TEOCO CUSTOMER SUPPORT PORTAL

NEW USER TRAINING GUIDE

WELCOME

- TEOCO Customer Support Portal
  - TEOCO Customer Support Portal is the primary way for users to submit support requests for TEOCO's products and services.
  - The following slides will walk you through TEOCO's Customer Support Portal to assist you in getting started working with our support team.

USING THE CUSTOMER SUPPORT PORTAL

- What follows is a step-by-step guide to:
  - Registering your account
  - Logging in
  - Navigating the home page
  - Submitting a new support request
  - Viewing prior support requests
  - Updating an existing support request

REGISTERING YOUR ACCOUNT

- Prior to logging into the Customer Support Portal for the first time, we ask that you enroll in TEOCO's Password Management System.

- Enrolling in password management allows you to manage your own password to the support portal. This will make it easier and faster for you to reset your password due to expiration or inactivity.

- The password management system will send notifications to you when your password is set to expire to allow you to proactively reset your password and maintain easy access to the Portal.

REGISTERING YOUR ACCOUNT

The TEOCO Password Management Tool can be accessed at:

https://pwreset.teocosolutions.com

REGISTERING YOUR ACCOUNT

Click the Enroll Now link to enroll in the system

REGISTERING YOUR ACCOUNT

Enter the user name and initial password you received as part of your enrollment. Omit the 'USHS\', as that is specified in the Domain field, (e.g. If user name is 'USHS\doed', enter 'doed').

Choose and answer your security questions

Enroll

Enter your User name, Domain and Password to confirm your identity. You cannot enroll if you have forgotten your password, or if your account is locked.

Use the question and answer fields to choose and answer some questions about yourself. You should choose questions that only you know the answers to. You will need to answer these questions again to reset your password or unlock your account.

User name	
Domain	USHS
Password	

Question 1	---- Choose a question ----
Answer	
Question 2	---- Choose a question ----
Answer	

Cancel   Next >>

Click *Next*, and when the confirmation appears, click *Main Menu*.

REGISTERING YOUR ACCOUNT

Click the *Reset Password* link to reset your password to something you can easily remember

REGISTERING YOUR ACCOUNT

Enter your user name as you did in the enrollment window.
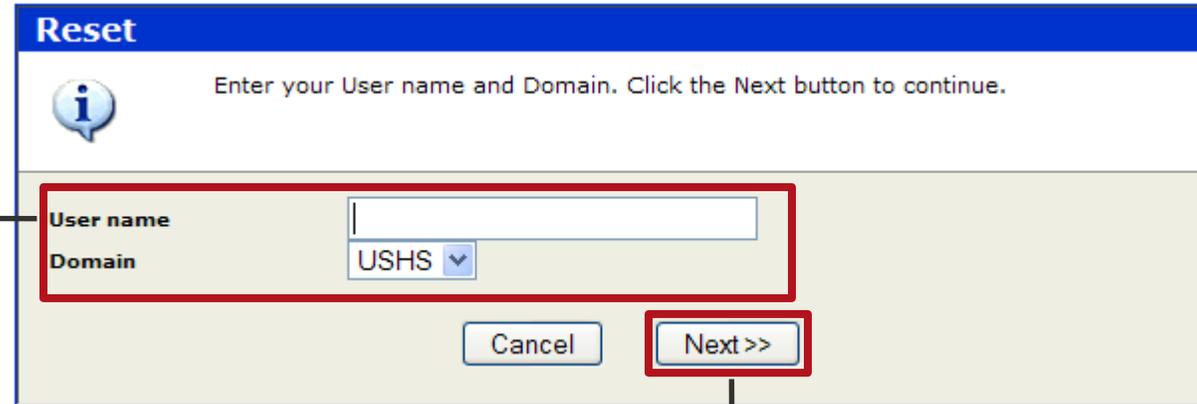
Reset

Enter your User name and Domain. Click the Next button to continue.

User name

Domain: USHS

Cancel   Next >>

Click *Next*. On the next two screens, answer your security questions. On the third screen, enter your new password. Click next and you will receive confirmation of your password change.

