



Kanso Native Housing Summit

Kanso Success Tools

Lifecycle of a Support ticket

July 31, 2024, at 1:00 P.M.



Hi! My name is Emilio.



- I am the Lead Account Manager and Senior Client Support Specialist here at Kanzo Software. Up here on stage with me are the renowned Rachel, Amy, and Marc who are also account managers and client support specialists. We are also graced with the presence of our senior Quality Assurance member, Jesse

 Supporting Cast



Jesse
Koch-Laskowski



Amy Vermette



Rachel Majure

Marc Galloway



Session Outline

Submitting a support ticket

Where does the ticket go from there

Types of support tickets

How to write an effective support ticket

Self help

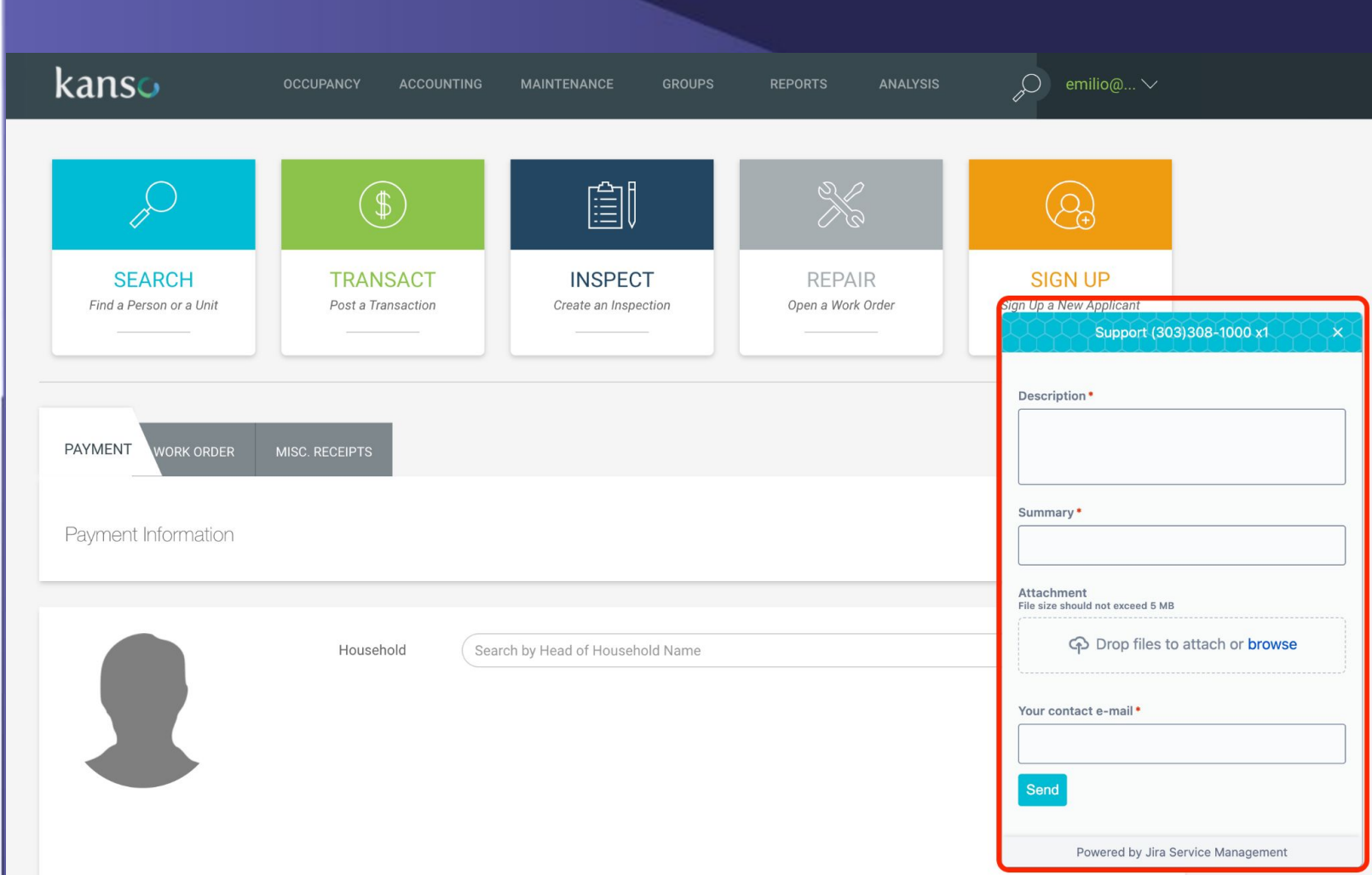
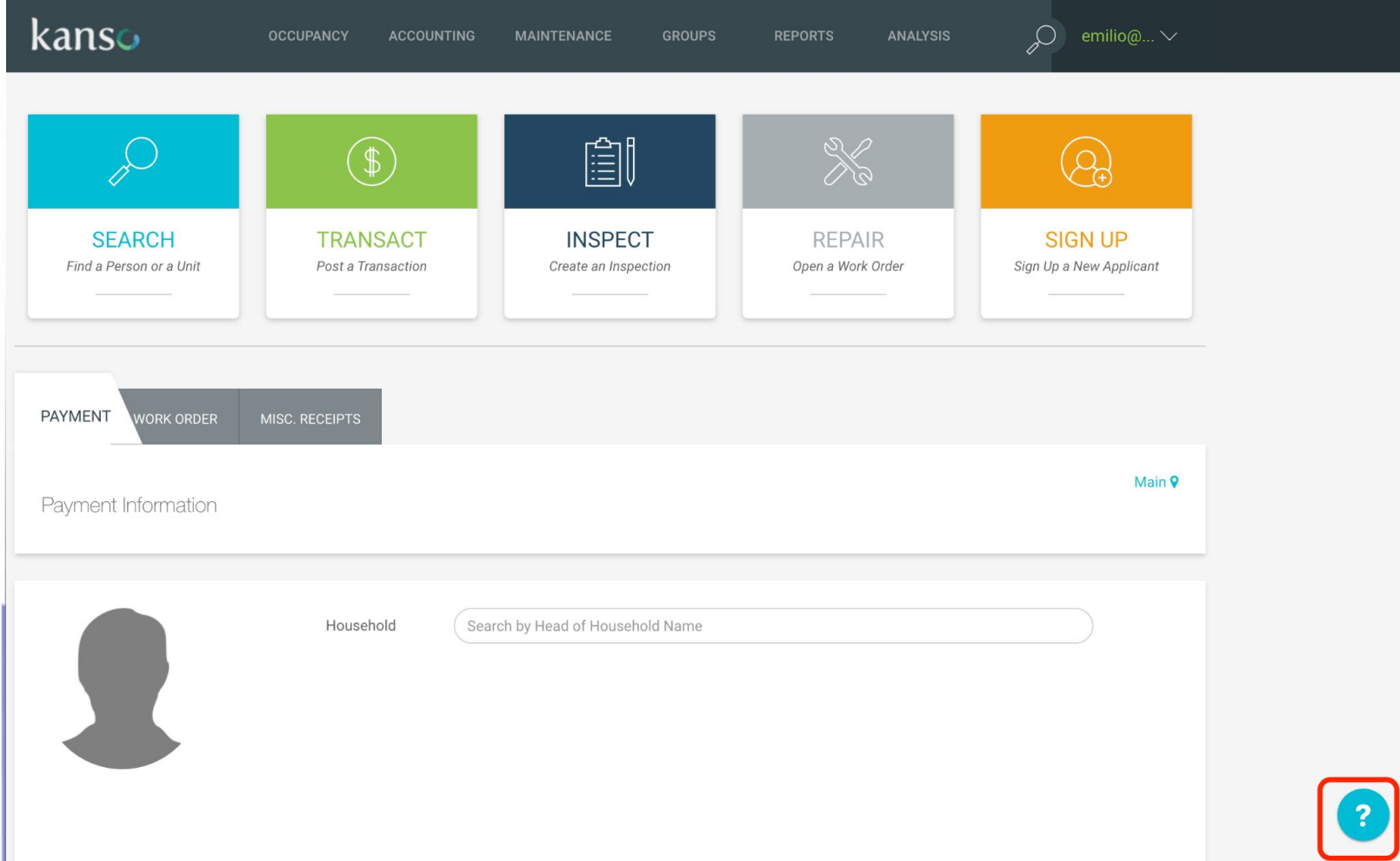
Starting with the basics - How to Submit a Support Ticket

- Ways to contact support:

- Use the blue question mark at the bottom right of any page within the Kanso application.
- Email your question or concern to support@kansoftware.com
- Call the general support line at (303) 308-1000 extension #1.

