

Support Check List

Last Update: 9/22/00

Rep's Name: _____

Date: _____

Everything on this list is relevant to all Deneba Customer Support Representatives. Please use this list as a guide to stay in compliance with the guidelines, policies and resources listed in this document. As changes occur they will be documented here for your reference, so viewing this list often is recommended.

Orientation:

- Assign access card and review its use.
- Complete Tax and Immigration forms.
 - Turn in to Accounting with a photocopy of driver's license and social security card.
- Review Deneba Employee Manual.
- Review benefits package.

Product Knowledge & Training:

Canvas 7 Professional version for Mac and Windows'95, '98, NT and 2000

Current shipping version is Canvas 7.0.2

- Read all current printed and web based marketing material.
- View tapes 1 – 5 of the Canvas 5 series.
- View tapes 1 & 2 of the Canvas 6 series
- Install on Mac & Windows workstations
- Review the Canvas 7 Training CD.
- Complete tutorials

Canvas 7 SE for Mac and Windows'95, '98, NT and 2000

Current shipping version is Canvas 7.0.1

- Read all current printed and web based marketing material.
- Install on Mac & Windows workstations

DenebaCAD for Mac and Windows '95, '98, NT and 2000

Current shipping version, DenebaCAD 2.0.2.

- Read all current printed and web based marketing material.
- Install on Mac & Windows workstations
- Complete tutorials

Internal Systems:

- ❑ **Microsoft Outlook email client:**
 - ❑ General use
 - ❑ Mail Log
 - ❑ Creating Folders
 - ❑ Saving to TEXT for archive
 - ❑ ALL CAPS = SHOUTING (Not a good thing)
 - ❑ To request an RMA (Return Merchandise Authorization Number) or a UPS Call Tag, email your request to Gurlande Lewis in Accounting. Include all relevant data. cc Carmine.

- ❑ **Install Internet Browser Software:**
 - ❑ Review current Deneba product and service information.
 - ❑ **Products**
 - Canvas 7 Professional Edition
 - Canvas 7 Standard Edition
 - DenebaCAD 2
 - Advanced Canvas 7 Techniques
 - Deneba Custom Solutions Program (DCS)
 - Professional Prepress Center
 - ❑ **Downloads**
 - Canvas 7 Download Files
 - Canvas 7 Add-on Files
 - DenebaCAD 2 Download Files
 - ❑ **Buy**
 - Deneba's e-commerce is handled by Digital River. Ordering from Deneba's web site will bring the user to Digital River, but the pages will have the look and feel of Deneba's web site.
 - Purchase Options
 - ❑ **Register**
 - Register using our secure (encrypted) server.
 - Register using our conventional server.
 - ❑ **Support**
 - Search Knowledge Database
 - Deneba Discussion Forums
 - Support Policy and Contact Information
 - Software Downloads
 - Canvas Tips and How-To's
 - Latest Version Numbers
 - ❑ **Community**
 - Profiles
 - How To's
 - Gallery
 - Third-Party Links
 - ❑ **Company**
 - ❑ **International**
 - Distributors
 - Austria
 - Denmark
 - Finland
 - France
 - Germany
 - Benelux Countries
 - Italy
 - Norway
 - Sweden

- Switzerland
- United Kingdom
- English
- Japanese
- Africa
- Asia
- Australia
- South America
- Other countries

❑ **Search**

- ❑ Build list of favorite URLs for support resources to...
 - Third party Canvas forums and web sites. There are some excellent “how to’s” and information on these sites. They are worth visiting.
 - <http://www.wizaerd.com/Forum/index.cfm>
 - <http://contact@thecanvascommunity.com/skins/skin1/default.htm>
 - <http://www.thecanvasexpert.com/Home.html>
 - <http://www.sketchpad.net/>
 - Vendor support pages and FTP sites
 - <http://www.deneba.com/support/knowledgebase.html>
 - <http://support.atitech.ca/>
 - <http://www.connectix.com/support/index.html>
 - <http://www.umax.com/usa/>
 - <http://www.aladdinsys.com/>
 - <http://www.epson.com/home.shtml>
 - <http://www.hp.com/>
 - <http://support.microsoft.com/directory/>
 - <http://www.apple.com/support/>
 - <http://www.adobe.com/support/main.html>
 - <http://www.corel.com/support/index.htm>

❑ **Non-disclosure agreement:**

This Agreement is made to protect Confidential Information, as defined in the non-disclosure agreement. The Recipient acknowledges that Deneba will provide the Recipient with Confidential Information for product evaluation purposes. The Recipient expressly agrees not to dissolve or disclose such information and to take necessary measures to prevent access to it by persons not authorized to receive it.

Since Support personnel is given access to beta software and technology, which is still under development, all support personnel are required to sign and turn in a non-disclosure agreement to management.

❑ **Support Reference:**

A new volume titled "SupRef" has been added to NSX. This directory replaces the old Support Databases Mac. The sub-directories include: forms, updates to policy memos, procedures, guidelines and other helpful information and resources. You should visit it often since these documents will be modified as well as new docs added regularly. You should view the files in their directories with "details" to see the modification dates for the individual files.

The current file structure is as follows:

NSX
SupRef

Apps_&_Updaters

Utility, patch, driver, update, etc useful to Support specifically. If you have something useful, feel free to contribute to this folder.

Forms

Corp FAX form

Fax_0600_corp

READ THIS FIRST

cafe form:

Fill out, print and turn in this form to Accounting if you wish to participate in Deneba's Cafeteria Plan.

Letter_of_DestructionDR

Letter_of_DestructionDSI

NDA

Deneba's non-disclosure agreement.

