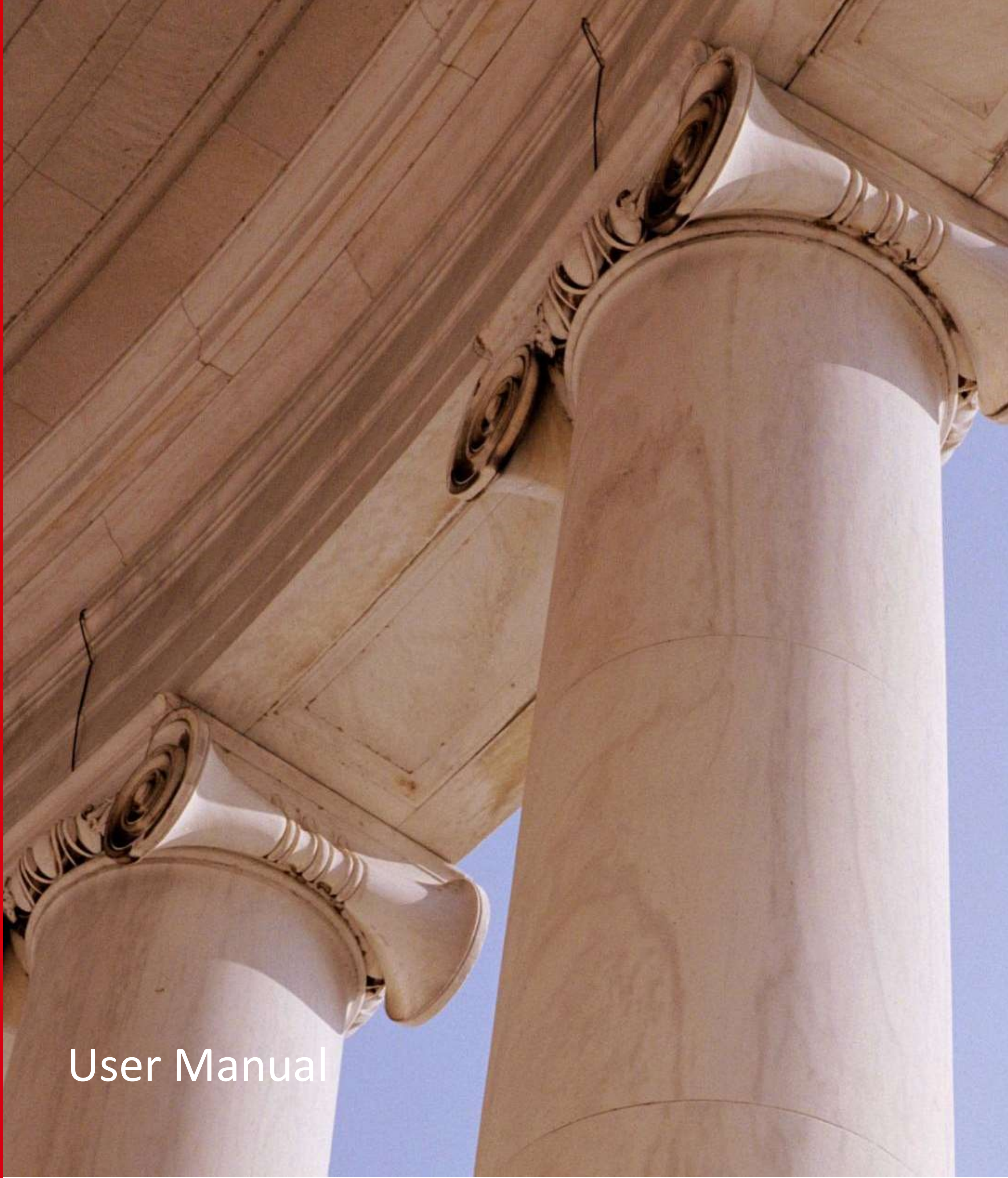
Exigy Customer Portal



User Manual

Exigy Customer Portal

User Manual Document

03 July 2023

Version 1.0

Contents

Introduction

The purpose of this document is to guide users on how to navigate and use the Exigy Customer Portal. This will include:

- Redeeming the Invitation Token
- Exigy Customer Portal views
- Using My Support
  - Filtering
  - Creating a new Case
  - Editing a Case
- Viewing Case History

Redeeming the Invitation Token

To Redeem the Invitation Token, Exigy must forward an email to the user to Redeem Token.

