



# Providing Initial Support and Troubleshooting

Welcome to Module 3. This guide equips support teams with techniques to assist new customers effectively. We'll cover common queries, troubleshooting, and best practices for customer support.

**DK** by Dan K

# Account Creation Issues

## Verify Details

Ensure all required fields are correctly filled.

## Check Email

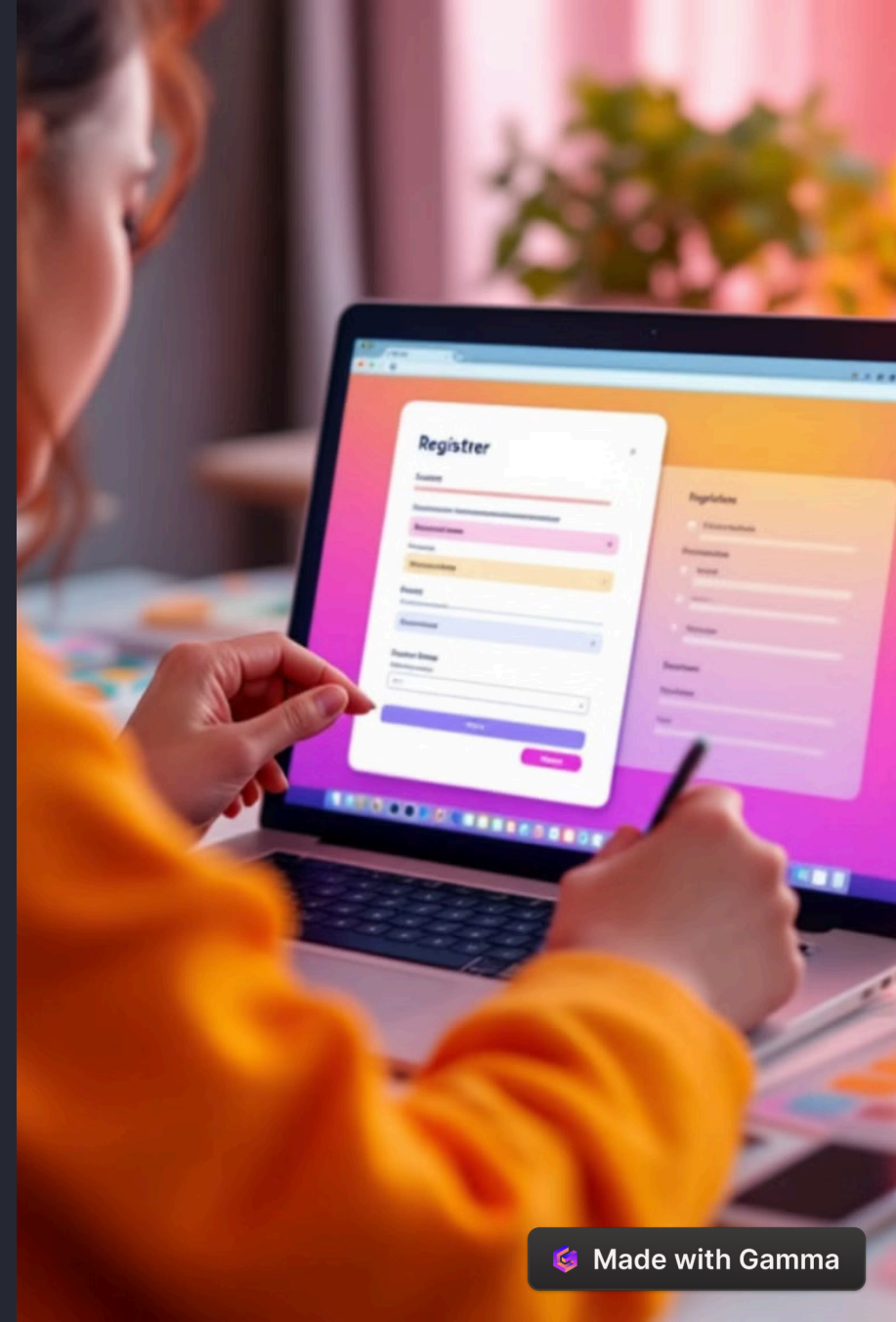
Look for typos in email addresses.

