Orchestra Support

Task Overview

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2/9/2021

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What is/is not changing

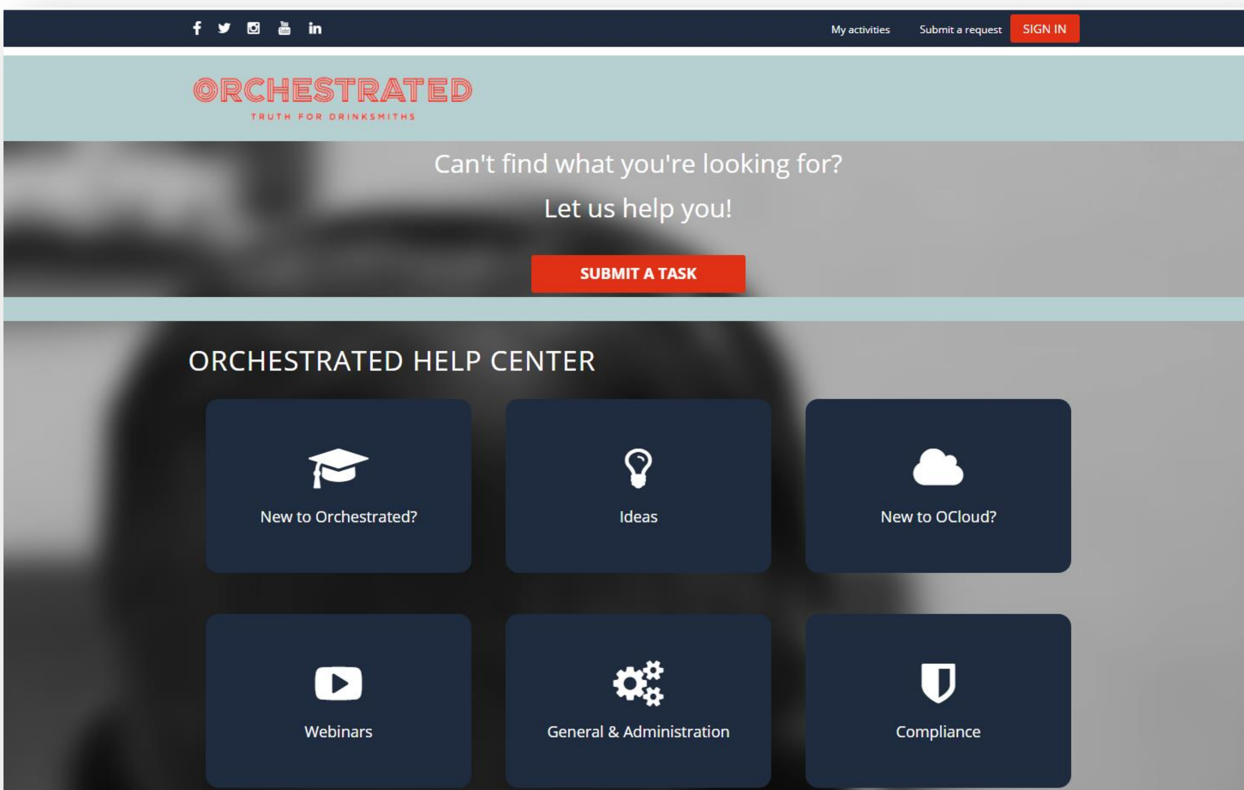
You may have heard that Orchestra Software & Encompass Technologies have merged! Together, we are building a connected supply chain, and are hard at work creating a single source of truth for operations, data, and decision-making.

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.

