Impersonate and Troubleshoot

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Overview

As a **Brand Admin**, you may occasionally need to assist your franchisees with managing their accounts and users. While you're not expected to be a ServiceMinder expert, you do have access to tools that make it easier to support your locations when simple questions or issues arise.

For larger projects or when you're unsure how to proceed, you can always submit a support ticket to our team for help. That said, there are a few tasks you may find convenient to handle directly, especially as you become more familiar with the platform.

> This article will review:
> - About Impersonating
> - How to Impersonate
> - Top 5 Troubleshooting Techniques

About Impersonating

Impersonating a user gives you access to all of the data and privileges associated with their account. This means you can manage information specific to one organization or user from a single high-level account.

> ℹ️ You will see more options when you are impersonating than what that user would actually see. This is because the system knows you are a brand admin, so you can made edits and updates in an org's account while you are impersonating.

Once you are impersonating a user, you will see that you are logged in as that user proximately via your account.

Logged in as Test McTest (Katie H) | Clear | Log out

The **Clear** link will revert the impersonation, restoring your normal account functionality.

> ℹ️ If you submit a support ticket, while impersonating, the ticket will look like it comes from the User that you are impersonating.

How to Impersonate

We recommend not adding your User to each account. Instead, use the impersonation feature to get access to any org. There are two ways to begin impersonating.

1. Impersonate through Dashboard

Go to **Dashboard > Home** tab. Here, you will find a search field labeled **Impersonate**. This is the interface through which you may access service**minder** as another User, allowing access to all of their data and permissions.

When you search, you can enter a name, email, or org name. When you find what you are looking for, select **Impersonate**. Search results will include users and organizations matching all or part of the entered text.

Search results for **Users** will appear with limited information about each user and their organization. Each user is accompanied by a button labelled "Impersonate" under the "Action" column.

Search results for organizations will not allow you to directly impersonate a user.

2. Impersonate through Organization

Go to **Dashboard > Tools** tab **> Organization**. Click on the name of the correct org and on the right-hand column, go to **Users**. There you will see any User that has access to that org. Look for someone that has Owner or Org Admin role.

Top 5 Troubleshooting Techniques

Here are some of the most frequent issues and how to help your franchisees.

1) Product Release Notes

Make sure to read every product release information about service**minder**. We regularly release fixes to bugs or new features or small updates that may pertain to your franchisees. Release Notes will display as a new notification when you log in to your account. They can also be found via **Help > Service Bulletins**.
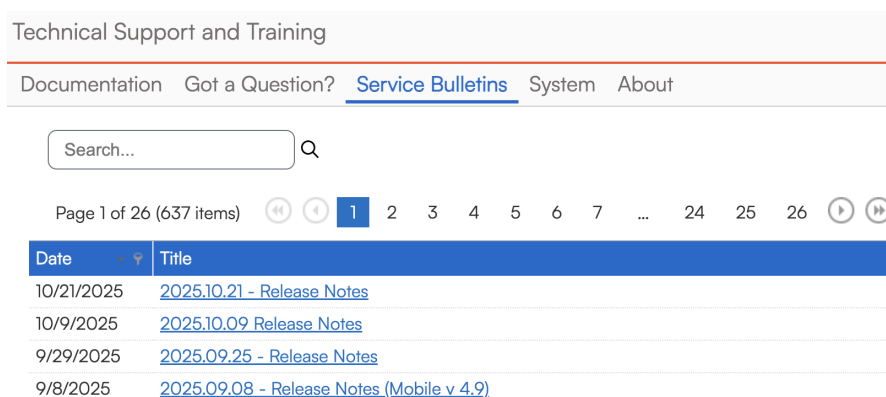
2) Site Health

We monitor all aspects of service**minder**'s operations 24x7. Operations team members get alerts when are issues. We post information about known issues to our status page at status.serviceminder.io. You may subscribe to alerts when we open incidents on that page.

3) Page is Slow to Load

If you're experiencing slow performance, here are a few things to check (and gather information on) before reporting an issue to us:

1. Is it a particular page or operation that is slow? If so, is it always slow or just sometimes?

2. If things are generally slow, it could be your network. Do you see the same issue when accessing service**minder** from another location or network? Does it follow you to the different location, or different computer? If you switch from WiFi to cellular, or a mobile hotspot, is the performance the same?