## Password Reset

Guide users through password reset if necessary.

## CAPTCHA

Confirm CAPTCHA completion if applicable.



# Email Registration Confirmation

1

## Check Spam

Advise customers to check spam or junk folders.

2

## Resend Email

Resend confirmation from WHMCS admin panel.

3

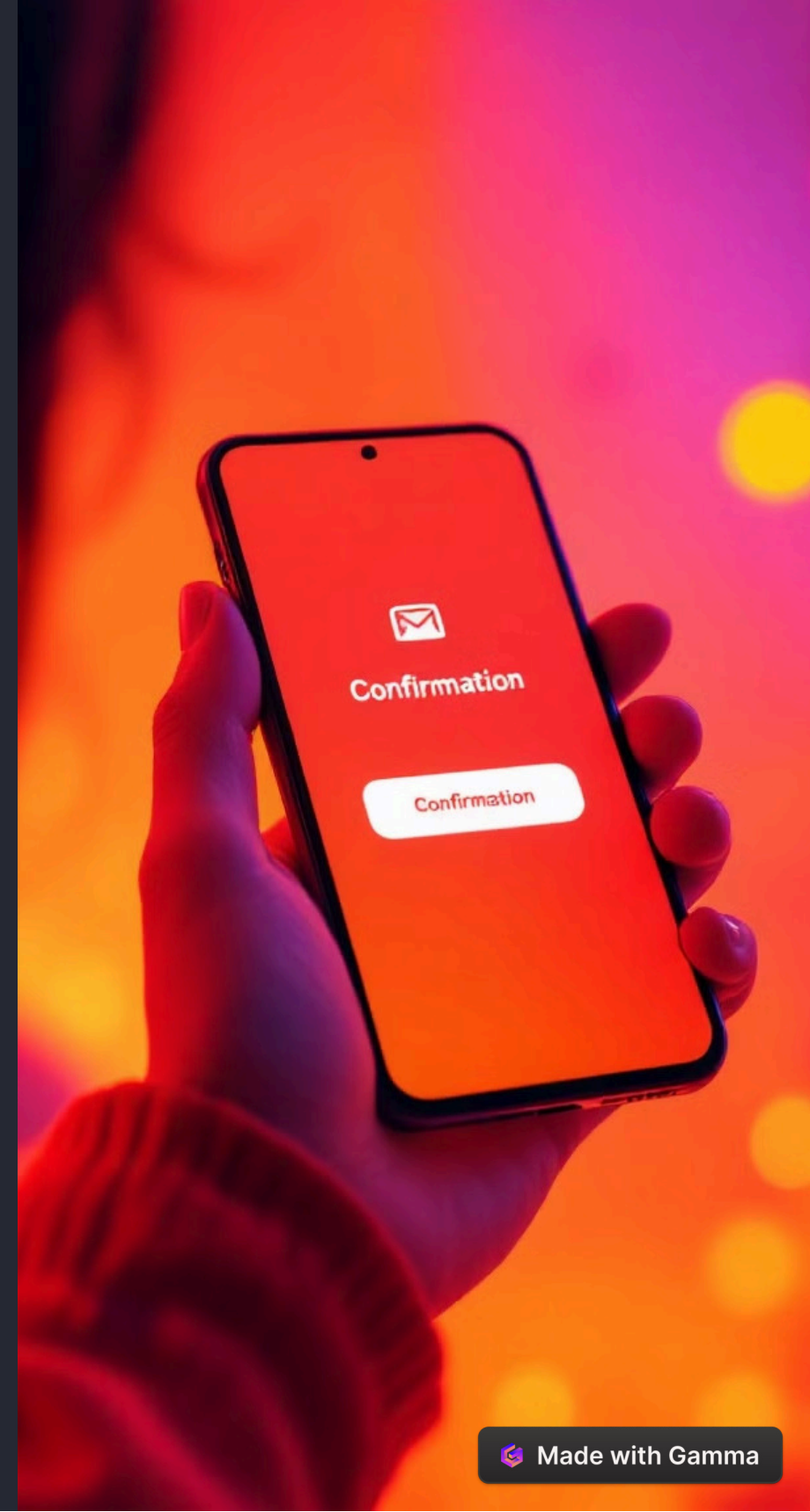
## Verify Address

Ensure correct email address was provided.