- Note about contacting by phone:

- Our support team is relatively small, making answering phone calls difficult at times.
- The quickest and most effective way to reach us is by submitting a support request via email or using the blue question mark.
- If calling, please leave *your name, The Housing Authority you represent, a good callback number, and a brief message.* if we're unable to answer immediately. We'll respond as soon as possible.



A peak under the hood - What happens to a Support Ticket after submission

Once a Support Request is received, it can typically go one of three ways.

1. General Support:

- a. Attending support specialist assists with the original request.

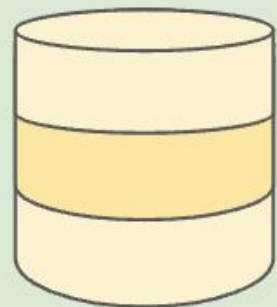
2. Data Fix:

- a. Occurs when the support specialist cannot immediately identify or fix the issue, which appears site-specific.
- b. Ticket forwarded to the data team for further investigation.

3. Bug:

- a. Identified when multiple clients report the same issue, not limited to one site.
- b. Issue is reproducible across multiple instances, indicating a code error.
- c. Requires attention and resolution by the development team.

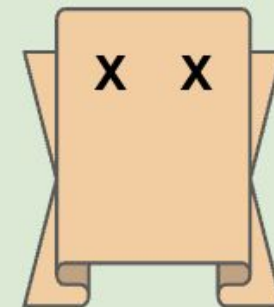
Data Fixes



A mistake or error in the **data**

VS

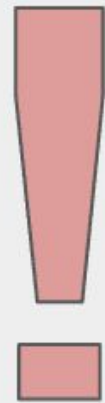
Bugs



A mistake or error in the **code**

Hotfix - Our highest priority

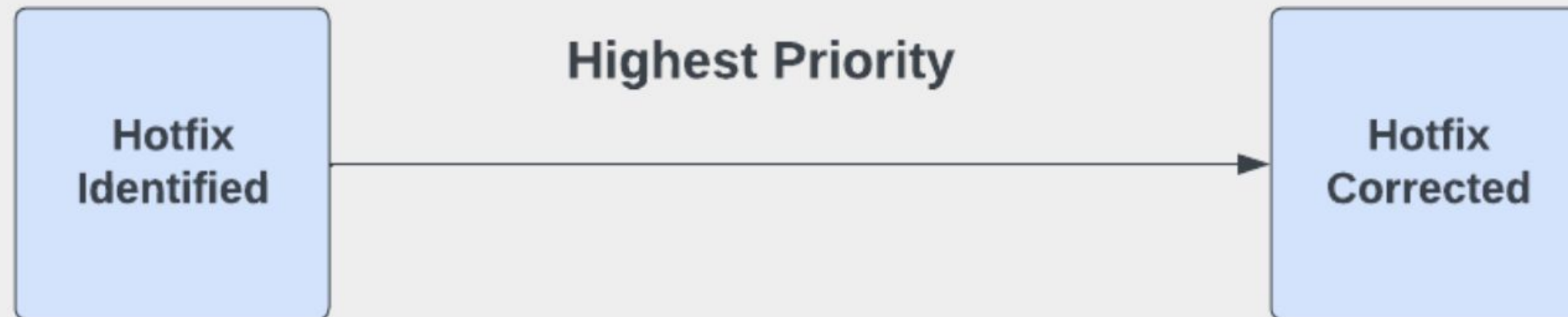
When a bug is identified and it prevents most users from completing their tasks with no possible workaround, the bug becomes a hotfix.



A Hotfix is a bug that prevents users from completing their tasks with no possible alternative workarounds.

What do we do when we identify a Hotfix?

- Immediate developer assignment
- Quality Assurance and Testing priority
- Special release schedule
- 24-72 hour turnaround



Writing an effective Support Ticket

Supply as much information on the issue or question as possible

Our support team is trained to look for a handful of key pieces of information when a ticket is submitted

1. Your name
2. The name of the Housing Authority you work at or support
3. The issue/question you are experiencing
4. The pertinent information to help us to dive right into the request
 - i. If the question is about a specific household. What is the name of the head of household.
 - ii. If the question is about a specific unit. What is the address or PPU of the unit.

