
Sugar Serve 9.2 Portal User Guide

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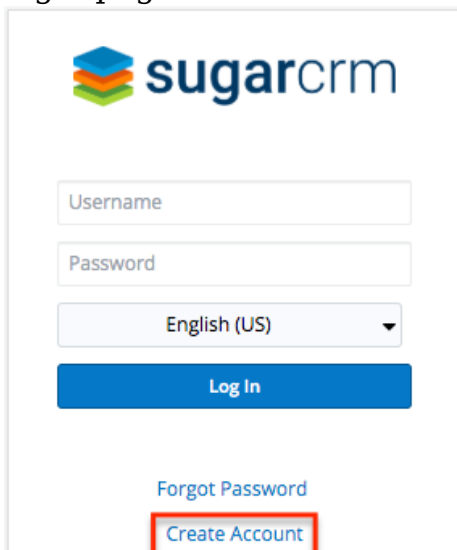
Sugar Serve 9.2 Portal User Guide

Overview

The customer support portal allows you, the end portal user, to interact with your vendor and perform actions such as creating and managing your support cases as well as searching for and accessing any product defects/feature enhancement requests and knowledge base articles. You can also view and update your contact information via the portal which allows you to keep your record up-to-date in the vendor's system. Please note that the modules, options, and functionality available in the portal may vary depending on your vendor's configuration. This documentation covers the basics of utilizing the support portal as well as how to perform common tasks such as creating records (e.g. cases), adding notes to records, searching for records, etc.

Signing up for the Support Portal

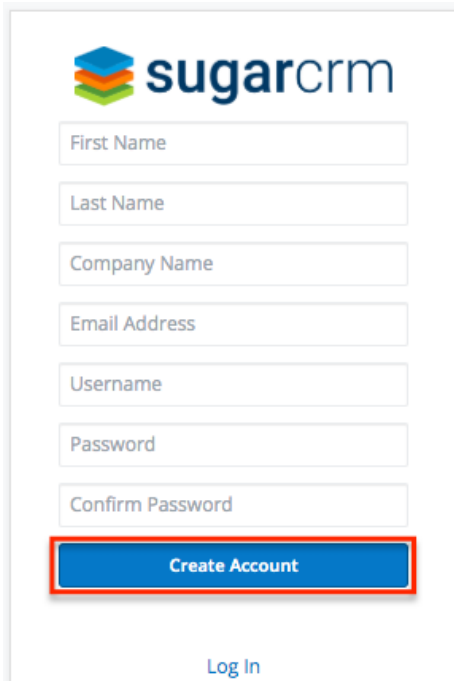
In order to access the support portal, you must first sign up for a portal account via the URL provided by your vendor and click "Create Account" on the portal's login page.



The screenshot shows the SugarCRM login page. At the top left is the SugarCRM logo. Below it are two input fields for "Username" and "Password". Underneath the password field is a dropdown menu currently set to "English (US)". A blue "Log In" button is positioned below the dropdown. At the bottom of the form area, there are two links: "Forgot Password" and "Create Account". The "Create Account" link is highlighted with a red rectangular border.

Complete the registration form, including all required fields (e.g. Email Address, Username, Password), then click "Create Account". Please note that the password you enter must conform with the password requirements configured by your vendor. Once your portal activation request gets submitted to your vendor, a representative in the organization will need to review and approve your request before you can access the portal. Once your portal account has been activated, you

will receive an email from the vendor confirming that your account is ready to access.



The image shows a registration form for SugarCRM. At the top left is the SugarCRM logo, which consists of a colorful cube icon followed by the text "sugarcrm". Below the logo are seven input fields: "First Name", "Last Name", "Company Name", "Email Address", "Username", "Password", and "Confirm Password". Each field is a simple white box with a light gray border. Below the "Confirm Password" field is a blue button with the text "Create Account" in white, which is highlighted with a red rectangular border. At the bottom center of the form area is a blue link that says "Log In".

Accessing the Support Portal

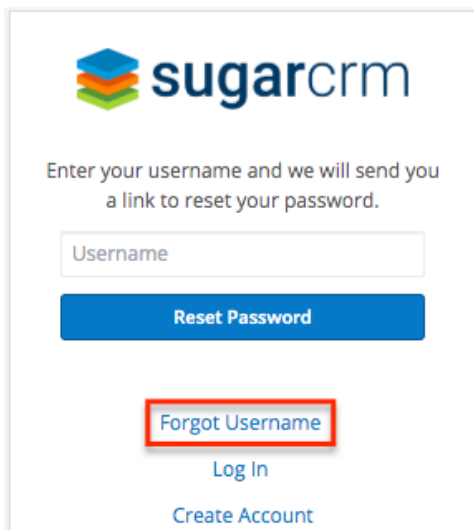
Once your portal account has been activated, you can navigate to the portal's login page using the portal URL previously provided by your vendor. If you do not have an active portal account, you will need to sign up for portal access by following the instructions in the [Signing up for the Support Portal](#) section. The following sections will cover the basics on how to log into the portal, reset your password, etc.

Logging in

The portal login screen is where you will enter the username and password that you entered when registering for the portal account. Once you have entered in your login credentials, click the Log In button to access your portal account. Please note that you will need to have an [active portal account](#) before you can access the portal.



If you do not remember your username or are having difficulty logging into your account click the [Forgot Password](#) link then click "Forgot Username" (if the link is available) in the following screen, which will open up a Contact Info screen containing the vendor's contact information (e.g. phone, email) where you can reach out for further assistance.

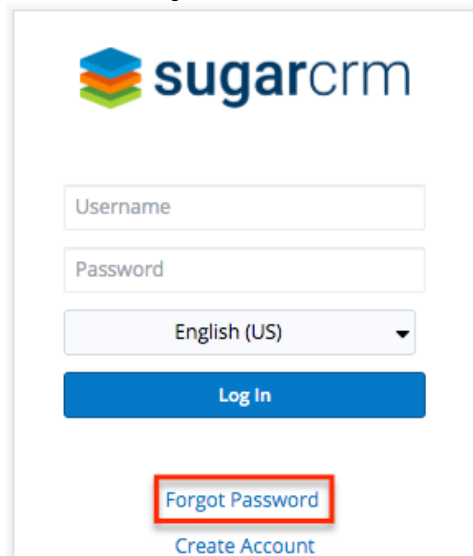


If you have forgotten your password, then you can reset it by clicking the [Forgot Password](#) link and entering your username in the next screen. For more information on resetting your password, please refer to the [Resetting Your Password](#) section below.

