



Synergem Support Portal

Overview of the Salesforce.com Community Experience

January 2024 update



Table of Contents

- Introduction
- Accessing the Portal
- The Home Page
- Main Case List Page
- Overview of the Case Page
- Closing a Case
- Submitting a Case in the Portal
- Submitting a Case via E-mail





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

The screenshot shows the home page of a system. At the top, there are navigation links: "Home" (underlined), "All Cases", and "Add New Case". To the right is a search bar labeled "Search..." and user profile icons. Below the navigation is a large hero section with a background image of a call center agent. The hero section contains the heading "The Next Generation of 9-1-1" and a paragraph: "We make the switch to next gen easy, efficient, and seamless. With over 25 years of upgrading legacy processes, innovating life-saving technologies, and upgrading organizations to i3 compliance – we're the people PSAPs call." Below the hero section are three buttons: "Portal User Guide" with a "PSAP Resources" icon, "Public Safety News" with a "Public Safety News" icon, and "Next Gen 9-1-1 Services" with a "Next Gen 9-1-1 Services" icon. Below these buttons is a section for "All Open Cases" with a dropdown arrow and a filter icon. Below this is a summary line: "50+ items • Sorted by Case Number • Filtered by All cases - Closed, Case Record Type • Updated 11 minutes ago". To the right of this line is another search bar "Search this list..." and filter icons. Below is a table with columns: "Ca...", "Account Name", "Subject", "Status", "Pri...", "Last Modified Date", and "Owner Name". The table contains one row with the following data: "1", "000015...", "CA-SOCAL CORE", "i3 logging for transfer legs", "In Progress", "Mediu...", "5/11/2023, 12:45 PM", "Steve Wise".

Home All Cases Add New Case Search...

The Next Generation of 9-1-1

We make the switch to next gen easy, efficient, and seamless. With over 25 years of upgrading legacy processes, innovating life-saving technologies, and upgrading organizations to i3 compliance – we're the people PSAPs call.

Portal User Guide PSAP Resources

Public Safety News Public Safety News

Next Gen 9-1-1 Services Next Gen 9-1-1 Services

All Open Cases

50+ items • Sorted by Case Number • Filtered by All cases - Closed, Case Record Type • Updated 11 minutes ago Search this list...

Ca...	Account Name	Subject	Status	Pri...	Last Modified Date	Owner Name
1	000015... CA-SOCAL CORE	i3 logging for transfer legs	In Progress	Mediu...	5/11/2023, 12:45 PM	Steve Wise

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

Case
Email from Schlooty McSchlueter + Follow

Priority	Status	Case Number	E-bonding?
3 - Medium	In Progress	00002392	<input checked="" type="checkbox"/>

DETAILS | FILES & PRIOR CASE LOGS

Case Details

Case Number 00002392	Case Owner NOC
Account Name Schlooty Project Account	Case Origin Partner Email
Project	Status In Progress
	Priority 3 - Medium
	Incident Start DateTime

Contact Information

Contact Name Schlooty McSchlueter	Contact Phone
	Contact Email jeff@schlueter.net

Description Information

Post: Close Case

Share an update... Share

Search this feed... Like Comment 1 view

[jschlueter](#) (Employee) updated this record. October 3, 2022 at 5:36 PM

Description Changed

Write a comment...

[jschlueter](#) (Employee) October 3, 2022 at 5:35 PM

I am now going to change this from an Internal record type account to a Lumen record type account to see if the Circuit and PSAP IDs are automatically brought into the case and if the e-bonding check is added. The Account record does have these two fields populated already. Here I go.

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

The screenshot displays the 'Case View Page' for a case titled 'Email from Schlooty McSchlueter'. The page is divided into two main sections: 'DETAILS' and 'ATTACHMENTS'. The 'DETAILS' section is further divided into 'Case Details', 'Contact Information', and 'Description Information'. The 'Case Details' section includes fields for Case Number (00002392), Account Name (Schlooty Project Account), Project, Case Owner (NOC), Case Origin (Partner Email), Status (In Progress), Priority (3 - Medium), and Incident Start DateTime. The 'Contact Information' section includes Contact Name (Schlooty McSchlueter) and Contact Email (jeff@schlueter.net). The 'Description Information' section includes Subject (Email from Schlooty McSchlueter) and Description. A 'Close Case' modal is open, showing a confirmation dialog with the question '*Do you want to close this case?' and radio buttons for 'Yes' and 'No'. A 'Next' button is visible in the modal. The modal is highlighted with an orange border.

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

Submit Community Case

Check this box to select a specific Site other than your default.

Select a Site from the list below for your Case submission.

Site Name
<input type="radio"/> Peoples County - Precinct D
<input checked="" type="radio"/> Peoples County - Precinct E
<input type="radio"/> Peoples County - North Region
<input type="radio"/> Peoples County - Precinct A
<input type="radio"/> Peoples County - Precinct B
<input type="radio"/> Peoples County - Precinct C

Enter the required information below to submit a Case to the Synergem NOC Team.

*Case Type: Problem

*Priority: 2 - High

*Subject: We Need a Repostulation of the Frim Fram Widget in Precinct E

Description: The Frim Fram widget got discombobulated during a microstorm and needs to have a parameter repostulation post haste!

File Upload? None

Next

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. 9



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







SYNERGEM
technologies

The next generation of 9-1-1

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 866-859-0911

 support@synergemtech.com