REGISTERING YOUR ACCOUNT

- **<u>When you are selecting or resetting your password, please follow the guidelines below:</u>**
  - Minimum of 8 characters
  - Mixed case (at least 1 capital)
  - Minimum of one special character or number
  - No part of your name or username can be part of your password

- **<u>Passwords can only be changed once in a 24-hour period.</u>**
  - If you have submitted a request to have your password changed by the TEOCO support team, you must wait to change your password.

LOGGING IN TO THE SUPPORT PORTAL

The TEOCO Customer Support Portal can be accessed at:

https://support.teocosolutions.com

LOGGING IN TO THE SUPPORT PORTAL

Enter your full username as supplied to you in your enrollment email, and the password you set in Password Management

Click *Login*

HOME PAGE

Account Settings: Personalize and Logout

Left Side Pane: Main navigation links for viewing and submitting support requests

**Global News Feed:** Latest updates on all support requests

Right Side Pane: Headlines and Support Portal FAQs

HOME PAGE – LEFT SIDE PANEL

Home Page Return:
- Click on your name (below) or the TEOCO logo to return to the home page at any time
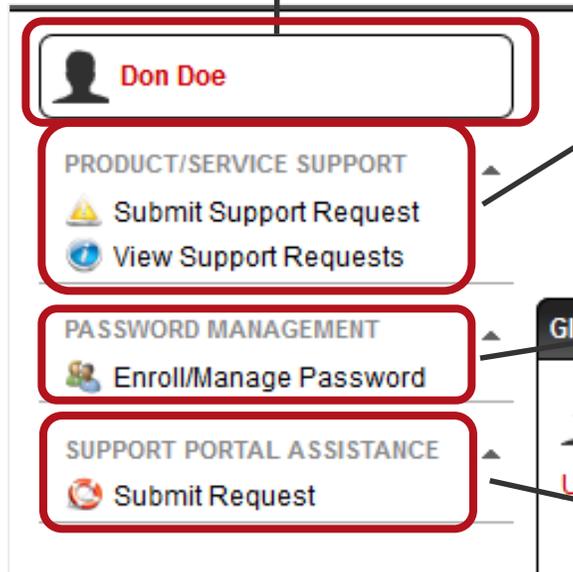
Product/Service Support:
- Submit Support Request for TEOCO Product/Service (e.g. BTP, ViewLogic, Acuite, SONAR, Fault, etc.)
- View all previously submitted Support Requests for you and your team (based on configuration for each customer)

Password Management:
- Link to external Password Management tool (initial enrollment and password change/resets)

Support Portal Assistance:
- Submit request for Support Portal assistance (new Support Portal account, questions about features, report errors)

HOME PAGE – RIGHT SIDE PANEL
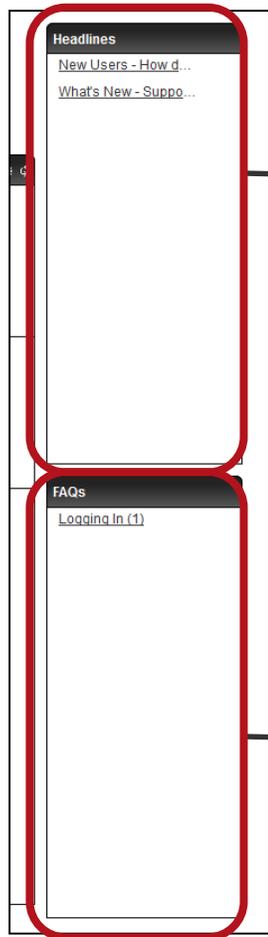
Headlines – Permanent links to new user training as well as the latest news we want you to know about the Support Portal (upcoming outages, new features, etc.)

New Users - How do I use this portal?

Click the link below to launch a presentation that will provide an introduction to the Support Portal and provide step-by-step instructions for how to use this portal to communicate with our support teams.