Resetting Your Password

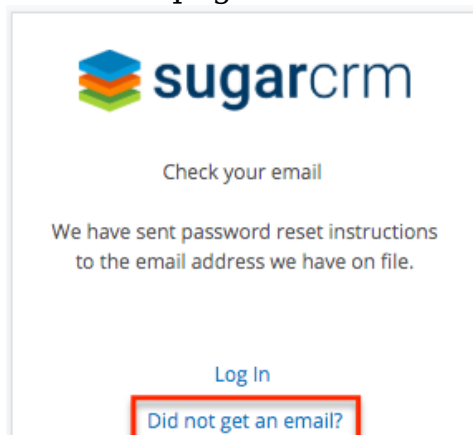
There may be occasions where you forget your password for the portal and will

need to reset it. You can request a password reset directly from the portal's login screen by clicking the Forgot Password link. If you do not see the Forgot Password link on the login screen, reach out to your vendor for further assistance. Once you click the Forgot Password link, the Forgot Password screen will open where you can enter your username and click "Reset Password".



The screenshot shows the SugarCRM login interface. At the top is the SugarCRM logo. Below it are input fields for 'Username' and 'Password', followed by a language dropdown menu set to 'English (US)'. A blue 'Log In' button is positioned below the dropdown. At the bottom of the login form, there is a red-bordered button labeled 'Forgot Password' and a blue link labeled 'Create Account'.

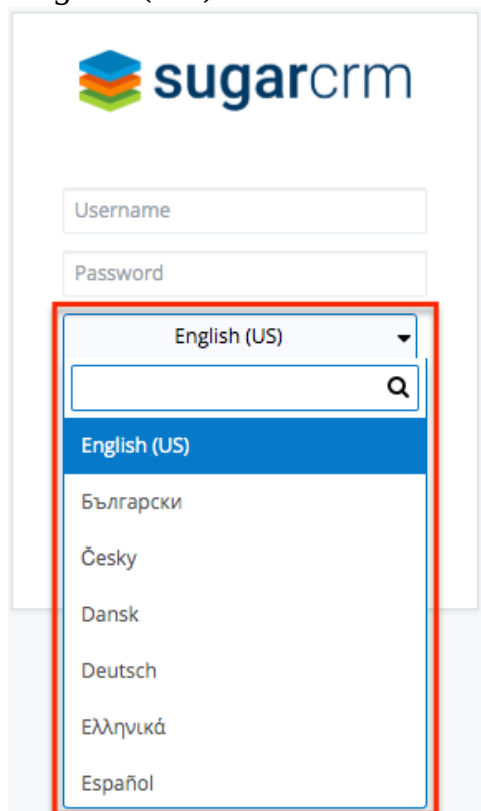
An email containing instructions to reset your password will be sent to the email address the vendor has on file for you. Simply click the link in the email which will open the reset password page where you will enter your new password and confirmed password. Please note that the new password must conform with the password requirements configured by your vendor. If you do not receive an email, you can click the "Did not get an email?" link on the email confirmation screen, which will open up a Contact Info screen containing the vendor's contact information (e.g. phone, email) where you can reach out for further assistance. Please note that you can also click the Forgot Username link on the Forgot Password page to access the same contact information.



The screenshot shows the 'Forgot Password' confirmation screen. It features the SugarCRM logo at the top. Below the logo, the text reads 'Check your email' and 'We have sent password reset instructions to the email address we have on file.' At the bottom of the screen, there is a blue 'Log In' link and a red-bordered button labeled 'Did not get an email?'.

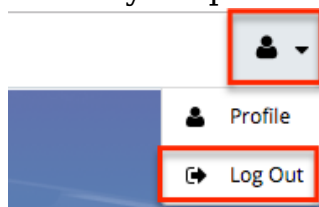
Setting Your Language

You have the option to choose the primary language you want to be displayed in your portal account by selecting the desired language from the language dropdown list on the portal login screen. Please note that the default language selected is English (US).



Logging Out

When you are done using the portal and wish to log out of the system, simply click the user profile image on the upper right of the portal and select "Log Out". This will log you out completely from the portal and you must [log in](#) again in order to access your portal account.



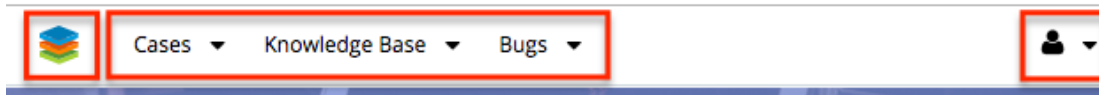
User Interface

Once you are logged into the portal, the portal provides you with a simple, streamlined, and intuitive user interface to access the information you need. Please

note that the [navigation bar](#) displays at the top of each page in the portal for easy access to various modules (e.g. Knowledge Base), access to common actions (e.g. create, view) in the module tabs, etc. Clicking the company logo icon on the far left of the navigation bar will return you back to the portal's [Home page](#) dashboard.

Navigation Bar

All pages within the portal display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the Home page dashboard, various modules (e.g. Cases, Knowledge Base), as well as your user profile.



The navigation bar consists of the following options from left-to-right:

Navigation Item	Description
Home	Click the company logo icon on the far left of the navigation bar to access the Home page dashboard.
Module Tabs	The Cases, Knowledge Base, and/or Bugs modules display on the navigation bar. Click the module name to open its list view or click the triangle to the right of each module name to display the Actions and Recently Viewed menu. Please note that the modules available in the portal may vary depending on your vendor's configuration.
User Menu	Click the user profile image to display the user menu, which allows access to your profile as well as the Log Out option.

