - Feedback	-	Search Grou	Jp 🔹 🖓 Screen Share	
Customer 1 Pioneer Distributing			Q Search Use	ers	
Assign To	Here is where my other question/update goes for this task	^	Customer l	Users (2 selected)	- 8
			🗆 Name	Pre	eferred Con
Peg Ray (Program Manager) (R&D)).	🗹 Sarah Elis	2	sarahelis1
Event ID •			Ann Conn	nelly z	s arrowhea
Objective Type How To					

- a. Select the Users tab in the upper right
- **b.** Check off the users in your organization you'd like to have follow this task
- c. Ensure the Notify box is checked
- 6. Click Save Changes to save your updates to your task
 - To navigate back to the Tasks table screen, **Tip**
 - simply click your back button, or type 'Tasks'
 - into the search bar and select 'Tasks' under
 - Pro the Tables option.
- 7. If you'd like to skip straight to adding additional questions/updates to your task from

the Tasks table, click the 'Edit' pencil icon at the left and that will bring you into the Tasks Details screen

8. You can also reply to your task by responding via email, however best-practice is to bookmark the support page and throw us additional details directly in the task.

How to view your historical tasks

Your Tasks table has been pre-filtered to only show the open & in-process tasks for your company. However, if you're ever in need of reviewing your previously resolved tasks, you're in luck, you can do that! This can be done by filtering for tasks with a status of resolved.

- **1.** Click the Status column filter
- 2. Click the dropdown icon from within the text box
- 3. Click Clear
- 4. Then type in Resolved in to the text box (or find it within the status list) and check it off
- 5. Click OK
- 6. Click GO



☆ T	asks	View -	Columns -	Sub Tables	s 🗸 🕞 Add Tasks 📳 Save Report 🔍 < Sha	re 🛃 Export 🗑			
		Task ID	Unread	Customer	Task	Assign To	Objective Type	Objective	Status ▼ Feature
→ Ø	Ū I	839309	sarahelis	<u>1 Pioneer</u> Distributing	Orchestra Support - Feedback	Peg Ray (Program Manager) (R&D)	<u>How To</u>	<u>Create a</u> <u>Support Task</u> <u>v2021</u>	✓ Sort Z → A Column Change Request Remove From View
→ ∅	Ê	838680	Cheryle	<u>1 Pioneer</u> Distributing	l am trying to save our bank rec for December and its not letting me, it also gives me a blank pop up box.	Gene (Ben) Plambeck (Product Manager) (Accounting Team)	Bug	<u>Create a</u> <u>Support Task</u> <u>v2020</u>	Resolved Go Kesolved M tio
→ #	<u></u>	765830	API_1045	<u>1 Pioneer</u> Distributing	Loves not getting all products in the pricing files	Ross Eisenhauer (Analyst) (Invoicing)	<u>How To</u>	<u>Default</u>	Clear select All Not In OK Assigned Invoicing -> Invoicing Invoicing -> Invoicing Invoicing -> Invoicing

7. You've now filtered out all other task status' except for resolved!

How to send us your feedback

While you will be notified via email as your task is getting worked, we always strive to provide kickass support from beginning to end. Once your task is resolved, you'll receive a notification email with a handy link to throw us a smiley, neutral or unsmiley face to tell us how we did!

Customer Feedback Requested for Task 83	9282 >
support@encompass8.com via amazonses.com	
Hello Sarah Elis,	
Great news, your Task 839282 I'm having issues with month end close	e has been resolved.
Now, would you help us get better? Leave us your feedback here regarding	ng your task by selecting an emoji.
Thank you!	Customer Feedback
Er(/ ompass 0 ORCHESTRA	Task 839282: I'm having issues with month end close
<u>a</u>	→ See Task Details
Keply	Please let us know how $\!$
	Optional: please enter a comment below
	Your comment here
	Submit
	Submit

And so you know, we take any/all feedback seriously, so thank you for helping us with continuing to improve.

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Task Tips & Tricks

We're so pumped with the new Support platform we're able to offer you! As we've been learning, we wanted to share some useful features you may be able to take advantage of!