Dear Randle Gili,

We're excited to offer you personalised access token to the Exigy Customer Portal, where you can create and manage your cases with us at any time.

To use the token will require you to have an active Microsoft 365 account and will automatically create your profile in the Portal. As security is at the forefront of what we do, at no point will Exigy have access to your account or passwords.

Step 1: Click on the link below to redeem token invitation!

Redeem Token

Step 2: A new window will pop-up showing your auto-populated token and click on *Register*, easy!

Step 3: Read the attached document which will help you understand how to navigate our Customer Portal.

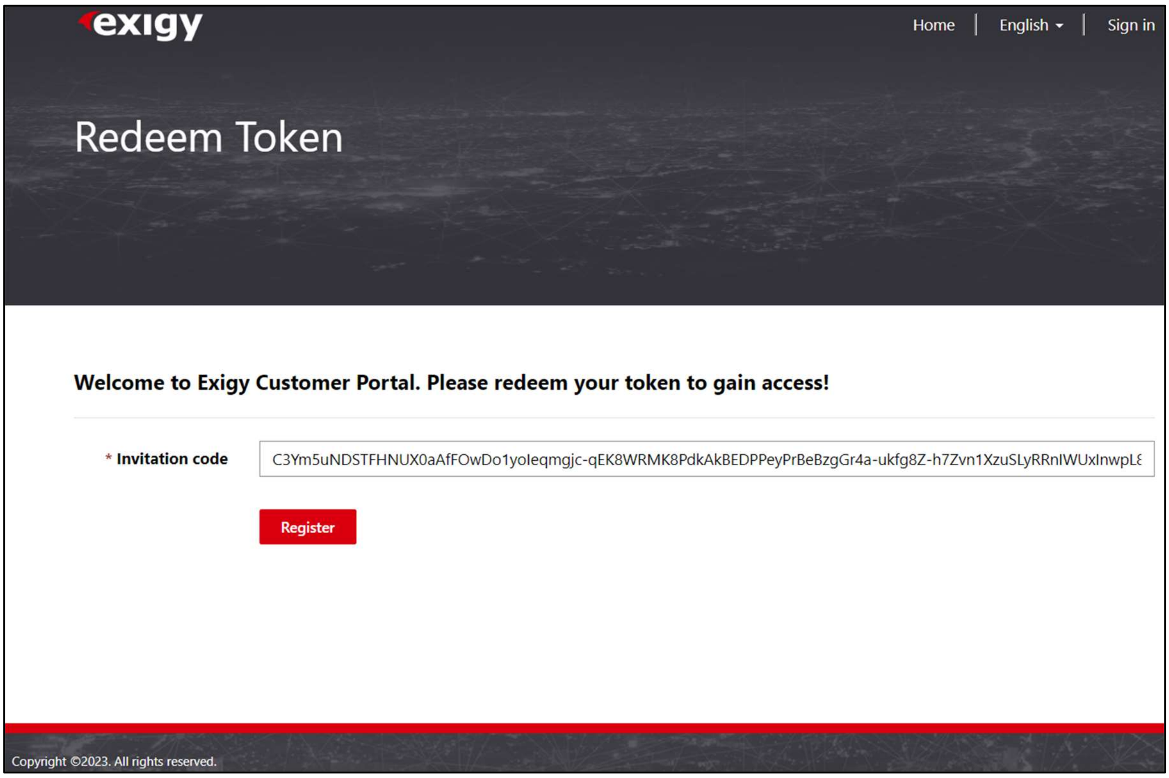
Many thanks,

The Exigy Customer Success Team

Customer Success Team

Tel: +356 2011 2011
Email: support@exigy.com
Web: www.exigy.com

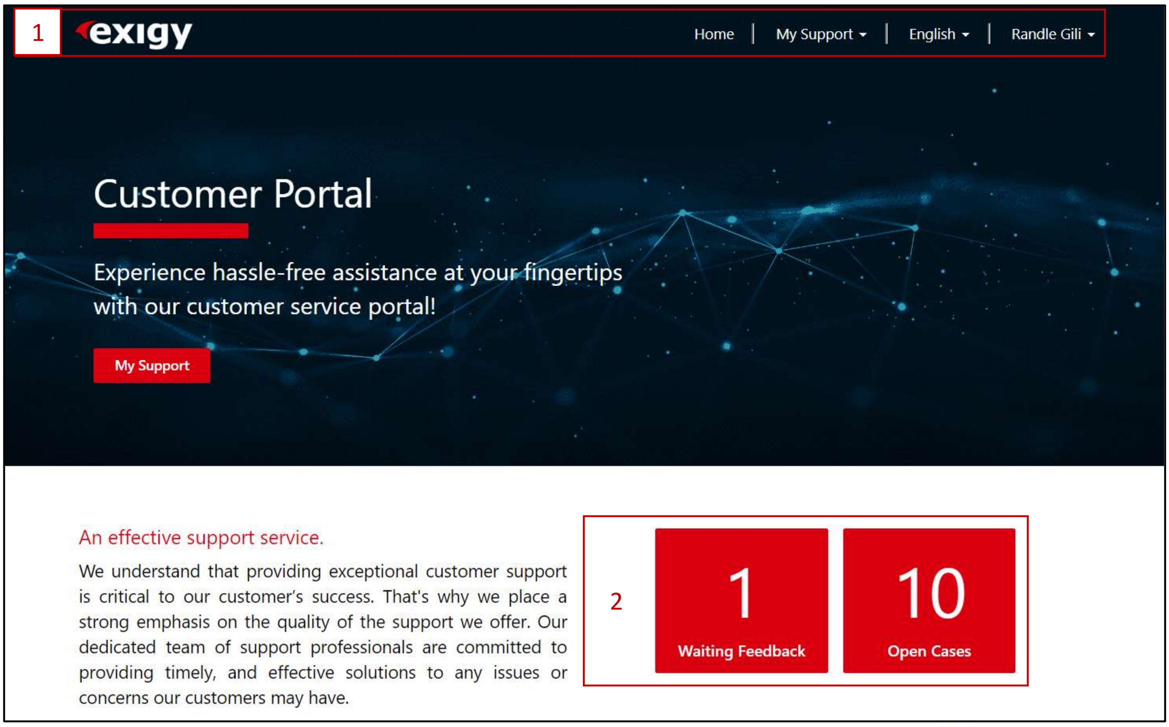
The user must click on the *Redeem Token* button from the email. This action will prompt the user to the *Redeem Token* page within the Exigy Customer Portal.



After the user clicks on the *Register* button, the user will be automatically signed in and directed to the Exigy Customer Portal Home page.

