

When it breaks

Three safe checks. Then text your support contact. For any live build we shipped: a site, app, phone agent, work agent, payment flow, or outbound tool.

Use the same calm steps, no matter which part went quiet.

Start with what you see

A page won't open. A form goes nowhere. A sale has no receipt. An agent stops. A new lead is missing from your customer list, often called the CRM. Write the first thing that went wrong. You don't have to find the cause.

This guide is for a new fault in a system you already use. It isn't a launch checklist or a request to test our whole build.

Skip the checks if harm is happening

Private data on view? Wrong charges? Messages going to the wrong people? Use only a pause control you were shown. Text for help now. Don't wait to finish three checks.

01

Look

Is it just your screen, or the same fault elsewhere?

02

Trace

Follow one old item. Find where it stopped.

03

Read

Look for a notice or a recent change.

Checks, not three retries. Never pay, send, or run a job three times.

NEED THIS NOW?

GO TO

A safe way to check your screen

2

Find the missing step in a known item

3

Look at notices and recent changes

4

Site, form, checkout, agents, or CRM

5

Keep work moving, send the note, close the gap

6–8

Keep the working parts on.

Don't take the whole business offline to chase one fault.

Try 1. Look in one new place.

First, rule out one stuck screen. Don't buy anything, send a new message, or submit the same form again.

01 Write the time

Note when you first saw the fault. Add your time zone, such as Central time. Save the page link without any private sign-in codes.

02 Open one fresh view

For a public site, use a new browser tab or your phone on mobile data. For a work app, sign in the usual way. Never skip a browser safety warning.

03 Compare what you see

Does the same page fail in both places? Write “both” or “one.” A fresh view working is a clue, not proof that every part is fixed.

Don't lose unsaved work

If a form or app still has your work on screen, copy only the non-private text to your approved work note before you refresh. Don't copy card details or passwords.

For a phone agent

One short call from your own cell is enough if it is safe and allowed. Don't place repeated calls. Stop if a real person answers.

For a work or outbound agent

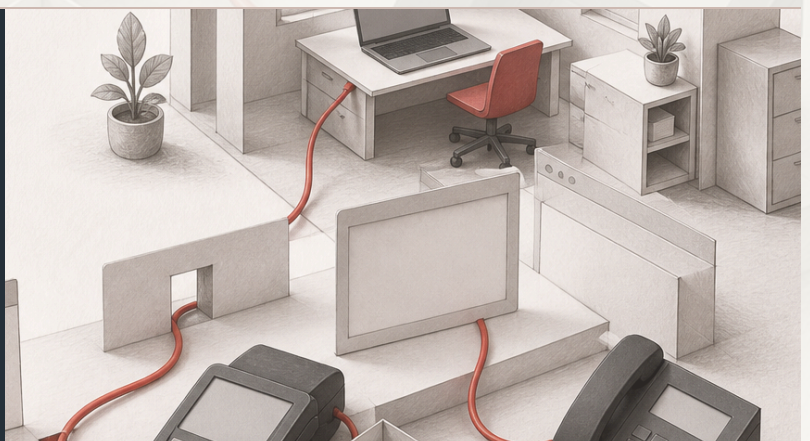
Look at its last job and its next due time. Quiet between jobs may be normal. Don't press Run to see what happens.

WHAT YOU SAW	SAFE COMPARISON	WRITE THE RESULT
Site won't open	Open the exact public link on your phone.	
App or form is stuck	Look in a fresh view. Keep the first screen.	
Checkout failed	Look for an existing receipt or order. Don't pay again.	
Agent or CRM is quiet	Open the last known job or record. Read only.	

If the fresh view works: Save both results. If the customer's task still fails, go to Try 2. Don't clear all data, reset the office router, or change a site setting.

One comparison is enough.

Still wrong? Keep the time and the result. Go to the next check.



Try 2. Follow one known item.

Use something that already happened. One old order, form entry, call, or job can show us the first missing step.

01

Start

Someone clicked, called, or a job became due.

>

02

Work

The site or agent tried to do the task.

>

03

Save

An order, note, or record should exist.

>

04

Tell

A receipt or update should reach the right place.

A green “done” mark at one step doesn't prove the last step happened.

Pick one item you can name

Use an order number, job name, or the time of a call. Look inside the tool your team already uses. Don't dig into code. Don't open a customer's private file just to get a screenshot.

