QUICK GUIDE

Daily *Snapshot*

One page for the whole day: how every Support Services team did yesterday, and how the season is tracking against last year and the year before.

For supervisors and leads
See how every team did yesterday and how the season is tracking, from any desk or phone.

You get
Ticket volume against the same weekday last year, filing season and post-season comparisons, CSAT scores, the top 5 categories per team, the top 10 agents, and the top 20 knowledge base articles.

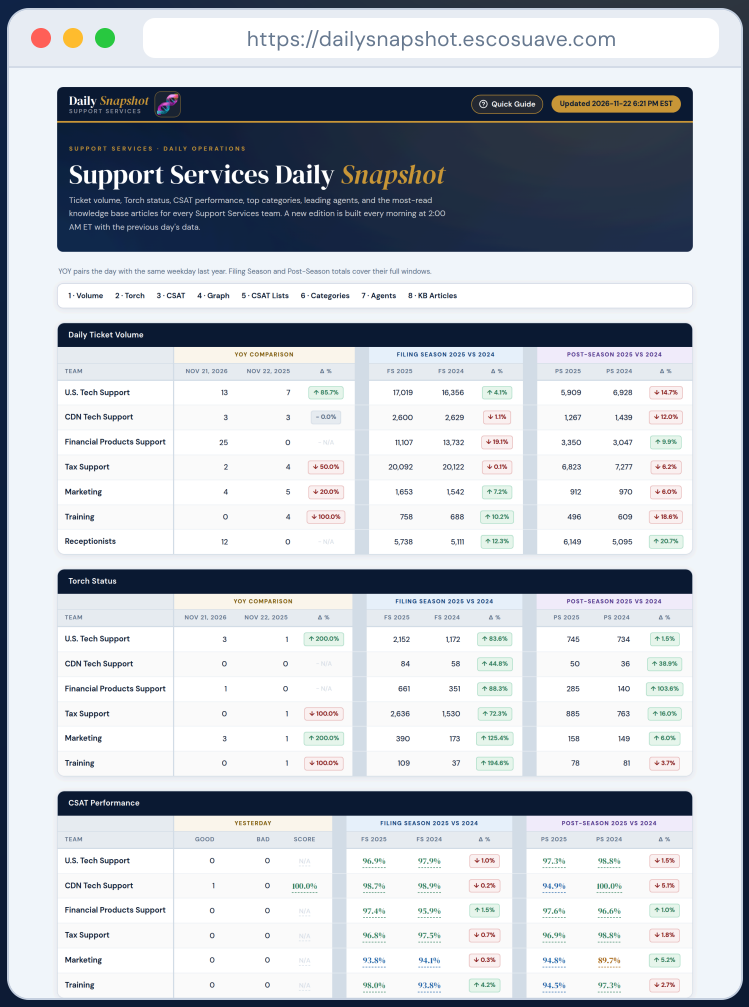
You need
Any web browser. No sign-in and nothing to install. The page is public and read-only.

Where the numbers come from
Support Central report exports for the seven teams: U.S. Tech Support, CDN Tech Support, Financial Products Support, Tax Support, Marketing, Training, and Receptionists. Counts are tickets created, in Eastern time.

OPEN THE DAILY SNAPSHOT

dailysnapshot.escosuave.com

One link to bookmark. It always shows the newest edition.



