

What a support ticket needs before it reaches engineering

Fill it in while support still has the customer. Leave a field blank rather than guess.

Ticket

Date

Filled in by

Type ☐ Defect ☐ Question ☐ Change request

Support's first call; the product owner confirms.

LOOK UP from your own systems **ASK** only the customer knows **DECIDE** a person on your side

REQUIRED Anything sent to engineering has these four.

01 Version and environment **LOOK UP**

The version the customer is on, and the configuration that changes the behavior: format, settings, plan. Ask only if your systems don't record it.

02 Expected and observed **ASK**

Two sentences, kept separate.

Expected: what the customer expected to happen

Observed: what happened instead

03 Reproduction **ASK, THEN TRY IT**

The steps, numbered. Attach sanitized evidence only.

Happens ☐ Every time ☐ Sometimes ☐ Once

04 Ownership **DECIDE**

A name or a role, not a queue nobody watches. The next action may be an engineer, or the product owner if a decision comes first.

Next action

Confirms with the customer (usually whoever took the ticket)

ADD WHEN IT APPLIES

The customer's words ASK

Copied as written, not paraphrased.

Who is affected and the impact ASK

Which users or records, and what the problem stops them doing.

User role and access LOOK UP

What the reporting user can see and do.

Already checked LOOK UP

Settings, documentation, known issues, and the steps support tried.

OPEN QUESTIONS AND DECISIONS What you couldn't look up and the customer couldn't answer.

Question 1

Who answers ☐ Customer ☐ Product owner ☐ Engineer Blocks work ☐ Yes ☐ No

Question 2

Who answers ☐ Customer ☐ Product owner ☐ Engineer Blocks work ☐ Yes ☐ No

Question 3

Who answers ☐ Customer ☐ Product owner ☐ Engineer Blocks work ☐ Yes ☐ No

Bug or change request DECIDE

The product owner, not the ticket's wording.

☐ Bug ☐ Change request ☐ Not decided

Priority DECIDE

The product owner, using the impact.

"ASAP" is the customer's urgency, not a priority.

BEFORE HANDING IT OVER

- ☐ Expected and observed are two separate statements.
- ☐ The reproduction has been tried, or the ticket says it hasn't.
- ☐ Every open question has an owner.
- ☐ Someone is named to confirm with the customer.
- ☐ No passwords, tokens, keys or connection strings in the ticket or attachments.
- ☐ Logs and screenshots are redacted, or replaced with a reproduction on a test account.
- ☐ No data from another tenant.