Find the last step you can see

A form may have saved even if its thank-you page failed. A charge may have worked even if no email arrived. A job may have sent one email before it stopped.

Stop at “not sure”

If you can't tell whether it saved, sent, or charged, write “not sure.” Don't try again. We need to check for duplicates before another run.

ITEM TYPE	LOOK FOR THE EXISTING PROOF	DON'T REPEAT
Form or booking	A saved entry, booking, or staff notice.	The submit click.
Payment	An order and the payment status in your payment tool.	A charge or refund.
Phone agent	One call entry and any note saved from it.	The call over and over.
Work agent	The last job and the step it reached.	The whole job.
Outbound tool	The existing sent list, draft, or stop notice.	A send to real people.

Item name or number (no private customer details)

Last step I can see

First step I can't find

Save the trail.

A missing email and a missing order are different faults. Tell us which one you saw.

Try 3. Read the notices.

Look for a clear clue. Don't change a setting just because a screen offers a button.

Check the tool you already know

- Read any banner about a bill, a usage cap, a lost sign-in, or a service problem.
- Look at the tool's official status page if its own help menu links to one. A green page doesn't rule out a fault in your account.
- Ask your team if anyone changed a name, form, rule, card, work hours, or account access. Write what they say.

Leave these alone

- Don't replace a key or share a login.
- Don't raise a spending cap.
- Don't change the site address or domain settings.
- Don't cancel a service or delete old records.
- Don't restart all agents at once.

CLUE	WHAT TO NOTE	WHO CAN ACT
Bill or card notice	Tool name and the short notice. No card image.	The person who pays.
Usage cap reached	The cap, used amount, and reset time shown.	The owner who can approve spend.
Needs sign-in again	The account name and affected tool.	The named account owner.
Service problem	The posted issue and time of the update.	ED follows the provider's recovery.
A recent edit	What changed, who changed it, and when.	The person who owns that change.

EXAMPLE ONLY

"The form stopped at 2:10 PM Central. It fails on my laptop and phone. I found the earlier entry, but not today's. The tool says 'connection expired.' No one has changed the form."

Notice or recent change I found

No clue? Write "no notice found." That is useful too. You have finished the three checks. Send the note on page 7.

Read it. Don't repair it by guesswork.

The wrong setting can hide the clue we need.

Pick the fault you can see.

This page helps you describe the problem. It doesn't ask you to fix the hidden parts.

WHAT STOPPED	LOOK AT THIS ONE THING	KEEP THIS SAFE
Site down	Exact page link. Does the home page work while just one page fails? Does your phone show the same error?	Don't change hosting, domain, or security settings.
Form dead	Where it stops: opening, typing, submitting, or thank-you page. Look for the entry before you try again.	Don't send the same private form twice.
Checkout dead	Existing order, receipt, and charge status. Note pending, paid, failed, or unknown exactly as shown.	Don't pay again, refund, or change payment settings.
Phone agent quiet	One short call result, its time, and the existing call entry. Was it silent, busy, or sent to the wrong person?	Don't change forwarding or rebuild the agent.
Work agent quiet	Last job time, next due time, and whether it says paused, waiting, or failed. Note any approval it needs.	Don't force a run or widen its access.
CRM empty	One known item. Is the date filter right? Is the record in another view? Are you in the right work account?	Don't delete, import, or copy a whole contact list.
Outbound stopped	Draft or sent list, last job, scheduled time, and any send limit or consent notice.	Don't send a test to real customers or turn off opt-out rules.

One part can fail alone

A site can load while checkout is down. Calls can work while notes fail to save. Say what still works so we can leave it alone.

Small fault, real impact

Tell us if it blocks all work, one person, or one item. “Three known orders lack receipts” is clearer than “everything broke.” Use only counts you know.

The symptom is enough.

You don't need the right technical word to ask for help.



Keep work moving without risk.

Use the backup we agreed on for your build. Don't make a new live route while a fault is still open.

Use only a known backup

- Site or form: use an already-approved phone or inbox for new requests.
- Payments: keep a safe order note. Don't collect card numbers in email or text. Use only an approved payment method.
- Phone agent: use the saved human-answer route if your handoff includes one.
- Work or outbound agent: hold the affected queue if you were shown that control. Don't resume it yet.