4

## Check Logs

Investigate email system logs for issues.



# Placing an Order



## Guide Checkout

Walk customers through the checkout process step-by-step.



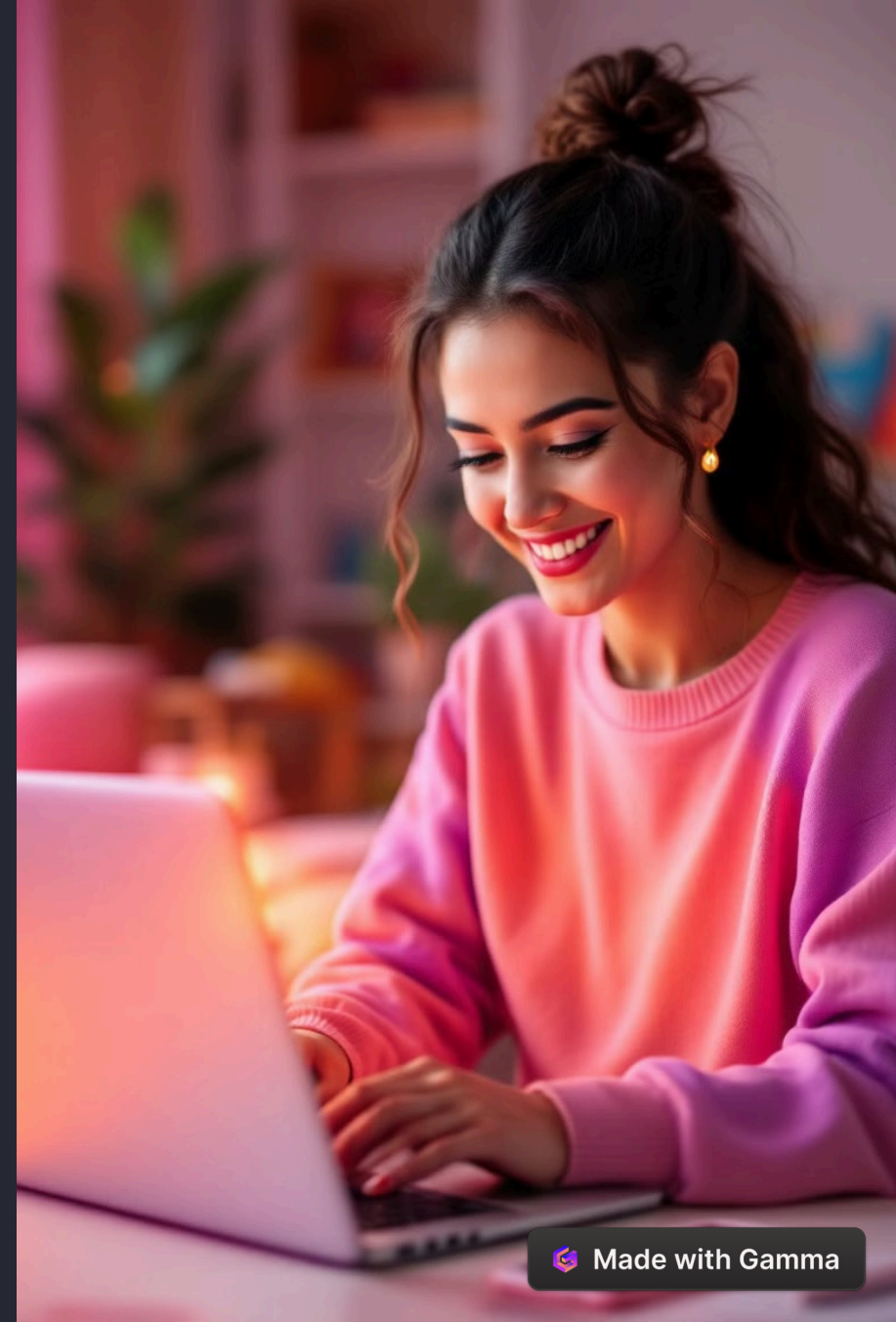
## Verify Payment

Confirm payment options and methods are working.