Home

The portal's home page houses the dashboard which contains various dashlets as well as a help search box. Please note that the dashlets available in the portal may vary depending on your vendor's configuration. The help search box appears at the top of the screen and allows you to perform a knowledge base article search to try

and find relevant articles that can help answer your question or help troubleshoot your issue prior to creating a case. If the vendor did not enable this search option for the portal, then a Create Case button will appear instead in its place. For more information regarding this search box, please refer to the [Help Search Box](#) section. Below the help search box, the following cases and knowledge base dashlets will display:

- **All Open Cases** : Displays a list of all cases filed for your company with an open status (e.g. New, Assigned). You can click the case's subject in the dashlet to open its record view and access additional details. You can also sort by a field column in either ascending or descending order by clicking the column header that has a pair of arrows.
- **Recently Resolved Cases** : Displays a list of recently closed cases for your company within the last 7 days. You can click the case's subject in the dashlet to open its record view and access additional details. You can also sort by a field column in either ascending or descending order by clicking the column header that has a pair of arrows.
- **Knowledge Base Categories & Published Articles** : Displays a hierarchical structure of categories which can be used to locate and access knowledge base articles. The folder icons represent categories while document icons represent articles. Click the folder icon to expand and display the child categories and published articles. To collapse an expanded category, simply click the open folder icon. You can click the article's name to open the article in record view.

The screenshot shows a user interface with a search bar and three dashlets. The search bar is highlighted with a red box and contains the text "Search...". The "All Open Cases" dashlet contains a table with columns: Subject, Num., Status, Priority, and Type. The "Priority" column header is highlighted with a red box. The "Recently Resolved Cases" dashlet contains a table with columns: Subject, Num., Status, Priority, and Type. The "Knowledge Base Categories & Published Articles" dashlet contains a tree view with categories: Documentation, Tutorials, Video, and Help. The "How to change the language" article is highlighted with a red box.

Subject	Num.	Status	Priority	Type
Getting ...	255	New	High	Product
User can...	252	New	High	Admini...
Cannot a...	251	New	High	Admini...
Warning ...	239	Assigned	Low	Admini...
Help	256	Assigned	High	Admini...

Subject	Num.	Status	Priority	Type
Need as...	236	Closed	High	Product
Warning ...	237	Duplicate	Medium	User
Need to ...	240	Duplicate	Medium	Product
System ...	238	Rejected	Low	User

- Documentation
- Tutorials
- Video
- Help
 - How to change the language

Help Search Box

The help search box allows you to perform a knowledge base article search from the portal's home page to try and find relevant articles that can help answer your question or help troubleshoot your issue prior to filing a case with your vendor. If the vendor did not enable this search option for the portal, then a Create Case button will appear instead on the home page. To perform a search, simply enter in the search term, and the search results will begin displaying relevant knowledge base articles once you enter in at least one character. You can click the article's name in the search result to open the knowledge base article's record view in a new tab. Please note that clicking your mouse outside of the search box or clicking an article's name to open the record view will clear the search results but the search term will remain in the search box.

If there are multiple matching articles, the search result will be broken up into pages that you can scroll through by clicking the right and left arrow. You can also click the page number to view the search results on a particular page. If the articles in the search result do not answer your question and you would like additional assistance, please click the "Create a Case" link below the search results to file a case. The case's subject in the record view layout will be pre-populated with your search term. For more information on creating a case, please refer to the [Creating Records in the Portal](#) section.

Cases ▾ Knowledge Base ▾ Bugs ▾

What can we help you with today, John Smith?

troubleshooting

Troubleshooting broken buttons
Upon logging into your instance, you see that the buttons in the system are not displaying correctly on the pages and clicking the buttons do not work as expected. This article will cover some of the troubleshooting steps you can take to try and resolve this issue.

Troubleshooting users unable to view imported records
There may be occasions where a user may not be able to view records that have been imported into the system. There can be a number of reasons why the user is not able to see the records and this article will go over the various troubleshooting steps.

Troubleshooting users unable to view records
Occasionally a user may report that they are unable to access their records in the system. This article covers some of the troubleshooting steps you can apply to try and identify the reason why some users are unable to view records.

Troubleshooting missing records
Upon logging into your instance, you see that there are missing records in your account.

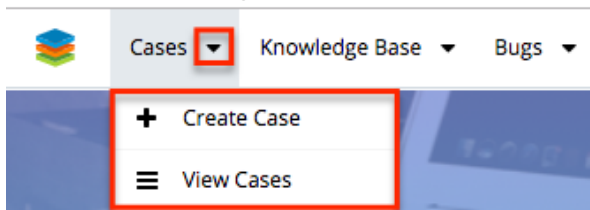
< 1 2 >

Didn't find what you are looking for? [Create a Case](#)

Subject	Num.	Status	Priority	Type	Date Created	Re...
Help	256	Assigned	High	Admin...	2019-09-17 12...	
Warning ...	239	Assigned	Low	Admin...	2019-09-16 08...	
Cannot a...	251	New	High	Admin...	2019-09-16 11...	
User can...	252	New	High	Admin...	2019-09-16 11...	
Getting ...	255	New	High	Product	2019-09-17 12...	

Module Tabs

Module tabs are located to the right of the company logo icon on the navigation bar at the top of any portal screen. To access a specific module's list view, simply click the module's name (e.g. Cases). You can also click the triangle to the right of the module's name to display the Actions and Recently Viewed menu. The Actions menu allows you to perform important actions such as "Create Case" while the Recently Viewed menu displays the list of records you last viewed in the module. Please note that the modules available in the portal may vary depending on your vendor's configuration.

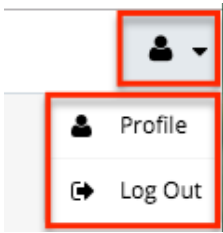


The following operations are available in the module tab's Actions menu:

Menu Item	Module	Description
Create Case	Cases	Opens the record view layout to create a new case
Report Bug	Bugs	Opens the record view layout to create a new bug
View "Module Name"	Cases, Bugs, Knowledge Base	Opens the list view layout to search and display cases, bugs, or knowledge base articles

User Menu

A profile image icon will display on the upper right of the portal and you can click this to display the user menu where you can access your profile or log out of the portal. Please note that you can upload an image via your user profile to display as your main profile image in the portal. For more information on updating your user profile, please refer to the [User Profile](#) section below. Selecting the Log Out option will log you out of your current user session and direct you back to the main [login](#) page.