November 2026 · Screens captured from the live site

FOR SUPERVISORS AND LEADS

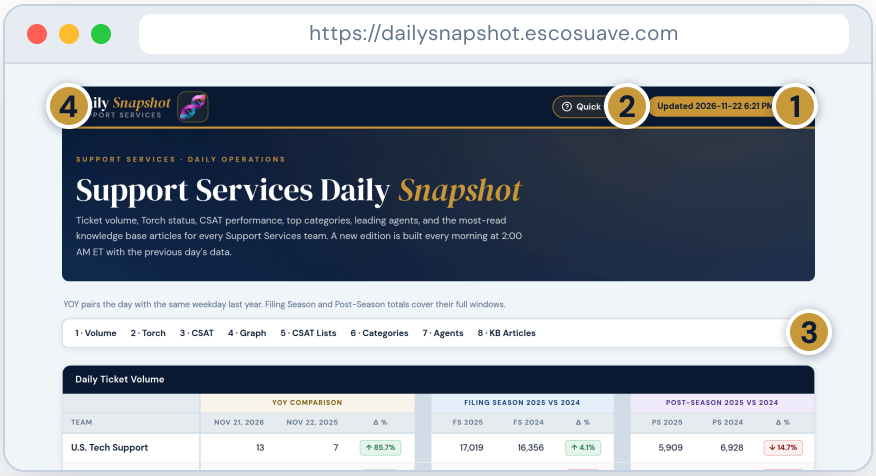
Start at the Top

1. **Check the Updated badge.** The gold badge in the top bar shows when this edition was built. A new edition lands every morning at 2:00 AM ET.

2. **Reach this guide from the gold pill.** The Quick Guide pill sits in the top bar of every edition.

3. **Jump with the section bar.** Eight numbered links mirror the page: Volume, Torch, CSAT, Graph, CSAT Lists, Categories, Agents, and KB Articles.

4. **Move between apps with the App Catalog.** Point at or select the Daily Snapshot logo at the top left (the helix mark). The App Catalog opens with every Support Services app: Support Metrics, Holiday Advance, Torchie Trace and Drake Credential Lookup. Select one to go there, or press Esc to close it. The last page shows how.

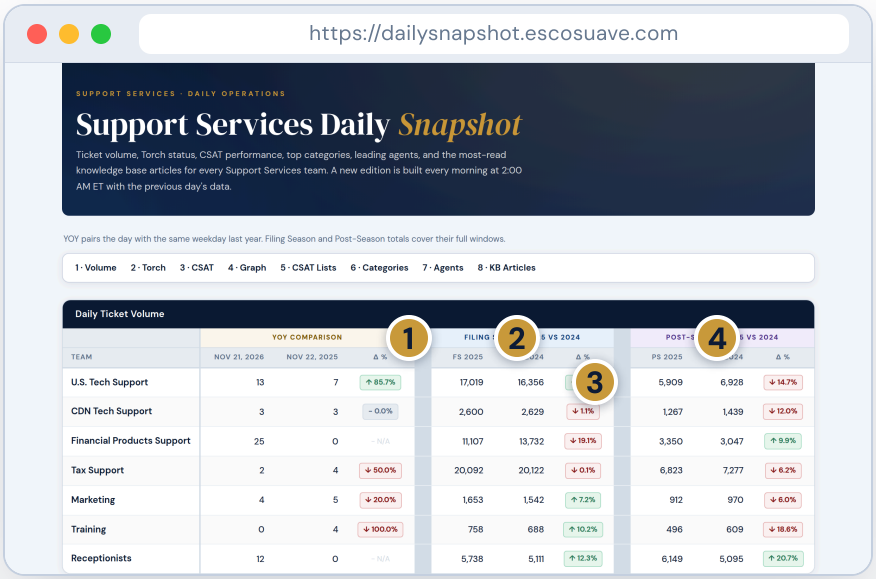


The line above the bar is the whole method. YOY pairs the day with the same weekday last year. Filing Season and Post-Season totals cover their full windows.

FOR SUPERVISORS AND LEADS

Read the Tables

1. **Read YOY Comparison first.** It pairs the report date with the same weekday one year earlier, so a Saturday is always compared with a Saturday. The badge shows the percent change.
2. **Move right to the season groups.** Filing Season and Post-Season totals cover their full windows, each with its own change badge. From the November 29, 2026 edition, Filing Season shows three seasons side by side: FS 2026, FS 2025, and FS 2024.
3. **Read the delta badges, and hover any number.** A tooltip shows the exact date range behind it, so a season total never hides its days.
4. **Know the season frame.** Filing season starts on the Sunday of the week containing December 1 and runs to April 15. Post-season runs April 16 to late November.



Same layout, two more tables. Torch Status runs it for Torch-tagged tickets only, and CSAT Performance scores each team below it. Receptionists appear in Daily Ticket Volume only: they sit out Torch Status and CSAT Performance.

