quorum
software

Managing Support Cases

Salesforce Overview

Table of Contents

Introduction to Salesforce

Quorum utilizes Salesforce as the primary method for communication between customers and our support teams. This allows an auditable form of communication for both parties, and is accessible 24/7/365 via the online portal.

What is a case?

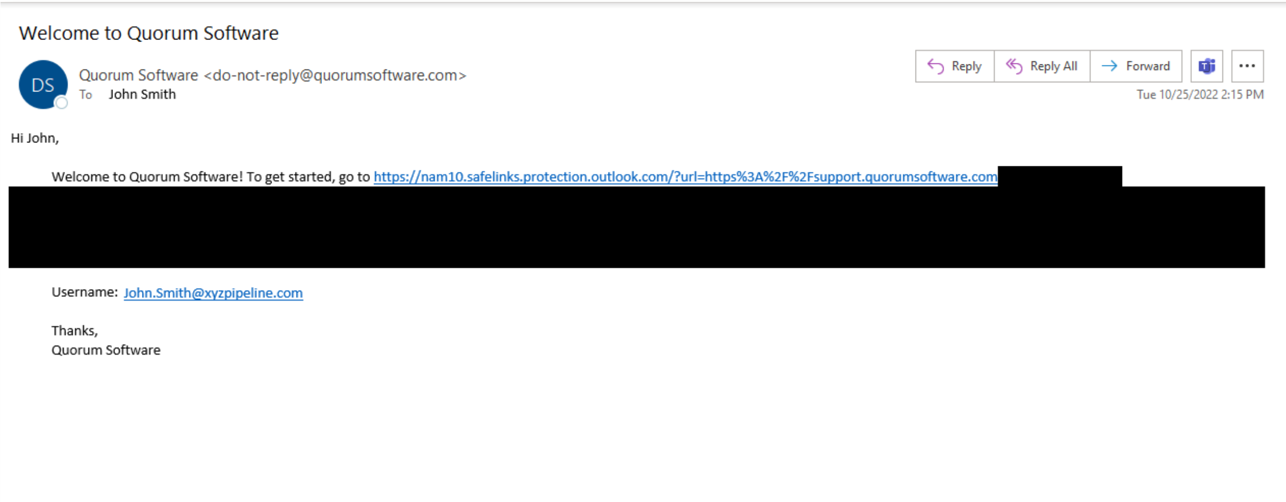
A case represents a request submitted to Quorum. It may be a question, a problem, or ask for new functionality.

Requesting Salesforce Access

If you do not yet have a Quorum Salesforce account, please reach out to your support team lead or super user.

Once the new account has been created, you will receive an email with a URL to follow to finish setting up your account.

Example email (full URL redacted):


Welcome to Quorum Software

DS Quorum Software <do-not-reply@quorumsoftware.com>
To John Smith

Reply | Reply All | Forward

Tue 10/25/2022 2:15 PM

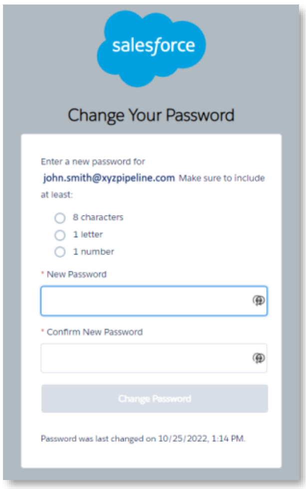
Hi John,

Welcome to Quorum Software! To get started, go to https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Fsupport.quorumsoftware.com[redacted]

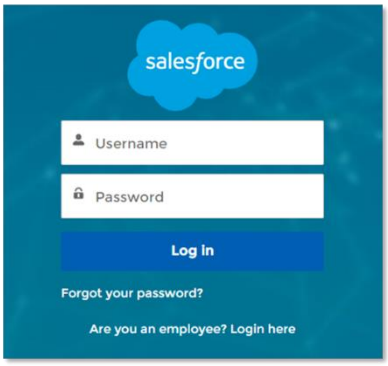
Username: John.Smith@xyzpipeline.com

Thanks,
Quorum Software

After following the URL, you will be prompted to set your password.



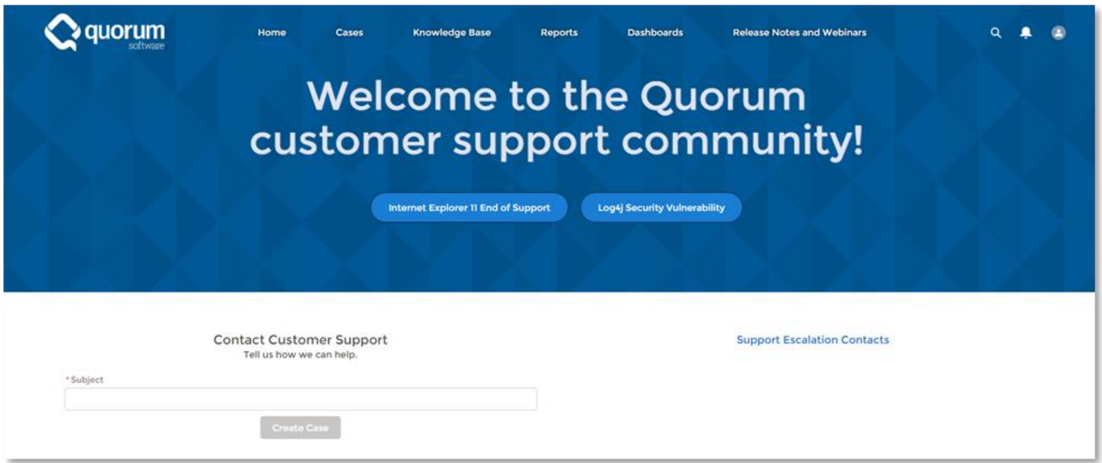
Logging In



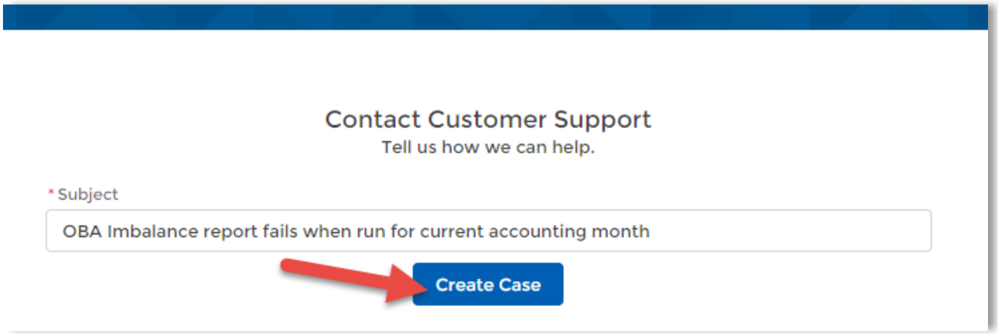
To access Quorum's Salesforce customer portal, go to https://support.quorumsoftware.com Enter your company email address as the Username and the password you selected.

Note: If your password has expired, please follow the Forgot Your Password? link below the Log In button. If you have any issues resetting your password, you may reach out to your support representative to report the issue.

Quick Start to Creating Cases

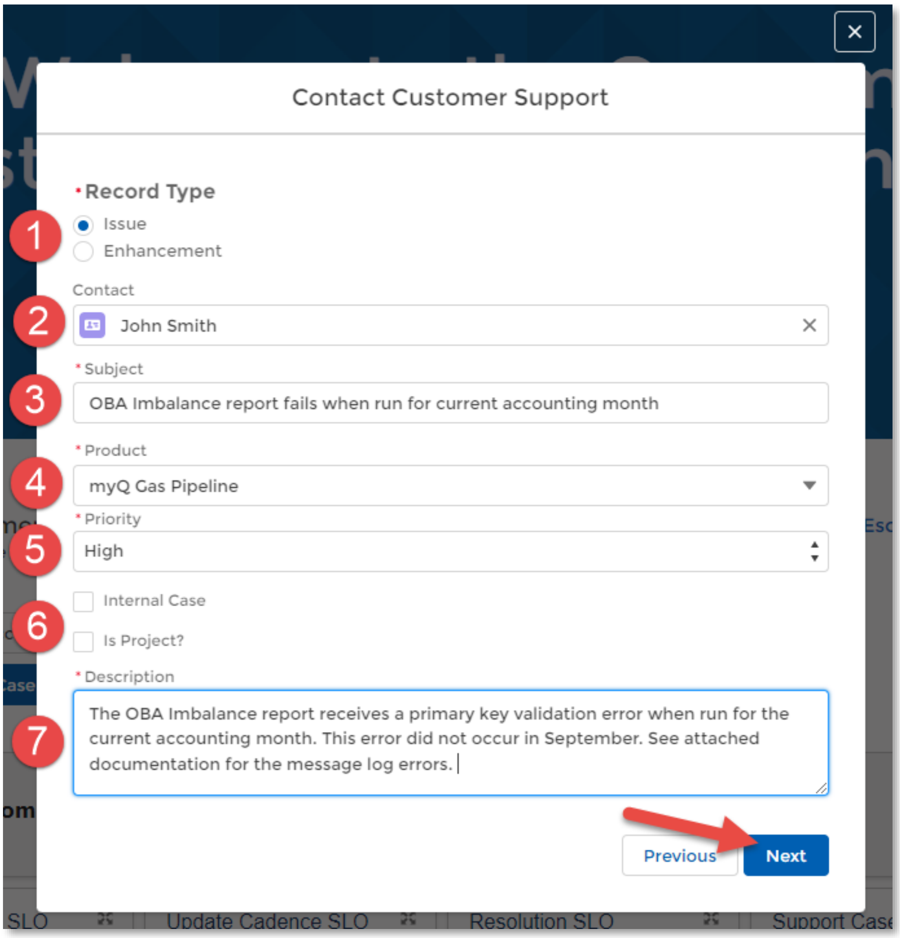


On the Home Page, there is a quick start prompt for logging a new case.
Start by typing in a subject that describes the request.



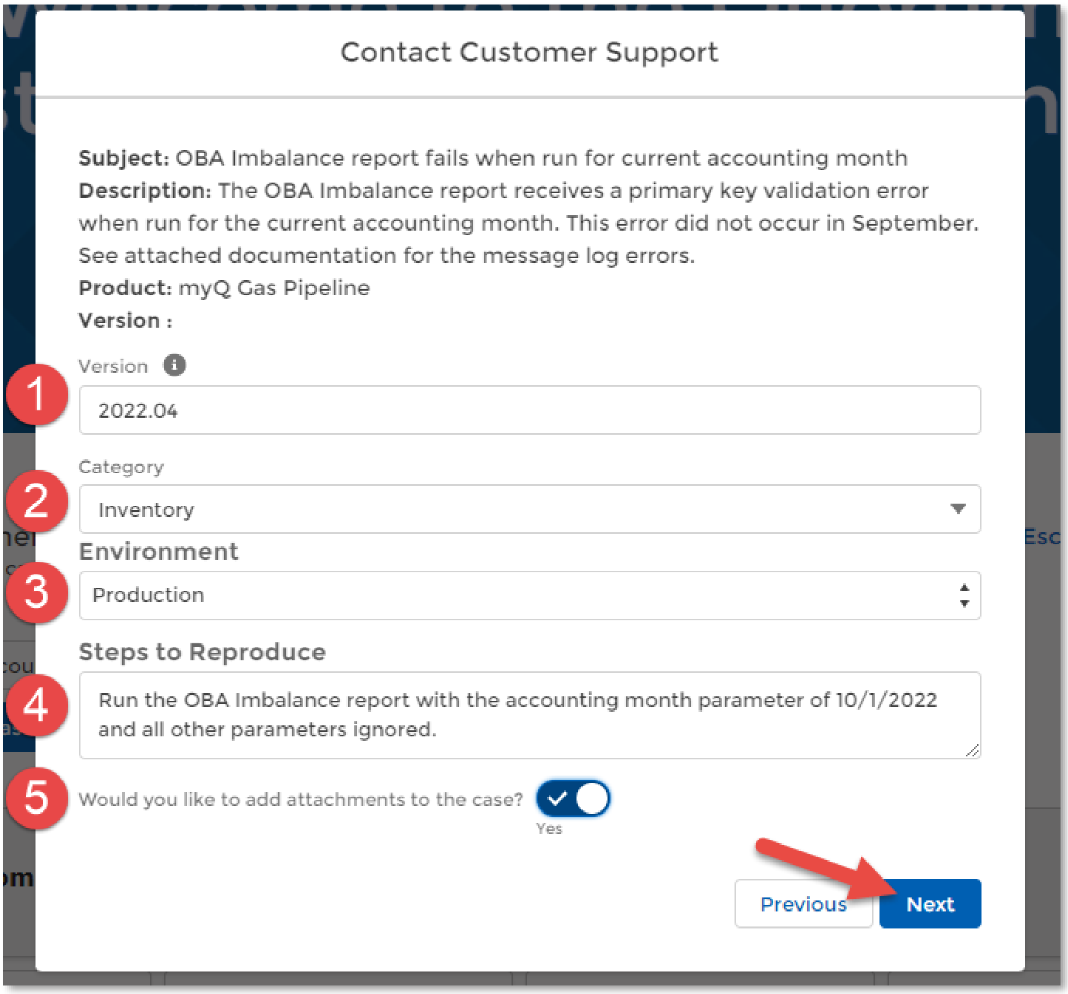
Next, a prompt appears with the user's default account prepopulated. If a user is associated to multiple accounts under Quorum, they may click on the X to clear out the record and type to search for the other account(s). Only accounts the user has been associated to will appear in the list.

