The Customer Support Handbook

Practical ways to prioritize, personalize, and perfect your customer support behind the scenes with Sonar.

Every customer interaction tells a story — from the first support ticket to the follow-up that closes the loop.

Sonar was built to keep that story connected behind the scenes, so your account managers, support reps, and billing teams always have the context they need to deliver quick, accurate, and personal service.

But do you know all the ways it does this?

This handbook shares practical ways to streamline customer support, automate account updates, and simplify the tools your team uses every day. From managing tickets and automations to linking jobs, payments, and communications, you'll see how Sonar helps your team deliver the kind of service customers remember for the right reasons.

And no matter how long you've been with Sonar, we bet you didn't know Sonar could do all this.

The craziest part? This guide doesn't even cover everything. If you're looking for more insights, check out our Knowledge Base:

Learn More ›

Account Management

Did you know Sonar offers multiple ways to organize customer accounts?

Sonar lets you structure how customers, services, and locations connect — from simple residential accounts to complex, multi-site organizations.

For most subscribers, a standard individual account keeps everything in one place: billing, services, and communication.

For businesses or property managers, parent-child accounts group multiple accounts under one parent. The parent handles billing, while each child tracks its own services, equipment, and history.

Anchor-linked accounts connect customers through a shared serviceable address, keeping installation and network data tied to the location even as occupants change. They also support subsidized billing, where a property owner covers base service while tenants pay for upgrades or add-ons.

It's flexible account management built for how your customers — and your network — actually work.

Learn More ›

Did you know you can organize and filter accounts with groups and types?

In Sonar, Account Groups and Account Types help you organize customers, control available services, and filter reports more effectively.

Use Account Groups to manage service eligibility — like making employee-only plans visible only to accounts in an Employee Group, or limiting certain packages to business customers.

Use Account Types to define how accounts are billed, setting parameters like due dates, payment terms, or delinquency rules.

And both can be used to segment data, filter reports, and keep your accounts organized and consistent.

Learn More ›

Did you know Sonar can organize inventory for every stage of your fiber build?

With Segmentable Inventory, you can separate equipment and materials by region, project, or build phase — keeping everything from ONTs to splice enclosures easy to track. Assign segments to warehouses, crews, or job sites, and monitor what's deployed, reserved, or in transit — all from a single view.

It's a cleaner, faster way to manage your network buildouts — reducing mix-ups, speeding up installs, and giving your team full visibility from planning to go-live.

Learn More ›

Did you know you can customize what you see on every account?

In Sonar, every user can tailor their Account Overview to match how they work. Move key panels to the top for quick access, hide sections you don't use often, and arrange the layout around your priorities — whether that's billing details, technical data, or customer notes.

Need to connect to tools outside Sonar? Custom Links make it easy to jump straight to CRMs, documentation, or network maps — no extra searching required.

It's flexibility that keeps your view clean, personal, and focused on the details that matter most.

Learn More ›

Did you know you can check the health of your customer accounts at a glance?

The Account Issues Report gives you a quick way to spot potential problems across your customer base — like missing billing details, inactive services, or overdue balances.

By surfacing these issues in one place, Sonar helps your team fix errors before they impact customers, ensuring accounts stay accurate and healthy.

It's an easy, at-a-glance snapshot of account health that keeps your data clean and your operations running smoothly.

Learn More ›

Did you know you can plan customer move-ins and service changes in advance?

With Future Serviceable Addresses, Sonar lets you schedule and manage upcoming customer moves before they happen — so your team can plan installations, equipment transfers, and activations well ahead of time.

When the move date arrives, the address change can happen automatically with a Scheduled, keeping the customer's history, billing, and service details intact.