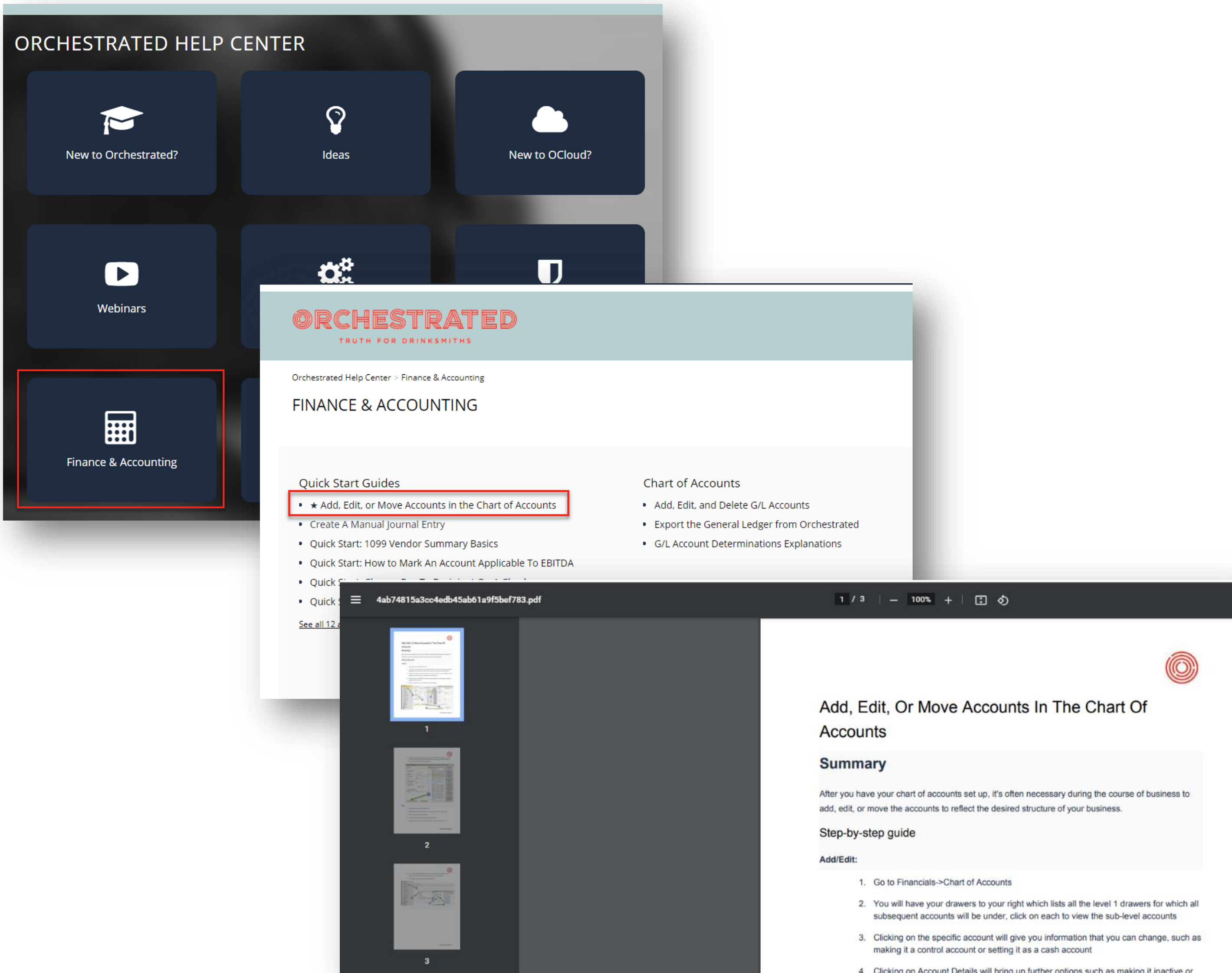
How to access Orchestra Support

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



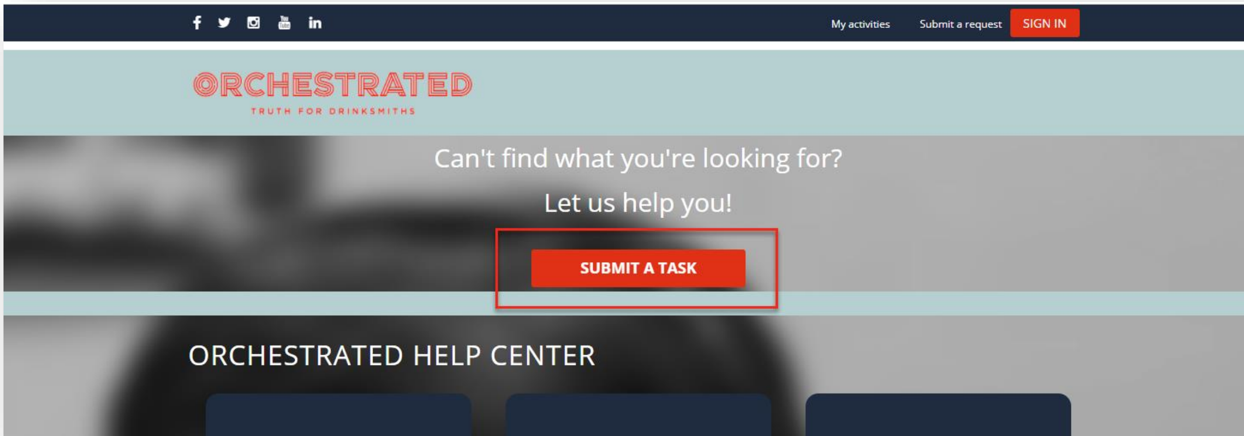
How to view support articles

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.

