



WELCOME TO iSUPPORT!

Use this guide as a quick-reference to ease your iSupport navigation. The two main sections of the iSupport home page, “How can we help you?” and “Service Requests,” will be covered, as well as instructions on customizing your home page.

HOW CAN WE HELP YOU?

This section, on the left of your home page, includes links to three main areas.

Find a Solution

Find solutions to problems and avoid potential service requests by using the Knowledge Base of information found here. (Note: An alternative navigation to the Knowledge Base is to click on the *Support* folder tab at the top right of the page.)

Step 1: Click on *Find a Solution*.

Step 2: Select Platform: Solutions are grouped based on the different systems that Activant supports.

Step 3: Enter your search criteria and click *Go*. The more detailed the criteria, the more exact your results.

Step 4: Click on the title of the Solution you would like to review.

Step 5: At the bottom of each Solution is the question, “Can this solve your problem? Yes/No.” Responding yes or no here assists the Knowledge Management team in maintaining solutions.

Frequently Used Solutions

The Frequently Used Solutions has two parts. One is a list of the solutions that you have viewed. You can pick a time-frame for the listing. The second part is available for Activant to list solutions that are beneficial for all users.

Create a Service Request

Click on *Create a Service Request* to send a request for assistance.

Step 1: Select the correct *Account Number*, if you have more than one account.

Step 2: Select *System ID/Name*, if you have more than one system.

Step 3: *Contact By*: Select the best method for Activant to contact you.

Step 4: Select *Request Type*: This required field allows Activant to direct your request to the proper person.

Step 5: Select *Problem Code*: This list of Problem Codes varies depending upon the Request Type that you selected. Select the appropriate Problem Code for your issue. (Required field.)

Step 6: Select *Urgency*: It is required that you select the *Urgency* appropriate for your request. Four options are given. (Note: P0 is reserved only for a down system.)

Step 7: Enter *Request Summary*: It is required that you enter a description of your problem (up to 80 characters).

Other options on this page:

- a) You can enter *Error Messages* in the Error field, and you can attach documents that may assist an agent in resolving your issue.
- b) You can *Search* for a solution. If you view a solution and it doesn't help you, click "No" to answer the question, "Can this solve your problem? Yes/No." This places a record of your viewing the solution in the service request to let the agent know a particular solution didn't help you. If the solution solved your problem, then the request is cancelled and you are taken to a listing of your Service Requests.

Step 8: Click *Continue*. (Note: You can enter more information in the Note box. Select Note type and key in more detailed information about your problem in this field. Then click *Continue*.)

Step 9: Review and make any changes to your Service Request. Then, click *Submit Service Request*. The next screen gives you your Service Request number. Depending upon how you set up the Service Request area of your home page, the Service Request might be seen on your home page now.

Step 10: Click *Home* at the top right of the page to return to your iSupport home page.

SERVICE REQUESTS

This section of your home page will list your Service Requests. To view or update an open Service Request, click on the Service Request number.

To **update a service request**, then enter any changes to the request and click *Update*.

CUSTOMIZE YOUR HOME PAGE

Service Requests

To customize your Service Request content, follow these steps:

Step 1: Click on *Edit* to change the content of the Service Request.

Step 2: Next, click on *Create View*.

Step 3: Enter a *View Name* and select items and the order for the view. You may edit these views at any time.

Solutions Quick Link

The Solutions Quick Link section is located on the left side of the screen.

Step 1: When viewing a solution, click *Add to Quick Links* in the top right of your screen. The solutions will then be listed in the Solutions Quick Link section.

Step 2: To close this feature, click *Close*. To add it after closing, click on *Content* and select *Solutions Quick Link* and *Update*.

"How Can We Help You?"

This menu will list the default functions of iSupport. To close this feature, simply click *Close*. To add it after closing, click on *Content* and select *Solutions Quick Link* and *Update*.



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