FOR SUPERVISORS AND LEADS

CSAT and the Graph

The CSAT Performance table scores every team except Receptionists. Each score is Good divided by Good plus Bad, for yesterday and for both season windows. Hover any score to see the Good and Bad counts behind it. A score of N/A means the team had no ratings in that window yet.

1. **Pick a team.** The dropdown at the top right of the Ticket Volume Graph switches the graph between the seven teams. There is no all-teams view; the graph is always one team at a time.
2. **Set the range.** All draws the full season to date. Narrow it to Last 30 Days or Last 7 Days to see the recent shape.
3. **Hover any bar.** The tooltip reads out the exact values for that day, for this season and the year-ago season.
4. **Export to Excel.** When you need the numbers themselves, the export downloads the two season series from the graph, day by day.



Two series, always. The bright bars are the current season and the gray bars are the year-ago season, day for day, so the filing season rush and the post-season lull line up at a glance.

TERMS AT A GLANCE

YOY	The same weekday, one year earlier
FS	Filing season, from the Sunday of the December 1 week to April 15
PS	Post-season, April 16 to late November

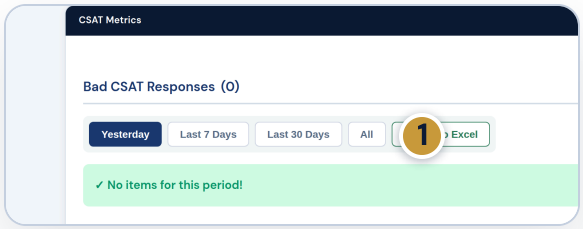
WHAT IT MEANS

Delta %	Change against the comparison window beside it
CSAT score	Good divided by Good plus Bad
All	On the list filters, the full season to date

FOR SUPERVISORS AND LEADS

Go Deeper

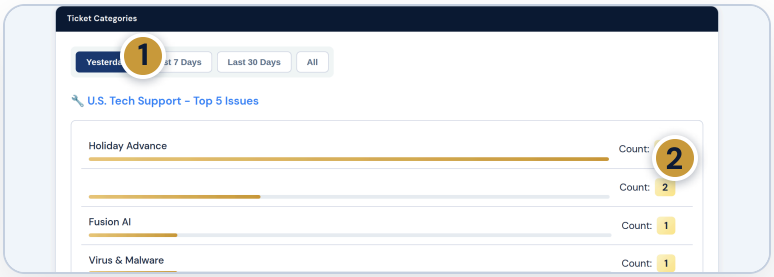
CSAT LISTS Work the lists



1. **Start with Bad CSAT Responses.** Every low rating in the range you pick, with the ticket behind it. A green "No items for this period" is a clean stretch, not a gap in the data.
2. **Balance it with Good CSAT Responses.** These are the wins worth naming in a huddle.
3. **Watch Knowledge Base Opportunities.** Agents flag these tickets when a knowledge base article needs to be created or updated, so the list is a coaching and content signal.

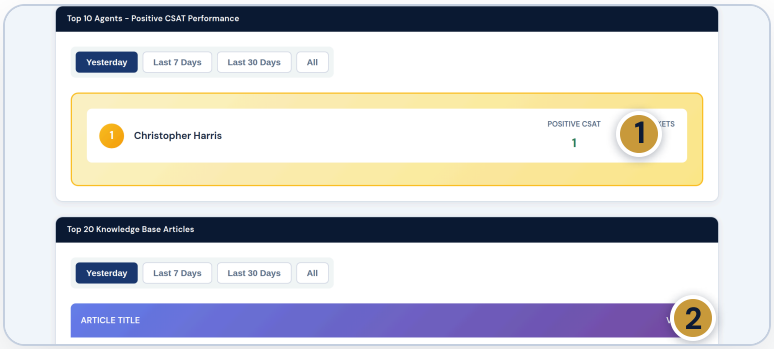
One filter set for every list. Yesterday, Last 7 Days, Last 30 Days, or All, and any list exports to Excel. The count beside each list title follows the filter.

