

# TEOCO Customer Support

Customer Support  
Portal Training

January 2010



**PRIVILEGED AND CONFIDENTIAL.** The information contained in this material is privileged and confidential, and is intended only for the use of the individual to whom it is addressed and others who have been specifically authorized to receive it. If you are not the intended recipient, you are hereby notified that any dissemination, distribution or copying of this material is strictly prohibited. If you have received this material in error, please destroy it immediately.

# The Basics - What



- **TEOCO Customer Support Portal**
  - As communicated to customers in the last few months, TEOCO has been working to consolidate our previous support request systems to a single support request system portal.
  - The following slides will walk you through TEOCO's Customer Support Portal that is available to **ALL** customers and is the primary way for users to submit support requests.

# The Basics - Where



The TEOCO Customer Support Portal can  
be accessed at:

**<http://support.teocosolutions.com>**

# The Basics - How



- What follows is a step-by-step guide to:
  - Submitting a support request
  - Viewing prior support requests
  - Updating an existing support request

# First Things First – Logging In



Login

**Step 1:** Enter your username and password supplied to you by your Account Manager

Username:

Password:

Login

**Step 2:** Click *Login*

Powered by: GWI Help Desk Software

Internet

100%



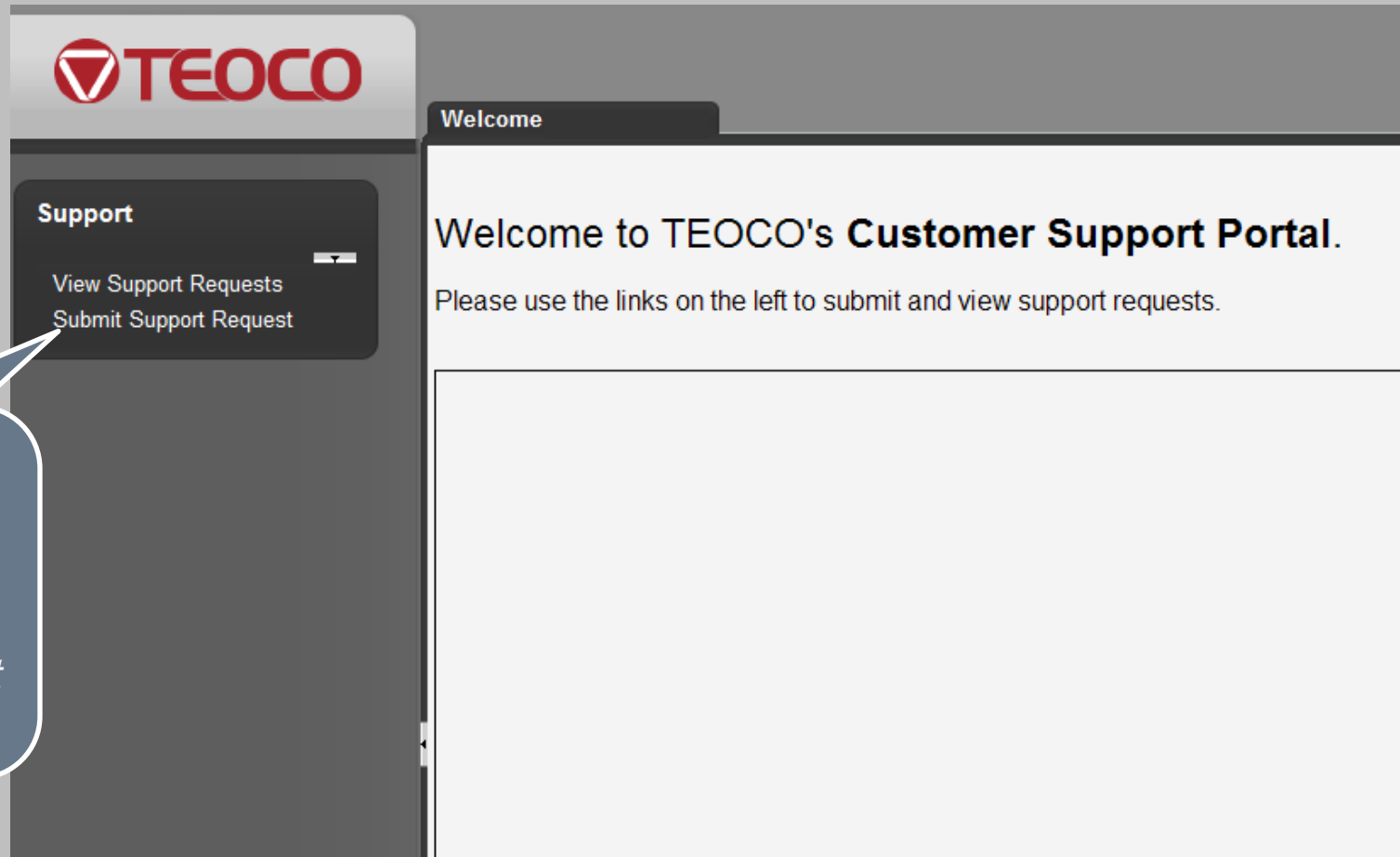
# First Things First – Logging In



The screenshot shows the TEOCO Customer Support Portal. At the top left is the TEOCO logo. Below it is a dark sidebar with a 'Support' section containing two links: 'View Support Requests' and 'Submit Support Request'. The main content area has a 'Welcome' header and a message: 'Welcome to TEOCO's Customer Support Portal. Please use the links on the left to submit and view support requests.'

Once logged in,  
you will be  
taken to this  
Home Screen.

# Submit a Support Request



To submit a support request, simply click the link *Submit Support Request*.

# Submit a Support Request



**Support**

View Support Requests

Submit Support Request

**Step 1:** Choose the product your request applies to from a drop-down menu of products.

**Step 2:** Enter a description of your request.

**Step 3:** Set the priority level of this request by choosing low, medium, or high from the drop-down menu.

**Step 4 (optional):** If available, you may enter the specific customer ticket number and if necessary, you may attach supporting documents.

**Step 5:** Click *Submit*

Home | Support Request

Fields marked with an asterisk are required.

\* Category:

\* Description:

Customer Ticket Number:

\* Customer Priority:

\* TEOCO Severity:

Attachment:

(Max size per file: approx. 4 Mb)

