Support and Community Portal: Dealer Guide

April 2021

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Contacting Support

Reporting an Issue

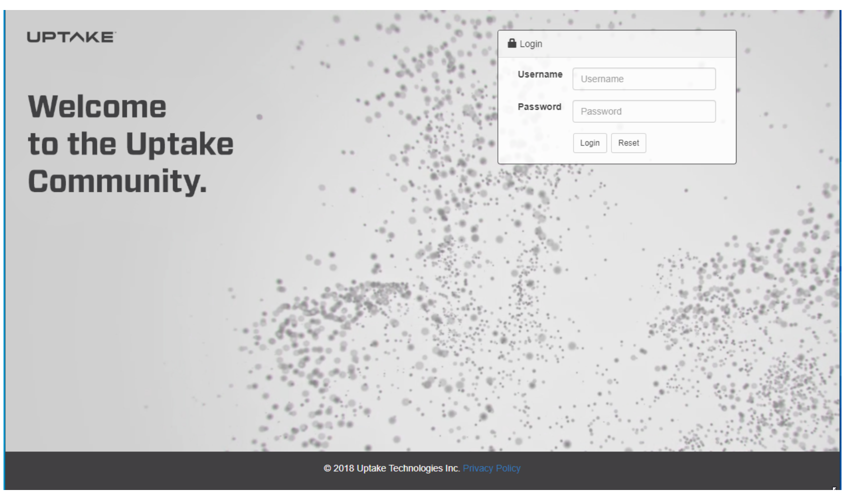
There are several methods in which to report an issue or initiate a change to the applications.

1. Create a case in Community Portal https://uptake.force.com/landingcommunity/LoginPage
2. For urgent issues, call us at (312) 242-2300 or toll free at (888) 357-5800
3. Email support@uptake.com

Include as many details as relevant about the issue or change including screenshots of the affected area, attachments if importing or exporting a file, or steps to reproduce the issue.

Accessing Community Portal

For access to the Community Portal, call us at (312) 242-2300 or toll free (888) 357-5800 with the name, dealer name, email address and phone number of the person who requires access. The user will receive an email when they are set up and it will contain a link in the email to direct the user to a login page to set their password. Once set, login to begin.



Creating a Case

To create a case in the Community Portal, follow the steps below to create a new case in the portal.

1. After logging in, select the Open a new Case' button
2. Fill the following information:
3. Subject: Short description of issue or request
4. Impact*: select the option that best fits how this issue impacts your organization
5. Urgency*: select the option that best fits how urgent this issue is for your organization

   *Impact and Urgency are used to calculate Priority according to this table:

Impact \ Urgency	High	Medium	Low
High	Critical Priority	High Priority	Medium Priority
Medium	High Priority	Medium Priority	Low Priority
Low	Medium Priority	Low Priority	Low Priority

6. Product: Select the product which is affected or in question
7. Environment: Select affected environment
   a. For CloudLink environments, select one of the following: CloudLink Production, CloudLink Sandbox
   b. For On Prem environments, select one of the following: OnPrem Production, OnPrem QA, OnPrem Training
8. Customer Internal Ticket Number: if the dealer has another ticketing system, use this field to reference that ticket number.
9. Category: select the category that best fits the issue or request
   a. Depending on the category selected you will be prompted to include specific information. The more complete a set of information we receive, the less time it takes us to assign the issue and the less likely we will need to contact you for more details.
10. Description: Describe the issue or request in as much detail as you determine appropriate.
11. Next: Select the Next button
    a. If the Category selected requested attachments, you will be prompted to upload them

You will be brought to a Case Submitted screen which provides additional helpful information.
Emailing **support@uptake.com** is an alternative to entering via the community portal. An email confirmation will be sent when the case is created with the case number. You may be contacted for more details if the information emailed was not complete.