Exigy Customer Portal Views

Home Page

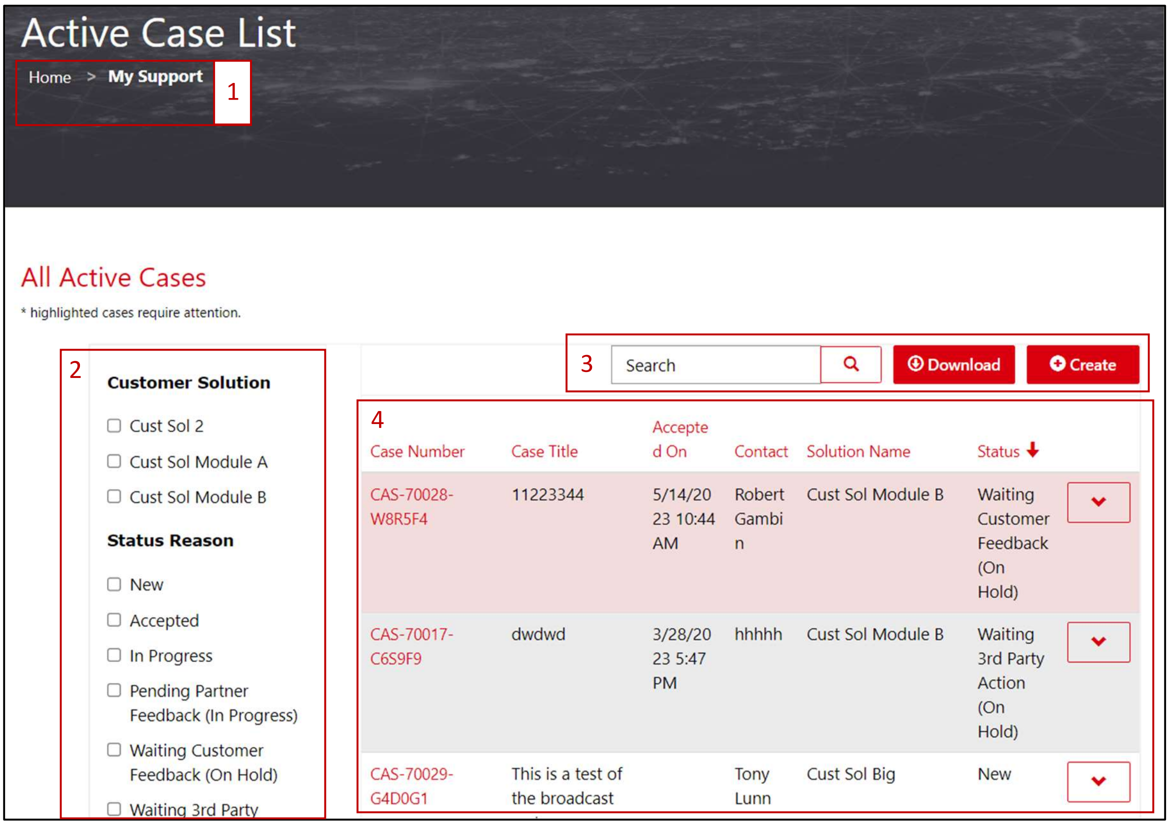


1. Navigation Bar: This is common throughout the whole portal. From the Navigation Bar users can quickly navigate to:

- The main Exigy website by clicking on the logo.
- The Home page (current page), by clicking on the *Home* button.
- View the *Active Case List* and *Case History* by clicking on the *My Support* drop-down and select either: ***My Support*** or ***Case History***
- Language can be changed from English to Italian or vice-versa from the language drop-down button.
- View ***Profile*** or ***Sign Out*** by clicking on the users name drop-down.

2. Quick Views: These will give the user a quick glimpse of the cases that are awaiting the users feedback and the number of cases that are currently open with Exigy. Clicking on one of them will display the *Active Case List*.

My Support Page



1. Breadcrumbs: These will show the user where they are currently at within the Exigy Customer Portal. Clicking on previous breadcrumbs will take the user back within that structure.

2. Filters:

This side menu contains checkboxes to manipulate how the List View will be displayed. After selecting the desired filters by clicking on the desired checkboxes, click on the *Apply* button to change the *List View*.

3. Tabs Bar:

This bar contains the *Search Bar*, a *Download* and a *Create* button.

- The *Search Bar* can be used as any other search bar by typing in the text field and click on the search icon, this will display the cases that has any related keyword.
- The *Download* button will download an Excel spreadsheet listing all the cases that are related to the user.
- The *Create* button will pop-up a sub-window allowing the user to input details and submit the case. Refer to *Create a Case* section for further information.