# Submit a Support Request



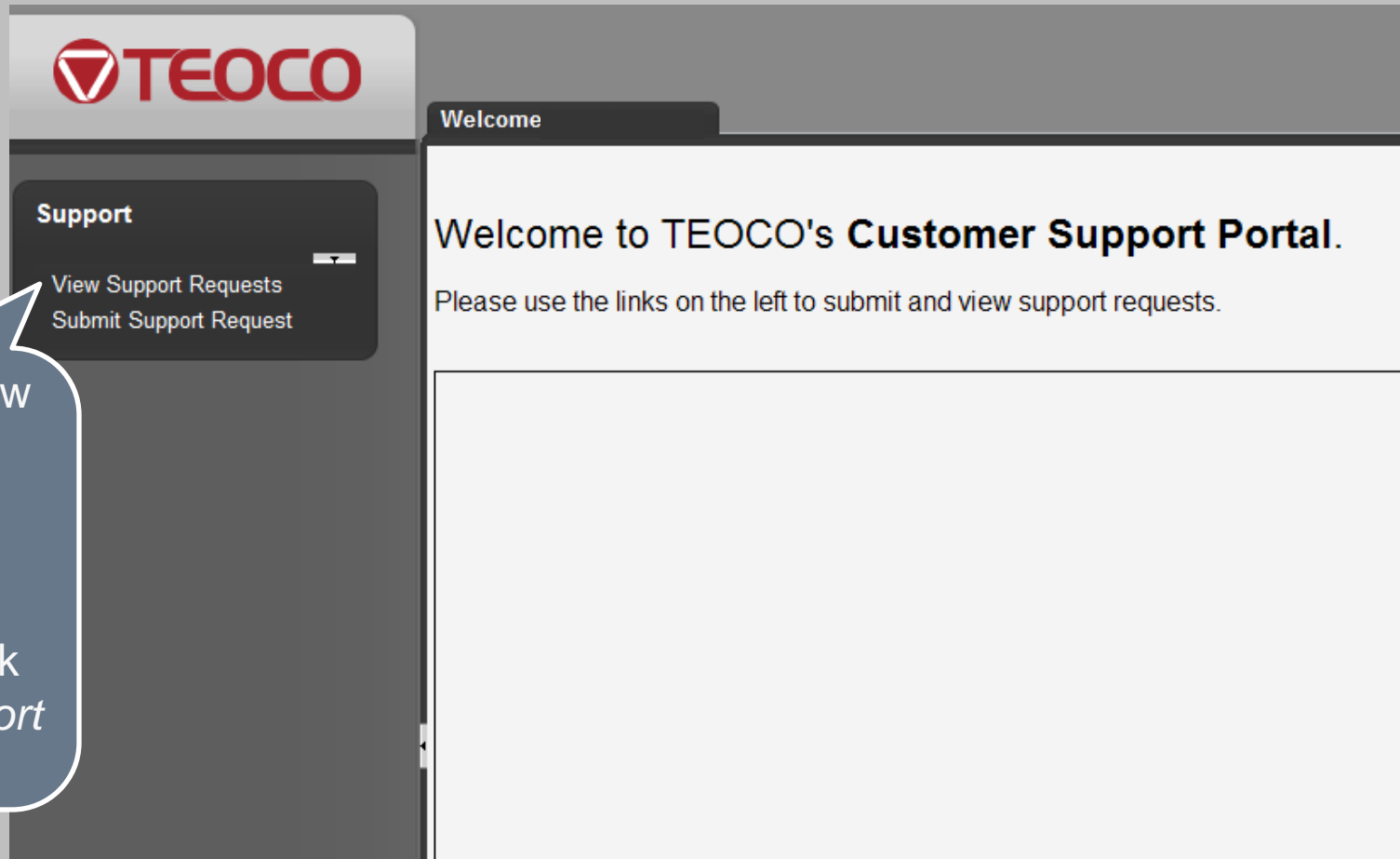
You will receive an e-mail notification once your support request has been assessed.

# View Support Requests



At any time, you will be able to log in and **view previously submitted support requests** in just a couple of easy steps. To do so, we'll assume you've successfully logged in and are starting from the Home Page.

# View Support Requests



**Step 1:** To view a list of previously submitted support requests, click on *View Support Requests*

# View Support Requests

You can also search for words or phrases contained within your existing support requests by typing your search words in the "Search Text" box.

And then clicking *Search*

From here, you can **sort** your existing support requests by simply clicking on any one of the headers. Click again to sort in descending order.



Home | Support Requests

Currently viewing incidents for: Test Customer

Search Text:

Search

Clear Search

Created ▲	Number	Status	Customer	Issue
<a href="#">12/14/2009 9:17:17 AM</a>	9CEA2438A4	Open	Test Customer	The sorting does not appear to be working on the Disputes tab. When I click the column header on the Dispute Amount, it appears to be sorting by absolute value rather than actual value. See the attached screenshot.
<a href="#">12/14/2009 9:20:22 AM</a>	9CEA2A5A3A	Open	Test Customer	The system is currently unavailable. When we try to go to the Citrix website, we get an error message.
<a href="#">12/14/2009 9:21:46 AM</a>	9CEA314932	Open	Test Customer	I am missing the 11/15/09 invoice for BAN ABC1234, vendor Farmers Telephone. This BAN is processed by XTrak.
<a href="#">12/14/2009 9:25:44 AM</a>	9CEA352239	Open	Test Customer	We are getting an error when we try to run a report in the Business Objects universe. See attached for a screenshot of the error message. This report is needed for month-end reporting.
<a href="#">12/14/2009 11:24:56 AM</a>	9CEC341664	Open	Test Customer	lkk
<a href="#">12/17/2009 2:24:55 PM</a>	9CHF352718	Open	Test Customer	Please add a report which shows the workflow history of a specified invoice and all associated transactions based on the selection of BAN, bill date, and invoice number.
<a href="#">12/17/2009 2:26:43 PM</a>	9CHF374221	Open	Test Customer	I am missing the 12/15/09 invoice for BAN ABC1234, vendor Farmers Telephone. This BAN is processed by XTrak.

