






BYALLACCOUNTS

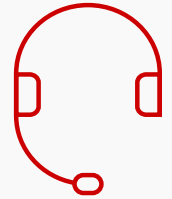
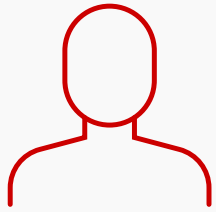
# ByAllAccounts Support Case Process

	Step	Description
	<b>Initial Contact with Your Level One Support</b>	Initial issue assessment and logging by your primary support representative.
	<b>Escalation to ByAllAccounts Support for Review</b>	Escalation for a more in-depth review by ByAllAccounts' Support Team to determine further action.
	Triage*	Critical assessment by a specialized team to prioritize the case based on complexity and urgency, either leading to resolution or escalation to Engineering.
	Engineering Analysis*	Cases with unique complexities are assigned to the appropriate Engineering group for expert handling and resolution. Engineers may seek additional information or pose follow-up questions to ensure a comprehensive understanding, requiring cooperative response for expedited resolution.
	<b>Resolution</b>	Regardless of the resolution pathway, upon your approval of the fix, support finalizes the case by issuing a detailed resolution email, ensuring you are informed, and that the resolution is clear and actionable.

This presentation will walk you through how a case flows through the ByAllAccounts' Technical Support and Engineering workflow and how you play an instrumental role in the process.

Thank you for familiarizing yourself with the life cycle of a case.

# Potential Resolution #1: Support Resolves the Issue



**1**

You report an issue to your Level One support representative, who will then escalate aggregation-related issues to the ByAllAccounts Technical Support team.

**2**

A ByAllAccounts Support representative logs the issue and provides you with a case number.

**The more details you include about your issue, the more efficient the research process will be for the Support representative.**

**3**

The Support team determines if the issue can be resolved by adjusting an account's setup in AccountView or settings in CI.

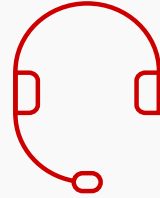
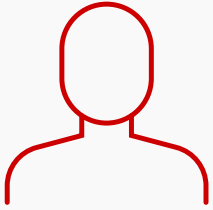
**4**

The Support team generates a resolution email containing next steps, if needed, to resolve the reported issue.

**5**

You read the resolution information in the email and implement any instructions it may contain. If the problem persists, please contact Support for further assistance.

# Potential Resolution #2: Triage Team Investigates the Issue



**1**

You report an issue to your Level One support representative, who will then escalate aggregation-related issues to the ByAllAccounts Technical Support team.

**2**

A ByAllAccounts Support representative logs the issue and provides you with a case number.

**The more details you include about your issue, the more efficient the research process will be for the Support representative.**

**3**

The Support team determines if the issue can be resolved by adjusting an account's setup in AccountView or settings in CI.

**4**

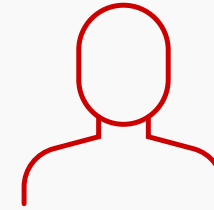
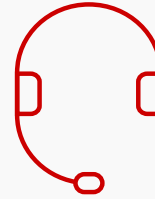
If the issue cannot be resolved by Support, it's sent to the Triage team.

**The Triage team resolves basic engineering issues, including data translations and custom CI exports.**

**5**

The Triage team further investigates your case and either resolves it or determines that it requires a specialized solution.

## Potential Resolution #2 - Continued: Triage Team Resolves the Issue



**6**

The Triage team can resolve the issue.

**The Triage team resolves basic engineering issues, including data translations and custom CI exports.**

**7**

A Support representative logs the issue and provides you with a case number.

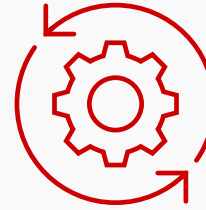
**8**

Support closes the case and generates a resolution email to you.

**9**

You read the resolution information in the email and implement any instructions it may contain. If the problem persists, please contact Support for further assistance.

## Potential Resolution #3: Engineering Team Resolves the Issue



**6**

If your case is specialized, Triage assigns it to the proper dedicated Engineering group.

**7**

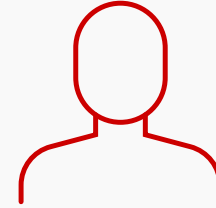
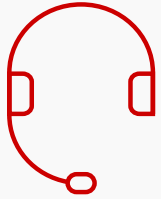
Once your case is assigned to a specific Engineering group, they evaluate it to determine its scope.

**8**

An engineer researches the cause of the problem, identifies the most efficient fix, and submits changes for technical review.