If there is no backup

Tell your team what is down. Take a short work note in the place your business already uses. Name one person to keep it. Don't build a second customer list in a new app.

Keep private data out of group chats. A work reference and safe callback path are enough.

01

Tell the team

Name the part that is down.

02

Use the agreed route

Keep the rest of the work on.

03

Keep one list

Track work held for later.

If a pause control is unclear, ask. Don't unplug or shut down unrelated services.

Our approved backup route

Where that private list lives

Person keeping the held-work list

Person allowed to turn work back on

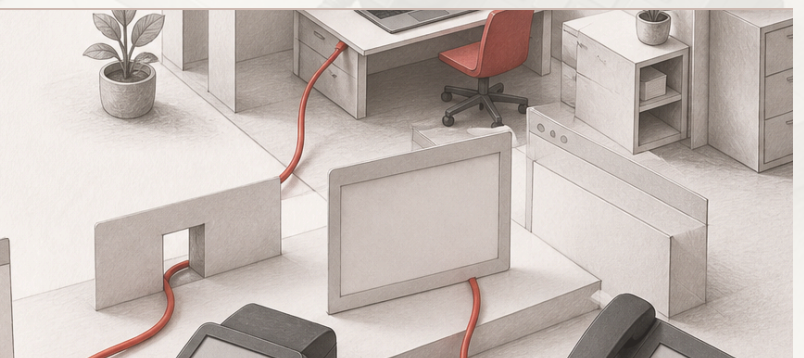
SHORT CUSTOMER NOTE, IF YOUR TEAM NEEDS ONE

"Our online form isn't working right now. Please use [approved contact route]. If you already sent a request, we'll check for it before asking you to send it again."

Possible leak or wrong charge? Use your agreed urgent support route now. Keep proof private. Don't wait for a normal check-in or send raw account screenshots.

A pause isn't a repair.

Write what you paused and when. Let your support contact know.



One clear text gets help started.

Use your usual ED support thread. Include the facts below. No passwords, keys, full card details, or private customer files.

Who gets this note

ED contact or support thread

Business backup contact

Use the support route in your handoff. This sheet doesn't change your agreed support hours.

Lead with the impact

Say which company and build. Say what can't happen now. If private data or money is at risk, put that in the first line.

Stay reachable. If the impact changes, add one update in the same thread.

EXAMPLE ONLY, NO REAL CUSTOMER DATA

"Acme team: checkout is stuck. It started at 1:40 PM Central. The site still opens. Try 1: same fault on laptop and phone. Try 2: order TEST-01 exists, charge status unknown. Try 3: no notice found; no known edits. We haven't charged again. Maya is keeping the held orders. Please check the payment before any retry."

PUT THIS IN YOUR NOTE

WRITE IT HERE

Company and build

First seen: date, time, time zone

What failed; what still works

Try 1 result: fresh view

Try 2 result: known item and last step

Try 3 result: notice or recent edit

Anything paused; safe callback contact

If you send a picture: Crop to the error. Hide names, addresses, private links, account numbers, and secrets. If you can't crop it safely, type the short error instead.

Keep it in one thread.

One clear trail is easier to act on than scattered screenshots.



Close the fault. Then clear the gap.

Wait for ED or your named support person to say what is fixed and what can restart. Don't treat a green light as permission to replay old work.

01 Confirm the affected path only

Use the one safe check your support person names. We handle the technical repair checks. You aren't being asked to retest the whole build.

02 Check what happened during the gap

Keep a list of the orders, forms, calls, or jobs that might be missing. Check existing records before anyone repeats an action.

03 Name who will catch up the work

One person owns held work. Payment retries, refunds, and customer messages need their normal approvals. Mark each item when it is handled.

04 Write the close note

Save the cause we confirmed, what changed, and the time work resumed. If it happens again, send this note instead of starting from zero.

GAP ITEM (SAFE REFERENCE)	ALREADY SAVED / SENT / PAID?	NEXT STEP AND OWNER

Support person who cleared restart

Restart time and time zone

If it comes back

Stop at the same safe point. Add the new time and result to the old support thread. Don't repeat the same failed check all afternoon.

Keep these nearby

Who Has the Keys tells you who can act. After-Hours List tells you who is on duty. When a Run Fails covers one stopped agent job.

Done means the gap has an owner.

The repair and the catch-up work are two separate things.