3. Disable any browser extensions. Chrome and other browsers make it easy to install many extensions that offer to help with common tasks. Those extensions may cause performance issues or interfere with the operation of service**minder**. Ad blocking extensions in particular can cause issues as they may block access to resources that service**minder** needs to function. If you are using an extension like this, be sure to whitelist *.serviceminder.

4. Do other users see the same behavior or does it just affect you?

5. If a specific page or operation is slow, it could be due to the amount of data needed for that page. We may be able to optimize that page for your situation so definitely let us know which page/operation, especially if it is consistent.

6. What info do I need to report? We need to know what browser you're using and on what platform (Mac, PC,

iOS, Android), what extensions you have installed and whether the issue is on specific pages (if so, which ones) or in general. We also need to know if the issue follows you to another computer (or phone/tablet) or is isolated to just your current environment.

4) Email Delivery Issues - Bounces and Unsubscribes

There are two types of email bounces: soft and hard. A soft bounce is classified as one that may be intermittent, such as the recipient's mailbox is full or their mail server is not currently responding. In these cases, we'll send a bounce notification to indicate that the message couldn't be delivered. A hard bounce is where the mail server for the recipient reports back that the email address does not exist. In this case, we also send a bounce notification and the reason will indicate why (such as no such user, etc.) In these cases, our delivery provider automatically blocks future deliveries to that email address as continually sending email to known bad email addresses will reduce deliverability.
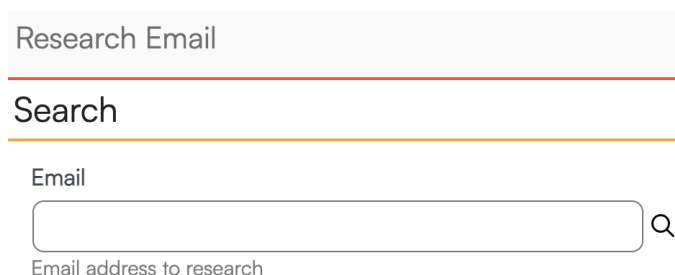
If you see the bounce reason of "Bounced Address," that indicates that the email address is already marked as having bounced previously. Look at the email history for the contact to find the first bounce and you'll then see the original reason for why the email address was marked as undeliverable.

You may also receive bounce notifications with a reason of "Spam content detected by scanner." In these cases, the recipient's mail server determined that your email failed their spam content check. This indicates an issue with your email template or content. There are a variety of tools available where you can test your email templates for deliverability. Unfortunately we can not resolve these types of content related issues for you.

A similar thing happens if the user hits the "This is spam" button/link in their email reader. We will send you a notification, our delivery provider will block future sends to that address and we will also mark the contact as unsubscribed so they don't get future marketing emails. Like hard bounces, we can clear these upon request once you've verified that the client does in fact want to receive your emails.

Clearing A Bounce

As a Brand Admin you have the ability to research and assist a franchisee with bounce notifications and clearing these so they can retry the send after correcting the problem. Brand staff can research email deliverability for specific email addresses by going to **Dashboard > Tools > Email Delivery**.

Research Email

Search

Email

[   ] 🔍

Email address to research

You can select "**Clear**" to remove the bounce and then retry sending after updating the email address.

The service**minder** team can also clear these blocks once you've confirmed with the client that the email address is valid and that you're able to send to it from your regular email address. To make this request just put in a ticket with the email address you need researched/cleared. If you send to a blocked email address, we'll send back a bounce notification.

Queued Emails

If you click on the email to see the details and the message includes something along the lines of "delivered" or "queued for delivery", then that means it was successfully sent off to the recipient's mail server.

"Queued mail for delivery" is the relevant part at the end. 250 is another common code used by a lot of mail providers to indicate they received it successfully.

This doesn't necessarily mean it was delivered to their inbox, but just means that their mail provider received it and should be delivering it accordingly. We have no control past this point, so if the customer isn't receiving it, then the email is getting filtered into junk/spam, automatically deleted, or any other possible outcome their mail provider deems appropriate.

5) Review Contact's History

On a Contact Detail Page, there is a **Timeline** button.

This will show you every recorded action associated with that Contact history such as when they were added to the system, when a proposal was declined, tag added, drip triggers, or changes to Contact info. At the top, you can filter by specific type of action such as **Tasks** or **Text Messages**.