CATEGORIES See what the work was



1. **Filter the range.** Categories, agents, and articles all share the same Yesterday, Last 7 Days, Last 30 Days, and All filters.
2. **Read the bars.** Ticket Categories ranks the top 5 topics for each team. The gold bar scales to the team's top count, and the Count badge gives the exact number.

AGENTS AND ARTICLES Who and what led



1. **Top 10 Agents** ranks agents by positive CSAT, with total tickets beside the count.
2. **Top 20 Knowledge Base Articles** shows the articles with the most views, so the team can see what offices are reading.

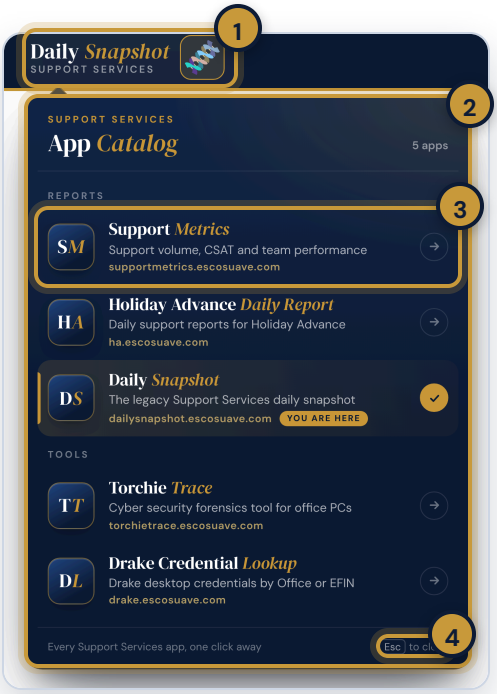
Need live numbers instead? The Snapshot is the daily record, built once each morning. For queue pressure as it builds through the day, use Support Metrics at supportmetrics.escosuave.com, which refreshes every 30 minutes. The two connect through the App Catalog: select the Daily Snapshot logo at the top left and choose Support Metrics.

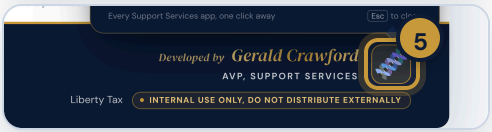
Questions? **Gerald Crawford, AVP, Support Services, Liberty Tax**

REFERENCE

Moving Between Apps

All five Support Services apps share one menu, the App Catalog. It looks and works the same in every app, so once you know it here you know it everywhere. This page shows it on Daily Snapshot.





1. **Find the logo.** Every Support Services app shows its name at the top left with the small DNA helix mark beside it. That is the App Catalog button.
2. **Open the catalog.** Point at the logo, or select it. On a phone or tablet, tap it. A panel opens over the page and lists every app.
3. **Pick an app.** Select any row to go straight there. The row marked You Are Here is the app you are in now.
4. **Close it** with Esc, or select anywhere outside the panel. The page you were reading stays as it was.
5. **Or use the footer.** The same helix sits beside the developer credit at the bottom of every page. Point at it or select it and the catalog opens upward.

GOOD TO KNOW

Keyboard: Tab to the logo, press Enter or Down Arrow, move with the arrow keys, press Enter to go.

Header: the right side holds only the Quick Guide button and the Updated badge.

Returning: an app opens in the same tab, so the browser Back button brings you back.

THE FIVE APPS

SM — Support Metrics
Support volume, CSAT and team performance
supportmetrics.escosuave.com

HA — Holiday Advance Daily Report
Daily support reports for Holiday Advance
ha.escosuave.com

THIS GUIDE
DS — Daily Snapshot
The legacy Support Services daily snapshot
dailysnapshot.escosuave.com

TT — Torchie Trace
Cyber security forensics tool for office PCs
torchietrace.escosuave.com

DL — Drake Credential Lookup
Drake desktop credentials by Office or EFIN
drake.escosuave.com

DEVELOPED BY

Gerald Crawford

AVP, SUPPORT SERVICES

Liberty Tax

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Questions or ideas?

Scan the code with your phone camera to start an email to Gerald about Daily Snapshot. The subject line is already filled in.

gerald.crawford@libtax.com

Subject: Daily Snapshot question