Moving to the next page, fill in the details about the request.



1. Record Type:
   a. Enhancement – Request for new functionality that could be a new or updated screen, configuration, integration, process, etc.
   b. Issue – Application error, quick functional question, reporting issue, etc.
2. User submitting the case who will receive updates through Salesforce.
3. Short description of the issue that will be viewable at a summary level in Salesforce reporting. This is populated from the prior screen but can be further updated here.
4. Cases are routed to the appropriate support teams based on the product selected. It is essential to pick the correct product to prevent delays in your case being worked. **Note: If the Product list does not contain a value the user expects, they should select the Quorum product that is most closely related to the issue being reported for these tools. Some related tools will be found as categories under a product. If no product is available, reach out to support using the escalation path.**
5. Indicates the impact and severity of the issue. See Case Priority Definitions for more information.
6. Indicates whether the submitted case is related to project activities rather than production support.
7. Detailed explanation of the issue. See Case Logging Best Practices for tips on the type of information to provide.

Once the required fields have been filled out, click on the Next button which contains additional prompts.

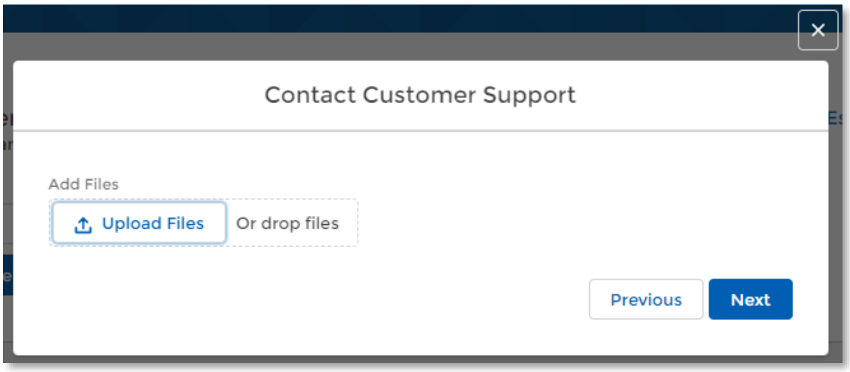


On this screen, the user has a text view of the information submitted on the prior page and additional prompts.

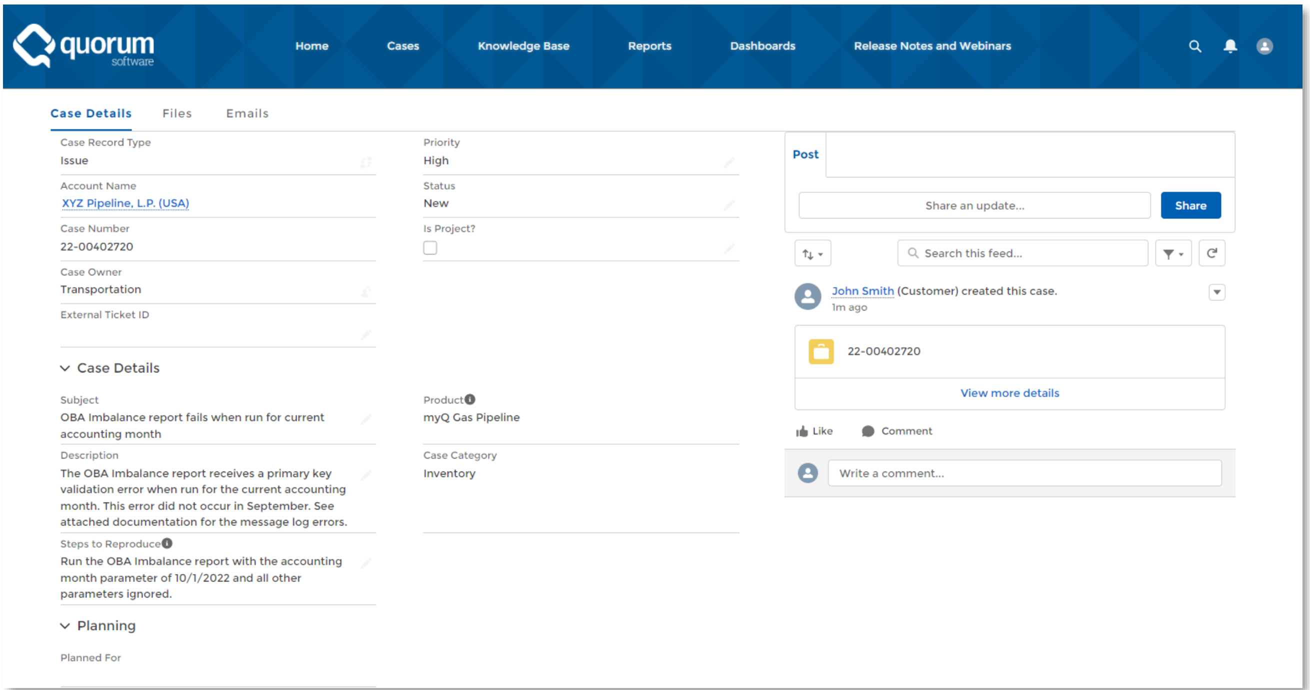
1. Populate this field with the version of software related to the request. Provide as much detail as available, such as the specific build version. **Note: For On Demand Suite, this may be left blank.**
2. This droplist is populated based on the Product selected and is used to indicate the area of the application related to the case being submitted.
3. This indicates the environment where the issue originated (i.e. production or test environment).
4. While this field is optional, providing clear steps to replicate the issue ensures Quorum has the information needed for validating the reported issue.
5. Toggling this button will add an additional prompt on the next page where attachments can be immediately added to the case.

By clicking Next, the case will be submitted.

If the user has selected to add attachments, the case will still be submitted immediately but the user will be taken to a new page to add the attachments.



Once the case has been submitted, the user will be taken to view the new case. Note that a case number is assigned upon creation, which is a unique identifier for the case.



Case Logging Best Practices

When logging Quorum support issues, including the following information will assist the Customer Support team to work towards resolution:

- Accurate priority
- Environment where issue is present
- # of affected users and impacted deadlines
- Screenshots of observed behavior and related screen/process name
- Steps outlining how to reproduce the reported behavior
- Data examples (inputs, outputs, notable attributes)
- Any updates or environment changes made prior to reported behavior
- Current vs. expected results

Case Priority Definitions

Critical – An emergency condition that causes the system to fail or causes customer data to be lost or destroyed. A showstopper usability bug can also be one that is likely to cause frequent data integrity errors. There is no workaround to these problems.

Example: Billing process fails with non-descriptive or technical error message

High – A serious condition that impairs the operation, or continued operation, of one or more product functions and cannot be easily circumvented or avoided. The software does not prevent the user from making a serious mistake. The usability problem is frequent, persistent, and affects many users. The application is moderately impacted and there is not workaround currently available, or the workaround is cumbersome to use.

Example: Screen validation prevents record save for non-business critical function

Medium – A non-critical, limited problem. It does not hinder operations and can be temporarily circumvented or avoided using an acceptable workaround. The problem causes users moderation confusion or irritation.

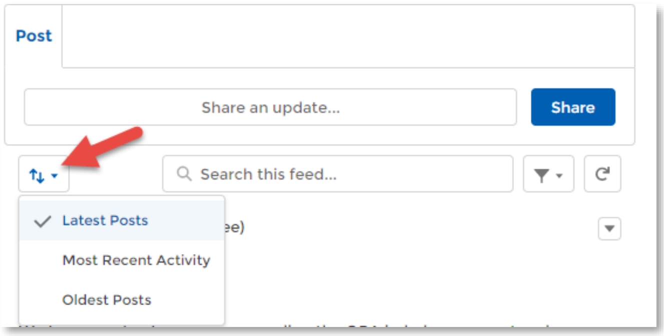
Example: Unexpected warning message appears on screen, but data saves successfully

Low – Non-critical problem, general questions about the product or the functionality does not match documented specifications. These could be misspellings or change or wording in existing documentation. There are minor inconsistencies that cause hesitation or small cosmetic issues like labels and fields that are not aligned properly.

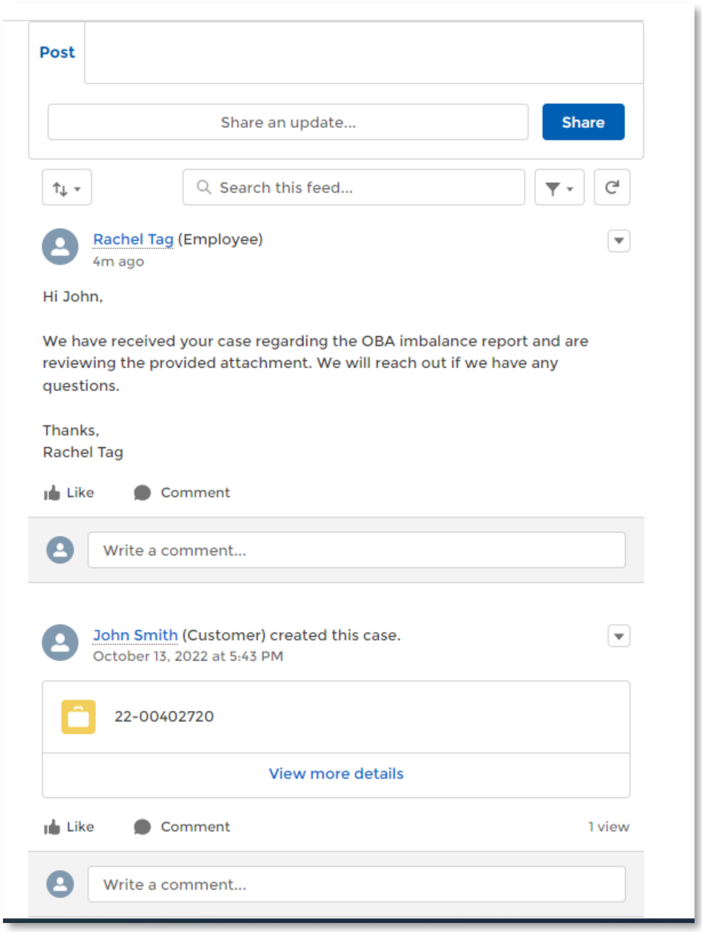
Communicating through Cases

Posting in Salesforce

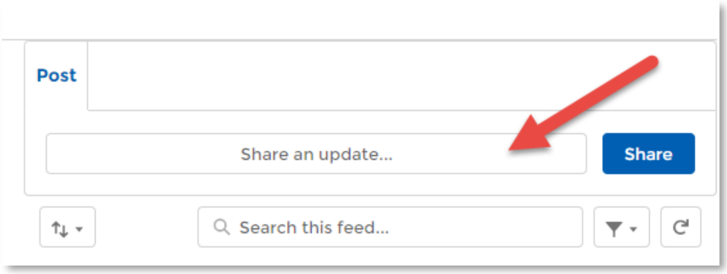
The Post section of the Case screen gives a timeline ordering of messages and updates to the case. You may change the sort order to have the most recent activity or latest posts on top.



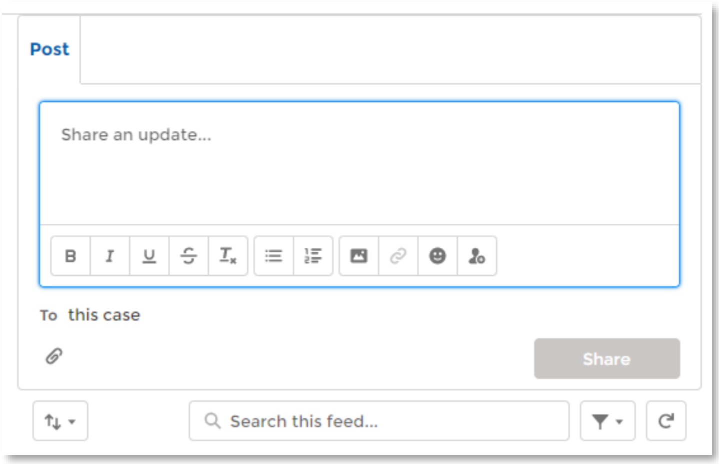
Please note if a comment is posted in direct reply to a specific post that comment will appear beneath the original post.