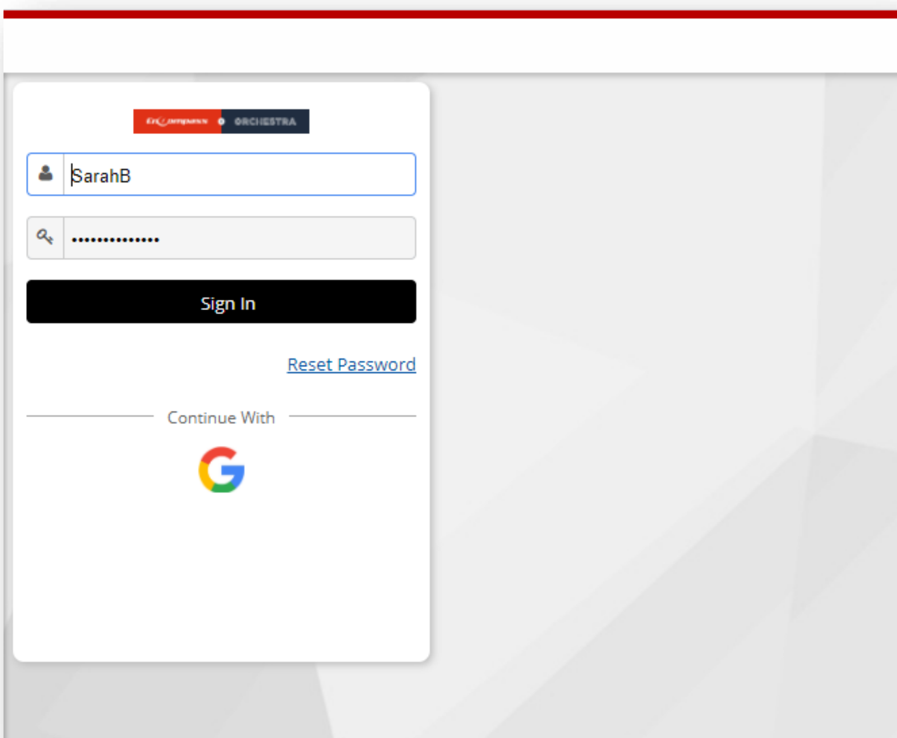


How to submit a task

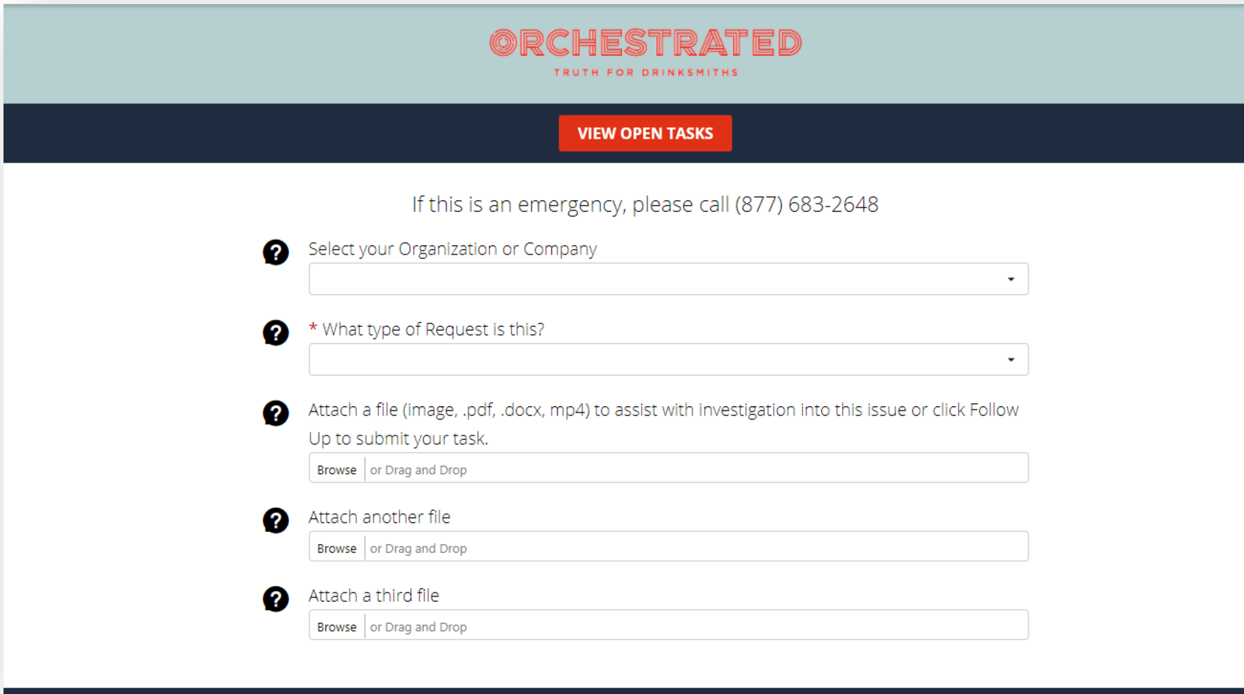
1. Click *Submit a Task* button from the Support landing page*