**If our engineers require additional information or have any follow-up questions, we may reach out to you for clarification. Your cooperation in providing any requested details will greatly assist us in the resolution process.**

# Potential Resolution #3 – Continued: Engineering Team Resolves the Issue



**9**

When the fix is approved, the case is resolved and a notification is sent to the Support team.

**10**

After receiving the resolution notification from Engineering, Support reviews the case again to ensure the fix has the desired effect.

**11**

Support closes the case and generates a resolution email to you.

**12**

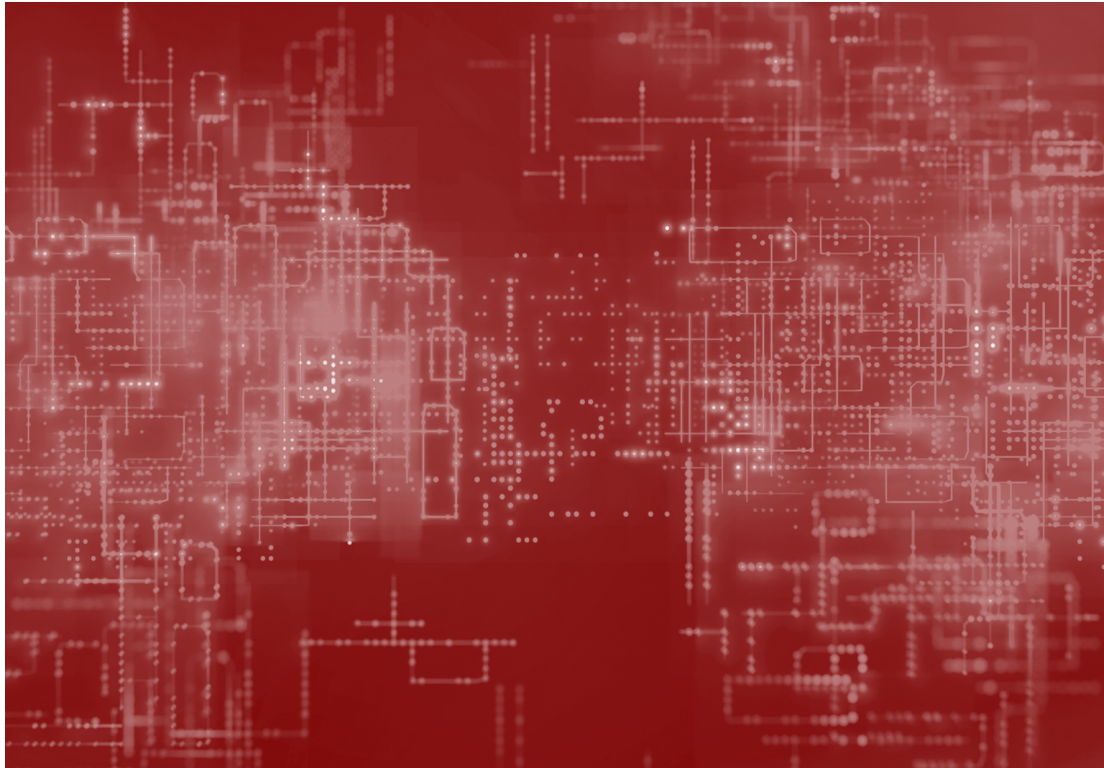
You read the resolution information in the email and implement any instructions it may contain. If the problem persists, please contact Support for further assistance.



**How does ByAllAccounts  
prioritize the issue backlog?**



# How Does ByAllAccounts Prioritize the Issue Backlog?



At ByAllAccounts, our engineering team follows a systematic approach to prioritize reported issues, ensuring a streamlined resolution process.

This process involves initial prioritization based on severity and accounts impacted in Jira. Additionally, specific considerations such as issue age, skill availability, and feedback from customers contribute to further evaluation.

We strive to swiftly address critical concerns while ensuring a methodical approach to resolving issues across varying severity levels, ensuring minimal disruption to your operations.

# How Does ByAllAccounts Prioritize the Issue Backlog?

Here's a brief insight into our prioritization framework:

## Critical Priority:

We address catastrophic errors or incidents that result in service unavailability, critical function failure, or significant impact on multiple customers. Security breaches and software errors rendering the application unusable fall under this category.

## High Priority:

Partial failures affecting service capacity, features, or functionality receive immediate attention. Significant impacts on business operations, system failures, or substantial performance degradation are included here.

## Medium Priority:

Limited failures affecting certain aspects of the service, with low-level impacts on business operations or minor software errors, fall into this category.

## Low Priority:

Minor failures with minimal impact on service features or functionality, causing limited disruption to a few users.

**Our teams are here to help  
you resolve your issues as  
efficiently as possible**