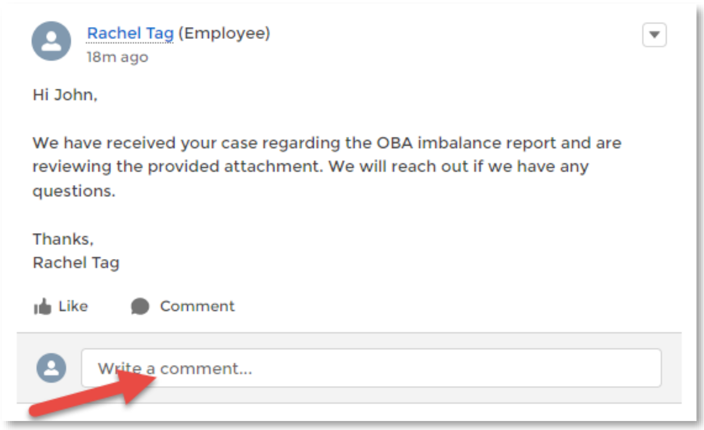
To make a new post, click on *Share an update* to start typing.

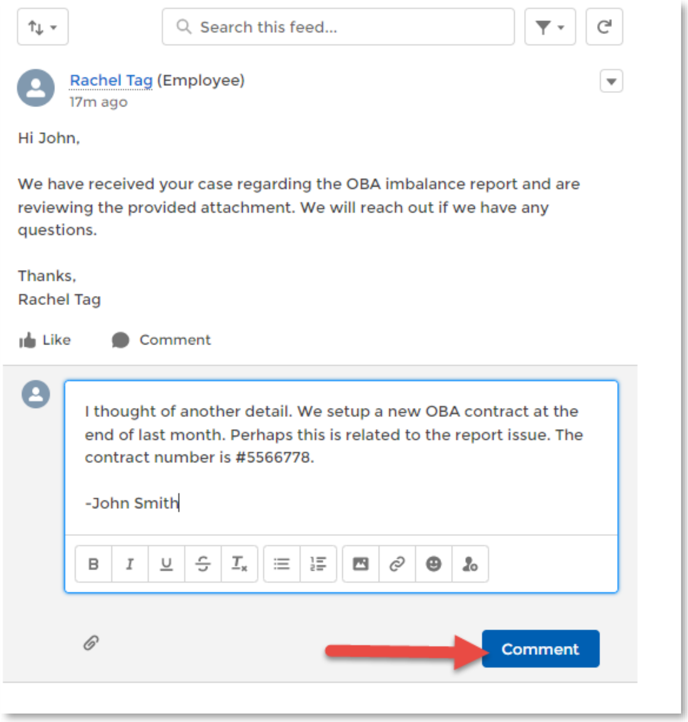


Now you can begin typing your message. You may also use the paperclip icon at the bottom left to attach pictures or documents. One you are finished, use the Share button to submit.



To comment directly on a specific post, click on Write a comment under the post.





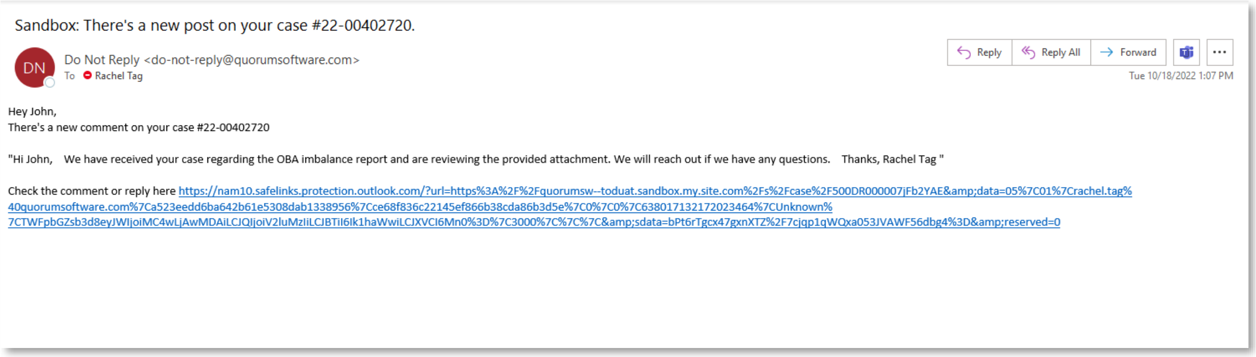
The best practice is to make new posts when asking for information or updates on a case rather than replying to an existing post.

Salesforce Email Communications

Case Comments

When a Quorum employee posts on a case, the customer contact on the case receives an email alerting them that a comment has been made.

Here is a sample email of a customer support representative replying to a customer through a post on the case.

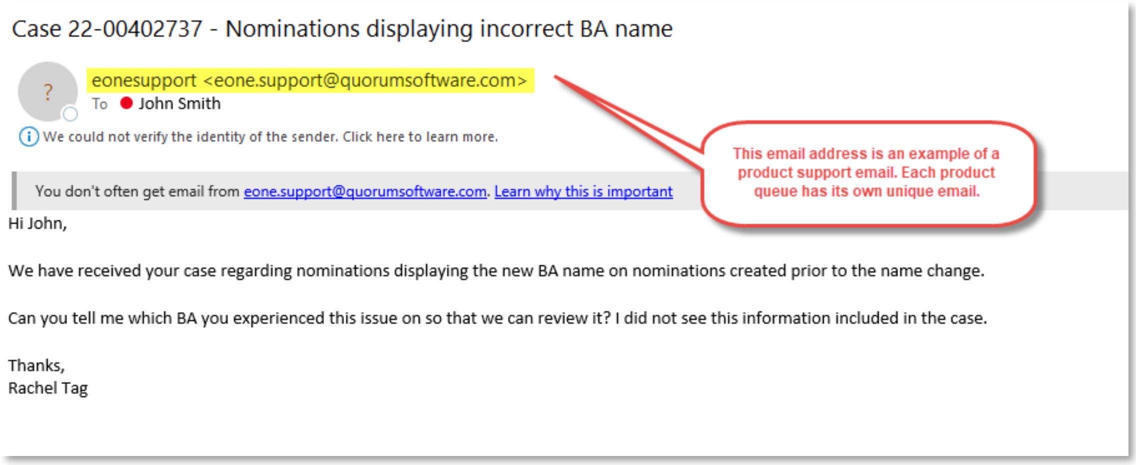


Do not reply to the email. Instead, click on the URL which will take the user to the Salesforce case to reply directly.

Communicating Via Case Emails

At times the Quorum support team may also send communication via an email generated through the Salesforce case. These emails will come from a @quorumsoftware.com email address which is associated to that product support team. Each product support queue has their own unique email address which is used by Salesforce.

Here is an example email sent from a case. Even though it says the case is from the generic eOne email address, if the user replies to this email, the support representative assigned to the case will receive a notification that a new message has been received. This ensures even if the support representative working a specific case change, the reply reaches the appropriate person.



When communicating with Quorum via an email chain associated to a case, there are a few rules to keep in mind

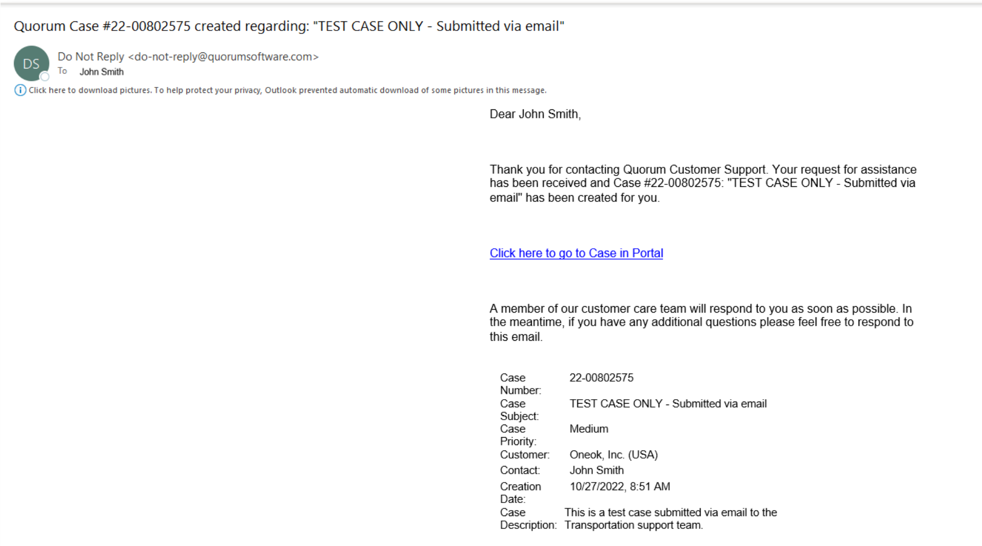
- The email address that originally sent the email from Salesforce must remain in the addresses receiving any further replies in the email chain. Removing it breaks the link with the case.
- Do not forward the email as this breaks the link to the case.
- Pictures may be included, but attachments are recommended to still be uploaded directly to the case, so they display under the Files tab in Salesforce.

Users may CC additional email addresses when replying to an email from Salesforce; and replies from those email addresses, so long as they also keep the above rules in mind, will also appear on the case and receive future replies from Quorum to that email chain.

Creating a Case Via Email

If users send a new email to the product support team's Salesforce email address, this will generate a new case that is sent to the team's queue. However, these cases will be created with minimal details (subject, body of the email as the details, case contact), as opposed to the Salesforce portal which allows users to choose whether a case is related to a project, is an issue or enhancement, and set a priority for the case (emails by default create cases as a medium priority).

Once you send an email to the specific product support team's Salesforce email address, you will receive a confirmation email from a do not reply email address with the case number. Creating a case via the portal will generate the same email.



Quorum Case #22-00802575 created regarding: "TEST CASE ONLY - Submitted via email"

DS Do Not Reply <do-not-reply@quorumsoftware.com>
To John Smith

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear John Smith,

Thank you for contacting Quorum Customer Support. Your request for assistance has been received and Case #22-00802575: "TEST CASE ONLY - Submitted via email" has been created for you.

Click here to go to Case in Portal

A member of our customer care team will respond to you as soon as possible. In the meantime, if you have any additional questions please feel free to respond to this email.

Case Number:	22-00802575
Case Subject:	TEST CASE ONLY - Submitted via email
Case Priority:	Medium
Customer:	Oneok, Inc. (USA)
Contact:	John Smith
Creation Date:	10/27/2022, 8:51 AM
Case Description:	This is a test case submitted via email to the Transportation support team.

Once a support team member is assigned to your case, they will send an email via Salesforce that starts an email chain you may reply to which automatically updates the case in Salesforce. Note: this email is tied to a specific case. If you wish to start a new request, you should create a brand-new email which will generate a new case.

RE: TEST CASE ONLY - Submitted via email

T transportation.support@quorumsoftware.com
To John Smith

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi John,

We have received your case. Can you provide some additional information regarding your issue? Any screen shots or steps to reproduce would be appreciated.

Thanks,

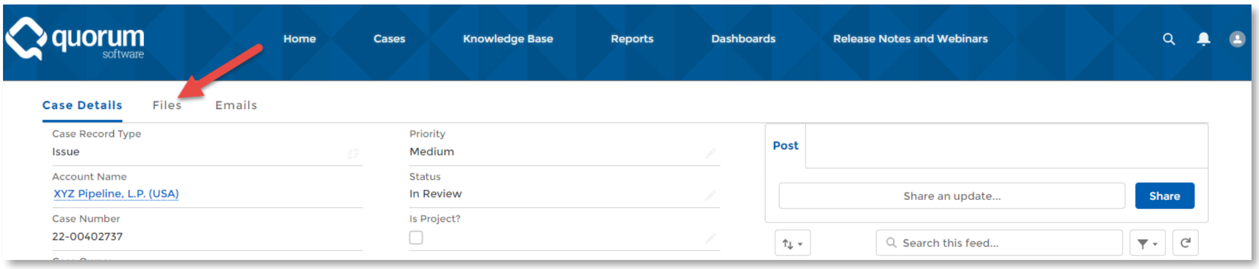
Rachel Tag

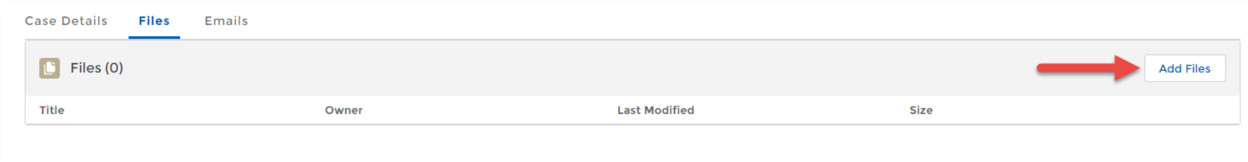
-------------- Original Message --------------
From: John Smith [john.smith@xyzpipeline.com]
Sent: 10/27/2022, 9:51 AM
To: transportation.support@quorumsoftware.com
Subject: TEST CASE ONLY - Submitted via email

This is a test case submitted via email to the Transportation support team.