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):



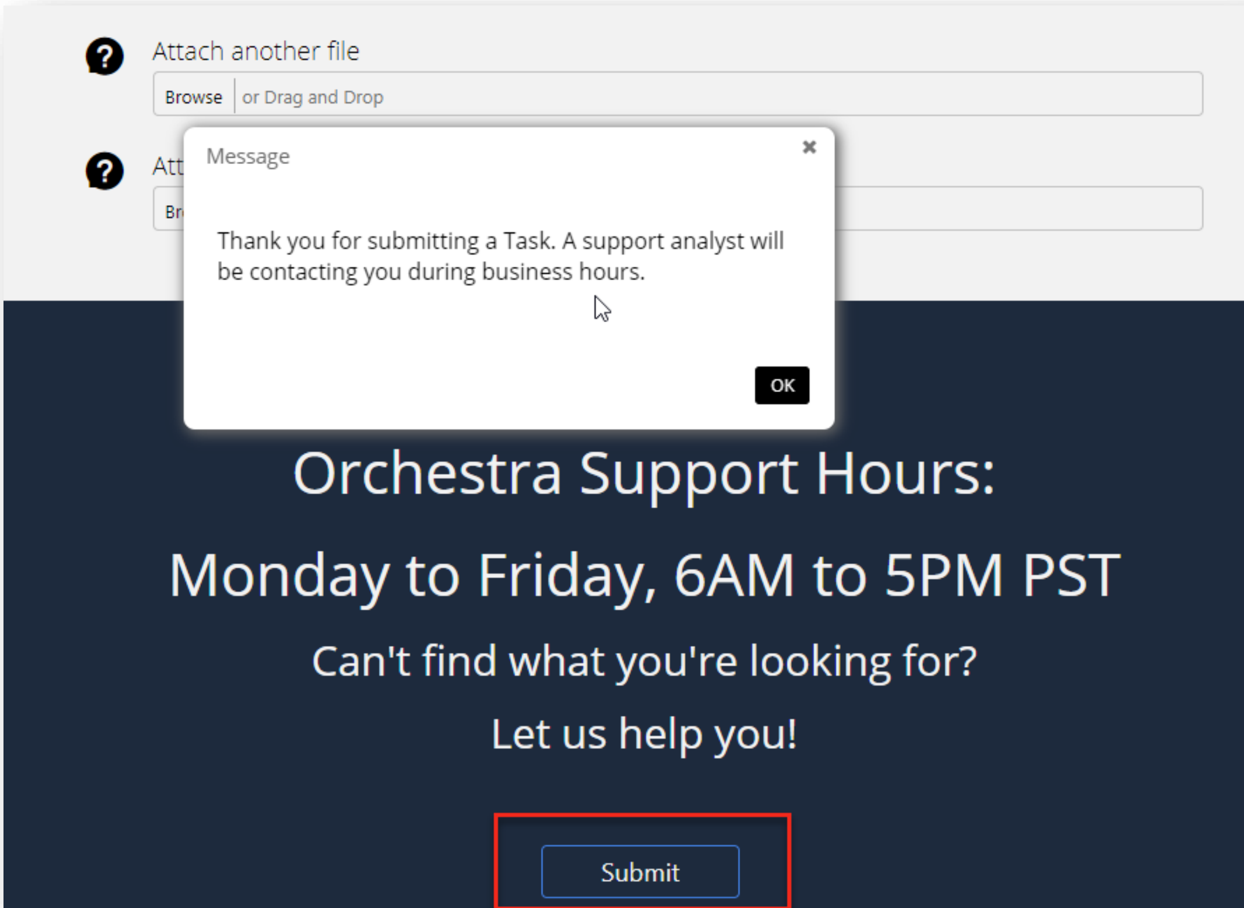
3. Once you've logged in, you will be taken to the Orchestrated Submit a Task page



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.