User Profile

The User Profile section of the portal displays basic information such as your name, email address, primary address, etc. that the vendor has on file in their system. If any of your contact information changes, please update your profile accordingly so that the vendor has up-to-date contact information. Please note that any changes made to your user profile will automatically be updated in the vendor's database as well.

User Fields

The User Profile contains a number of stock fields from the vendor's database as listed in the table below. Please note that depending on your vendor's configuration, the fields available to complete in the user profile may vary.

Field	Description
Alternate Address	Your secondary address (e.g. billing or shipping)
Assistant	The name of your assistant
Assistant Phone	The assistant's phone number
Birthdate	Your date of birth
Date Created	The date your contact information was entered into the system
Date Modified	The date your contact information was last modified
Department	The department where you work
Description	A description or other information about you
Do Not Call	Indication that you should not be called
Email Address	Your email address Note: Additional email addresses can be added using the Plus button below your

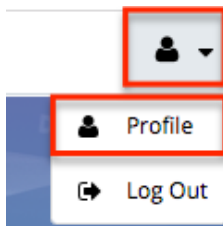
	current address.
Fax	Your fax number
First Name	Your first name
Home	Your residence telephone number
Language Preference	Your preferred language when accessing the portal
Last Name	Your last name
Mobile	Your mobile telephone number
Office Phone	Your office telephone number
Other Phone	Your non-primary telephone number
Portal Name	Your username for accessing the portal
Portal Password	Your password for accessing the portal
Primary Address	Your primary mailing address
Salutation	Standard greeting for you (e.g. Mr., Ms., Dr., etc.)
Title	Your job title

Editing User Profile

You can edit your user profile at any time by clicking the user profile image on the upper right of the portal then selecting "Profile". Once you are in the record view, you can edit individual fields without entering the full edit mode by clicking the field name (e.g. Email). Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. If you wish to edit multiple fields at once via the record view, click the Edit button on the upper right of the page. Once the necessary fields have been updated, click "Save" to preserve the changes made.

Use the following steps to edit your user profile:

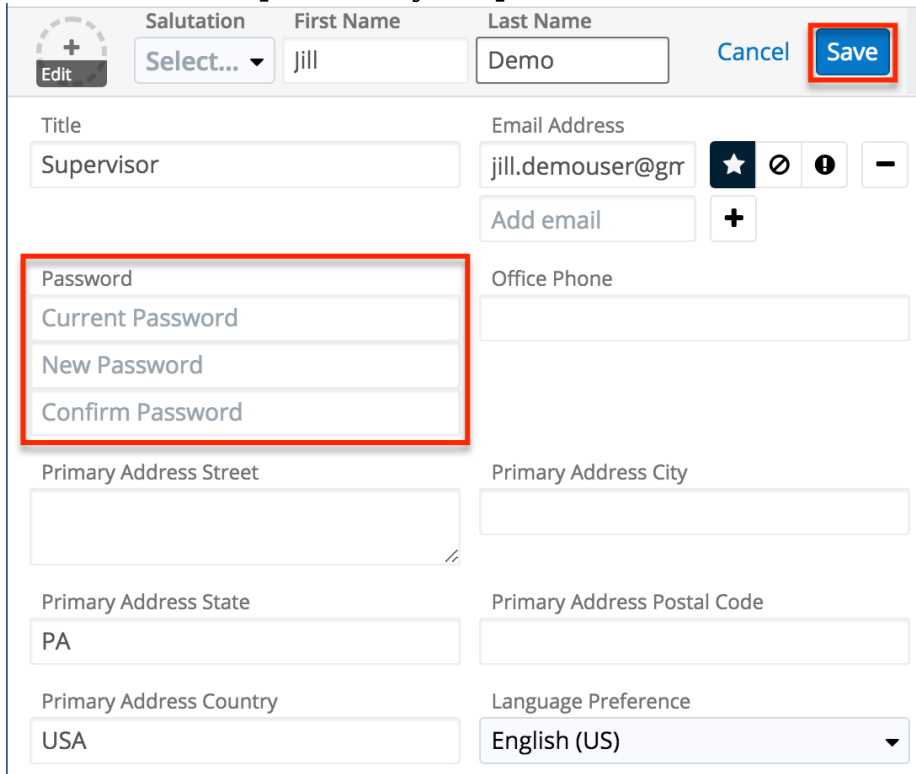
1. Click the user profile image and select "Profile".



2. Click "Edit" to make changes to your profile information.
3. Enter appropriate values for the [fields](#) you wish to update.

Note: To update your portal password, enter your current password, new password, and your new password again in the Confirm Password field. The new password must conform with the password requirements configured by your vendor.

4. Click "Save" to preserve your profile information.



The screenshot shows a user profile form with the following fields and controls:

- Salutation:** Select... (dropdown)
- First Name:** Jill
- Last Name:** Demo
- Buttons:** Edit (with + icon), Cancel, Save (highlighted with a red box), and a right arrow.
- Title:** Supervisor
- Email Address:** jill.demouser@grr (with star, lock, info, and minus icons)
- Add email:** + (button)
- Password section (highlighted with a red box):**
 - Current Password
 - New Password
 - Confirm Password
- Office Phone:** (empty field)
- Primary Address Street:** (empty field)
- Primary Address City:** (empty field)
- Primary Address State:** PA
- Primary Address Postal Code:** (empty field)
- Primary Address Country:** USA
- Language Preference:** English (US) (dropdown)

If you have updated your password, the new password will take effect the next time you log into the portal.

