



CUSTOMER SELF-SERVICE PORTAL MANUAL

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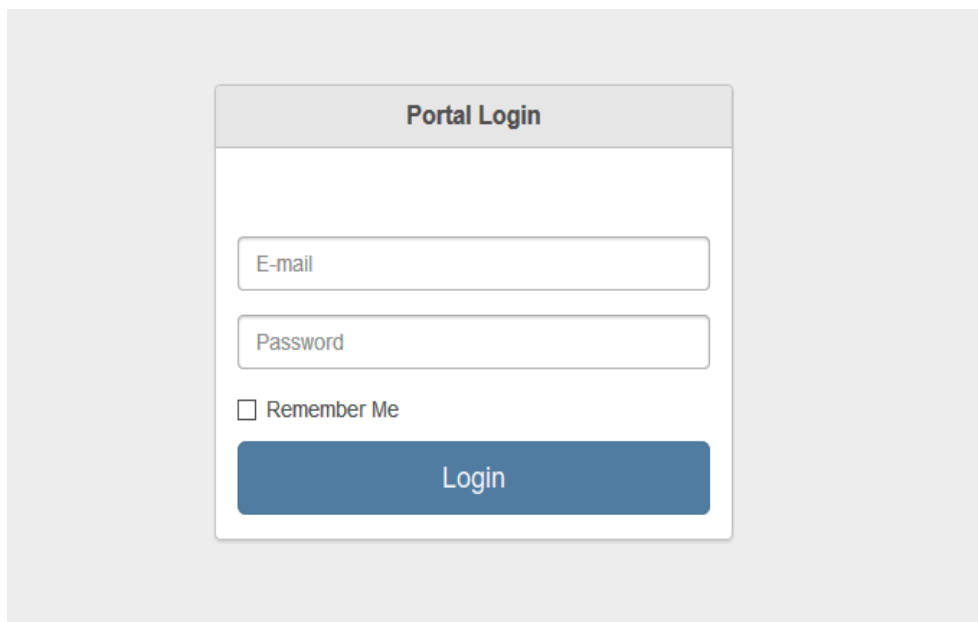
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1.0 Introduction

The CoreTEC Customer Self-Service Portal aims at assisting our clients in creating new support tickets as well as providing a real-time follow up on status and progress of existing support tickets. This document serves as a guideline for our clients on how to access and use the Self-Service Portal.

1.1 Portal Access

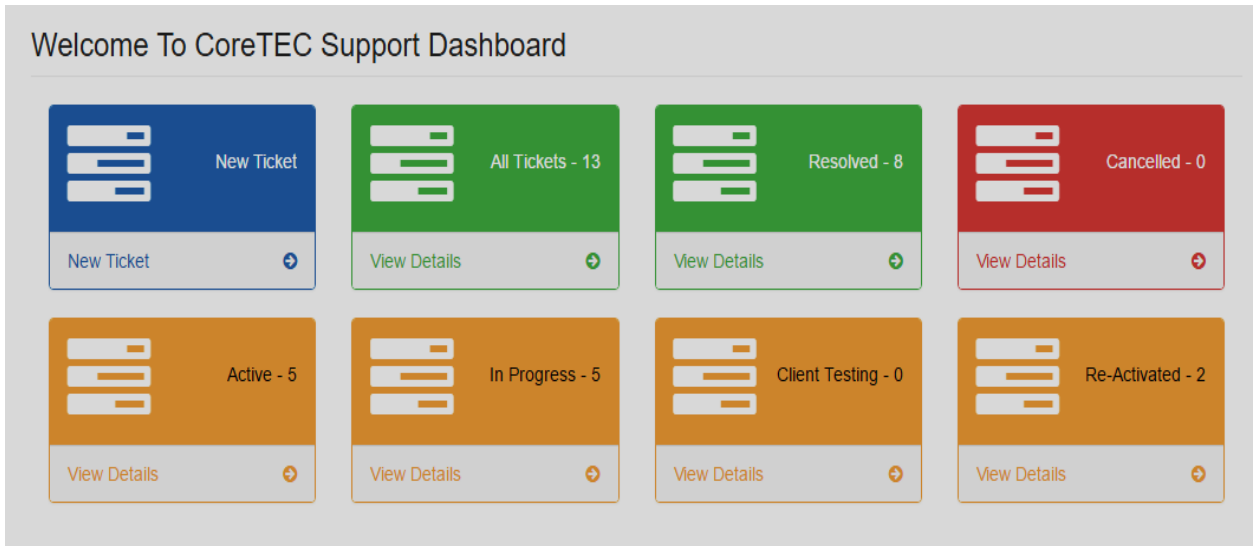
The CoreTEC Customer Self Service Portal is a web based platform and is accessible over the internet via <http://41.206.40.194:8085/> or <http://support.CoreTEC.co.ke:8085/> thus our clients should have internet connection to access this platform. Upon access, the portal loads the login section as shown below.