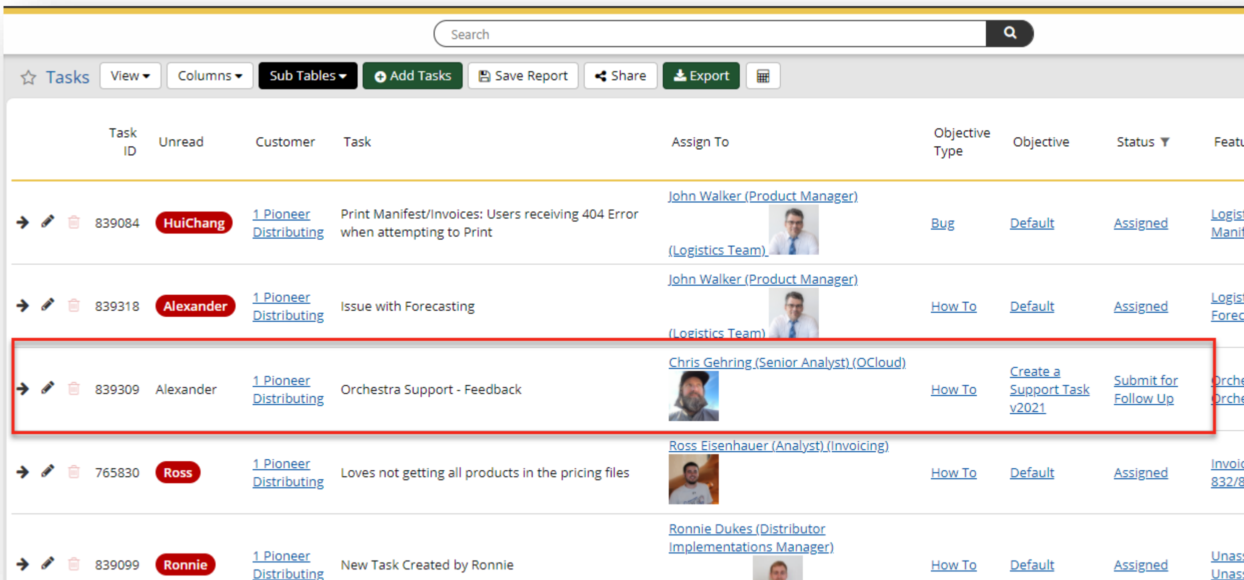
9. **Is this on a Mobile Application?** Select *Yes* or *No*
    a. If Yes, choose *Orchestrated App* from the **Mobile Application** dropdown
    b. Then choose the correct Orchestrated App from the additional dropdown
10. **What is the topic that most closely matches your issue?** Choose *Orchestrated* 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



How to view & comment on your open tasks

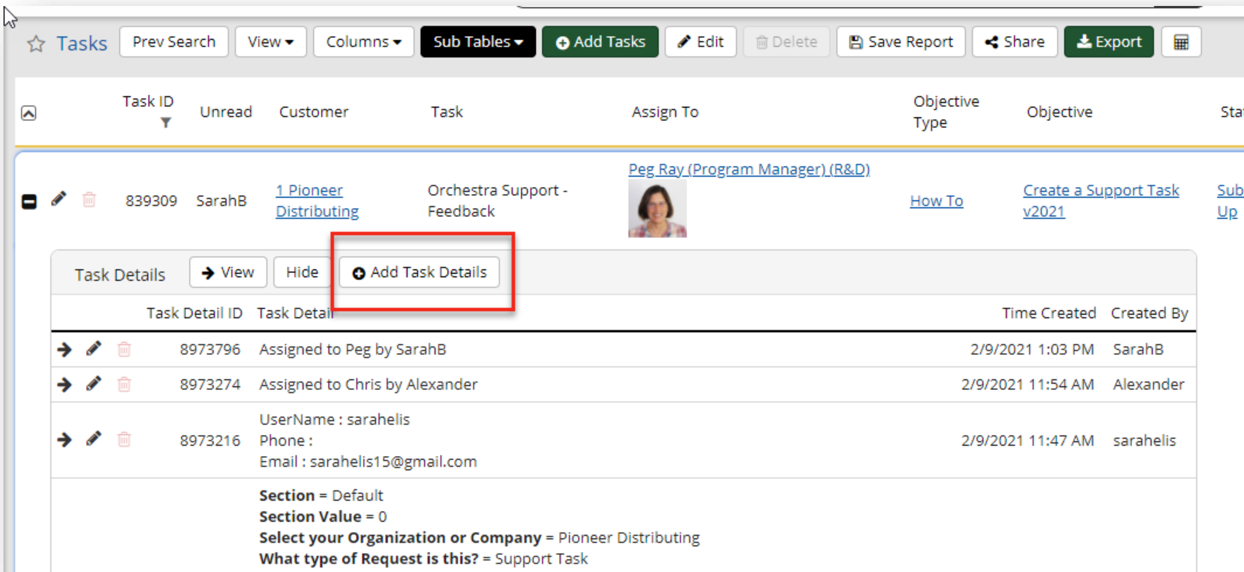
You will now have full transparency into seeing all tasks that have been submitted by yourself and all other Support users at your organization. This transparency will aid in allowing you to see what's going on, if another user is experiencing a similar issue, and if there is already a task in motion.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