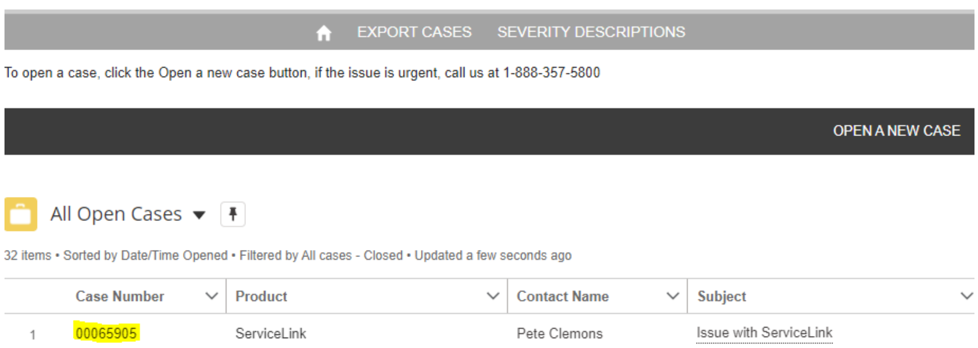
Updating a Case

By Email

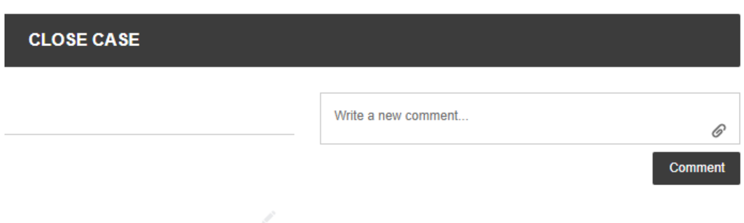
When a case is created or updated, an email will be sent to you that will include a reference token similar to this ***ref:_00D36q8gr._500369IV5E:ref*** located at the bottom of the signature. If this reference token is included in an email reply, it will update the case automatically. All email attachments will be attached to the case. All email content will be added as a comment in the case.

By Portal

Alternatively, you may login to the portal and manually update the case. After logging in, select the case number that requires updating.



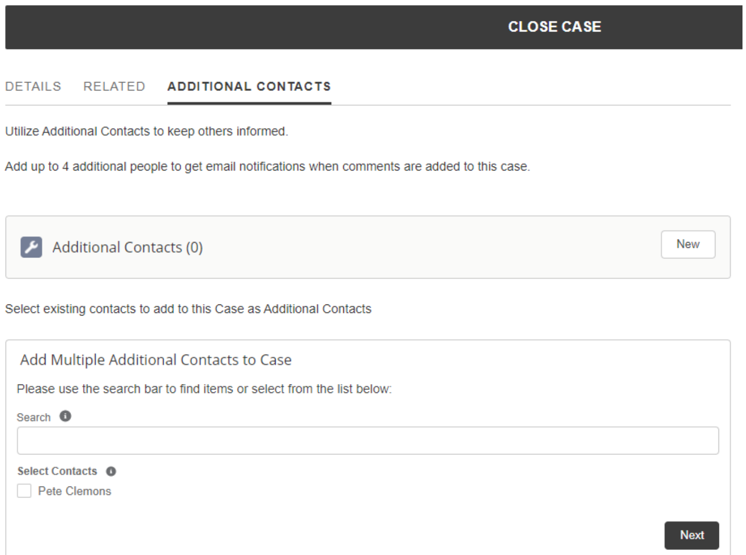
You may add comments in the section on the right.



Or you may click on the paperclip icon in the comments window to upload files.

Add Additional Contacts

To add additional contacts through the Portal,select the Additional Contacts tab under the Close Case button and enter them in this section.



Reviewing Cases

When reviewing open cases, there are multiple ways to adjust the settings of the cases you are viewing.