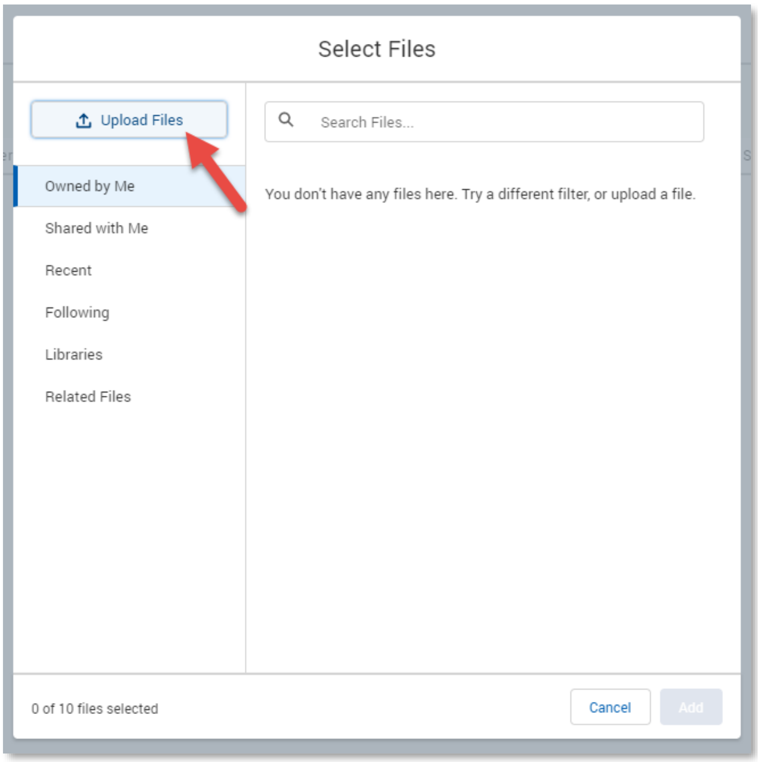
Viewing and Adding Attachments

When viewing a case, users may attach additional files by going to the File tab.

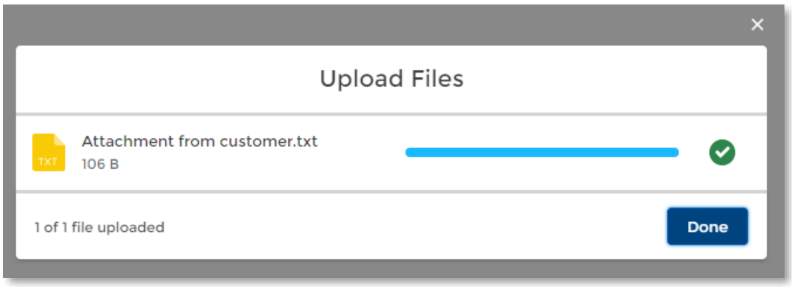




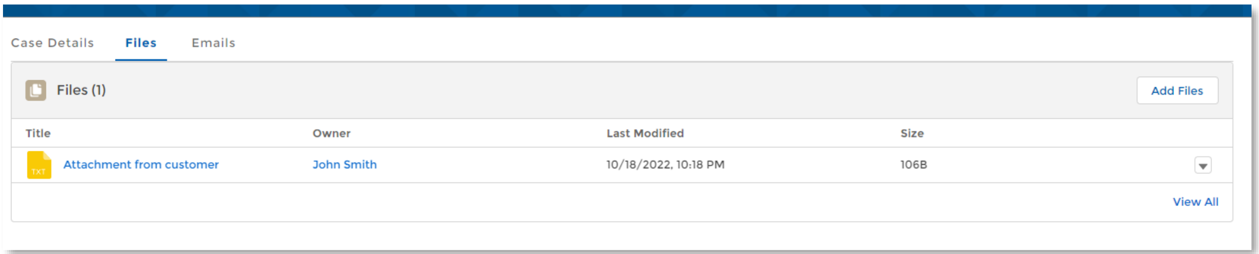
Clicking on Add Files brings up a popup window to upload new files.



Once the file is finished uploading, click Done to return to the File tab.



The file is now viewable by both the user and Quorum. Attachments added by Quorum will also appear in this list.



Additional Topics

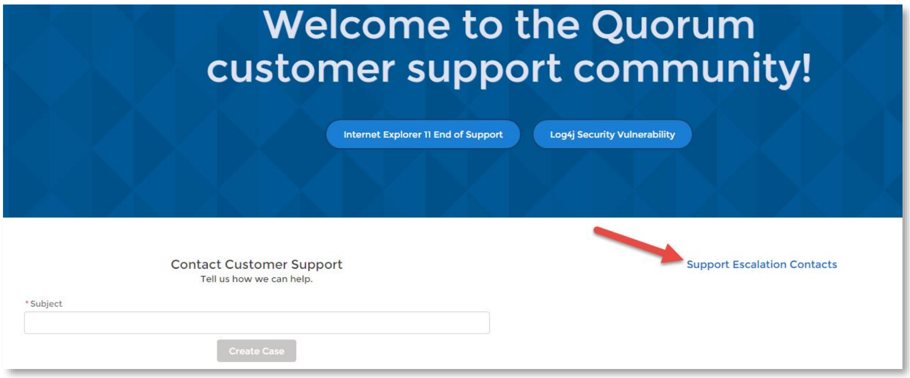
How to Escalate a Case

If there are any concerns that come up for a case, Quorum has implemented an escalation process to follow. Each product support team has its own escalation path.

Escalation Path

Case Owner → Support Team Manager → Practice Area Lead

The latest copy of the escalation path contact information can be found on the Salesforce homepage after logging into the site.



Escalation Process

Add Case Comment

- Add a comment to your case requesting that the case be escalated; include the reason an escalation is needed

Email

- Email the Team Manager for that Support team
- Type “ESCALATION - <case number here>” in the subject line and mark the email as high priority
- Include the reason an escalation is needed
- Follow escalation path if necessary

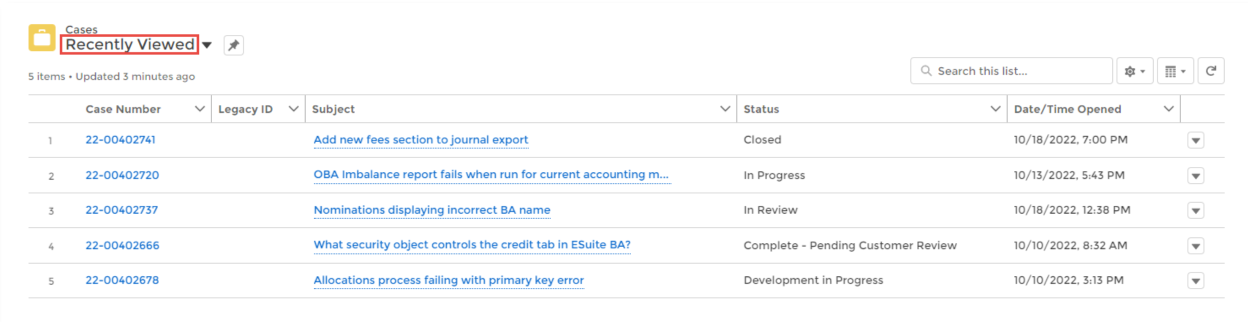
Call

- Call the Team Manager for that Support team
- No answer – leave a voicemail that includes the case number, the reason an escalation is needed, and your contact information
- Follow escalation path if necessary

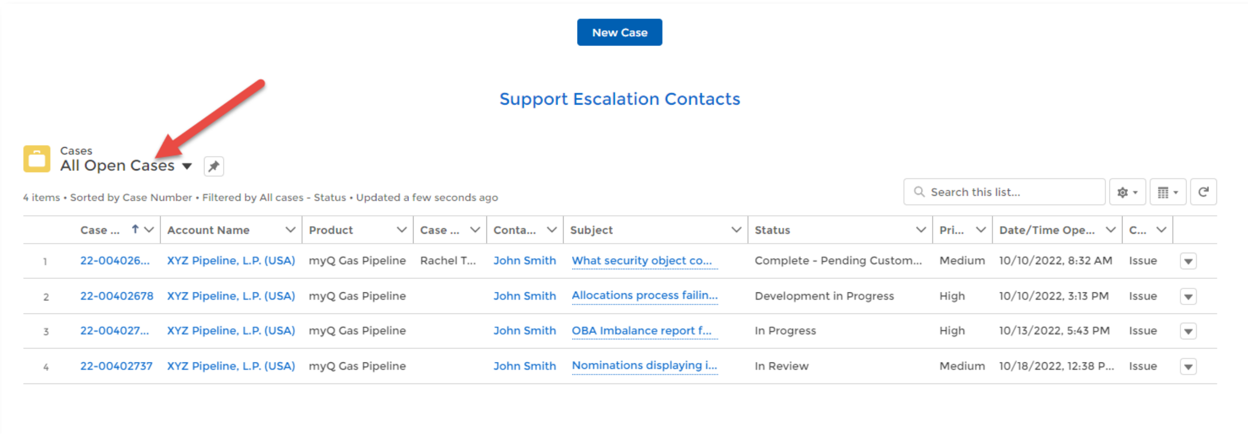
Case List Views

From the menu at the top of the screen, click on Cases.

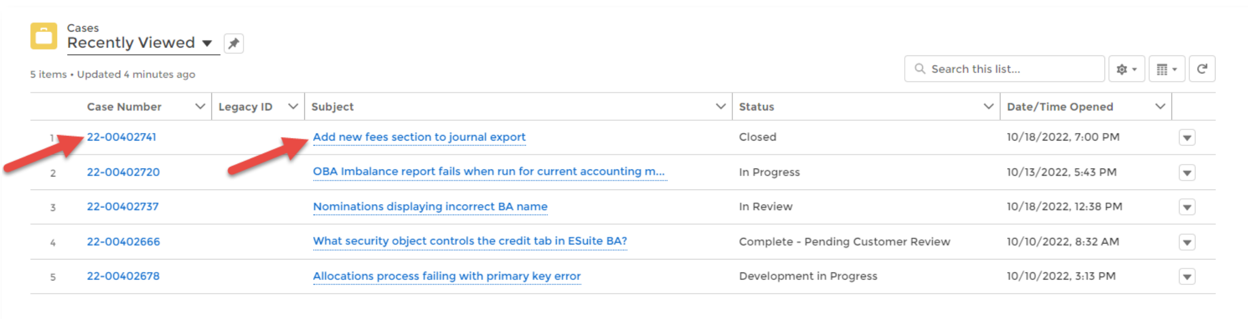
On the default view, cases the user has recently viewed will appear.



Clicking on the droplist allows the user to pick from several different views.



To open a case from the Cases listing, click on either the Case Number or the Subject.



Reporting

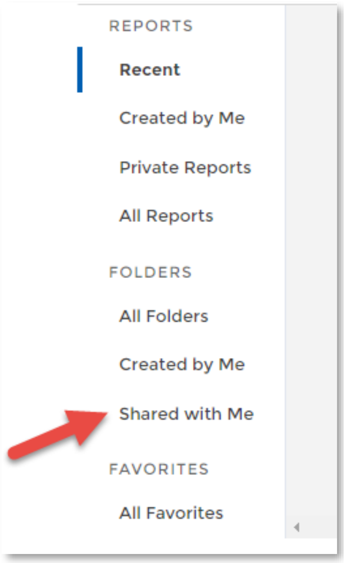
The reporting section allows users to create their own reports and view reports published by Quorum.

Please note that when looking at the reports listed, users will see all customer reports created and published – however if a user selects a report that belongs to another customer, they will not see cases for other customers. Cases are restricted based on the account(s) an individual's user ID is associated to in Salesforce which is controlled by Quorum.

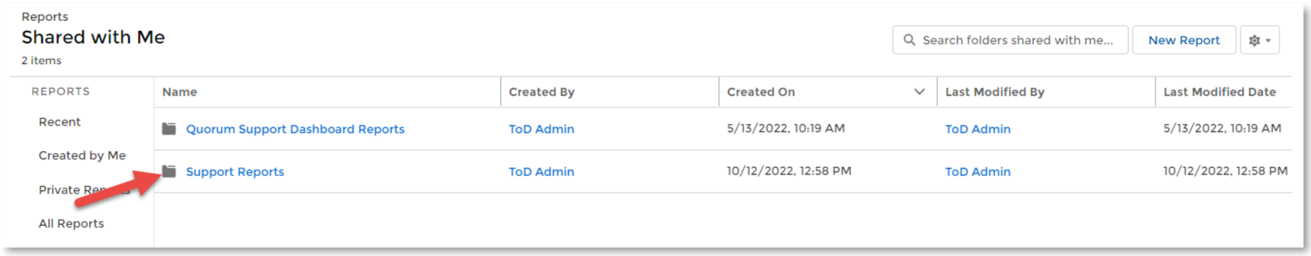
How to Run Reports

Step 1:
From the menu at the top of the screen, click on Reports in the upper right.

Step 2:
On the left side of the Report screen, click on Shared with Me.



Step 3:
Next, click on the “Support Reports” folder.