Support Portal Guide
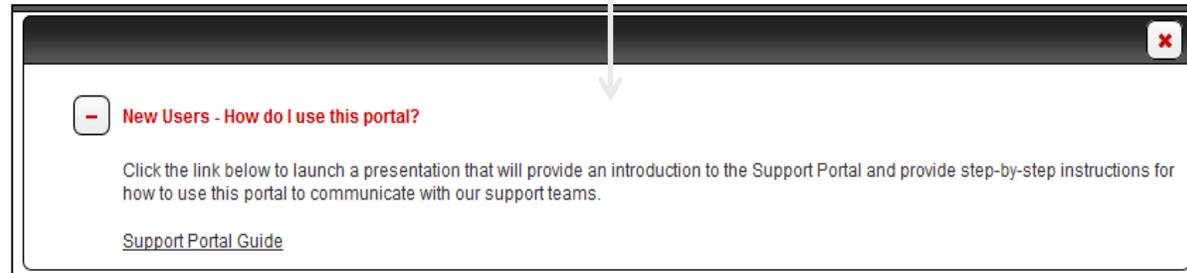
FAQs – Topics related to the Support Portal such as logging in, Support processes, etc.

HOME PAGE - CUSTOMER OPTIONS
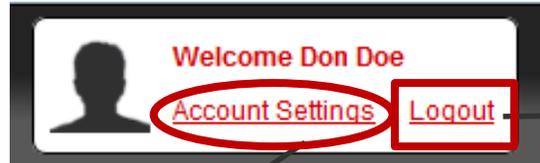
Logout link – logout option to close active Support Portal session (no need to close the browser tab/window)

Account Settings:

- Set your local time zone to display all timestamps in your local time
- Load photo as avatar (optional)
- Manage custom feed list

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HOME PAGE – GLOBAL NEWS FEED

Global News Feed:
Latest support request activity and updates

Configuration Options:
Uncheck "Group" to set News Feed to your own Support Requests

View/Update:
Use links to view all history entries, add an update, or click on the description to launch the full Support Request Detail.

SUPPORT REQUEST SUBMISSION SCREEN

Category Selection

Details, Additional Fields, and Attachments

Click to launch Support Request Submission screen

SUPPORT REQUEST SUBMISSION – CATEGORY SELECTION

Category Selection:
Click the top-level category or click the arrow to the left of the value to expand the category list.

Make selection by clicking on the desired value (has to be expanded to the lowest possible level for the category set to make a selection).

SUBMIT A NEW PRODUCT/SERVICE SUPPORT REQUEST

All TEOCO Products and Services will fall into one of the top-level categories below. The first category selection will be the top-most value. The next level of category selections will be retrieved from the respective bulleted list, based on the products and services your company is utilizing. Additional category selections (such as a module or application area) may be required based on the product or service selected.

| Service Assurance	Customer Analytics	Margin Assurance – Cost Mgmt	Margin Assurance – Routing Optimization	Network Optimization
• Activation • Call Expert • Fault • Mediation • NeTkT • Performance • Secure Access	• HyperAnalytics • Managed Hosting Services • SONAR	• Acuity • BillTrak • Claim Center • Invoice Automation • ViewLogic	• Acuite • AcuWorld	• Insight • Maxima Mentor • OptiPlanner • Ultima Forte • Ultima Mentor

SUPPORT REQUEST SUBMISSION - DETAILS

Save & Submit

Related Items – Requests with the same categorization

Description

TEOCO Fields - Additional requested details. Required fields marked with icon.

Attachments – select from location on computer or drag/drop

Category selection activates Related Items and TEOCO Fields options

VIEWING SUPPORT REQUESTS – INCIDENT FEED

Click to launch Incident Feed

Incident Feed:
All open and closed support requests for you and your team.