The ideal support ticket - What does it look like

Hello,
My name is **Emilio** and I work with the **Kanso Housing Authority**. I am having **trouble performing a move-in action for Rachel Majure**. I am trying to move her into **1234 memory lane** and I keep **getting an error message when I try to finish the action**.

- This example support ticket gives our team all the information we need to immediately start to dive in and address the issue for you!!

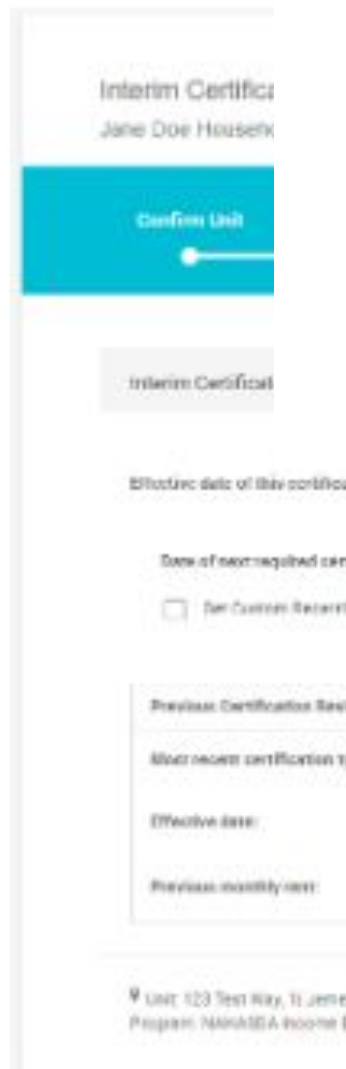
Bonus points if you can provide a screenshot of the error message

RM Rachel Majure 2 minutes ago

Test,

When performing an Interim recertification. You only want to click select custom recertification date if you are changing that date to something other then what the previous annual set it for. So if you are setting the effective date for the interim as 8/1/2024. You only want to select the set custom recertification date if you are changing that date from the exisiting next recert date, which in this case is 7/1/2025. You will get that error message if you are trying to set the custom recertification date to the date it is already set for.

So as long as you



Please let me know if th

Best,

Kanso Support Team

Edit · Delete ·

Test account 2 minutes ago

Kanso support team,

That does answer my questions. Thank you for your assistance.

RM Rachel Majure 1 second ago

Test,

You're welcome.

I'm going to go ahead and close this ticket.

Please don't hesitate to open another ticket if any additional issues or questions arise.

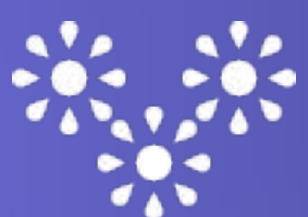
Have a great rest of your day!

Rachel

Edit · Delete ·

performing the recert?

message.