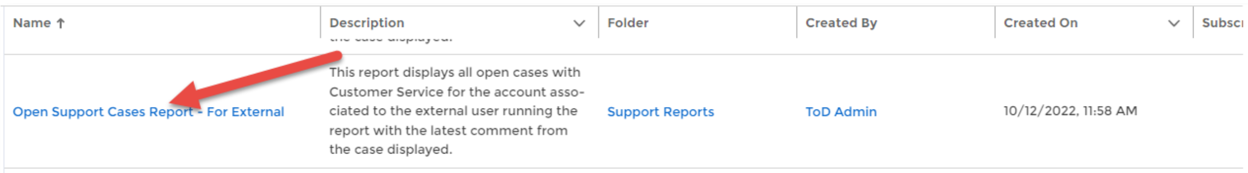


Step 4:
Click on “Name” to sort by name and scroll down to search for a report

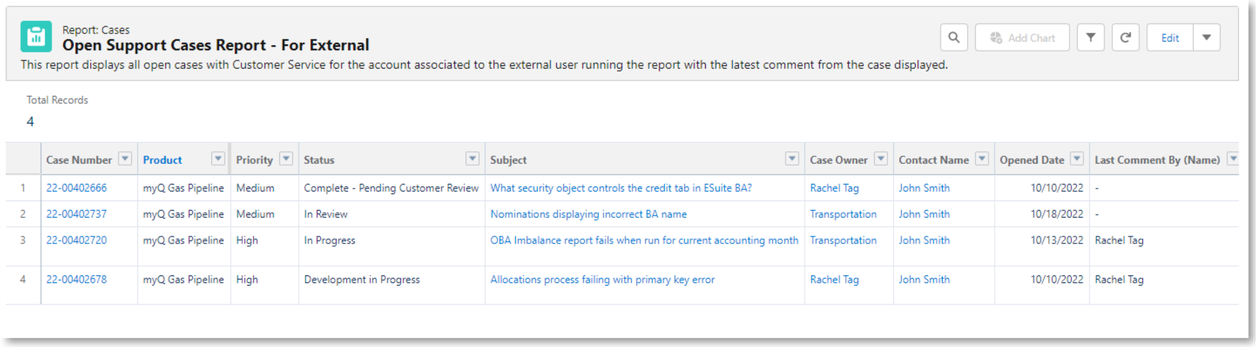
Please note that when looking at the reports listed, you will see all customer reports created and published – however if you select a report that belongs to another customer, the report will be blank when you select it, because it is not your report configured to your account. Any visible data will be your own with that report’s formatting and filtering applied.

Step 5:
Quorum has also created a standard report that allows users to review all of their open support cases, including cases submitted by other users for their company.

Scroll down to the report **“Open Support Cases Report – For External”** and click on its name.



This report displays all open cases—restricted based on the accounts your user ID is associated to in Salesforce. The Last Comment column in the report can be used to see the latest post on the case by either the customer or Quorum.



Report: Cases

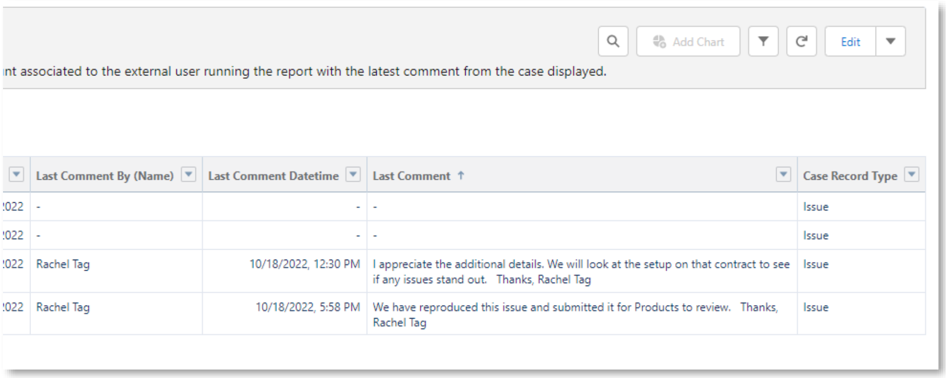
Open Support Cases Report - For External

This report displays all open cases with Customer Service for the account associated to the external user running the report with the latest comment from the case displayed.

Total Records

4

	Case Number	Product	Priority	Status	Subject	Case Owner	Contact Name	Opened Date	Last Comment By (Name)
1	22-00402666	myQ Gas Pipeline	Medium	Complete - Pending Customer Review	What security object controls the credit tab in ESuite BA?	Rachel Tag	John Smith	10/10/2022	-
2	22-00402737	myQ Gas Pipeline	Medium	In Review	Nominations displaying incorrect BA name	Transportation	John Smith	10/18/2022	-
3	22-00402720	myQ Gas Pipeline	High	In Progress	OBA Imbalance report fails when run for current accounting month	Transportation	John Smith	10/13/2022	Rachel Tag
4	22-00402678	myQ Gas Pipeline	High	Development in Progress	Allocations process failing with primary key error	Rachel Tag	John Smith	10/10/2022	Rachel Tag



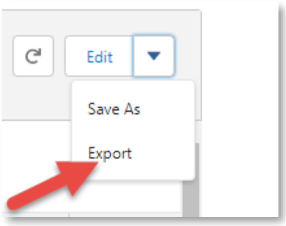
nt associated to the external user running the report with the latest comment from the case displayed.

	Last Comment By (Name)	Last Comment Datetime	Last Comment	Case Record Type
:022	-	-	-	Issue
:022	-	-	-	Issue
:022	Rachel Tag	10/18/2022, 12:30 PM	I appreciate the additional details. We will look at the setup on that contract to see if any issues stand out. Thanks, Rachel Tag	Issue
:022	Rachel Tag	10/18/2022, 5:58 PM	We have reproduced this issue and submitted it for Products to review. Thanks, Rachel Tag	Issue

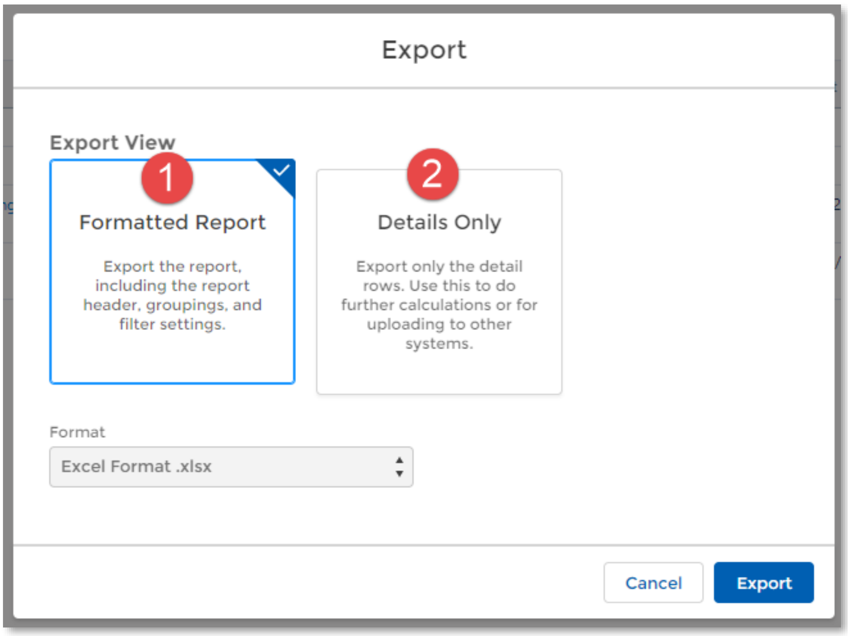
Step 6:

When viewing a report, you may also export it to Excel.

At the top right of the report, there is an arrow that gives a drop list menu. Select Export.



Reports can either be exported with full formatting (1) or only the raw data (2). This will allow the user to send complex reports with groups and sorting from Salesforce or build out pivots and filter down records for further analysis.



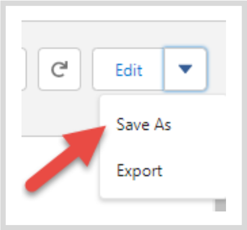
How to Create New Reports Using Existing Reports

While Quorum has published basic reports, users may prefer to build a custom report with additional columns or filters to better analyze their Salesforce case data.

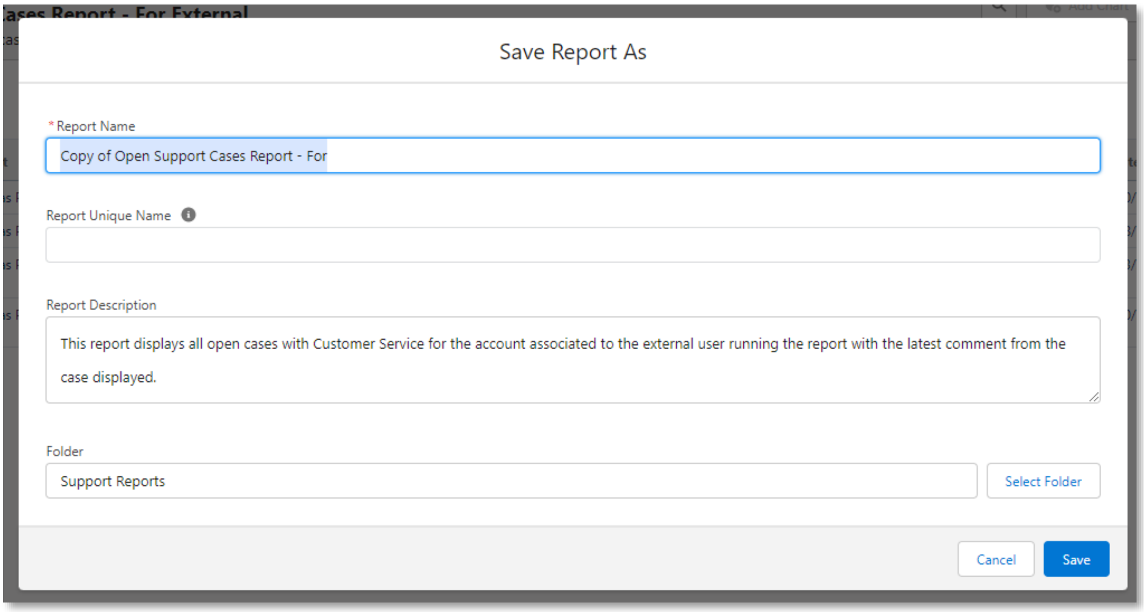
A quick way to create a new report is from copying an existing one.

Step 1:

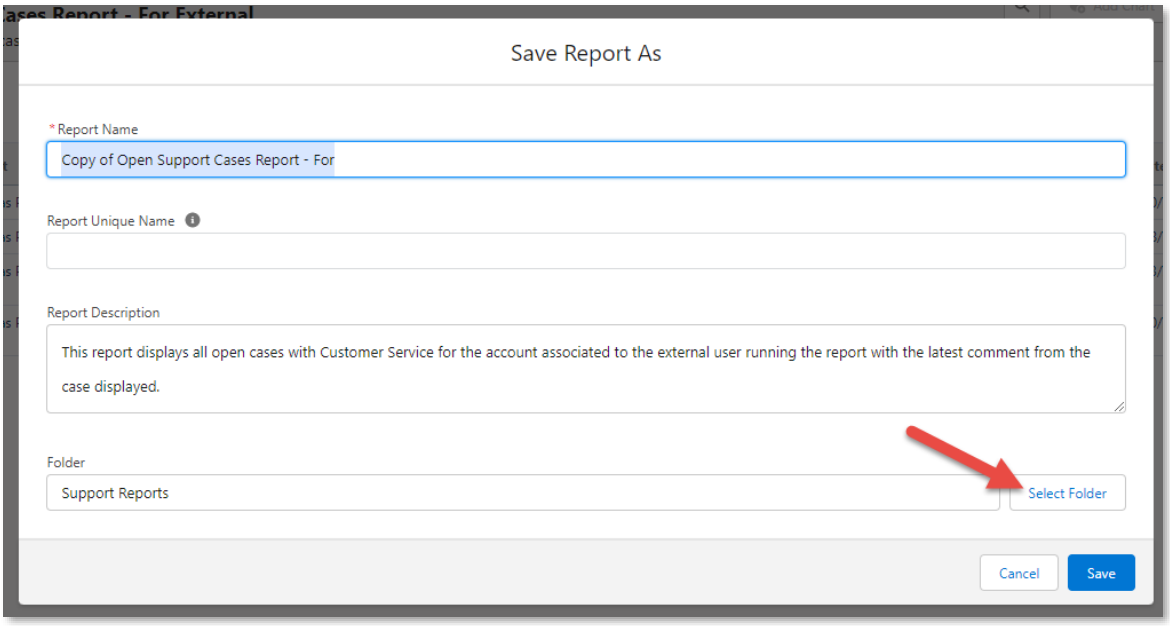
When viewing a report you want to copy, click on the arrow next to the Edit button and then click "Save As".



