

# **Support and Community Portal: Dealer Guide**

**April 2021**



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# Contacting Support

## Reporting an Issue

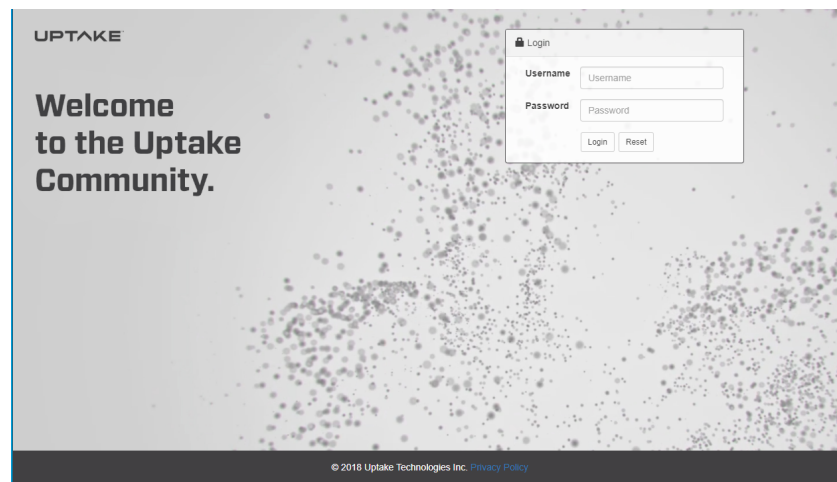
There are several methods in which to report an issue or initiate a change to the applications.

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](mailto: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](mailto: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.

The screenshot shows a web interface for case management. At the top, there is a navigation bar with a home icon, "EXPORT CASES", and "SEVERITY DESCRIPTIONS". Below this is a message: "To open a case, click the Open a new case button, if the issue is urgent, call us at 1-888-357-5800". A prominent dark button labeled "OPEN A NEW CASE" is visible. Below the button, there is a section for "All Open Cases" with a dropdown menu and a filter icon. It indicates "32 items • Sorted by Date/Time Opened • Filtered by All cases - Closed • Updated a few seconds ago". A table lists the cases with columns for Case Number, Product, Contact Name, and Subject. The first row shows Case Number 1, Product ServiceLink, Contact Name Pete Clemons, and Subject Issue with ServiceLink.

Case Number	Product	Contact Name	Subject
1	ServiceLink	Pete Clemons	Issue with ServiceLink

You may add comments in the section on the right.

The screenshot shows the comment section of the case management portal. It features a dark button labeled "CLOSE CASE" at the top. Below it is a text input field with the placeholder "Write a new comment..." and a paperclip icon for file uploads. A "Comment" button is positioned to the right of the input field. There is also a faint pencil icon below the input field, likely for editing.

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.

The screenshot shows a dark grey header bar with the text "CLOSE CASE". Below it are three tabs: "DETAILS", "RELATED", and "ADDITIONAL CONTACTS", with the latter being selected. The main content area contains the following elements:

- A sub-header "Additional Contacts (0)" with a "New" button to its right.
- Text: "Utilize Additional Contacts to keep others informed." and "Add up to 4 additional people to get email notifications when comments are added to this case."
- A section titled "Select existing contacts to add to this Case as Additional Contacts" containing:
  - A sub-header "Add Multiple Additional Contacts to Case"
  - Text: "Please use the search bar to find items or select from the list below."
  - A search input field with a "Search" label and a magnifying glass icon.
  - A section titled "Select Contacts" with a list item:  Pete Clemons
  - A "Next" button at the bottom right.

## 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'.

Select Fields to Display

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Available Fields		Visible Fields
Account Name	▶	Case Number
Application		Contact Name
Case Reason	◀	Subject
Case Record Type		Status
Category		Priority
Closed		Case Owner Alias

## 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.



Field  
Environment

Operator  
equals

Value  
1 option selected

Done

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.

The screenshot shows a user interface for 'CONTACT SUPPORT'. At the top is a blue button labeled 'CONTACT SUPPORT'. Below it is a section titled 'Recently Viewed' with a calendar icon and a person icon. Underneath, it says '2 items • Sorted by Contact Name • Updated a minute ago'. There is a search bar with the placeholder text 'Search this list...' and three icons: a gear, a refresh, and a filter. Below the search bar is a table with the following data:

	Case Number	Contact Name	Subject	
1	00048779	Marisel Dytuco	<a href="#">The data is not coming in</a>	▼
2	00048778			▼

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