VIEWING SUPPORT REQUESTS – SEARCHES AND CUSTOM FEEDS
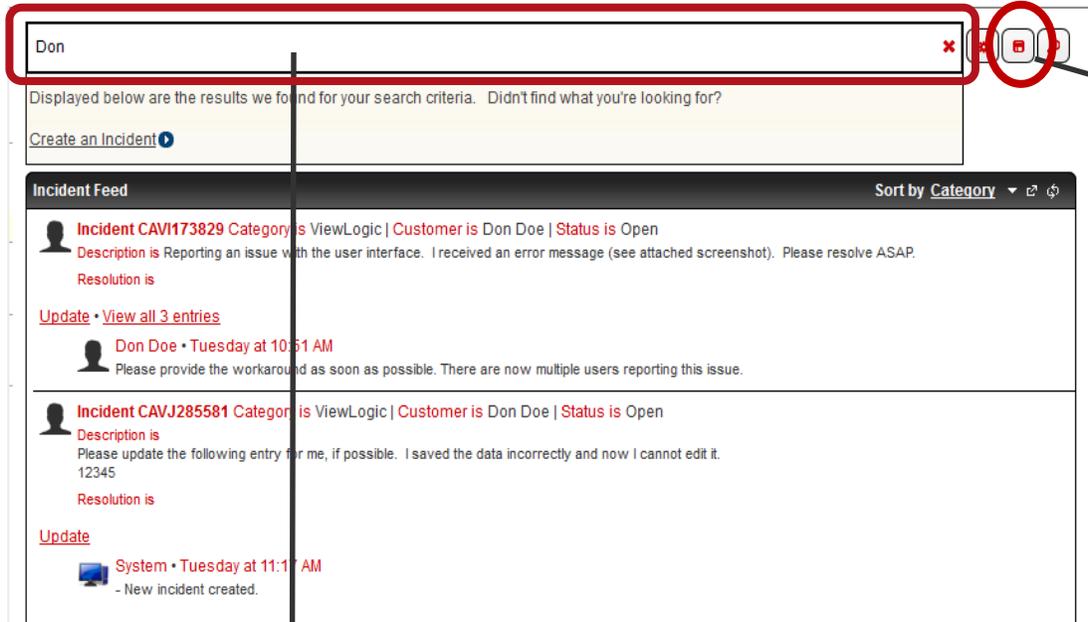
Save Search – saves the search terms/options for any search as a "Custom Feed" so that the search can be run as needed. Custom Feeds can be accessed from the right side navigation menu.

Search Bar – Type a search term to search existing open and closed support requests for you and your team based on pre-set search fields (retrieved from Advanced Search settings – see next slide). If no results are retrieved, there is a "Create an Incident" link to open a new support request.

VIEWING SUPPORT REQUESTS – ADVANCED SEARCH OPTIONS

Advanced Search – Set custom search filters and/or fields to search

Filter Options:
- Set (Is) or exclude (Is Not) specific category, customer, customer group, or status
- Allows multiple filter levels.
- Select values from drop-down lists/selection screens
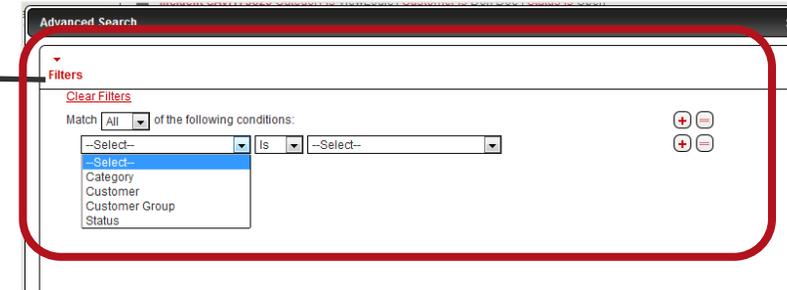
Field Options:
- Select fields to be searched by checking/unchecking options.
- <u>Selections are saved and applied to all future searches (standard and advanced) until options are changed.</u>
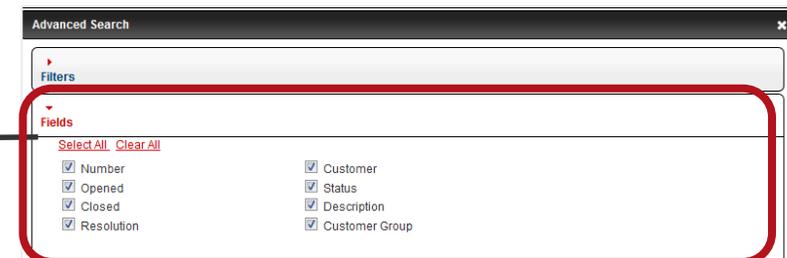
VIEWING SUPPORT REQUESTS – SORT OPTIONS AND EXPORT
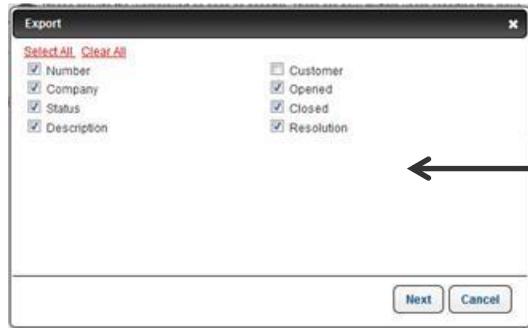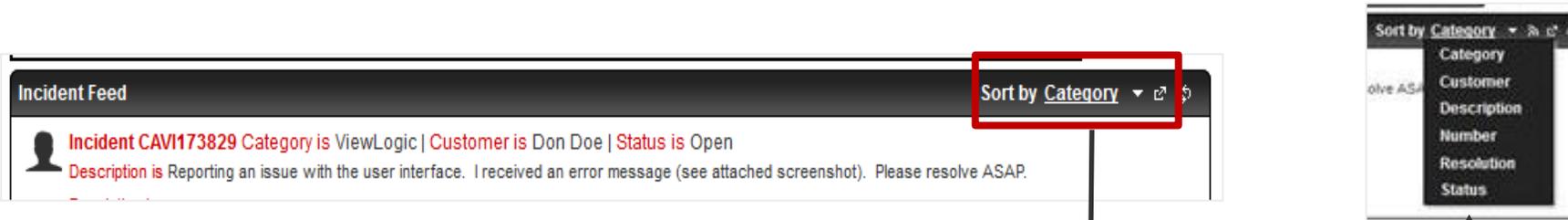
Sort Options: Multiple fields available for sorting, up/down arrow sets ascending or descending order for selected field.