The image shows a screenshot of the CoreTEC Customer Self-Service Portal login interface. It consists of a white rectangular form with a grey header labeled 'Portal Login'. Below the header, there are three input fields: 'E-mail', 'Password', and a checkbox labeled 'Remember Me'. At the bottom of the form is a prominent blue button with the text 'Login' in white.

Enter the username and password as provided by the help desk team.

On successful login, the platform loads the support dashboard which provides a statistical summary for the clients tickets as shown below.



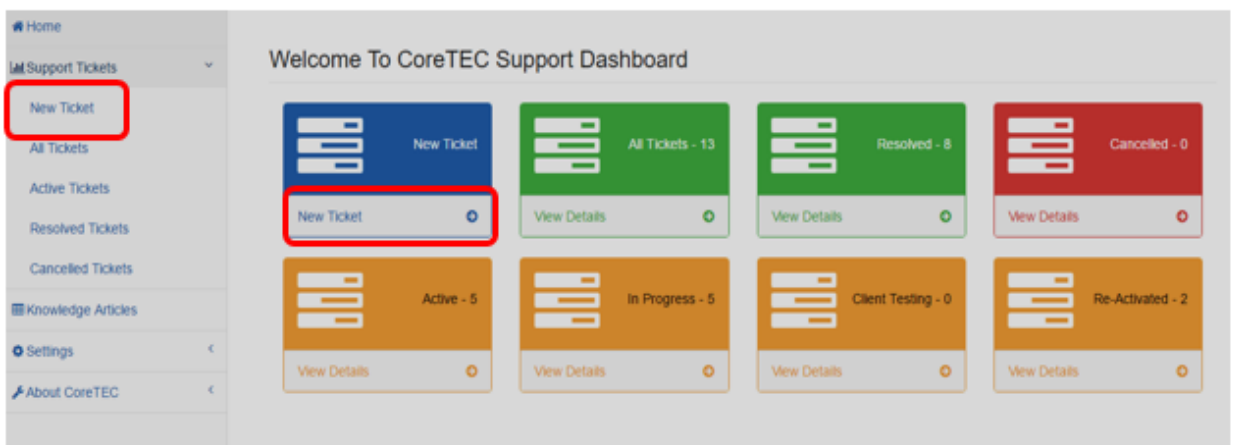
2.0 Tickets Management

This section explains in details the various operations highlighted below the client can perform with regards to support tickets using the portal.

2.1 New Ticket

To create a new support ticket, follow the steps below.

- a. Click on the **New Ticket** link on the Support Ticket Dashboard or the **New Ticket** link on the left navigation panel as shown below.



b. On the **New Ticket** page, fill in the ticket details.

The screenshot shows a 'New Ticket' form with the following fields and elements:

- Customer:** Text input field containing 'A. Datum Corporation (sample)'.
- Case Title:** Text input field.
- Subject:** Dropdown menu with 'Default Subject' selected.
- Description:** Text area for detailed input.
- Attachments:** A box labeled 'Drop files here' with a 'Select File' button and the text 'Please select file(s) to upload.'
- Buttons:** 'Submit' (green) and 'Cancel' (blue) buttons at the bottom.