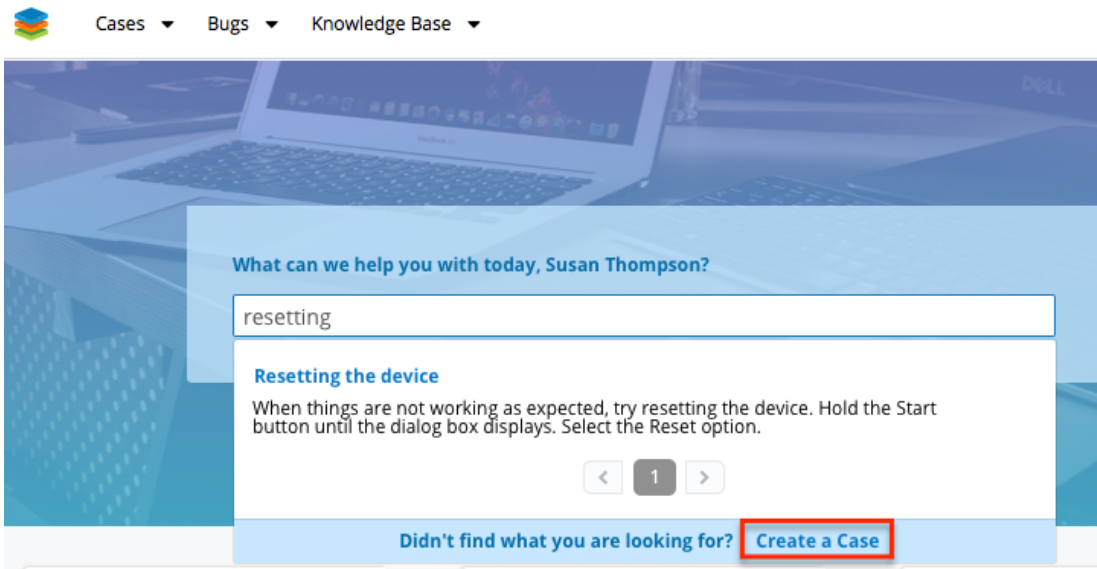
Creating Records in the Portal

There are various methods for creating records (e.g. cases, bugs) in the portal including via the module itself and the help search box. The same record view layout opens when creating records by any of these methods and includes all of the relevant fields you need to report the issue to your vendor. It is highly recommended that you include as much detail as possible to help the vendor's agent to better understand the problem or question and help resolve the issue as quickly as possible without spending excessive time gathering additional information. Please note that case and bug records cannot be edited once it has been saved. If you need to add additional information (e.g. screenshots, diagnostic files) to the case or bug, you can add a related [note](#) to the record. Any additional changes to the record's details can be made by an agent from your vendor.

Note: Please note that the cases you create can only be viewed by your vendor and the portal users associated with your organization. Bugs created in the portal, on

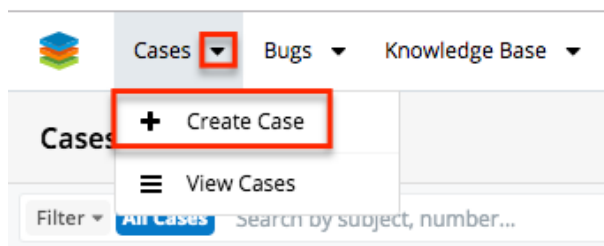
the other hand, can be seen by all other portal users and not just the portal users within your organization.

The most common method of record creation is via the individual module itself using the Create {Module} option in the module tab or Create button in the list view. This opens the record view layout in edit mode which allows you to enter all of the desired information. In addition to the create option in the module, you can also create a record (for cases only) via the help search box on the home page.

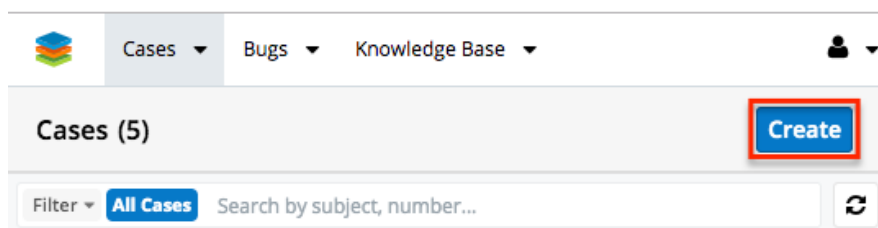


The following steps cover creating a case via the Cases module as an example:

1. Click the triangle in the Cases module tab to open the actions menu and select "Create Case". You can also click the Create button on the upper right of the Cases list view.
 - From Cases module tab:



- From Cases list view:



2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed

prior to saving.

3. Once the necessary information is entered, click "Save".

Viewing Records in the Portal

Records (e.g. knowledge base) can be viewed from a variety of locations in the portal including via the module's list view, record view, dashlets, preview, etc. The most common method of viewing the record is via the module's list view which displays all of the module's records that meet the current search criteria. To access the list view, simply click the desired module tab (e.g. Knowledge Base) in the portal. While the list view only shows key fields, you can click the record's subject or name to open the record view to access additional details including all relevant fields. Please note that the record view can be reached by clicking a record's subject or name link from anywhere in the portal. As you utilize the portal, it will keep track of the three records you most recently viewed in the particular module. Simply click the triangle in the module's tab to display the Recently Viewed menu and view the list of your recently viewed records. You can click the record's subject/name within the list to open it in record view.

Clicking the Preview button (eye icon) to the far right of each record's row in the module's list view allows you to easily view a record's details in the right-hand side pane without leaving the list view. You can click the record's subject or name to open it in record view. To view all of the fields on the module's record view, click the "Show more..." link below the record's fields. The left and right arrow buttons at the top of the right-hand side pane allow you to preview the next or previous record of the current list. To close a preview, simply click the "X" to the right of the arrows.

The screenshot displays a portal interface with a navigation bar at the top containing 'Cases', 'Bugs', and 'Knowledge Base'. Below this is a 'Cases (6)' section with a 'Create' button and a 'Preview' pane. The 'Cases' list has columns for 'Num.', 'Subject', 'Status', 'Priority', 'Type', and 'Di'. The first row is highlighted in blue and has an eye icon in the 'Di' column. The 'Preview' pane on the right shows details for case number 251, including the subject 'Getting a warning message after saving record', a description, and fields for 'Status' (New) and 'Priority' (High). A red box highlights the subject text in the preview pane, and a red arrow points to the eye icon in the list view.

