

# Support Ticket Templates for Brand Admins

09/04/2024 10:29 am CDT

## Overview

As a Brand Admin or Onboarding Specialist, you may find yourself sending in the same requests to our serviceminder Support team but are unsure of what is the best way to frame those requests. This would be things like having our team add accounting classes or transferring data.

Here are some best practices that you can use to get you started. You may have more specific language or needs but this is how our team can best understand and complete the work.



Please submit any org transfer tickets, org creation tickets, or org cancellation tickets 2- 3 business days BEFORE the date of the open/closing is scheduled. We cannot promise same day turn-around for that work since it can be time intensive.

## Example Email for Creating a New Organization

If you have completed the steps you need to do to create a new organization, we can complete certain work for you. Here is how you may want to frame that request:

**Subject:** New Franchise Org Created - BRAND - ORG NAME

A new organization has been set up for (BRAND/ORG NAME). The Org ID is (INSERT). Can I get your assistance with completing the setup for this location?

1. Please add the following zip codes (see spreadsheet attached).
2. Please create accounting classes and map royalties/geocodes.
3. Our Deploy account is called (NAME) and the Org ID is (INSERT). Please deploy the following fields to that org:
  - Proposal Terms and Conditions - V1
  - Parts - all active
  - Services - just consultation service, installation service, and repair service
  - Contact Categories - Customer, New Contact, Canceled, Cold Lead; please do not deploy Warm Lead or Prospect

Let me know if you have any questions or need clarification on anything.

Thank you!

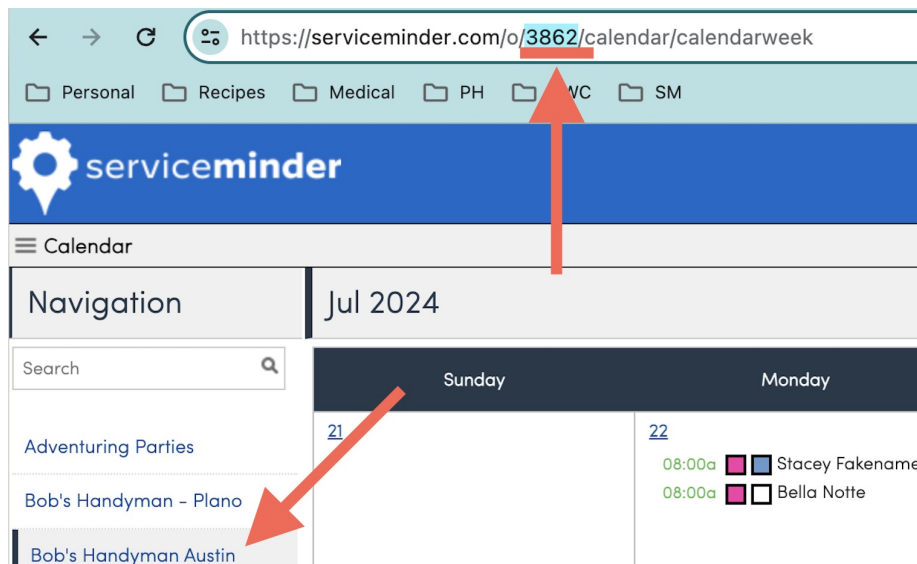


You can edit or add to this email template as needed; this is a suggestion on how to frame the message so our Support team can best understand the assistance you need with these steps. Please be detailed with what fields need to be deployed. We don't know what should or should not be included.

## Best Practices

Whether you are opening a new location, closing a location, or transferring contacts between orgs, here are best practice tips:

1. The Support person assisting with your ticket will do what you ask. Keep that in mind, because if you only ask for zip codes to be transferred from one org to another, consider that there are accounting classes, payment tokens, geozones and more data attached to those zip codes. Brands handle these in different ways, and we will not know what your brand's process is. Please be descriptive, detailed, and concise that way all steps are completed the way your brand prefers. If you are unsure what the practices are for your brand, you may need to create an instruction sheet for your team or reach out to your Account Manager here at **serviceminder** for assistance before submitting a ticket.
2. If you ask us to add Postal Codes (Zip codes) or help map accounting classes and GeoZones. We need to know the Territory ID name and all the zip codes included within that territory. This is for both U.S. and Canadian locations. If you just say, "please add", we will have to ask for additional information to make sure we are doing it correctly since each brand has territories broken up differently. There is no such thing as too much information.
3. Please include the Org ID number. **THIS IS NOW REQUIRED!** If you do not provide us the information, the Client Success team member assisting with your support ticket will have to ask you. You can find this information in several places. Check the URL string for the location(s) you are referencing. Or go to **Dashboard > Tools tab > Organizations** and click on the location to find the ID number. Or if you have impersonated into that org, go to **Control Panel > General** and you can find it there.



4. If you are requesting a transfer of contacts and they have payment history that you want to keep, you will need to reach out to your merchant processor to transfer tokens from one org to another. For instance, if you use Heartland, their timetable is completely independent of **serviceminder**. It may take several weeks for them to complete the move.
5. Provide an exact date of when the org is closing or the move needs to happen. You will also need to keep in mind that we will need several business days to complete large data moves. We ask that you submit these requests (at least) 2 - 3 business days ahead of your due date. We cannot guarantee a same-day turnover for

these tickets if the database team has many other inquiries ahead of yours.

6. If you are asking to deploy fields to an org, please include as much detail as you can about which Contact tags to include or which ad hoc email templates not to deploy. The more descriptive your notes are for what each org needs to have, the easier the process will be if you ask Support for help.
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