1. 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!)

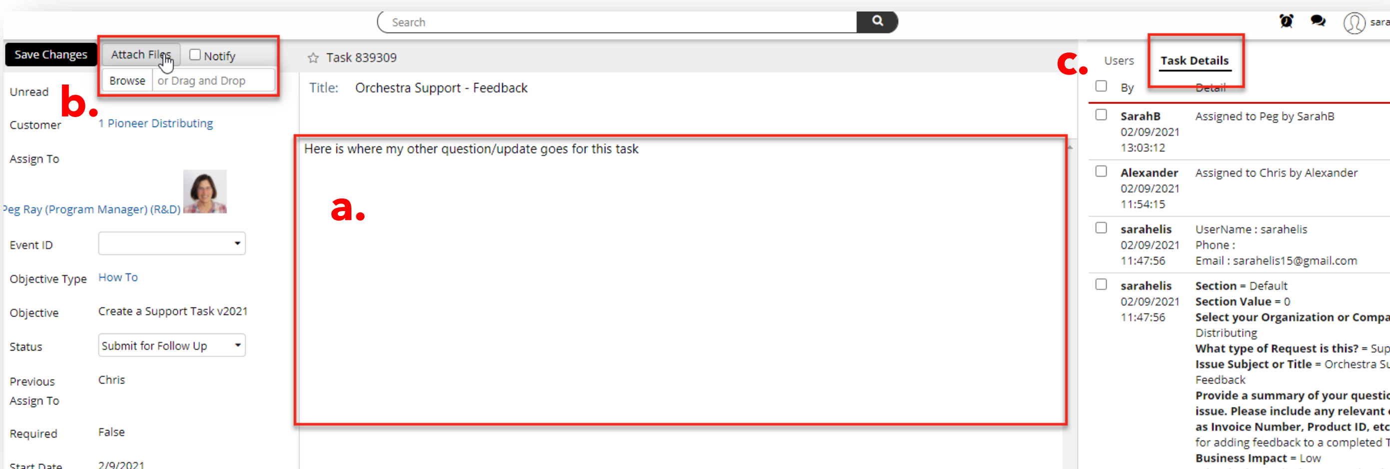


2. If you'd like to drill into your task to see more detail, click the 'View' ⟶ arrow icon at the left

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**

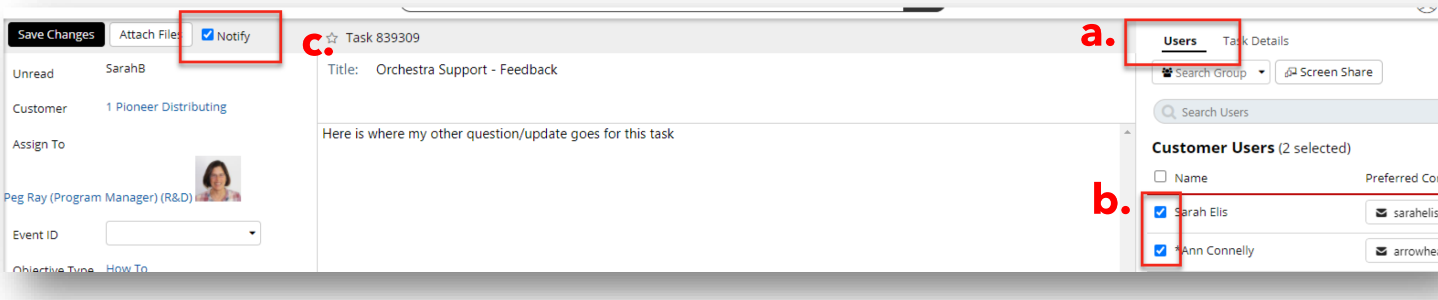


4. From within the Task Details screen:



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

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



   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

Pro Tip	To navigate back to the Tasks table screen, simply click your back button, or type 'Tasks' into the search bar and select 'Tasks' under the Tables option.