1. Adding another column – perhaps you'd like to see a bit more information on the Tasks table? By clicking on the Columns dropdown from the top or hovering between columns and clicking the plus icon, you can add more columns (like *Days Old*)*:

Tasks Prev Search	View Columns Sub Tables	Add Tasks 🕒 Save Report	t < Share 🛃 Export 🖩				1
Create View Edit All Colu	umns Add Columns			tive		5	ays _
 Tasks 					Objective	Status Y	olu P
<u>Select All</u> <u>Clear</u>							
🗧 🗹 Task ID	🗧 Time Updated	🗢 🗌 Deadline	TranslationTaskID		Default	Assigned	0 <u>S</u>
🗣 🗹 Unread	🗢 🗌 Event ID	Completed	Priority 1503				- <u>R</u>
🗧 🗹 Customer	🗢 🗌 Approval Group	🗢 🗌 Time Completed	🗢 🗌 Product Priority)	<i>c</i>		
🗧 🔽 Task	♦ ☐ Approved By	Completed By	Business Impact		<u>Create a</u> Support Task	Submit for	0 9

*the Tasks table will revert back to the 'out of the box' view next time you log in

2. **Export** - curious about the tasks you and your team have submitted? Perhaps you want to do a little task data mining? You can now easily export your task records by clicking the Export button from the top and selecting your preferred export choice.

☆ Tasks	Prev S	earch V	iew 🕶 🗌 Colu	Imns 🗸 Sub Tables 🗸 🕥 Add Tasks	🖺 Save Report 🛛 < Share	🛓 Export						
	Task ID	Unread	Customer	Task	Assign To	Export to Excel (XLSX) Comma Delimited (CSV) Comma Delimited All Records (CSV)	s d	Feature	Found In	Fixed In	Time Updated T î	Start Date
→ ♂ [⊕]	712009	MichaelB	<u>1 Pioneer</u> Distributing	She keeps getting emails from Encompass about labs for someone else to her email.	<u>Michael Bennish (Analyst)</u>	 &* Export to Google Drive Print (PDF) 	32	<u>CRM -> Email -> Email</u>	ECP 20.08.011		8/11/2020 2:45 PM	
→	711733	Connor	<u>1 Pioneer</u> Distributing	Pulled an invoice and it won't let her email it to a customer. She is getting an 'error in promise.'	Connor Shinefield (Analyst)	Encompass XML Encompass JSON	;0	<u>CRM -> Email -> Email</u>	ECP 20.08.010	ECP 20.08.015 & ECP 20.09018	8/13/2020 8:22 AM	
			1 Pioneer	Inventories.PreSales is negative	Lory Hamill (Analyst)	web Query view	í	WMS -> Inventory	FCP	ECP 20.08-017 &	8/13/2020	

3. Time Updated – If you need to look back more than 6 months (for open and/or resolved tasks), click the Time Updated column filter and update your date ranges. And yes, this table is dynamic, so as updates come in on various tasks, most recent updates will float to the top!

C C C C C C C C C C C C C C C C C C C	Objective Type	Objective	Status 🔻	Feature	Found In	Fixed In	Time Updated
Product Manager) Br	lug	<u>Default</u>	Assigned	<u>Platform -> Reporting - Comparison</u> <u>Reports -> Convert to Fusion</u>	ECP 21.02.010	ECP 21.02.014	2/9/2021 2:56 PM

4. Filtering Tasks via Wildcard – Let's say you're curious about open (or closed) tasks that have a specific word in their title. You will be able to use a wildcard/asterisk to search! Simply add the wildcard in front of the word you're searching for and click Go, and you'll be off to the races!

							C.	Search	١			
☆ Ta	sks	View -	Columns 🗸	Sub Table	25 🗸	• /	dd Ta	sks	🖺 Save Report	t < Share	▲ Export	
		Task ID	Unread	Customer	Tas	sk Sort /	A → Z	_			Assign To	
an a	<u> </u>	839399	Ann	<u>1 Pioneer</u> Distributing		Sort : Edit Co Colum	Z → A olumn in Chai	nge Re	equest		acob Segal (eCommerce	
an a	<u>î</u> 7	754367	ZengChao	<u>1 Pioneer</u> Distributing	ľ	Remo print	t by cu	m Viev i		s not mark picl	Michael Coo	
en a	ŵ 8	839460	Sam	<u>1 Pioneer</u> Distributin	☆	Tasl	ks [F	Prev S	earch View	Columns	Sub Tables 🕶 💿 Add Tasks 😰 Save Report < Share 🛓 Export 🚃	
1			-	-			т	lask ID	Unread	Customer	Task ¥ Assign To	Obje Type
					> (s (838	3895	LiHao	<u>1 Pioneer</u> Distributing	Syntax Error when Loading the LoadSheet and experienced 404 Error when they are printing manifests.	:) <u>Bug</u>
					> (*	838	3913	XiaoQiang	<u>1 Pioneer</u> <u>Distributing</u>	Auto Print Service did not update the print job status when the Job has printed.	() Bug
					> (* 1	731	226	Bradshaw	<u>1 Pioneer</u> Distributing	ability to print all delivery notices at once from mobile	<u>Featu</u> <u>Requ</u>

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