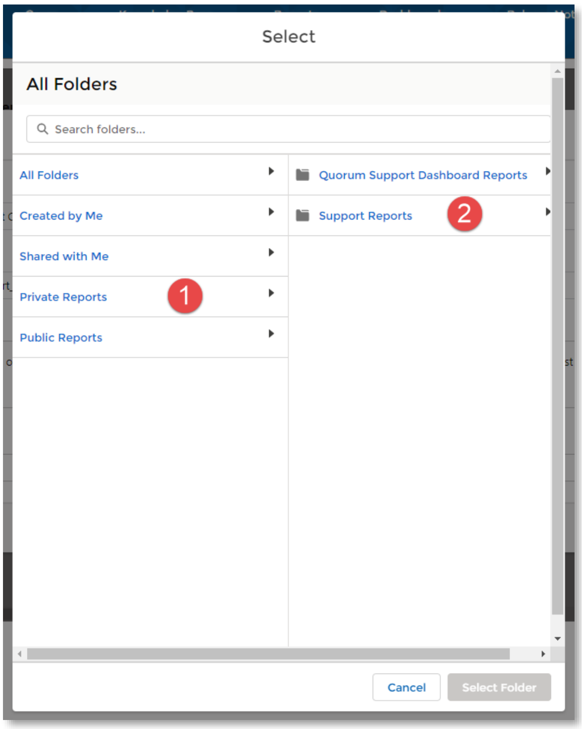
This will bring up a popup window.



Step 2:
Click on the “Select Folder” button to choose where to save the report.



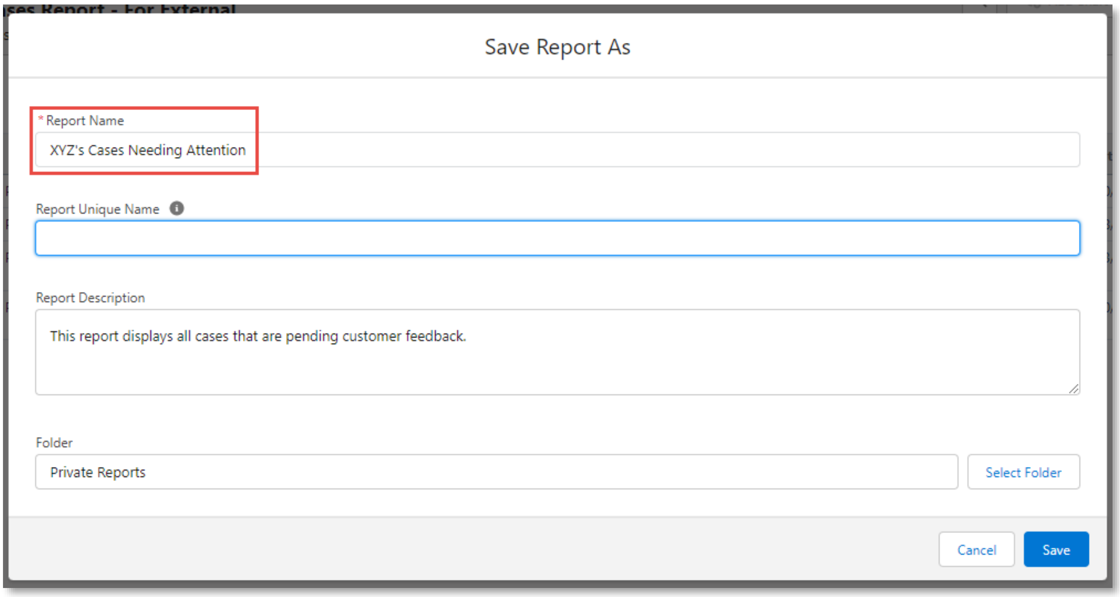
If you do not want any other users have this report available, you may select “Private Reports”. Otherwise, reports should be saved in the “Support Reports” folder under “All Folders”.

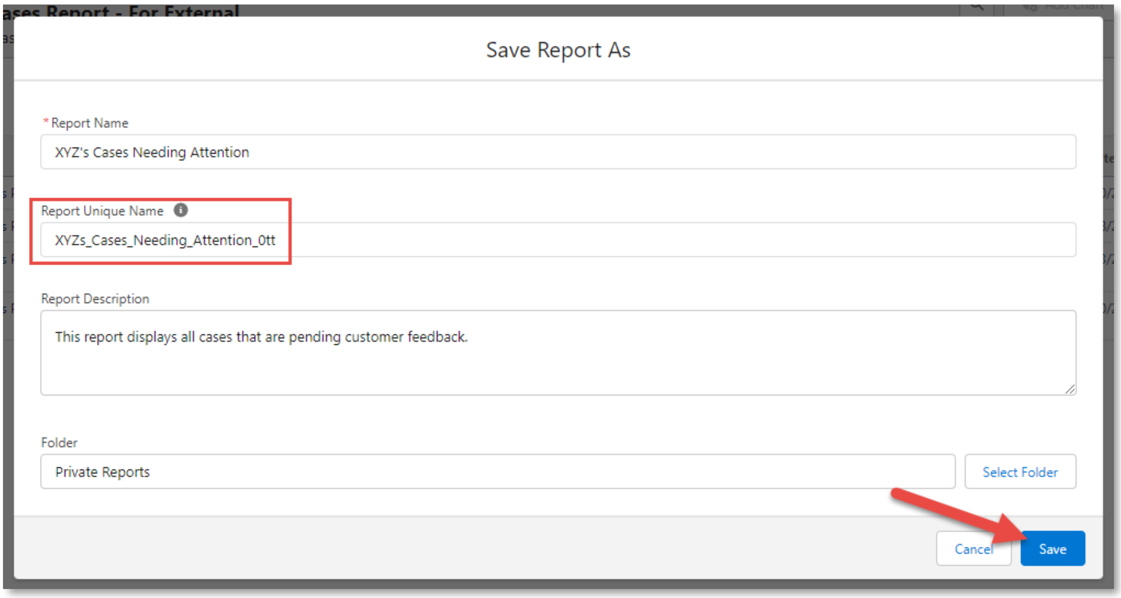


Step 3:

Clear out the “Report Unique Name” field and leave it blank. This field will auto populate after the “Report Name” field is updated.

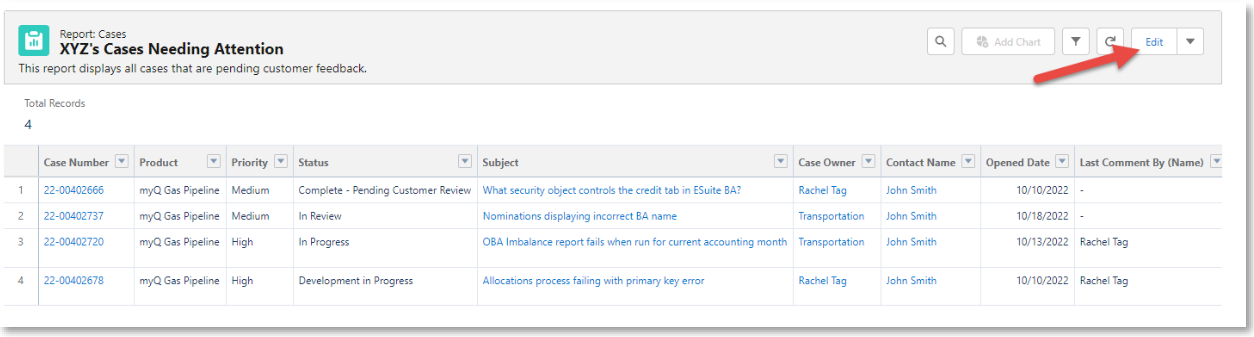
Rename the report to be a name that will be identifiable in the shared list of reports. Generally, a report name including your company’s name is recommended for reports that will not be saved in the Private folder.



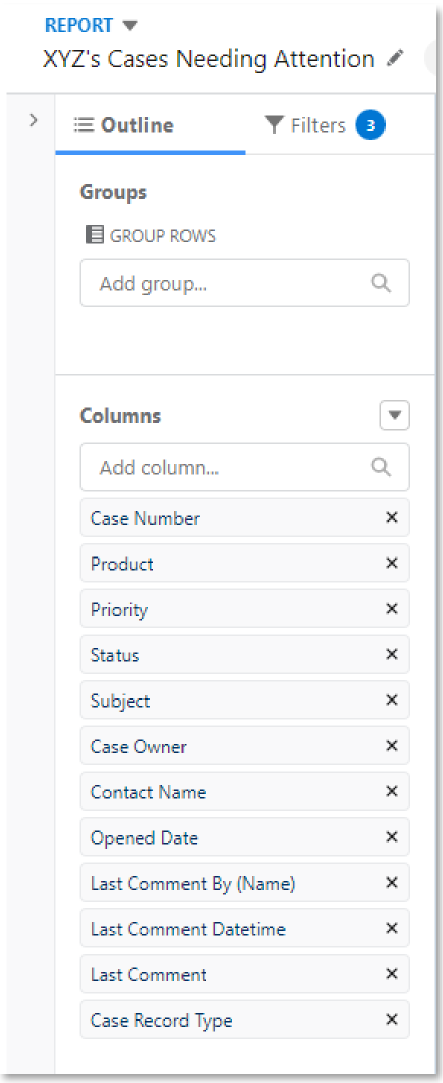


The copied report will display after clicking the Save button.

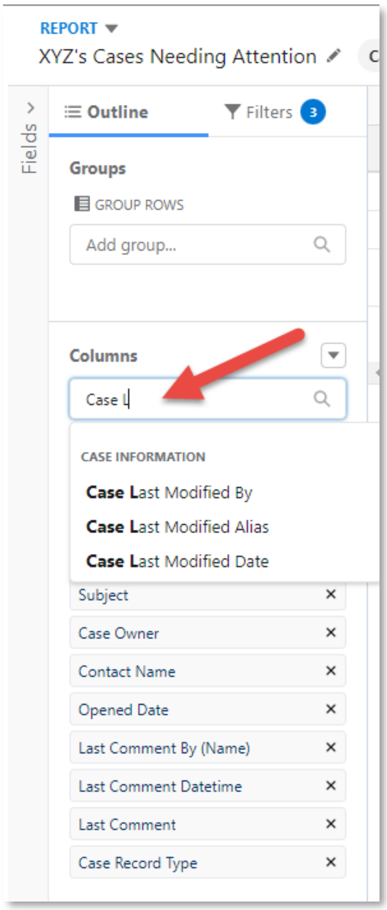
Step 4:
When viewing the report, use the Edit button to open the Report Builder screen.



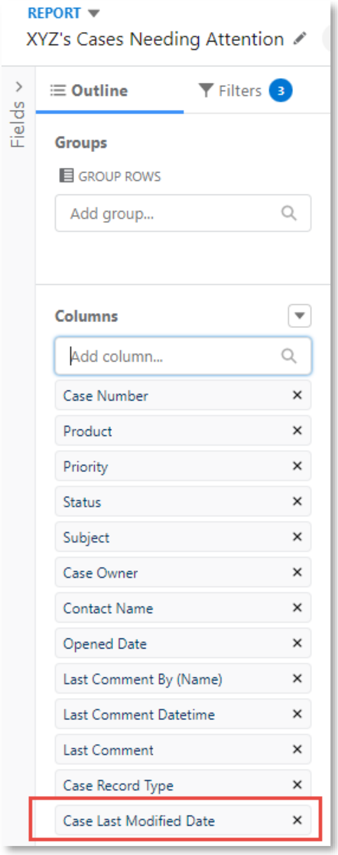
Step 5:
On the Report Builder screen, the Outline tab will start with all the fields from the report that was copied. Click on the X by any column to remove it.



To add an additional column, start typing in the Add Column field and click on the desired result.

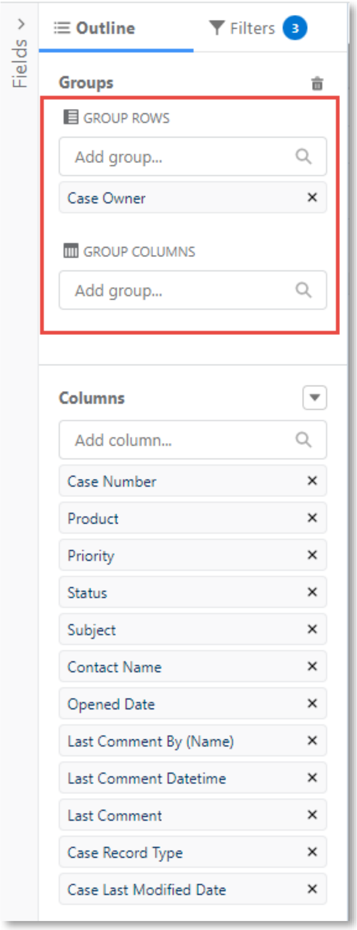


The columns can be reordered by clicking on an entry and dragging and dropping it in a new location.