4. List View:

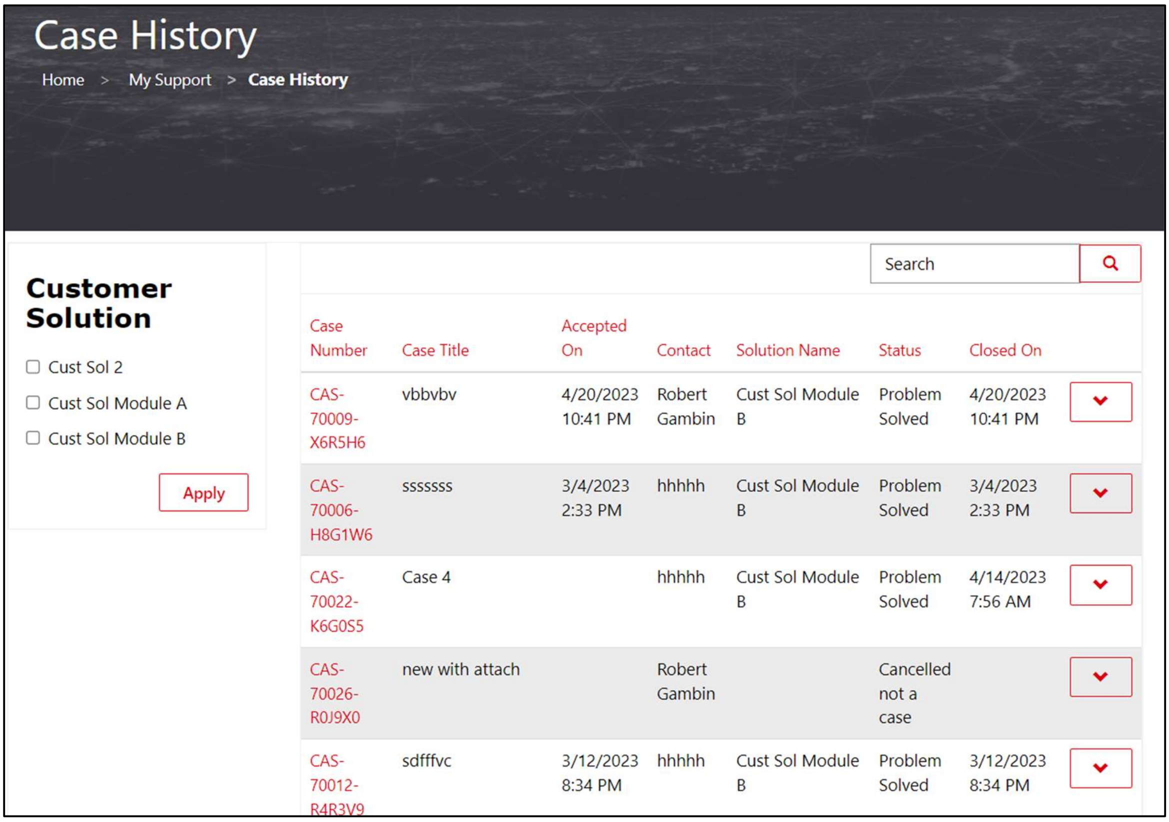
This section displays the list of cases that are currently active. Clicking on the *Case Number* will open a sub-window showing the user the *Case Details* and the *Timeline*. Refer to *Viewing a Case* section for further information.

Clicking on the drop-down arrow will let the user to select between the *View Details* and *Edit*.

- *View Details* will do the same as if the user has clicked on the *Case Number*.
- *Edit* will prompt the user with a sub-window to edit the case details. Refer to *Edit a Case* section for further information.

Note: The highlighted cases in soft red are cases that require the user's attention.

Case History



You may note that the *Case History* page is the same as the *Active Case List*, in fact it is. The following are the only differences:

- Less filters to select from since the user is viewing closed cases.
- The *Download* and *Create* buttons from the *Tabs Bar* are also removed since the user can download the list of cases from the *My Solutions* page and creating a new case from this page is out of its scope.
- Clicking on the drop-down button from the *List View* will only allow the user to *View details.*

Managing Cases

The Exigy Customer Portal will allow the user to manage cases by creating, editing, and viewing them.