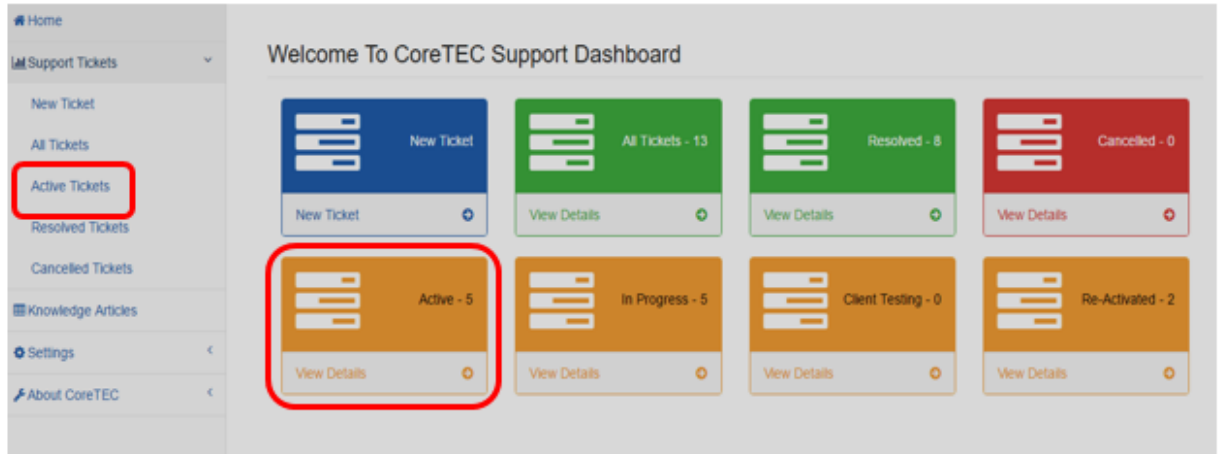
Note that Case Title and Subject are mandatory and thus be filled before submitting the ticket.

- Under case title, input a brief statement of what the request is about.
 - Under subject, in put the product/solution provided by CoreTEC from which the support request emanates.
 - Under description, put details of the support requests and explanation of the same.
 - If there are files to be attached on the new ticket, drag and drop or browse on the attachments section.
- c. Click on the **Submit** button to complete the Ticket creation process.
- d. An acknowledgement email notification will be sent confirming the successful creation hence receipt of the support ticket by CoreTEC help desk CRM & team.

2.2 Active Tickets

This provides details of all open tickets raised by the client. To access the active tickets, follow the steps below.

- a. Click on the **Active Tickets** link section on the Support Tickets Dashboard or from the left navigation menu as shown below.



- b. The system loads all the active support tickets with the ticket number, title, subject, description, date received, expert assigned, priority and ticket stage details as shown below.