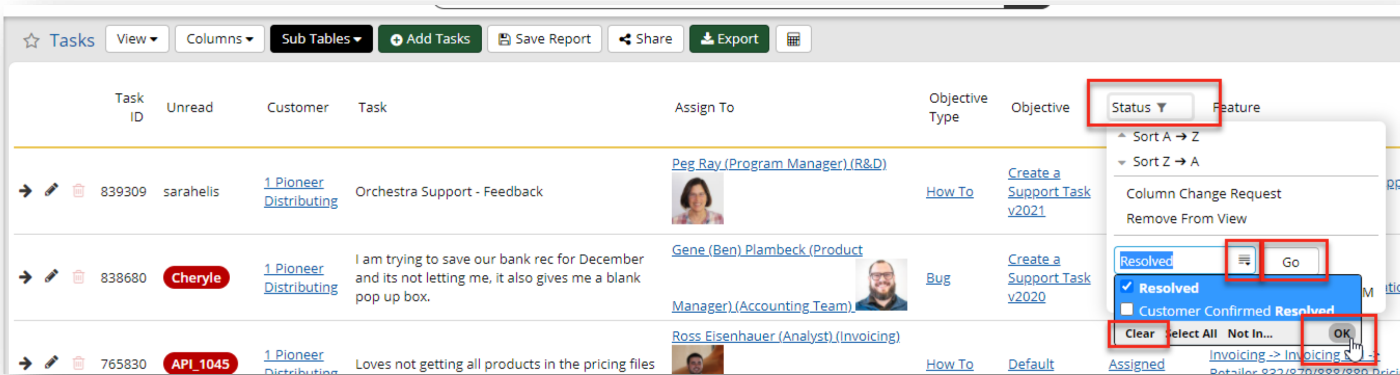
7. If you'd like to skip straight to adding additional questions/updates to your task from the Tasks table, click the 'Edit' pencil icon at the left and that will bring you into the Tasks Details screen

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.

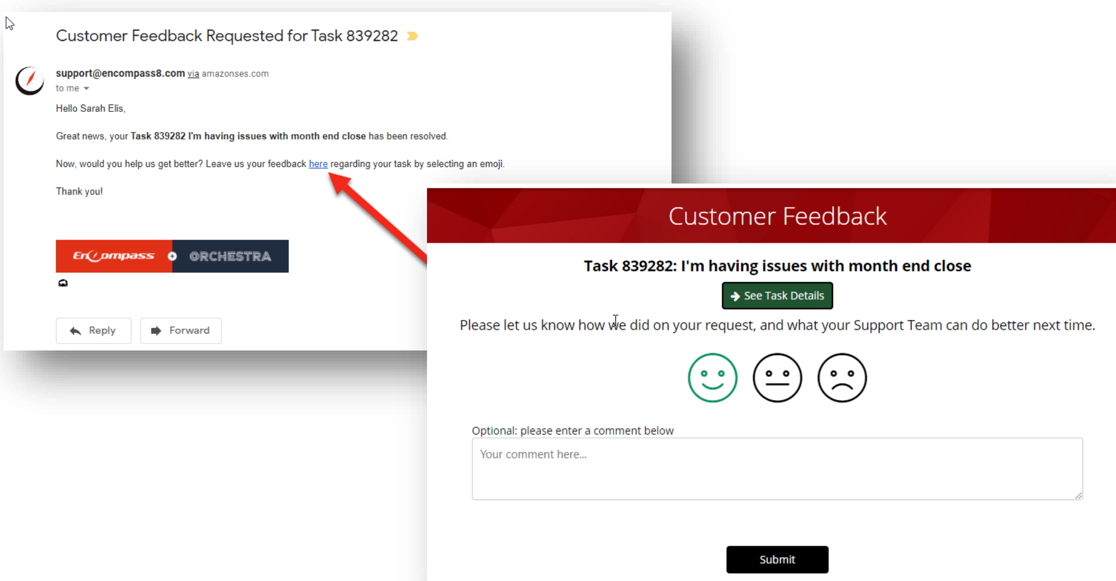
1. Click the Status column filter
2. Click the dropdown icon from within the text box
3. Click Clear
4. Then type in Resolved in to the text box (or find it within the status list) and check it off
5. Click OK
6. Click GO



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!