Create a Case

When clicking on the *Create* button from the *My Solutions* page, the user will be presented with a sub-window. In this sub-window the user must populate the following fields to submit the case to Exigy for their support:

Customer:	This field is auto populated, this will display the company(account) that the user is listed under.
Contact:	The users Name and Surname, this is also auto populated according to the user's contact.

Title:	To be given by the user that describes the case in a few words.
Customer Solution:	The user should list the solution where assistance is needed here.
Severity:	The user must choose from the drop-down list the severity of the problem that they are experiencing.
Case Type:	This field is auto populated to *Support*
Description:	The user must insert a detailed description of what they are experiencing.
Steps to Reproduce:	The user must provide Exigy with information on how to reproduce the problem that they are experiencing
Attach Relevant Information:	The user can choose to upload any images that may deem to be of helpful in identifying the problem that they are experiencing.

After populating the fields, click on the *Submit* button and after the provided information is processed, the sub-window will be automatically closed, and the user will be able to see the newly create case in the *List View*.

Editing a Case

When clicking on the *Edit* button from the *List View* within the *My Solutions* page, the user will be presented with a sub-window. In this sub-window the user will find an additional two tabs:

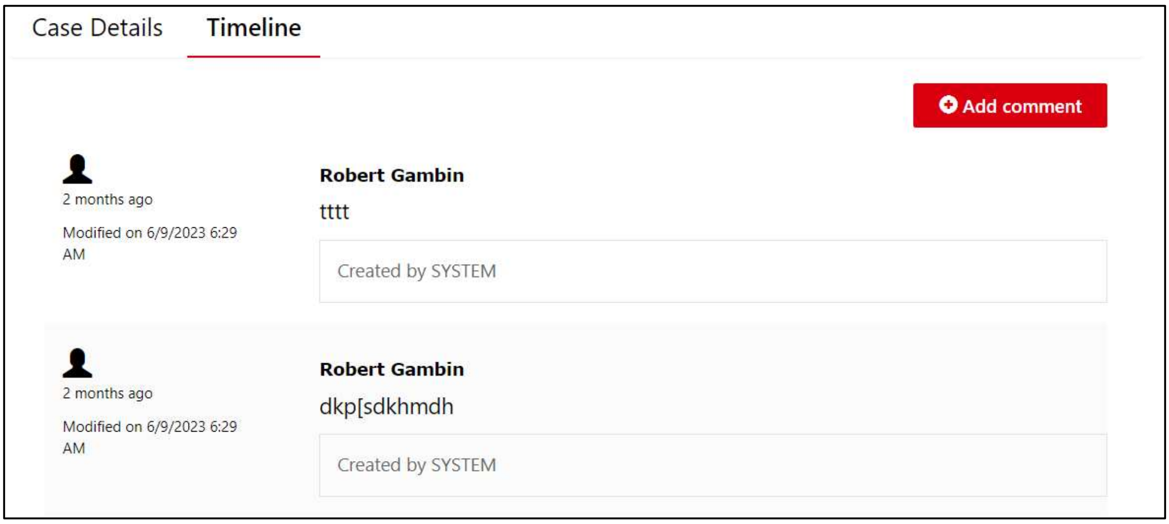
- Case Details
- Timeline

Case Details

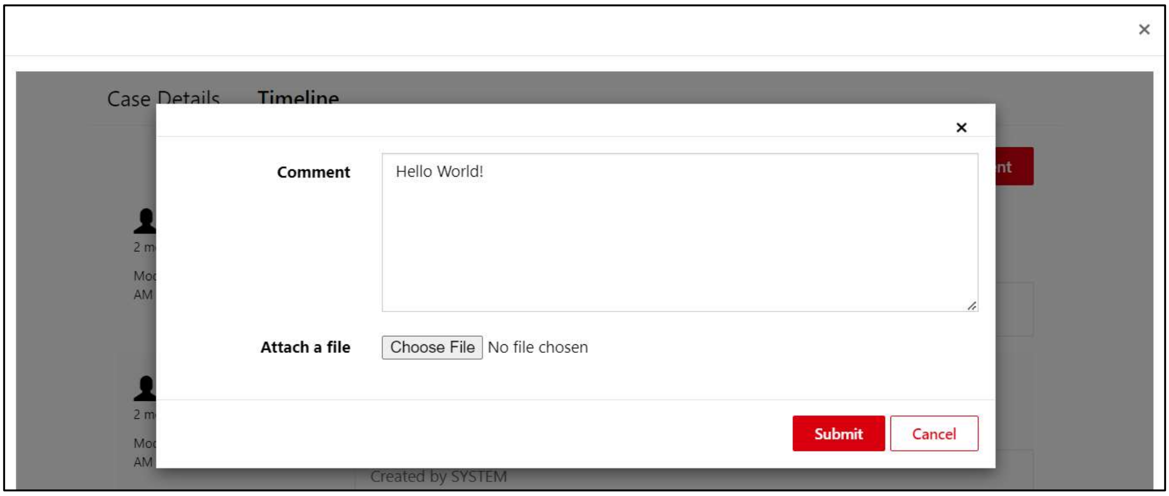
The *Case Details* tab will display the inputted information from when a case was created. As a matter of fact, they contain the same fields. Refer to *Create a Case* section. However, the user can edit the following fields:

- Title
- Description
- Steps to Reproduce

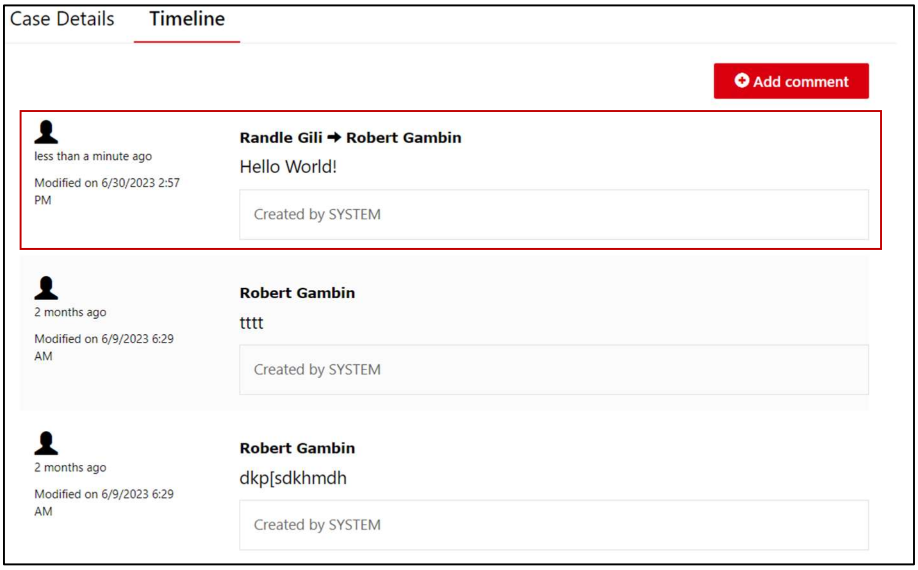
Timeline



The *Timeline* will display threads that are related to the case, such as emails and comments that are inputted by the user and Exigy Customer Support Officers. For the user to insert a comment, they must click on the *Add comment* button. This will prompt yet another sub-window.



From this sub-window, the user must populate the *Comment* field and attached any images if necessary. Once done, click on the *Submit* button. This will display the comment in the Timeline.



Viewing a Case

When clicking on *the Case Number* or *View Details* the user will be presented by a sub-window. The sub-window is the same one as the edit case window, the only difference is that from this view, the user will not be able to edit the *Case Details* or add any comments in the *Timeline*. For more information related to fields, refer to the *Editing a Case* section.