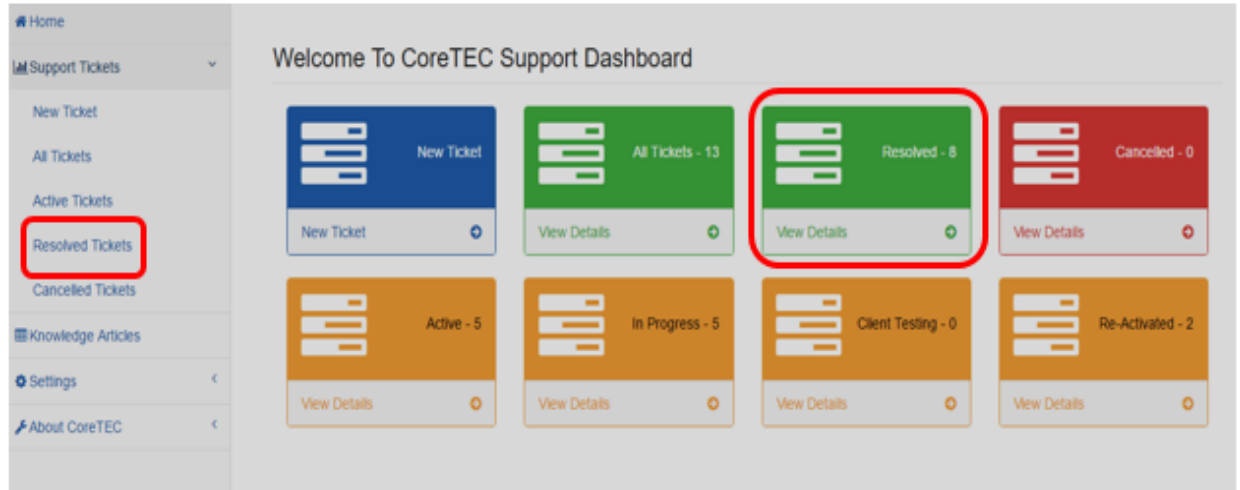
Ticket Number	Title	Subject	Description	Date Received	Assigned To	Priority	Stage
CAS-00014-R0D8C7	Missing parts (sample)	Delivery	ghghghgh	10/12/2015 7:00:00 AM	CRM Admin	Low	In Progress
CAS-00017-H4L1J0	Operating manual required (sample)	Information		10/9/2015 3:00:00 PM	CRM Admin	Low	Resolved
CAS-00025-R5P1Q2	Required Service (sample)	Maintenance		10/8/2015 5:00:00 PM	CRM Admin	Urgent	Resolved
CAS-00033-G0X5V1	Test Case		This is a Test Case	11/11/2015 7:20:38 AM	Eliazer Singoel	Urgent	In Progress
CAS-00037-P8T9Q2	ATM Withdrawal error			11/11/2015 7:43:09 AM	CRM Admin	Urgent	In Progress
CAS-00042-T5T1Q6	System Not Working	Default Subject	ghghghgh	5/24/2016 9:35:10 AM	CRM Admin	Urgent	In Progress

- c. Click on the ticket number link to view a ticket details from which the ticket details can be updated and resubmitted.

2.3 Resolved Tickets

This provides details of all resolved tickets raised by the client. To access the resolved tickets, follow the steps below.

- a. Click on the **Resolved Tickets** link section on the Support Tickets Dashboard or from the left navigation menu as shown below.



- b. The system loads all the resolved support tickets with the ticket number, title, subject, description, date received, expert assigned, priority and ticket stage details as shown below.

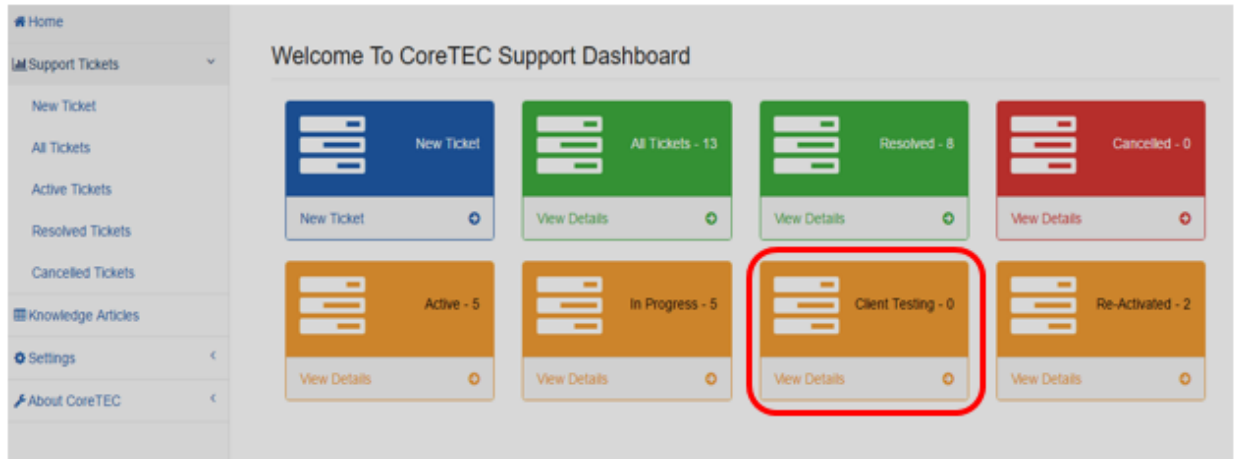
Resolved Tickets							
Search <input type="text"/> <input type="button" value="Search"/>							
Ticket Number	Title	Subject	Description	Date Received	Assigned To	Priority	Stage
CAS-00017-H4L1J0	Operating manual required (sample)	Information		10/9/2015 3:00:00 PM	CRM Admin	Low	Resolved
CAS-00025-R5P1Q2	Required Service (sample)	Maintenance		10/8/2015 5:00:00 PM	CRM Admin	Urgent	Resolved