Self Guided Training Tools

Help yourself with these resources available to you

1. Kanso Written Documentation

- a. Help Guides

2. WalkMe

- a. Guided Walkthroughs

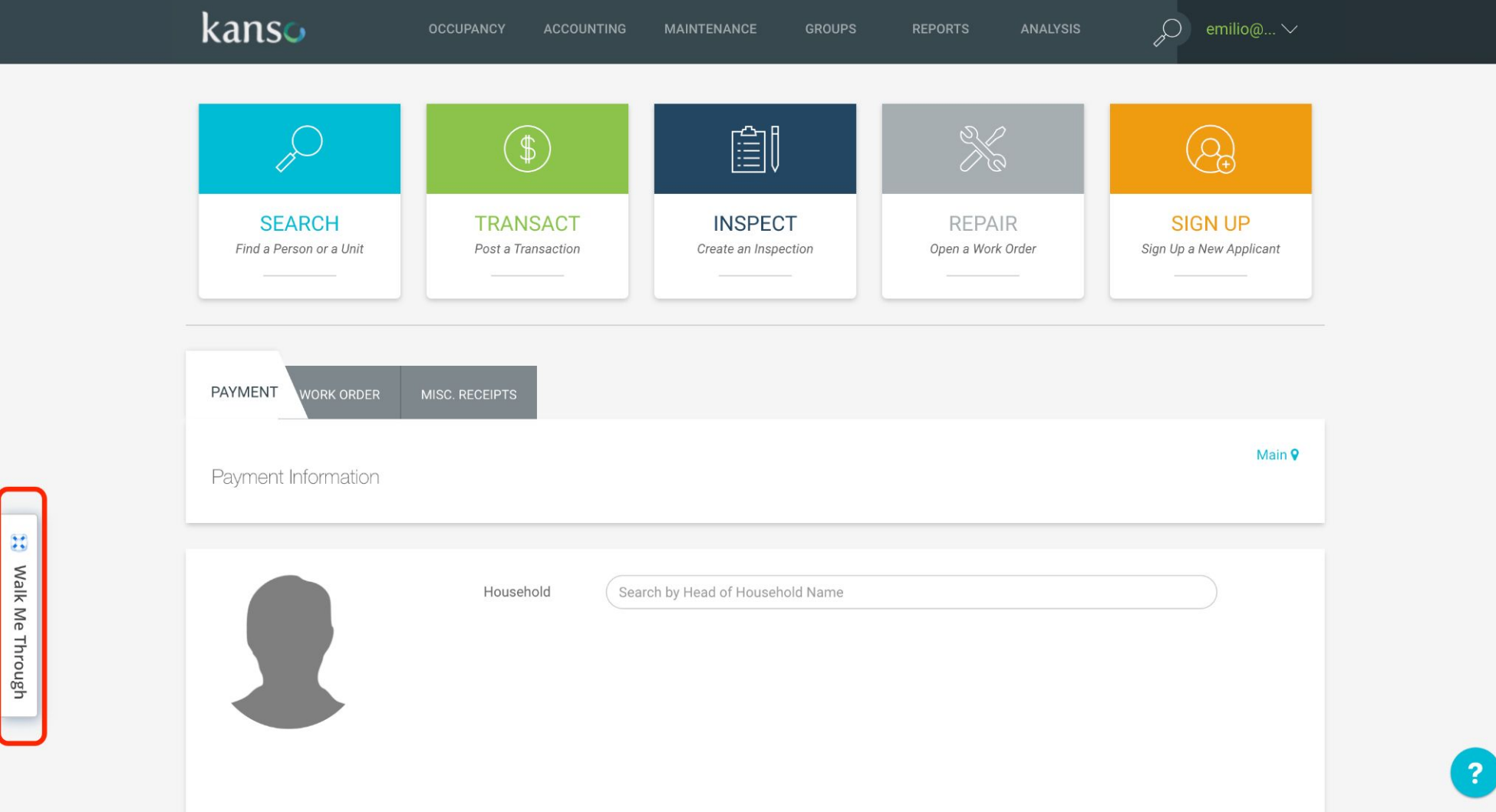
Help Guides - Kanso Written Documentation

How to access the Kanso Written Documentation:

1. First, log in to your Kanso site.
2. Next, click on your username in green lettering up in the right hand corner of the page.
 - a. We call this your “user drop down” menu.
3. Lastly, select “**Help Guides**” towards the bottom of the drop down menu

This will direct you to a new page where we have put together over 100 written documents showing and explaining step by step processes for features within your Kanso site.