Export: Exports current Incident Feed records to Excel as ".csv" file. Select export fields, specify set of records to export, and destination.
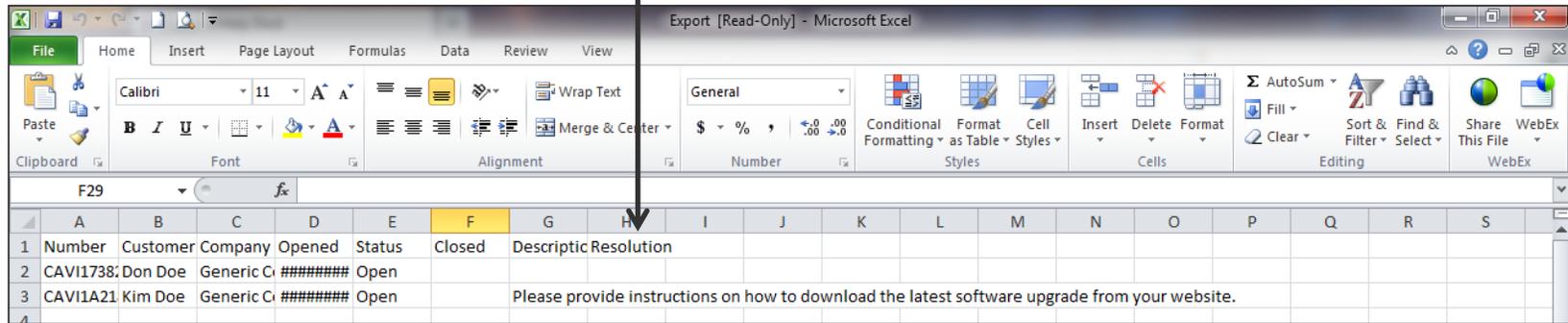
VIEWING SUPPORT REQUESTS – SINGLE REQUEST DISPLAY

Category & Related Items

Basics: Number, Customer, Status, Opened/Closed Dates

Attachments Tab: View or Add

Details Tab: Description, Resolution, Additional Fields, History/Updates (in desc. order)

VIEWING SUPPORT REQUESTS – ACTIONS

Update – Launches Update dialog window to submit an update on this support request

Print – Opens a print-friendly view of all support request details in a new browser tab/window