## Browser Check

Ensure browser compatibility for smooth ordering.





# Accessing Login Credentials

1

## Welcome Email

Ensure customers have received the welcome email.

2

## Client Area

Guide to retrieve login details from Email History Section.

3

## Password Reset

Assist with resetting passwords if required.

4

## Service Activation

Confirm that the service has been activated.

# Managing DNS

## Step-by-Step Guides

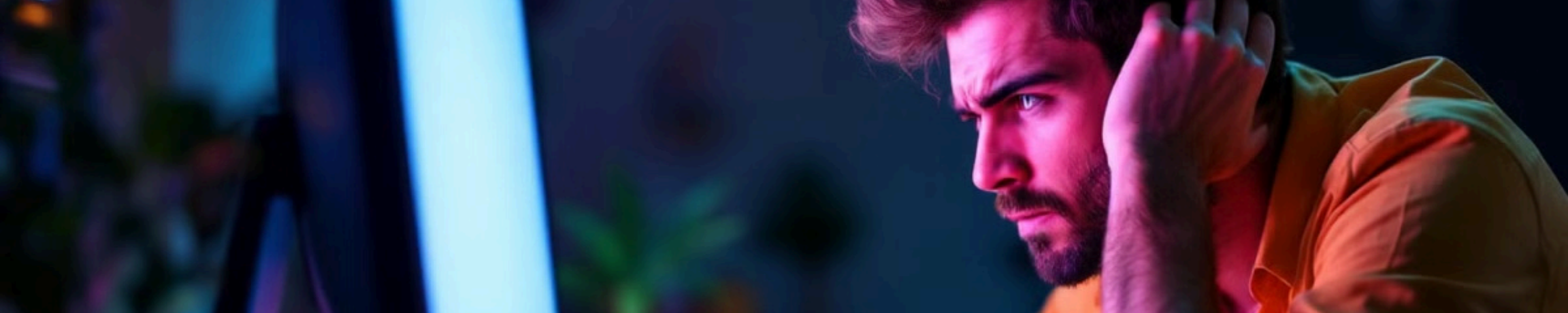
Provide detailed DNS record setup instructions, like the OLITT dns guide.

## Propagation

Explain DNS propagation times and use online tools to check status.

## Templates

Offer pre-configured templates for common use cases, like WorkPlace Email.



# Basic Troubleshooting: Login Issues

## Verify Credentials

Ensure customers are using correct login information.

## Clear Cache

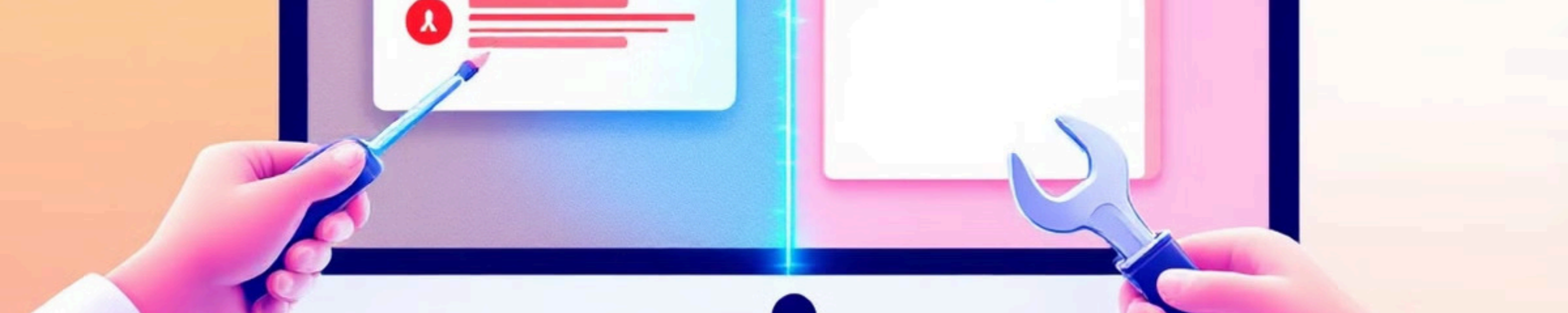
Suggest clearing browser cache and cookies.