- c. Click on the ticket number link to view a ticket details.

2.4 Client Testing Tickets

This section outlines all tickets that have been worked on by CoreTEC's experts but pending client's testing and confirming the resolution. To access the support tickets in the client testing stage, follow the step below;

- a. Click on the **Client Testing Tickets** link section on the Support Tickets Dashboard as shown below.

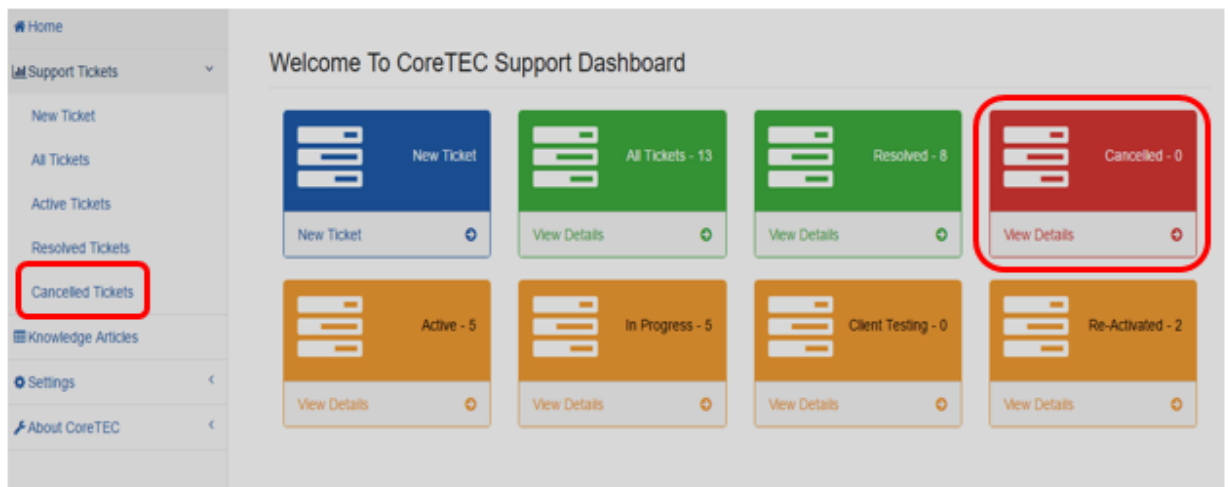


- b. The system loads all tickets in the client testing stage with the ticket number, title, subject, description, date received, expert assigned, priority and ticket stage details.

2.5 Cancelled Tickets

This provides details of tickets raised by the client but were later cancelled. To access the cancelled tickets, follow the steps below.

- a. Click on the **Cancelled Tickets** link section on the Support Tickets Dashboard or from the left navigation menu as shown below.



- b. The system loads all the cancelled support tickets with the ticket number, title, subject, description, date received, expert assigned, priority and ticket stage details as shown below. Click on the ticket number link to view a ticket details.

Cancelled Tickets

Search

Ticket Number	Title	Subject	Description	Date Received	Assigned To	Priority	Stage
CAS-00033-G0X5V1	Test Case		This is a Test Case	11/11/2015 7:20:38 AM	CRM Admin	Urgent	
CAS-00042-T5T1Q6	System Not Working	Default Subject	ghghghgh	5/24/2016 9:35:10 AM	CRM Admin	Urgent	

2.6 Re-Activated Tickets

This provides details of tickets that had been resolved or cancelled but were later reactivated for further working. To access the Re-Activated tickets, follow the steps below.