Num.	Subject	Status	Priority	Type	Di
251	Getting a warning ...	New	High	Product	20
240	Need to purchase a...	Duplicate	Medium	Product	20
239	Warning message ...	Assigned	Low	Administration	20
238	System not respon...	Rejected	Low	User	20
237	Warning message ...	Duplicate	Medium	User	20
236	Need assistance wit...	Closed	High	Product	20

Preview

Subject
Getting a warning message after saving record

Number
251

Description
Since this morning, we have been experiencing some unexpected issues after saving a record. When a user clicks the Save button, the system begins to process the save action but then displays a warning message and does not save the record as expected. I have attached a screenshot image showing the warning message that we get as well as a log file. This is affecting all of our users, so please help look into this as soon as possible.

Thank you~

Status
New

Priority
High

The dashlets on the home page also allows you to get a quick view of various records in the module and you can view basic details of each record within the field columns of the dashlet or click the record's subject/name to view more details via the record view. For more information on utilizing the dashlets, please refer to the [Home](#) section.

Searching for Records in the Portal

Each module's list view includes a list view search to help you easily locate records by subject, name, or number (only for cases and bugs) in a module-specific manner. Simply enter a keyword in the search box and the search results will begin appearing in the list view below once you enter at least one character. Please note that the portal automatically appends the wildcard character (%) to the end of your search phrase which will only return records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %error).

In addition to the list view search, the help search box on the home page allows you to enter a keyword or phrase pertaining to your issue/question to try and find relevant knowledge base articles that may help answer your question before creating a case. For more information on the help search box, please refer to the [Help Search Box](#) section.

Understanding List View Search Behavior

When searching for cases or bugs by number, you must enter the exact number in order to return a match. For example, if you search for "4", the search will return case number 4 as a match, but will not return case numbers 40, 41, 420, 4040, or any other case records whose numbers start with or contain the number "4". However, if any cases have a subject that begins with the number 4 (e.g. 400 error on startup), then the search will return both case number 4 as well as any records with a subject that begins with "4".

Please note that only the document's name can be used to search for articles in the portal. Search will not return results based on the body of the knowledge base article or any other fields in the record.

When searching for records by subject or name, the portal automatically appends the wildcard character (%) to the end of your search phrase. This means that the system will retrieve all records that start with the exact keyword or phrase entered in the search box. If you would like to broaden your search results, you can use the wildcard character (%) at the beginning of your search text as well which will pull

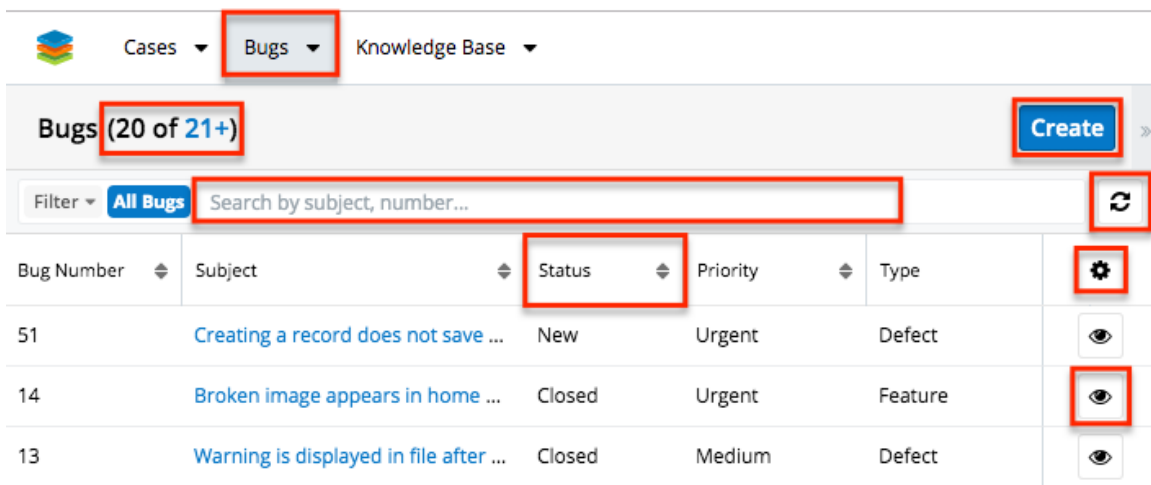
up any record containing the word regardless of how it starts or ends. So, for example, a search for "error" will return any case record that begins with the word "error" such as "Error occurs while running query"; whereas, a search for "%error" will return any case record that contains the term "error" in its subject such as "Console error on page".

Module List View

A module's list view displays all records meeting the current search criteria. You can view the basic details of each record within the field columns of the list view or click the record's subject or name to open the [record view](#). To access a module's list view, simply click the module tab (e.g. Knowledge Base) in the navigation bar at the top of the screen. The module's list view provides the following information and capabilities:

- **Record Count** : The list view displays the total count of records on the upper left of the screen next to the module name (e.g. Bugs). The count will capture the total number of records displayed on the current set of list view results. If there are additional records in the list view results set, a hyperlinked number (e.g. "21+") will display to the right of the initial count. Simply click the hyperlinked number in the parentheses to view the total count of all records in the list view result set.
- **Create Record** : Click the Create button on the upper right of the module's list view to create new record's in the module.
- **List View Search** : To search for a specific record within a module or for a list of module records by subject, name, or number, use the search bar located above the module's list view. Simply enter a keyword in the search box and the search results will begin appearing in the list view below once you enter at least one character.
- **Refresh Search Results** : Click the Refresh button to the right of the search box to load the most current list of matching records without reloading the browser or losing any filter or search criteria you may have set.
- **More Records** : The list view loads an initial number of records meeting the current search criteria with the option to show additional results upon request. By default, the portal displays 20 records per list view results set, but the vendor can change the number of records to display in the list view. To load the next set of list view results, simply click the More "Module Name" link (e.g. More bugs...) at the bottom of the list view.
- **Column Sorting** : Sort all of the current search results by a field column in either ascending or descending order by clicking the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may be sorted by only one column at a time.

- **Column Resizing** : Adjust the size of the columns by placing your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size.
- **Column Selection** : Personalize the list view by specifying which fields you want to be displayed in the list view. Click the Gear icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column in your list view.
- **Preview**: Click the Preview button (eye icon) to the far right of each record's row in the module's list view to view a record's details via the right-hand side pane.