## Reset Passwords

Guide through password reset process if needed.

## Check Lockouts

Investigate account lockouts due to failed attempts.



# Website and Email Troubleshooting



## Website Issues

Check domain pointing, DNS settings, and inspect for errors.



## Email Problems

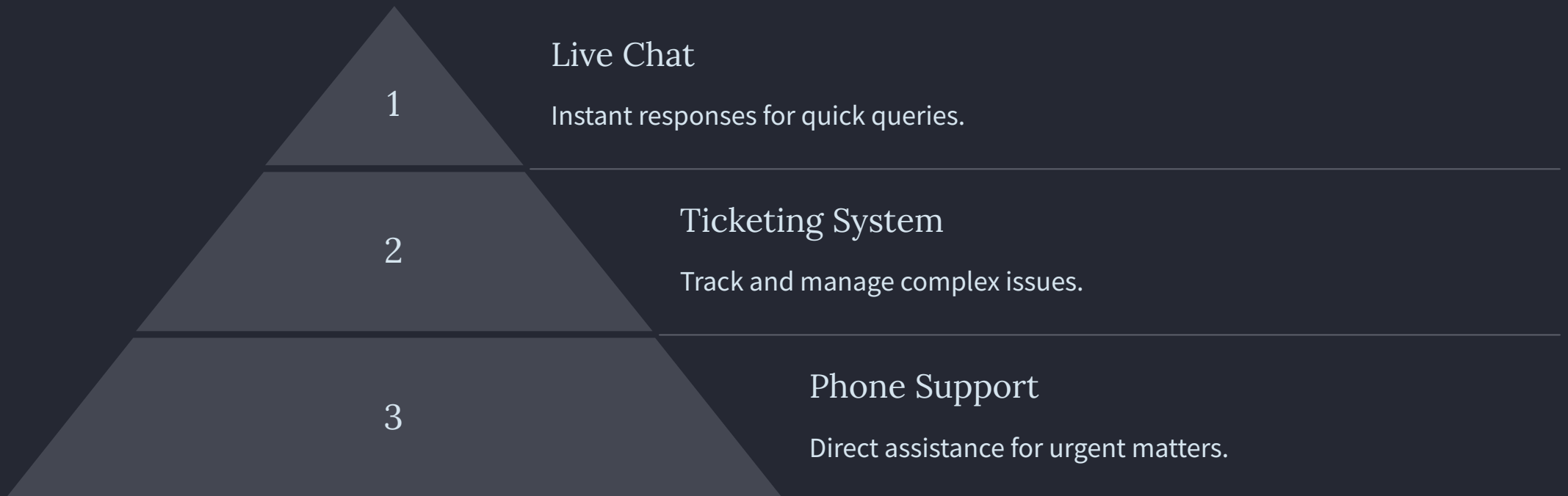
Verify email client settings, check for blacklists, ensure correct ports.



## Knowledge Base

Maintain comprehensive resources for common issues and FAQs.

# Support Channels



# Building Customer Trust

1

## Set Expectations

Provide realistic timelines for service delivery.

2

## Transparent Communication

Keep customers informed during troubleshooting.

3

## Regular Updates

Offer progress reports on ongoing issues.

4

## Follow-up

Ensure customer satisfaction after resolution.