- Click on the **Re-Activated Tickets** link section on the Support Tickets Dashboard as shown below.

Welcome To CoreTEC Support Dashboard

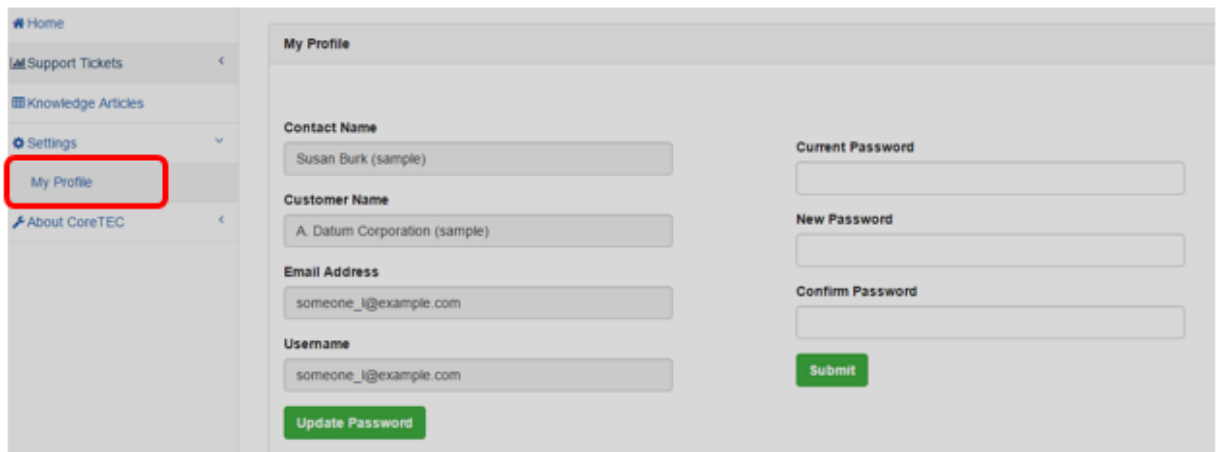
New Ticket	All Tickets - 13	Resolved - 8	Cancelled - 0
Active - 5	In Progress - 5	Client Testing - 0	Re-Activated - 2

- The system loads all the Re-Activated support tickets with the ticket number, title, subject, description, date received, expert assigned, priority and ticket stage details as shown below. Click on the ticket number link to view a ticket details.

3.0 Settings

3.1 My Profile

The profile section enable the client to maintain the account used to create and follow up on the support ticket through the portal. In addition, this section enables the client to update their account login details. To access the profile information, click on the **My Profile** link from the left navigation panel under **settings menu** as shown below.



The screenshot shows a user interface for the 'My Profile' section. On the left is a navigation menu with items: Home, Support Tickets, Knowledge Articles, Settings (expanded), My Profile (highlighted with a red box), and About CoreTEC. The main content area is titled 'My Profile' and contains several input fields: Contact Name (Susan Burk (sample)), Customer Name (A. Datum Corporation (sample)), Email Address (someone_l@example.com), and Username (someone_l@example.com). There is a green 'Update Password' button below the Username field. On the right side, there are three password input fields: Current Password, New Password, and Confirm Password, followed by a green 'Submit' button.

To update the profile password, click on the **Update Password** button and fill in the current and the new password and finally click on the **Submit** button to complete the password update process.

4.0 About CoreTEC

4.1 Contacts

This section provides the various channels through which you can reach CoreTEC. To access the contacts section, click the **Contact us** link on the left navigation panel as shown below.



4.2 Our Products

This link leads you to a page on our web site, with a comprehensive list of the business solutions & Products offered by CoreTEC.

To view the solutions offered by CoreTEC, click on **Our Products** link under **About CoreTEC** menu on the left navigation panel as highlighted on the figure above.