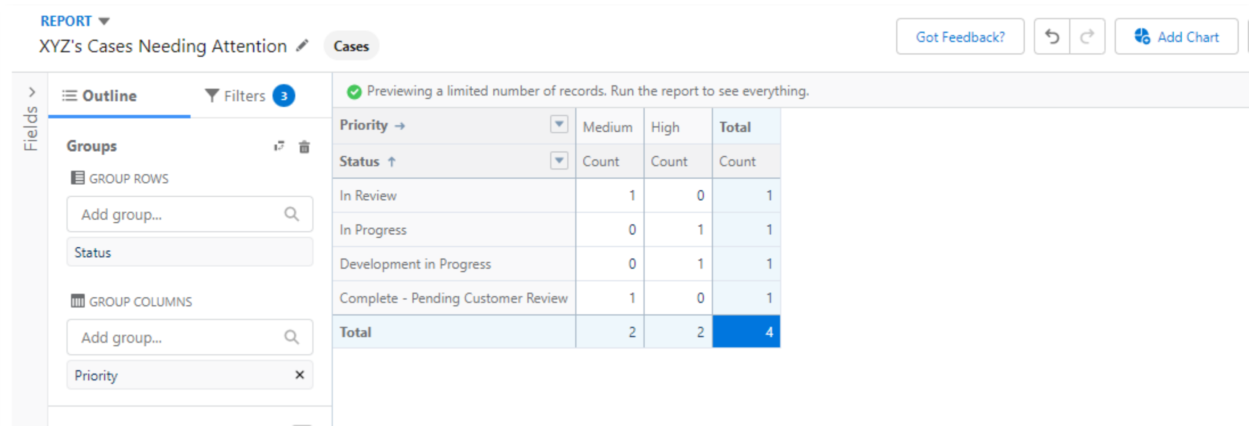


The Add Group field can be used in the same way to create grouping in the report. Once a single group has been added, the user will have the option to also add a column grouping to create a chart. Fields may also be moved from the Columns section to the Groups section.

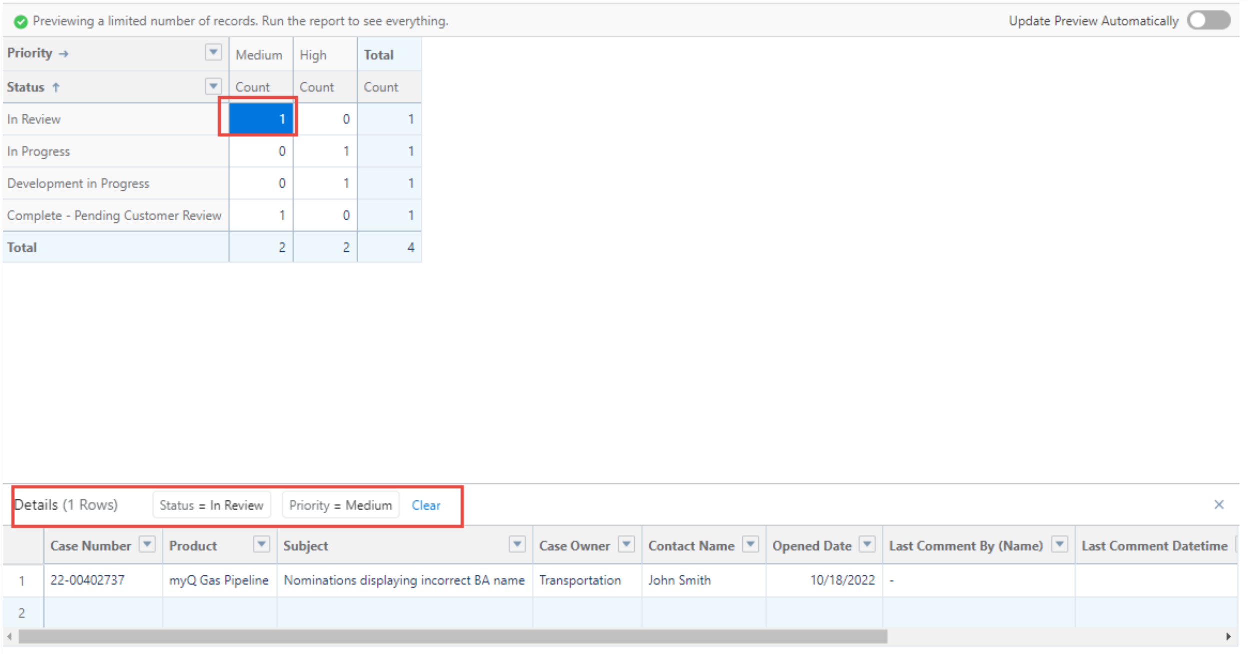
Note that only fields not already in the report as a column can be selected under “Add Group”.



When there is both a group by row and a group by column, Salesforce will display a table for the user. By default, the details will display for all cases below the table.



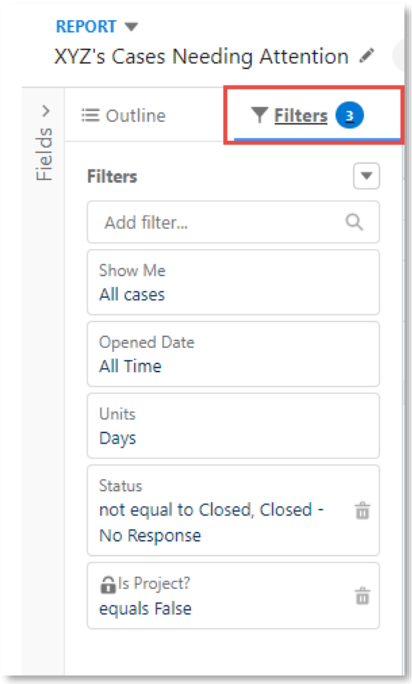
The user may click on any box within the table to narrow down the details results to only that information. See in the image below that it shows the details will only display two records, which matches the box selected in the report table.



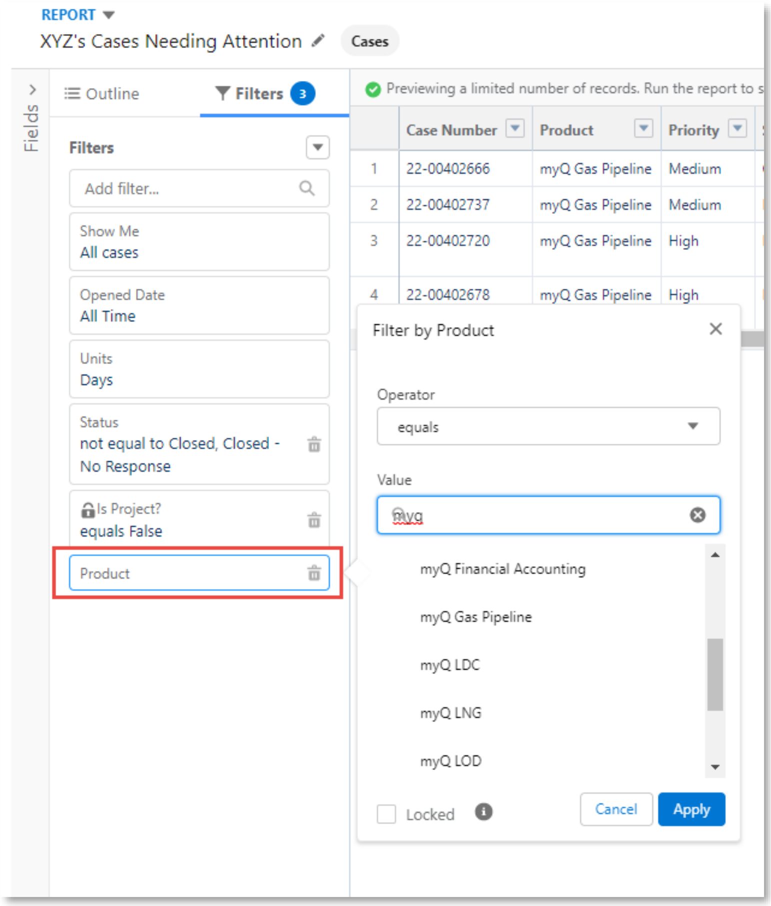
Step 5:

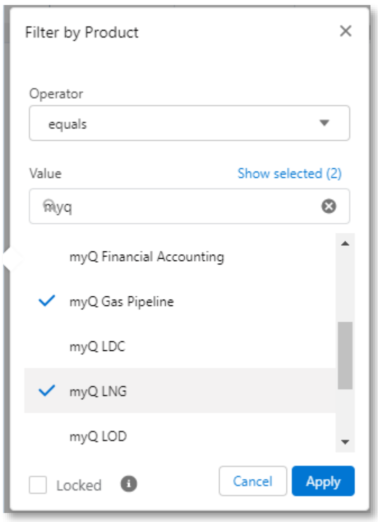
The Filters tab works similarly to the Outline tab.

First the user would type in the “Add filter” box to select a field.

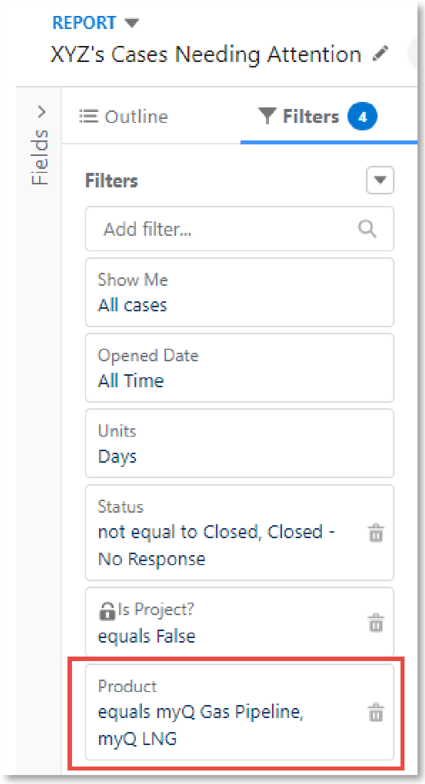


Once a filter field is added, it prompts the user to choose the filter restrictions. Using the Equals operator does allow the user to select multiple values.

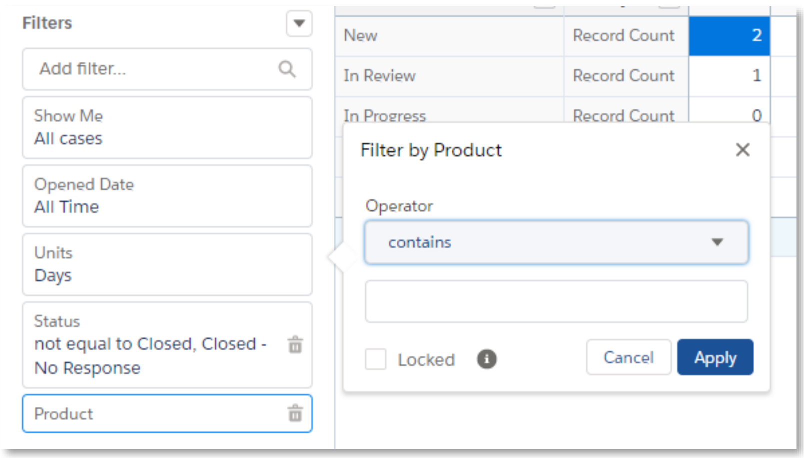


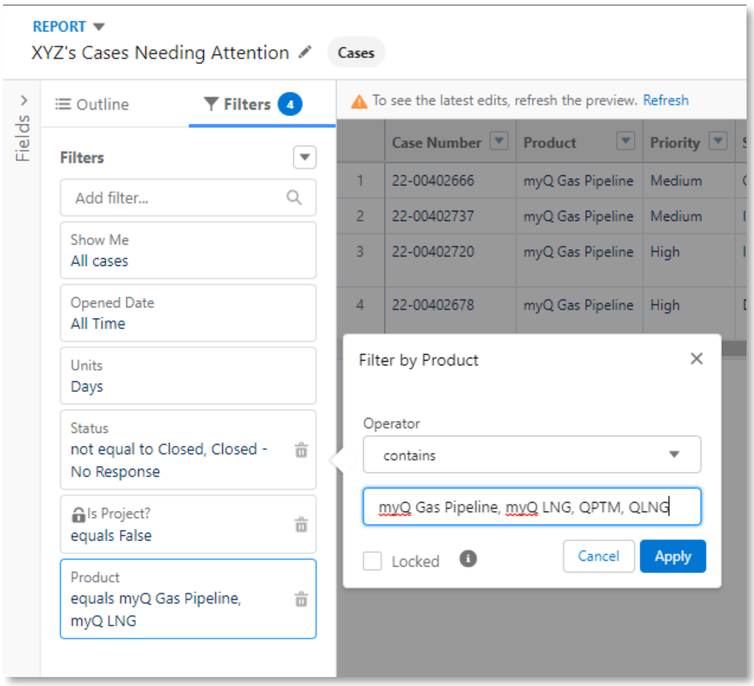


After clicking Apply, the user will see the filter added with its criteria listed in the left panel.