Module Record View

The module's record view displays thorough information regarding the record including all relevant fields (e.g. subject, name, status). Please note that the record view can be accessed by clicking a record's subject or name link from anywhere in the portal including from the module's list view. On the upper right of the record view, there are two buttons that allow you to page through each record in the module's list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results. In addition, clicking the double arrow icon to the right of the Left and Right arrow button will expand the record view to the full-screen width. Please note that the preview pane to the right of the record view will be hidden when the record view is expanded. To reduce the record view's width and reveal the preview pane, simply click the double arrow icon again.

Cases ▾ Bugs ▾ Knowledge Base ▾

Cs Getting a warning message after saving record < > > **Preview** < > X

Number
251

Description
Since this morning, we have been experiencing some unexpected issues after saving a record. When a user clicks the Save button, the system begins to process the save action but then displays a warning message and does not save the record as expected. I have attached a screenshot image showing the warning message that we get as well as a log file. This is affecting all of our users, so please help look into this as soon as possible.

Thank you~

Status	Priority
New	High

Type
Product

Date Created	Date Modified
2019-09-20 10:52	2019-09-20 10:52

Notes + Add a Note

- Note Log file a few seconds ago
- Note **Screenshot of warning message** a minute ago

Nt Subject
Screenshot of warning message

Description
Here is a screenshot of the warning message that appears on the screen.

Attachment
WarningMessage.png

Date Created
2019-09-20 14:46

Show more...

You can also view any notes you related or the vendor has posted to the record, which will appear beneath the record's fields. Clicking the note's subject or Preview icon will display relevant details of the note in the preview pane to the right of the record view. In addition, if there are any files attached to the note, you can download it by clicking the file name in the Attachment field. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the notes attached to the record. To close the preview, click the "X" on the upper right of the preview pane. To add a new note, simply click the Add a Note button to the far right of the Notes header. For more information on adding notes to records, please refer to the [section](#) below.

Adding Notes to Records

Notes in the portal can be used as a method of communication between you and the vendor regarding the case, bug, and/or knowledge base article. This helps ensure that all communications related to the record are preserved and can be easily viewed via the module. You can add related notes to the record to provide

any comments, additional information, or ask any questions you may have to the vendor. Once the note is added, it will appear in the Notes panel of the module's record view and your vendor will be able to view the note(s) attached to the record as well. Please note that notes attached to cases will only be visible to other portal users within your organization while notes attached to bugs and knowledge base articles will be visible by all portal users with access to the vendor's portal and not just to portal users in your organization.

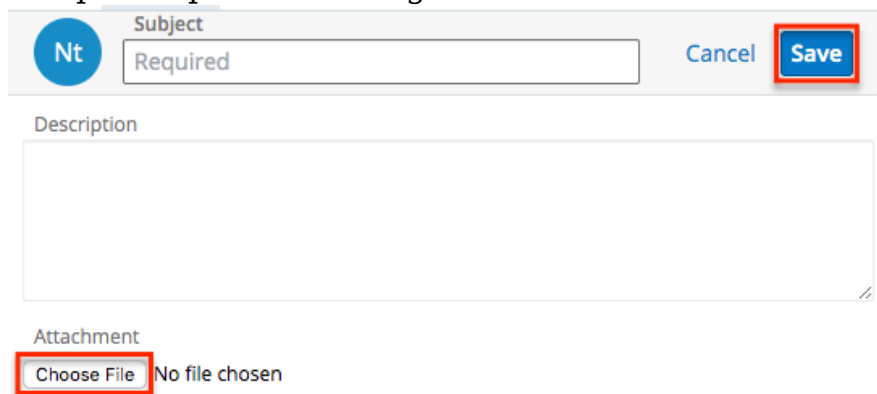
Note: There is a 30-second timeout limit for all uploads.

The following steps cover adding a note to a knowledge base article as an example:

1. Navigate to a knowledge base article's record view.
2. Click the "Add a Note" button below the knowledge base article's fields.



3. Enter appropriate details for the fields (e.g. Description) in the record view form and click the Choose File button if you wish to attach a file to the note. All required fields will indicate "Required" in the field and must be completed prior to saving.



4. Once the necessary information is entered, click "Save" to preserve your note.

Note: Note records cannot be edited once saved.

Cases

The Cases module displays all cases that have been filed for your organization and allows you to create and submit a new case to your vendor as well as access any existing cases to view or [add notes](#). To access the list of cases, simply click the Cases module tab in the navigation bar to open the list view. Please note that cases can only be viewed by portal users associated with your company and any portal

users outside of your company will not be able to view your organization's cases.

Once the list view opens, you can easily search by the case's subject or number to pull up matching records or use the Filter option to narrow your search further using the available options as follows:

Filter Options	Description
All Cases	Returns all cases records in the module
Open Cases	Returns only cases with an open status (e.g. New, Assigned) that are filed for your company
Recently Created	Returns only case records that have been created within the last 7 days
Recently Resolved	Returns only closed cases for your company within the last 7 days

Cases Fields

The Cases module contains a number of stock fields from the vendor's case management database that will be used to enter all relevant information when creating the case. Please note that the fields available in the case's record view may vary depending on your vendor's configuration.

Field	Description
Case Number	A number to identify every case
Date Created	The date the case was created
Date Modified	The date the case was last modified
Description	Explanation of the details and reproduction steps of the case when submitted
Priority	The level of urgency for the issue being reported
Resolution	Results of the investigation into the problem
Resolved Date	A system-generated date and time that the case is set to closed
Status	The case's current level of progress as the vendor's support team works through the case

Subject	Brief description of the issue being reported
Type	Type of categorization that this case falls into, such as "Administration", "Product", etc.
Work Log	A chronological list of activities and actions taken by the customer service agent while working on the case

Bugs

The Bugs module displays a list of new, in progress, and closed product defects and feature enhancements that have been reported to your vendor or that the vendor has filed in their system. You can also [add notes](#) to the bug if you have any questions or comments that you wish to communicate to your vendor. To access the list of bugs, simply click the Bugs module tab in the navigation bar to open the list view. Please note that filed bugs are visible to all portal users with access to the vendor's portal and not just to portal users within your organization.