Change History Settings – Opens a dialog window allowing user to show only Work History or only Correspondence History
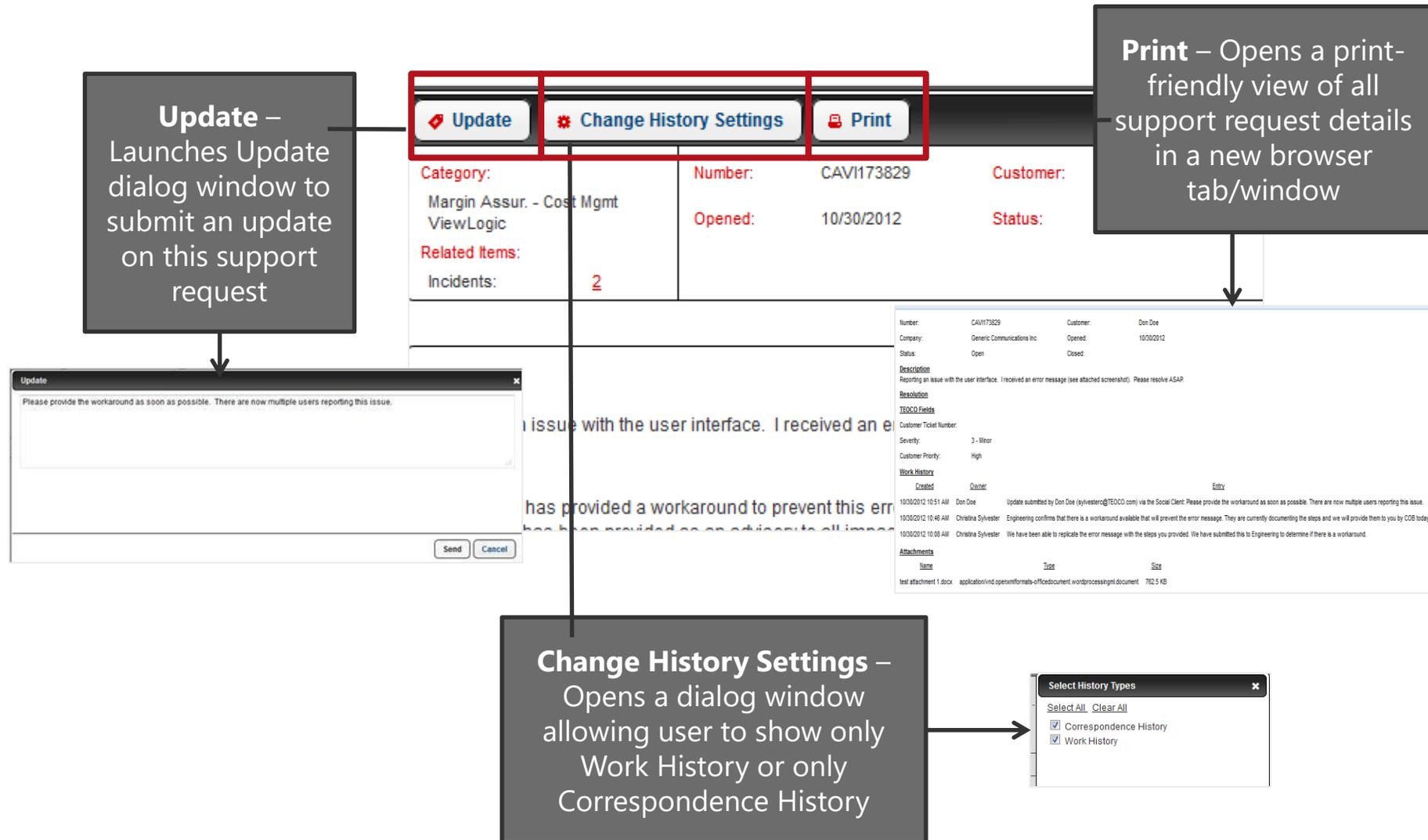
UPDATE AN EXISTING SUPPORT REQUEST VIA EMAIL

- In addition to sending an update from the Support Portal, existing support requests can be updated by responding to the system generated e-mail or by sending an email to the Support Portal's email address, **as long as you include the support request number either in the subject or body of the email**.

  - For matched emails, the system will automatically update the request within the Customer Support Portal and be noted in the correspondence history.

- **If you do not include a support request number in the subject or body of the email, the email will not be processed by the system or reviewed by the support team**.

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REVIEWING RESOLVED SUPPORT REQUESTS

- 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.

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 Customer Support Portal, please use the "Submit Request" option under the Support Portal Assistance menu option on the Support Portal home page or contact your Account Manager.

THANK YOU

www.teoco.com

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