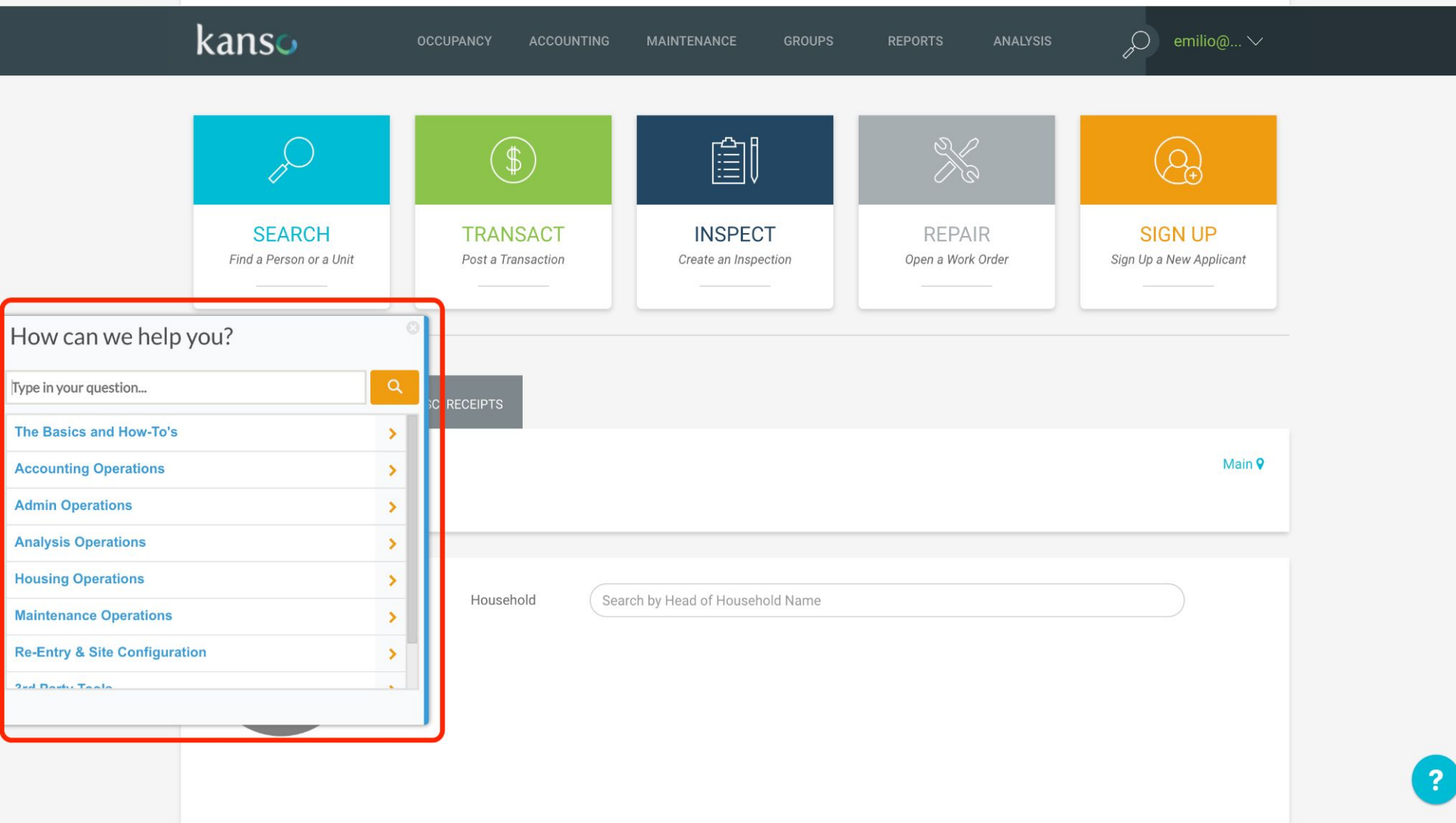
The screenshot displays the Kanso Software user interface. At the top, the navigation bar includes the 'kanso' logo and menu items for OCCUPANCY, ACCOUNTING, MAINTENANCE, GROUPS, REPORTS, and ANALYSIS. The user's profile 'emilio@...' is visible in the top right corner. Below the navigation bar, there are four main action buttons: SEARCH (Find a Person or a Unit), TRANSACT (Post a Transaction), INSPECT (Create an Inspection), and REPAIR (Open a Work Order). A 'user drop down' menu is open, showing options like Edit Profile, Users, Report & Letter Templates, Setup, Configuration, HDS Administration, About, **Help Guides** (highlighted with a red circle), Help Session, and Log Out. Below the main action buttons, there are tabs for PAYMENT, WORK ORDER, and MISC. RECEIPTS, with a 'Payment Information' section and a 'Main' link. The lower part of the screenshot shows a search bar for support articles and a grid of help guide categories: Home Dashboard, Households, Accounting, and Waiting Lists, each with a list of specific topics.



WalkMe - Guided walk throughs

How to access the WalkMe tool

1. First, log in to your KANSO site.
2. Next, locate and click on the **“Walk Me Through”** tab sticking out of the lower left hand side of the page
3. Lastly, find and select the Walk Through of the action you would like to perform.



This WalkMe tool is an extremely powerful and useful way to learn how to perform an action on your site.

Once a Walk Through is selected, blue bubbles/notifications will pop up on the screen and LITERALLY walk you through the action.

One More Thing

The Kanso success team offers video conference guided training.

- This is a professional service.
- Typically done in 1.5 hour meetings going over each of the three main modules, followed by a 1 hour Q/A meeting to wrap up any lingering questions.
 - Occupancy Module
 - Accounting Module
 - Maintenance Module
 - Q/A Meeting



As much information as possible!!!





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