Once the list view opens, you can easily search by the bug's subject or number to pull up matching records or use the Filter option to narrow your search further using the available options as follows:

Filter Options	Description
All Bugs	Returns all bug records in the module
Open Bugs	Returns only bugs with an open status (e.g. New, Assigned) that have been filed for your vendor
Recently Created	Returns only bugs that have been created within the last 7 days

Bugs Fields

The Bugs module contains a number of stock fields that will be used to enter all relevant information when reporting the bug. Please note that the fields available in the bug's record view may vary depending on your vendor's configuration.

Field	Description
Category	The general area of the product or service where the bug was discovered
Date Created	The date the bug was created
Date Modified	The date the bug was last modified
Description	Explanation of the details and reproduction steps of the bug when submitted
Number	A number to identify every bug
Priority	The issue's level of urgency
Resolution	The final reason the issue was closed or, for open issues, a more granular breakdown of its current status
Resolved Date	A system-generated date and time that the bug is set to closed
Source	The method in which this bug was submitted, such as internal or from a customer
Status	The bug's current level of progress as it moves along the process from submission to resolution
Subject	Brief description of the problem being reported
Type	Type of categorization that this bug falls into, such as "Defect" or "Feature"
Work Log	A chronological list of activities and actions while the bug is being worked on by the vendor

Knowledge Base

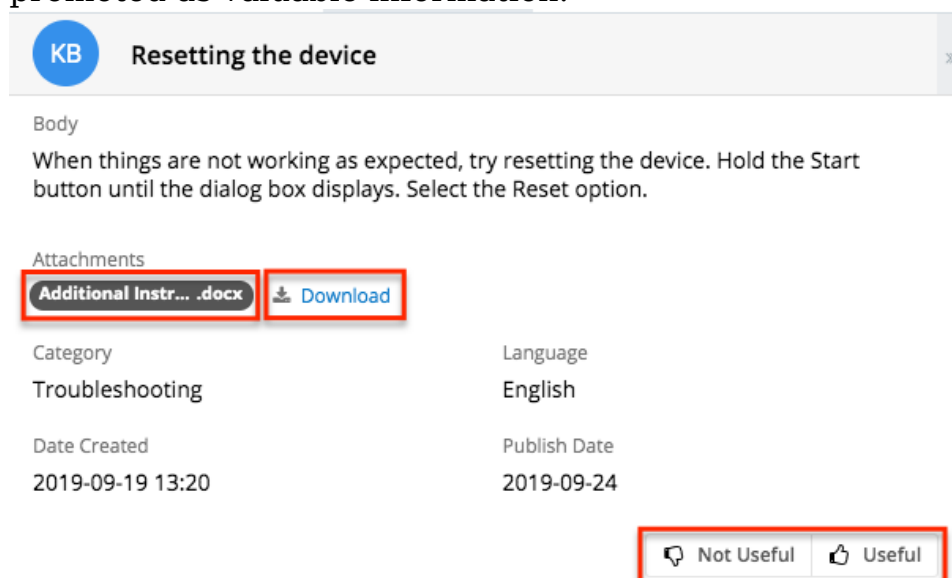
The Knowledge Base module allows portal users to review any articles published by the vendor and can cover a variety of topics such as common troubleshooting tips, frequently asked questions, etc. You can also [add notes](#) to the knowledge base article if you have any comments or questions that you wish to communicate to your vendor. Before filing a case in the portal, it is highly recommended that you perform a search via the [help search box](#) on the portal's home page as there may be relevant Knowledge Base articles that can help provide answers to your

question or help in troubleshooting your issue. To access the list of published articles, simply click the Knowledge Base module tab in the navigation bar to open the list view.

Once the list view opens, you can easily search by the article's name to pull up matching records or use the Filter option to narrow your search further using the available options as follows:

Filter Options	Description
All Articles	Returns all knowledge base records in the module
Recently Created	Returns only articles that have been published within the last 7 days

You can click the article's name in the list view to open its record view and access additional details. If the article you are viewing contains any attachments, you can click the file pill (e.g. Additional Instructions.docx) in the Attachments field or click the Download link to the right of the field to download the attachment as a .zip file to your local machine. Please note that if the article has more than one attachment, the Download All link will display instead allowing users to download all attachments as a .zip file at once. While viewing the article, you also have the option to rate the article's usefulness by clicking the "Not Useful" or "Useful" buttons. Your rating will be captured in the vendor's system, which will help them determine which articles should be improved or updated, and which should be promoted as valuable information.



Knowledge Base Fields

The Knowledge Base module contains a number of stock fields from the vendor's Knowledge Base. Please note that the fields that appear in the knowledge base's record view may vary depending on your vendor's configuration.

Field	Description
Attachments	Any files attached to the article
Body	The content of the article
Category	The category or topic specific to the article
Date Created	The date the article was created
Date Modified	The date the article was last modified
Description	A description or other information about the article
Name	The name of the article
Expiration Date	The date on which the article information will expire and no longer be available in the portal
Revision	The article's current revision number
Language	The language used in the article
Publish Date	The date the article was published
Status	The current status of the article

Knowledge Base Categories & Published Articles Dashlet

The Knowledge Base Categories & Published Articles dashlet displays in the Knowledge Base list view and record view and allows you to easily navigate the hierarchical structure of categories to locate published knowledge base articles. The folder icons represent categories while document icons represent articles. You can click the folder icon to expand and display the child categories and published articles. Clicking the article's name in the dashlet will open the article in record view. When viewing the dashlet in the Knowledge Base record view, the relative category will be expanded to display the current article you are viewing.

Knowledge Base ▾ 👤 ▾

Knowledge Base Categories & Published Articles

- Documentation
- Tutorials
- Help
 - Resetting the device
 - How to change the language
- Troubleshooting
 - Troubleshooting missing records in the system
 - Troubleshooting users unable to log in to the system
 - Troubleshooting users unable to view imported records
 - Troubleshooting broken buttons

Category	Language	Date Created	
Troubleshooting	English	2019-10-01 11:53	👁
Troubleshooting	English	2019-09-24 14:28	👁
Troubleshooting	English	2019-09-24 14:26	👁

Last Modified: 2019-10-07 16:34:11