It's an easy way to manage transitions smoothly, reduce missed activations, and give new customers a seamless start.
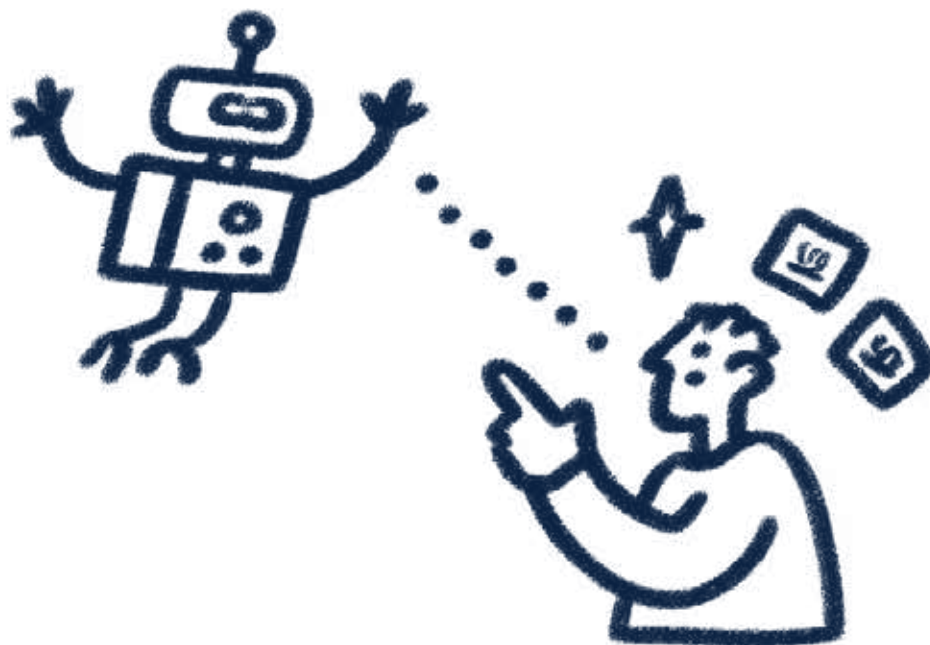
Learn More ›

Did you know Sonar uses AI integrations to support the entire customer journey?

Through integrations like Actifai and Sonar Retain, Sonar helps you deliver a more personalized and proactive customer experience — from the first plan selection to long-term retention.

Actifai uses AI-guided recommendations to help customers choose the right plan for their needs during checkout, reducing confusion and increasing conversions.
Sonar Retain monitors account activity and interactions to identify potential churn risks, auto-flagging them so your team can step in early — and helping ensure every retention call follows company policy.

