



cazarin
INTERACTIVE

cazarin.net tutorials:
PRINTABLE PDF GUIDE

cazarin.net tutorial: **OVERVIEW**

At Cazarin we strive to provide you with tools that will help you as we work together towards your success.

The Cazarin Technology Support Center is an application we created for the express purpose of making communication about your project easy, effective and efficient.

Our technical support center is open 24 /7.

On the home page you will find your login to Client Resources. This secured information is only accessible with your username and password. Your login gives you the ability to do all of the following:

- Add an action request for work on your website
- Attach files that may be needed for your project
- Review current work requests for progress
- Review completed work requests
- Run reports to track monthly hours on projects / requests
- Add a quote for time on a new project or enhancement

Returning to the home page you will find information about your online webmail including:

- Instructions to set up new email accounts on your computer
- Spam Issues

You will also find:

- Server information
- Server status
- Your website statistics

cazarin.net tutorial: **YOUR HOME PAGE**

The first screen is your dashboard. It gives you a quick overview of important information such as active projects, inactive projects, your Project managers name and action request along with the status of the requests.

To see any details of the projects and action requests, just click on the item you want more information about.

You'll see the navigation at the top which includes a home tab, Create AR, Reports, Request for Quote and your Personal Information. The next step is to walk you through creating an action request.

cazarin.net tutorial: **CREATING AN ACTION REQUEST**

Creating an action request is a basic 4 step process:

- 1 – Click to create the Request under your current project
- 2 – Complete the form
- 3 – Submit the form
- 4 – Attach files if needed

Please click to create the action request. If you are on maintenance, select the current year maintenance project, or whichever project is appropriate for your needs. Notice you can create a current request or schedule one. Pretty convenient!

The form that appears is very user friendly.

First fill in a title for your request. For example, "New image and text for about us page" fill in the URL, for example if I was creating one for Cazarin, I'd add "http://www.cazarin.com."

Select the Needed by date. Please give us a minimum of 48 hours to complete your request. Due to department demands, if it is going to take longer than requested, your Project Manger will contact you.

In the description area, please be as detailed as possible. For our example, I would type in: "add this new image and text to the about us page www.cazarin.com/about. The image will go at the end of the 2nd paragraph with the new text below it. Both the image and the text are attached to the ticket."

Now click the Save Changes button. Once that button is clicked, 3 things happen:

- 1 – The action request is added to our database, it cannot be lost!
- 2 – An email is automatically sent to your Project Manager indicating you have created a request
- 3 – You now have the option to attach files to your action request

cazarin.net tutorial: **ATTACHING FILES**

Attaching files to action requests is easy to do!

Once you have created an action request scroll down to the Attachments section. Click the Browse button and the next screen prompts you to browse your computer and upload a file.

You may attach such files as word documents, excel spreadsheets, visio diagrams and various image types.

Multiple files may be uploaded by clicking the Add One More button.

Click to Upload Files button to upload the files to your action request.

cazarin.net tutorial: **TRACKING PROGRESS**

Another feature of your Customer Resources is the ability to track progress! Once again, we've streamlined the process so it's easy to track the progress of your requests!

Our action requests have 6 distinct status classifications

1. Pending
2. Fixing
3. Clarify
4. QA – quality assurance
5. Review
6. Completed

When an action request is created, it automatically is assigned a status of Pending. Once your Project manager has reviewed the action request and assigned it to a department, the status becomes Fixing.

If there are internal questions or if all the necessary materials needed from you to complete the ticket have not been received, the status will be set to Clarify.

There will either be a note on the request itself stating clarification or a phone call from your Project manager or sometimes both in order to get what is needed to continue working on the action request.

After the department has finished working on an action request the status will be changed to QA. Then one or more Cazarin employees will review the work and either send back the request, if it hasn't passed QA or mark it to review if appropriate. In certain cases, clients have asked for a review prior to uploading changes. The action request will stay in review until approval for upload is received in writing.

Your Project Manager has the ability to change the action request status to complete and to add the total time spent doing the work. Once the ticket is completed it is archived in the corresponding project it was created under.

cazarin.net tutorial: **RUN A TRACKING REPORT**

When a quote is signed from Cazarin there is an estimated time for completion. This time is entered by the Project manager into the technical support system when the project is created. It is usually broken down by departments such as hours for Project management, design, programming, database development and quality assurance.

As work on the project is being done, time is recorded in the action requests. This makes it easy to review the hours spent on any given project.

Click on the reports tab in the main navigation. Next choose a project and a time frame. The support system will build a report based on the number of completed tickets.

The reports can be printed, downloaded or emailed.

cazarin.net tutorial: **REQUEST A QUOTE**

We have included a request a quote tab in the main navigation.

Click on the tab and give as much detail as possible in how we can help you to enhance your website, assist you in marketing on the internet or print or offer search engine optimization!

cazarin.net tutorial: **YOUR ONLINE WEBMAIL**

On the home page of cazarin.net you will find an email section. Under this section you can find:

- Access email
- Email set up
- Email etiquette
- Email policies
- Up to date information about spam issues

When you're ready to set up your email account on your computer, click the Email Set up link to open the PDF with step by step instructions. We've made it easy for you!

24 /7 online email access is part of your hosting at Cazarin. To check your email online, click the Access Email link. This will take you to a login screen. Click the white button to login.