Reimbursement form:

Time Adjustment Form:

If there is an error in your "Time Report", adjustment can be made by filling out this form and giving it to your manager.

Vacation Request Form:

Fill out this form and turn in to your manager who will need to approve it. Please refer to the Deneba Employee Manual for more information on vacations.

Vacation Sheet:

DO NOT EDIT THIS FILE- View only! Use this spreadsheet to see if someone else has been approved for vacation time during a particular range-of-dates. Please avoid asking for vacation time during a period, which is already booked by a co-worker. Bring your completed Vacation Request Form to Carmine or Albert who will edit this file upon approval of your vacation days.

Guidelines

Pricing

Public Posts

Reporting DCAD Bugs

Support Dropbox

PolicyMemos

Additional Distribution Center

DCAD Pricing as of 6-8-00

DCS and CGM PIP Issues

ESD 2000 plan 031900

ESD Questions Answered

ESD Refund Policy

Forum participation

Incorrect Platform Orders

Internal - CV 7 SE Explained
Overtime & Pending Jobs
Participating Service Bureaus
Pricing for Replacement CD's
Registration and LINKING
Remove from email list
Retiring Licenses or Transferring Ownership
Return to reseller
RMA's for 10 or more units
The Calendar Tool
Update CD Price
Updates in the Distribution Channel

Reference_Material

Active Sku List

A list of all active skus for Deneba products and services.

Canvas 7 Standard Edition – Explained

Canvas 7 Upgrade Offer History

DCAD Knowledgebase.FP3 (Old)

DenebaDatabase Tips

Helpful tips and overview for the DenebaDatabase System.

employee_phone_list

a tab delimited list of all Deneba Employees and their extensions, which imports into your MS Outlook Contacts .pst file. It's handy.

International Distributors

A list of Deneba's international distributors worldwide.

Knowledgebase_Index

a complete index of ALL approved published and internal Knowledgebase articles. This list is updated regularly so refer to the original rather than a copy for the latest.

License Definitions

Maintenance_Ltr

Support Check List

Deneba Database:

- ❑ **Customer database:**
 - ❑ Locate a customer record
 - ❑ The registration record explained
 - ❑ Creating a new record. Entering registration cards.
 - Entered Registration Card Count to be emailed to Carmine weekly.
 - ❑ Navigation through customer records.
 - ❑ Merge requests
 - Send an email to Carmine with a search string, which will bring up only the records to be merged. If a particular record should be “kept”, indicate the record ID.
 - ❑ Customer (or Record) ID number vs. Product serial number.

- Record Type
- Product Type
- Contact History
- Email addresses

Jobs database:

- All customer contact is to be logged. This includes phone calls, surface mail, Fax's as well as email, which is logged and distributed automatically.
- All Jobs must be linked to the customer record, if one exists.
- A valid Deneba product serial number is required for support. (See templates in the Action Taken window of Jobs)
- How to log?
 - Search Customer database for serial number.
 - Create new job record from the customer record.
 - Fill in fields.

Knowledgebase:

- Searching for articles
- Creating a Knowledgebase article

Bug database:

- Searching for a specific bug report
- Generating a bug report
- Linking bug report to Jobs (very important)

Order Entry:

- 4D Mac vs. DenebaDatabase Orders PC**
 - Explain temporary status of 4D**
 - Bill to vs. Ship to
 - Order numbers vs. Invoice numbers
 - Product skus
 - Order Number
 - RUSH orders
 - Ship date
 - Tracking numbers
 - Backup paperwork
 - Source
 - Use the "List Orders" command to avoid duplicate orders.
 - List Orders
 - Edit Order
 - Mailing label for non-registered user.
 - FAX to a non-registered user.
 - FAX from within 4D
 - Explain Tracking numbers and how to track on Internet.

Invoicing database:

- Searching shipped orders.

Phones:

- Monitor calls from an experienced support rep.
 - Take support calls while an experienced rep monitors the call.
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- Review basic telephone script.
 1. Hello, Thank you for calling Deneba Software.

2. This is <your name>.
 3. Can I have your product serial number please? (Required for support).
 4. One moment please. (Always verify registration information with the customer while you have them on the phone. Once this is done, proceed).
 5. How can I help you?
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- Program Voice MailBox.
- Record greeting and name
- Send an email to Manny Menendez, President & CEO of Deneba Software introducing yourself and requesting a phone code, which will allow you to make outgoing calls.
- Transferring calls.
 - NO BLIND TRANSFERS
- ACD extension vs Personal extension
- Outgoing Calls – Use Personal Extension Only – Log off ACD first.
- Taking messages.
 - Get callers Name, Company, Phone Number, Nature of call. Email information to the appropriate person.
- Privacy:
 - Do not give out serial numbers or any customer info to callers without having them verify they are the person in the record.
- Confidentiality:
 - Read and sign a non-disclosure agreement and give to your manager.

- Standard software to be installed on your workstations:**
 - Current shipping versions of all Deneba software products.
 - Microsoft Word
 - Microsoft Excel
 - Microsoft Outlook email client
 - Microsoft Internet Explorer or Netscape Navigator

- DSI World:**
 - Servers:**
 - CSMail
 - >MailATT
 - Email attachments from outside are temporarily stored here.
 - Ducati
 - EB110
 - >BigHD
 - >MacHD
 - NSX
 - >BugFiles
 - Bug files you receive from our customers or create yourself need to be stored here in the appropriate directory. The path to the file needs to be referenced in your bug reports.
 - SupRef
 - Contains updated reference material for support.
 - Software Library (No Password)
 - Support databases
 - Contains old support databases:

 - Printsrvr