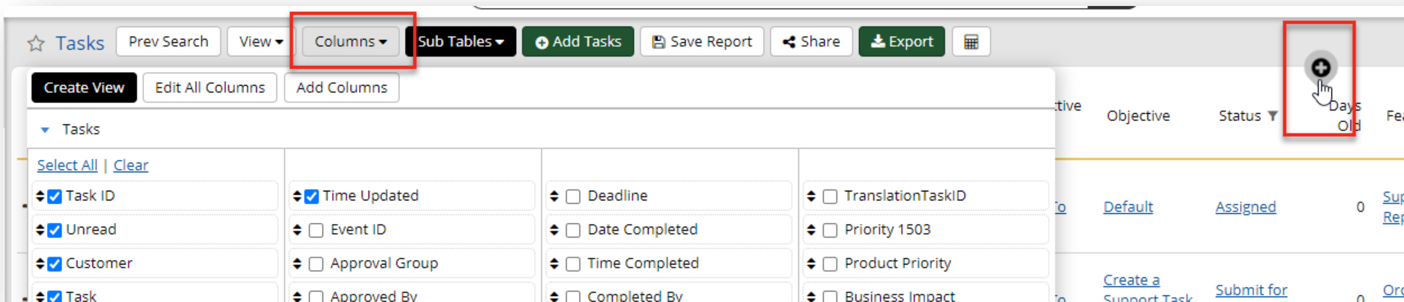


And so you know, we take any/all feedback seriously, so thank you for helping us with continuing to improve.

Task Tips & Tricks

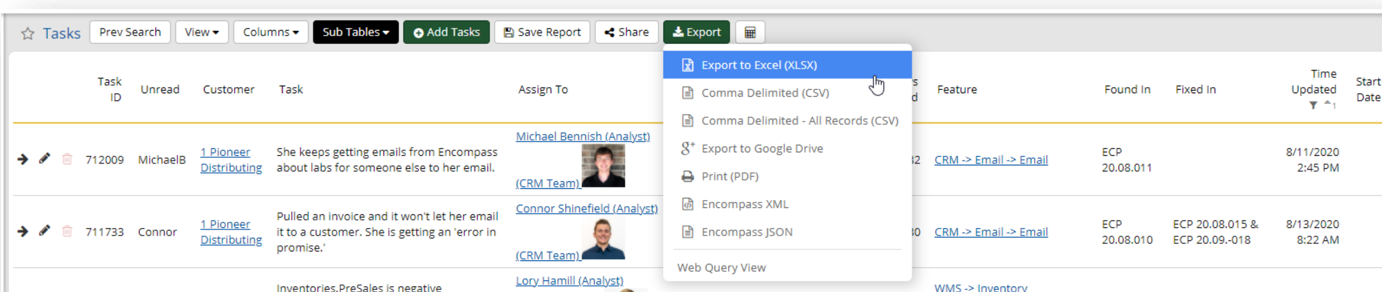
We're so pumped with the new Support platform we're able to offer you! As we've been learning, we wanted to share some useful features you may be able to take advantage of!

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*)*:

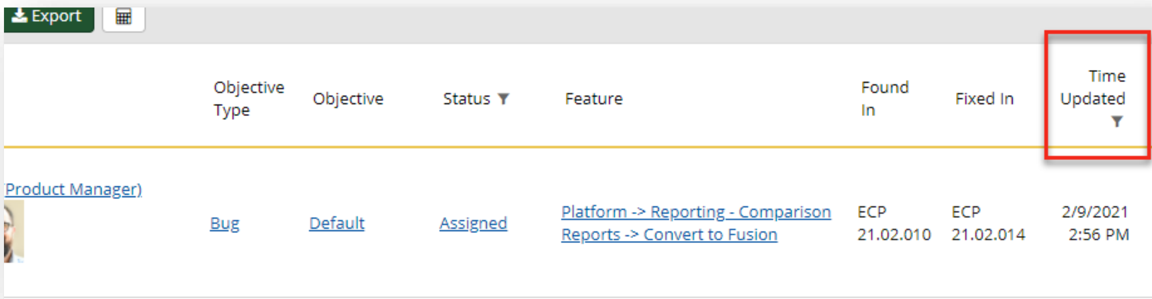


*the Tasks table will revert back to the 'out of the box' view next time you log in

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.



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!



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!