Learn More ›
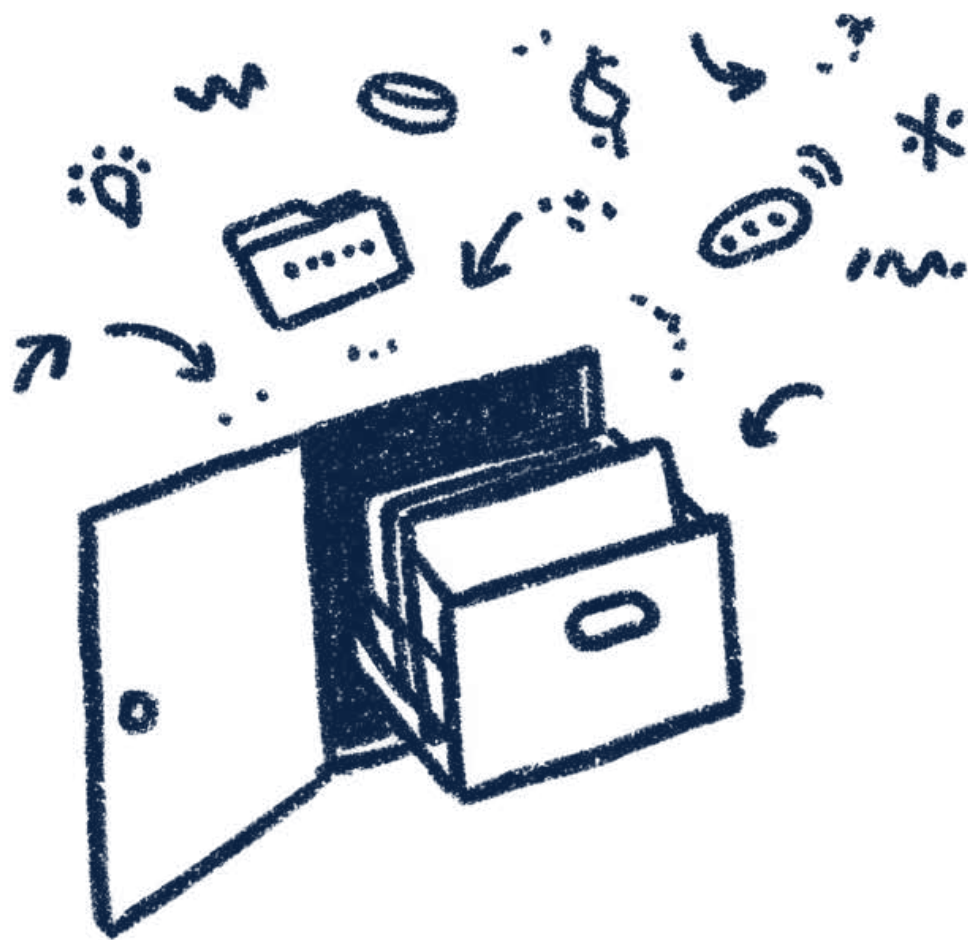
Did you know Sonar helps you keep account data clean — even after disconnection?

With Disconnection Reasons and Account Archives, Sonar makes it easy to close out accounts while keeping your data organized and useful.

Instead of deleting information, archived accounts preserve customer history for reporting and review — helping your team identify patterns and improve future processes. And by using consistent disconnection reasons, you can track why customers leave, spot recurring issues, and make data-backed improvements.

Learn More ›

Customer
Support

Did you know you can organize and filter tickets any way you need?

Sonar's Advanced Filters and Ticket Categories make it easy to keep support work organized and searchable — no matter how many tickets your team handles each day.

Use Ticket Categories to group tickets by function, like installations, billing questions, or service issues. Combine them with Advanced Filters to narrow down by status, assignee, account type, or any custom field — so you can find exactly what you need in seconds.

You can even save filters for quick access or build views for specific teams, making it simple to prioritize work and stay focused on what matters most.

Learn More ›

Did you know you can link and follow tickets to keep teams in sync?

Sonar's Parent Tickets and Ticket Subscriptions help your team stay coordinated when multiple issues or people are involved.

Use Parent Tickets to group related tickets — like when several customers report the same outage — so updates, notes, and resolutions stay connected. Closing the parent ticket can even close all related child tickets automatically.

With Ticket Subscriptions, anyone can follow a ticket to get notified of updates, ensuring key team members stay informed without needing direct assignment.

It's a simple way to reduce duplicate work, keep communication aligned, and make sure everyone sees the full picture.

Learn More ›

Did you know you can assign tasks to teams to pick up as needed?

With Task Groups in Sonar, you can organize work by team, department, or workflow and let team members pick up tasks from a shared queue as they go.

Each Task Group keeps related tasks in one place, making it easy to track progress, distribute workload, and ensure nothing gets missed.

Learn More ›

Did you know Sonar streamlines how you communicate with customers?

With Sonar, you can send direct messages to customers by email or SMS — right from their account — keeping all communication in one place.

Use Saved Messages for quick, repeatable updates or reminders, and when customers reply by email, speed things up with Canned Replies. These reusable templates make it easy to respond fast while keeping tone and messaging consistent across your team.

It's an efficient way to stay responsive, reduce repetitive typing, and ensure every customer gets a clear, professional reply — no matter who's answering.

Learn More ›