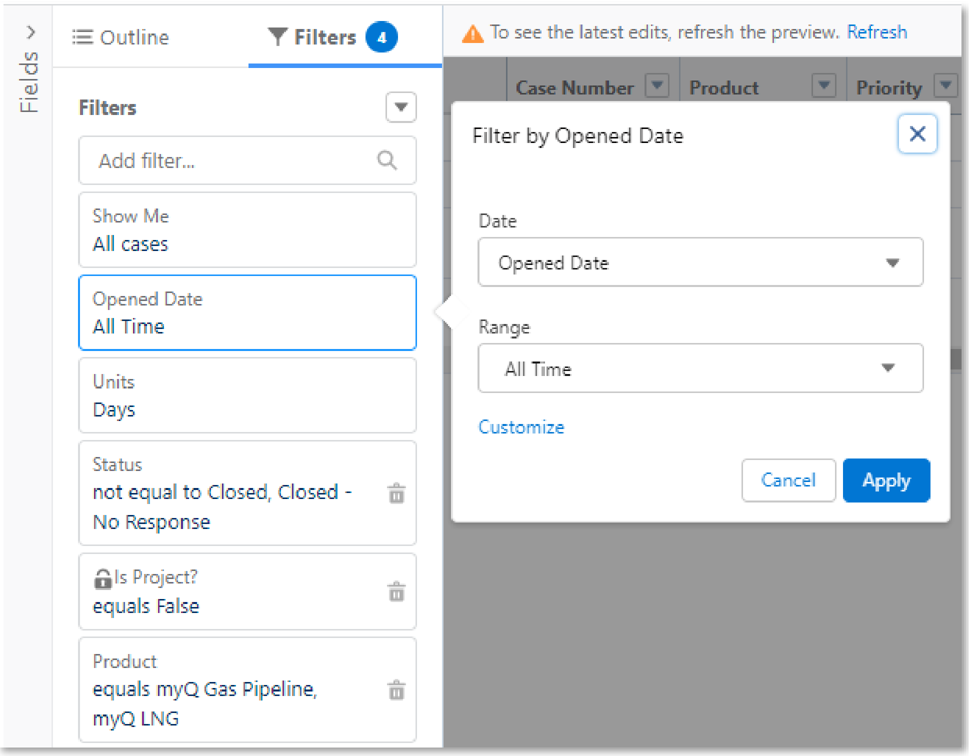


Other filter operators may require the user to type the criteria to use.



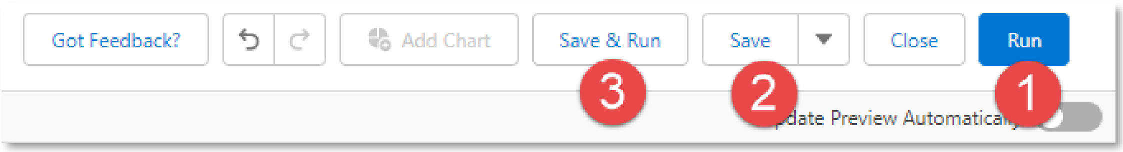


To edit any existing filters, click into the field and it will pop up options to select filter criteria.



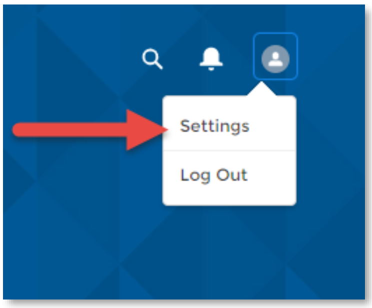
Step 6:
After finishing adding report columns and filters, the next step is to either run the report to see it with all records or to save it.

1. This option will run the report without saving any changes. If this option is used, make sure to click Edit when viewing the report to come back to the Report Builder screen to save it.
2. This option saves the report and keeps the Report Builder screen open to continue making changes.
3. This option saves the report and immediately runs it to view.

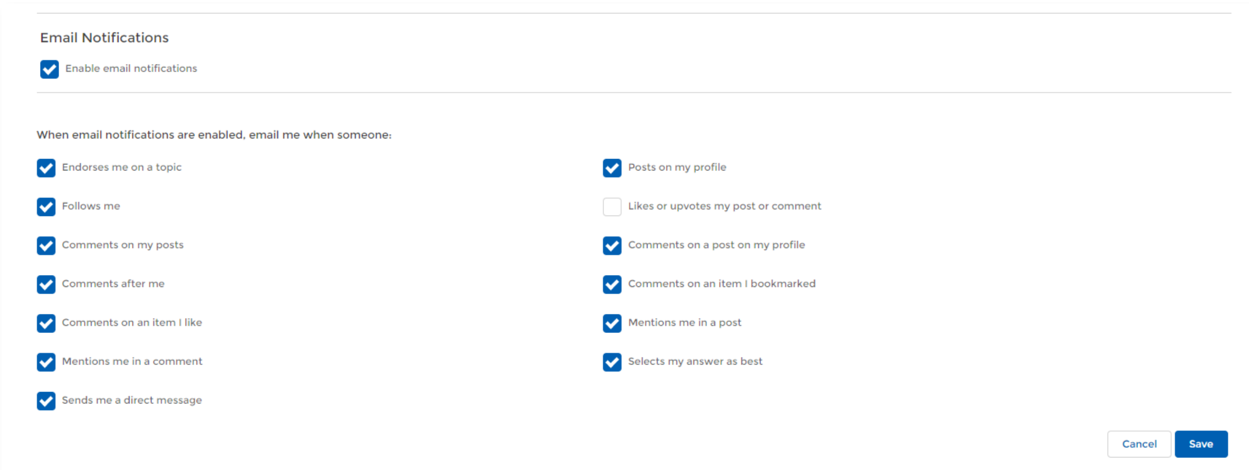


Email Notifications

Salesforce allows users to control which types of actions generate email notifications. If you would like to update these settings, click on the silhouette of a person at the top right of the page. Click on My Settings from the menu drop down.

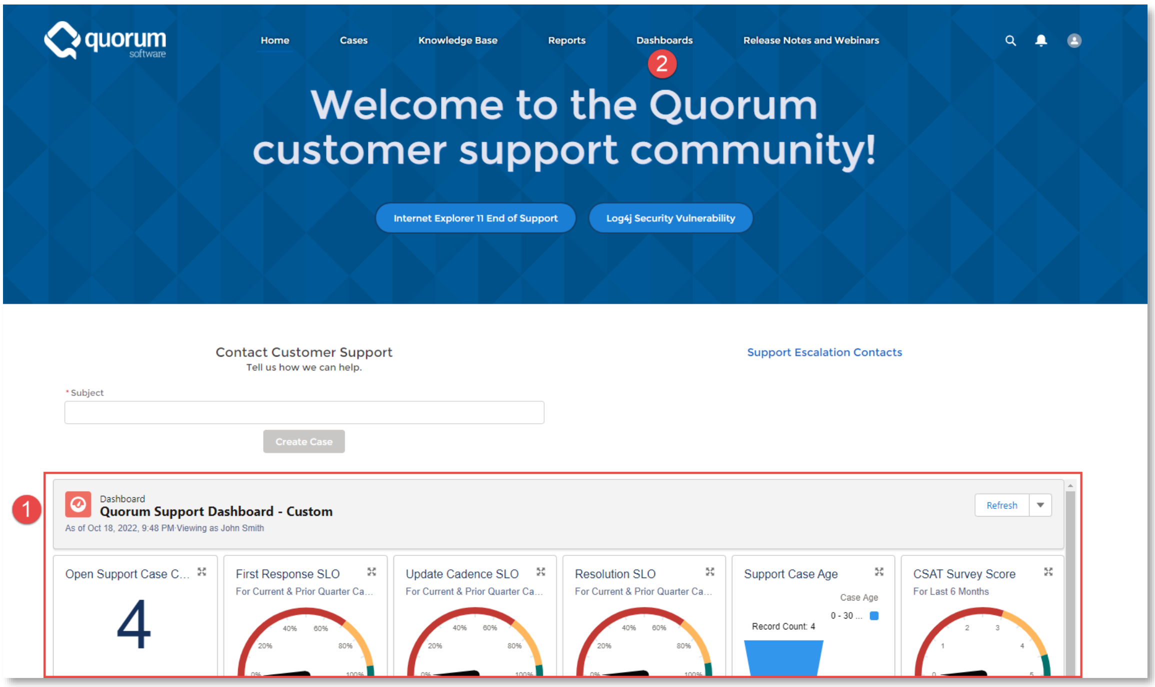


Go to the Email Notification section to select which actions generate an email notification.

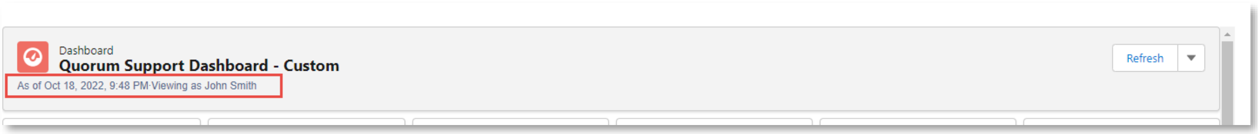


Quorum Support Dashboard

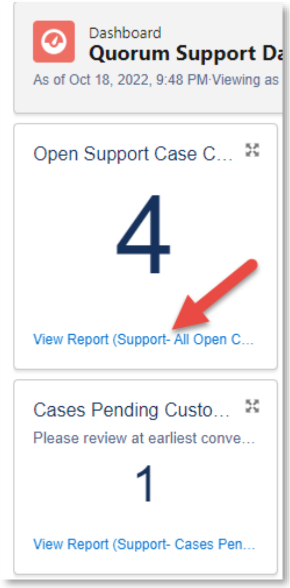
The Quorum Support Dashboard available via the home screen or through the Dashboard menu displays the support metrics for cases visible to the user based on their account user permissions. Users who can only see cases they submitted will only see metrics applicable to those cases.



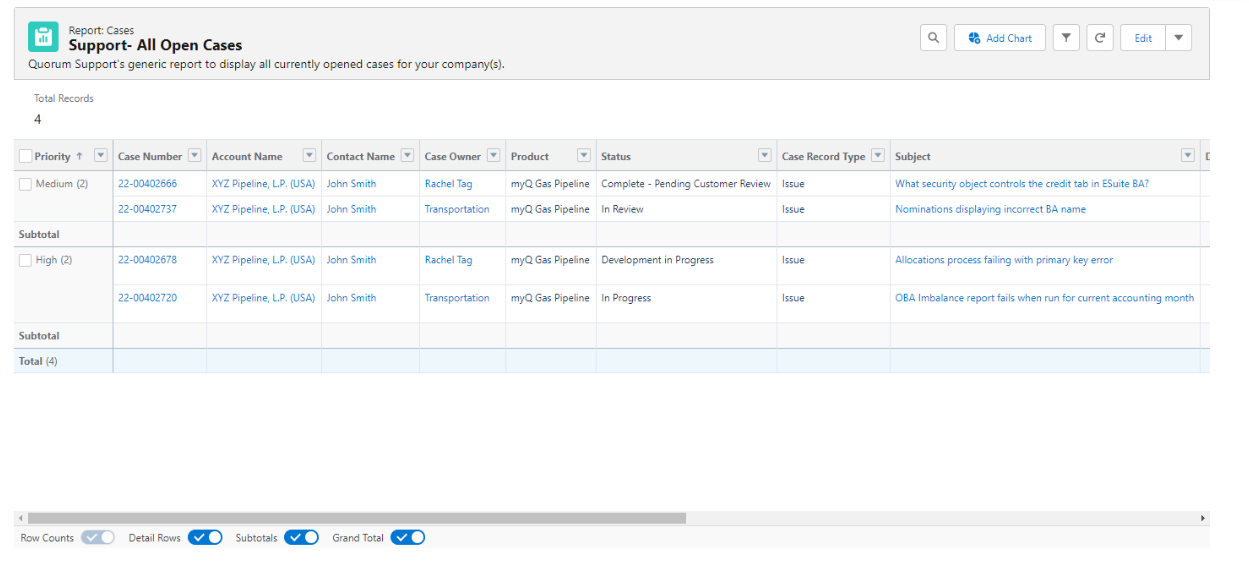
If the as of date for the dashboard does not reflect the current time, the user may click the Refresh button to bring back the latest results.



To see the results behind any of the dashboard widgets, click the View Report link at the bottom of the widget.



This takes the user to the report behind the widget where the specific cases and the relevant information is displayed. Use the back button in the browser to return to the dashboard from here.



Priority	Case Number	Account Name	Contact Name	Case Owner	Product	Status	Case Record Type	Subject
Medium (2)	22-00402666	XYZ Pipeline, L.P. (USA)	John Smith	Rachel Tag	myQ Gas Pipeline	Complete - Pending Customer Review	Issue	What security object controls the credit tab in ESuite BA?
	22-00402737	XYZ Pipeline, L.P. (USA)	John Smith	Transportation	myQ Gas Pipeline	In Review	Issue	Nominations displaying incorrect BA name
Subtotal								
High (2)	22-00402678	XYZ Pipeline, L.P. (USA)	John Smith	Rachel Tag	myQ Gas Pipeline	Development in Progress	Issue	Allocations process failing with primary key error
	22-00402720	XYZ Pipeline, L.P. (USA)	John Smith	Transportation	myQ Gas Pipeline	In Progress	Issue	OBA Imbalance report fails when run for current accounting month
Subtotal								
Total (4)								

About Quorum

Quorum Software is the largest fully-dedicated energy industry software provider in the world, serving more than 1,800 customers across the entire energy value chain in 55 countries. Quorum's solutions power growth and profitability for energy businesses by connecting people, workflows, and systems with decision-ready data. Twenty years ago, we delivered the industry's first software for gas plant accountants, and today our solutions streamline business operations with industry forward data standards and integrations. The global energy industry trusts Quorum's experts and applications to successfully navigate the energy transition while delivering value today and into the future. For more information, visit quorumsoftware.com.