Sort Columns

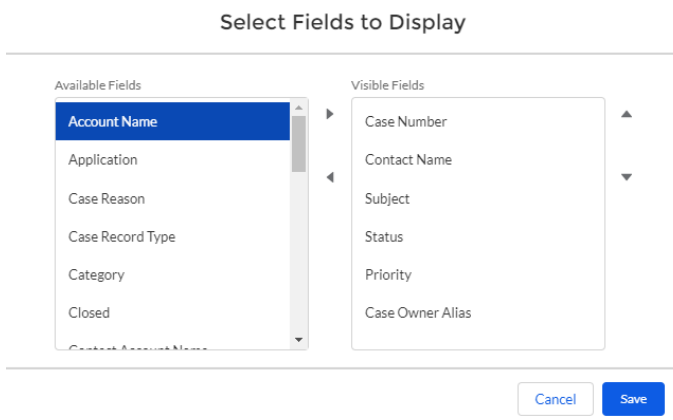
All fields can be sorted in ascending or descending order by clicking on the header of the field that you want to sort by.

Create Different List Views

Users can create different lists that display different fields. Upon first login, the default view will be **Recently Viewed**. To create a new list view:

1. Click on the List View Controls icon ( ) and select 'New'.
2. Name the list and select 'Save'.

3. Select fields to display. Click on the List View Controls icon ( ) and select ‘Select Fields to Display’.
4. Select a field and use the arrows to move fields back and forth between **Available Fields** and **Visible Fields.** To change the order of visible fields, use the arrows on the right to move items up and down. When finished, select ‘Save’.



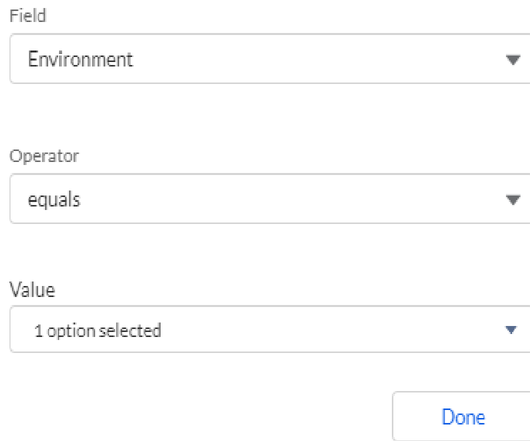
Save a List View

Any view can be persisted for each time a user logs in. The current fields displayed will also persist. Select the Pin this List View icon ( ) to the right of the header title to pin the view. To unpin, choose another list view to pin.

Adding Filters

Users can filter by any available field including, but not limited to Product, Status, Priority, and Environment.

1. To access the filters, click on the List View Controls icon ( ) and select ‘Edit List Filters’ or click on the Show Filters icon ( ).
2. Select ‘Add Filter’
3. Select the Field, Operator, and Values.



4. Select ‘Done’ to apply the filter.

Export Cases

To export cases, select ‘Export Cases’ in the top menu.

Severity Descriptions

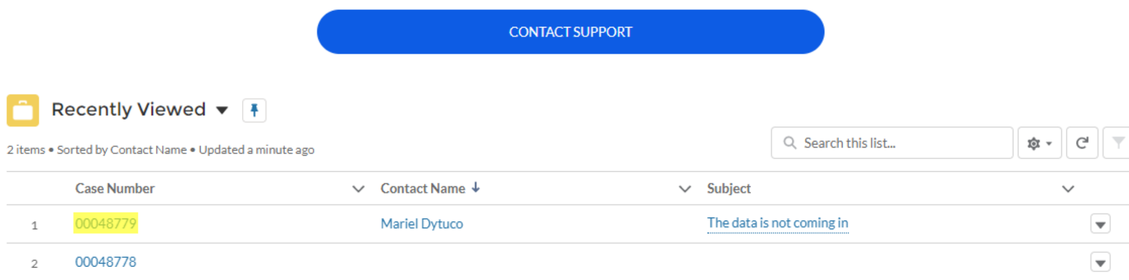
To view severity descriptions, select ‘Severity Descriptions’ in the top menu.

Closing a Case

When a case is corrected and the user would like to mark it as closed, the user can reply to the last email that contains the reference token similar to this **ref:_00D36q8gr._500369IV5E:ref** located at the bottom of the signature. The case will be updated with the response and a support representative will manually close the case.

Alternatively, users can login to the portal and manually close the case. Follow the steps below:

1. After logging in, select the case number that requires closing.



2. Select the Close Case button above the case details
3. The Close Case button will change to read Re-Open Case.