Synergem Support Portal

Overview of the Salesforce.com Community Experience

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Introduction

This document is an overview for users of the Synergem Community Experience Portal

- The portal is a simplified view into our Salesforce.com ticketing system
- Users of Salesforce will recognize many elements, although functionality is very simplified

Users will be provided with the access credentials by Synergem Administration

- Login ID will be your email address
- You will select your passcode during initial access
- Users of the previous system will retain their existing login credentials

Accessing the Portal

Primary access is via this URL:

- https://support.synergemtech.com

Supply access credentials:

- Login ID (email)
- Passcode (self selected)

The Home Page

Buttonology Descriptions

Home Icon: Takes you back to this page

All Cases: Goes to main Case page where all cases can be viewed

Add New Case: Opens page to add a new case

Search Cases: Any case number or text from the subject can be used to search for specific cases

Username dropdown: goes to profile page for user updates (not commonly necessary)

There is also a link to a **User Guide in PDF,** as well as topics on Synergem's main website.

Main Case List Page

All Open Cases is Default
Use Dropdown for Other Options

Click on either the Case Number or
the Subject to open the Case page

All Columns Sortable
Last Modified Date is Default

All Open Cases ▼ 📌

19 items • Sorted by Last Modified Date • Filtered by All cases - Closed • Updated a few seconds ago

	Case Number ∨	Subject ∨	Status ∨	Priority ∨	Last Modified Date ↓ ∨	Date/Time Closed ∨
1	00002415	Testing to See When Case is Updated from New to In Progress	In Progress	4 - Low	10/12/2022, 1:29 PM	
2	00002392	Email from Schlooty McSchlueter	In Progress	3 - Medium	10/6/2022, 5:51 PM	
3	00002416	Re: Sandbox: Case Update - 00002415	In Progress	3 - Medium	10/6/2022, 5:50 PM	
4	00002414	"Late Bond" Test Case from Site Account	New	3 - Medium	10/6/2022, 5:33 PM	
5	00002411	test	In Progress	2 - High	10/5/2022, 1:39 PM	

Case View Page

Buttonology

Details Tab: Shows various details about the Case

Files & Case Logs: Show existing and/or add new attachments to a case, or view Case Logs from linked support systems (e.g. Atos).

Post: The right side shows the chain of communications between the Case Contact and the NOC or other groups in Synergem that are working on a case. Just click in the "Share an update…" box to add your own content to the Case that will get sent back to Synergem. Scroll this pane to see history of the case.

Close Case: See next slide for important information about this option.

Exit Case: To exit the Case page just click on Home, All Cases, or use standard browser navigation buttons.

Closing a Case – Case View Page

Buttonology

Close Case Tab: Allows Customer to determine that a Case has been resolved and to Close the Case.

For certain accounts, Synergem has agreed with Customer that the Synergem NOC will mark the status of a ticket as Resolved, but allow the Customer to make a final determination and Close the case.

This feature should be used for this purpose.

Portal Case Creation Page

Buttonology

Site Selection: Users with access to multiple sites can check this box to reveal a list of all possible sites to assign the case. Only one site can be selected. Scroll to select the site.

Case Type Options: Select from Problem, Feature Request or Question

Priority: Select a priority type based on severity of issue. This will guide the NOC on how quickly to address the issue. See next page for further details.

Subject: Short description of the issue

Description: A more detailed description of the issue

File Upload: Select this to upload files, which will happen after you click…

Next: Click to submit case, or to move to next page for file upload.

Case Priority Descriptions

You can use these definitions to determine how to prioritize your Case from the Case Creation page:

- 1 – Critical – Any issue that interrupts service to end users
- 2 – High – Loss of redundancy in any network component
- 3 – Medium – Service impairment but not a complete interruption
- 4 – Low – Less critical service request
- 5 – Planning – Feature request or long range question

Submitting a Case Via Email

To submit a new case via email, simply send a message to

support@synergemtech.com

A few things to note:

- If you are an existing portal user, the case will be assigned to you and your primary account, and you can access it via the portal (site selection is not an option via email)
- The email Subject line and Body Text will form the Subject and Description of the case, respectively
- Attachments are accepted
- Emails from non portal users will go into a general "bucket" of cases until the NOC can evaluate them and determine to which customer they belong