# Update an Existing Support Request



- Once your support request is closed, you will receive a resolution email.
  - If your support request was not resolved to your satisfaction, you may **update the existing support request** (as opposed to opening a new request). TEOCO will assess your update and either re-open the existing request or start a new request.

# Update an Existing Support Request – Option 1



To **update an existing support request**, we'll again assume you've successfully logged in and are starting from the Home Page.

# Update an Existing Support Request – Option 1



**TEOCO**

Welcome

**Support**

- View Support Requests
- Submit Support Request

Welcome to TEOCO's **Customer Support Portal**.

Please use the links on the left to submit and view support requests.

**Step 1:** View your previously submitted support requests, by clicking *View Support Requests*

# Update an Existing Support Request – Option 1



Step 2: Select the request you would like to update.

TEOCO

Home | Support Requests

Currently viewing incidents for: Test Customer

Search Text:  Search Clear Search

Created	Number	Status	Customer	Issue
<a href="#">12/14/2009 9:17:17 AM</a>	9CEA2438A4	Open	Test Customer	The sorting does not appear to be working on the Disputes tab. When I click the column header on the Dispute Amount, it appears to be sorting by absolute value rather than actual value. See the attached screenshot.
<a href="#">12/14/2009 9:20:22 AM</a>	9CEA2A5A3A	Open	Test Customer	The system is currently unavailable. When we try to go to the Citrix website, we get an error message.
<a href="#">12/14/2009 9:21:46 AM</a>	9CEA314932	Open	Test Customer	I am missing the 11/15/09 invoice for BAN ABC1234, vendor Farmers Telephone. This BAN is processed by XTrak.
<a href="#">12/14/2009 9:25:44 AM</a>	9CEA352239	Open	Test Customer	We are getting an error when we try to run a report in the Business Objects universe. See attached for a screenshot of the error message. This report is needed for month-end reporting.
<a href="#">12/14/2009 11:24:56 AM</a>	9CEC341664	Open	Test Customer	lkk
<a href="#">12/17/2009 2:24:55 PM</a>	9CHF352718	Open	Test Customer	Please add a report which shows the workflow history of a specified invoice and all associated transactions based on the selection of BAN, bill date, and invoice number.
<a href="#">12/17/2009 2:26:43 PM</a>	9CHF374221	Open	Test Customer	I am missing the 12/15/09 invoice for BAN ABC1234, vendor Farmers Telephone. This BAN is processed by XTrak.

Support

- View Support Requests
- Submit Support Request

# Update an Existing Support Request – Option 1



TEOCO

Home | Support Requests | Support Requests

**Support**

Support Requests  
Support Request

First Name: Test  
Company: Test Company  
Phone:

Last Name: Customer  
Location:  
Email: coosee@teoco.com

Date Created: 14-Dec-2009 09:17  
Status: Open

Number: 9CEA2438A4

Category: BillTrak Pro

Description:  
The sorting does not appear to be working on the Disputes tab. When I click the column header on the Dispute Amount, it appears to be sorting by absolute value rather than actual value. See the attached screenshot.

History:  
1/6/2010 11:18:43 AM - Can you confirm the version of BillTrak Pro that is running on the machine from which the screenshot was taken? We are unable to reproduce this issue with the current version.

TEOCO Severity: 3  
Customer Ticket Number:  
Customer Priority: Low

Update This Incident:

Attachment:

(Max size per file: approx. 4 Mb)

Send Update

**Step 3:** Add necessary updated information in the update box.

**Step 4 (optional):** If necessary, you may attach supporting documents.

**Step 5:** Click *Send Update*

# Update an Existing Support Request – Option 2



- Existing support requests can also be updated by responding to the system generated e-mail **as long as you include the ticket number either in the subject or body of the email.**
- If the ticket number is included, the system will automatically update the ticket within the Customer Support Portal and be noted in the correspondence history.

# It's That Easy



- Our intention is for the TEOCO Customer Support Portal to be a helpful, easy-to-use tool for you to communicate with our Customer Support team.
- If you have any questions about the TEOCO Customer Support Portal, please don't hesitate to contact your Account Manager.



Thank you!