

PRIVILEGED



Customer Care

Client Guide

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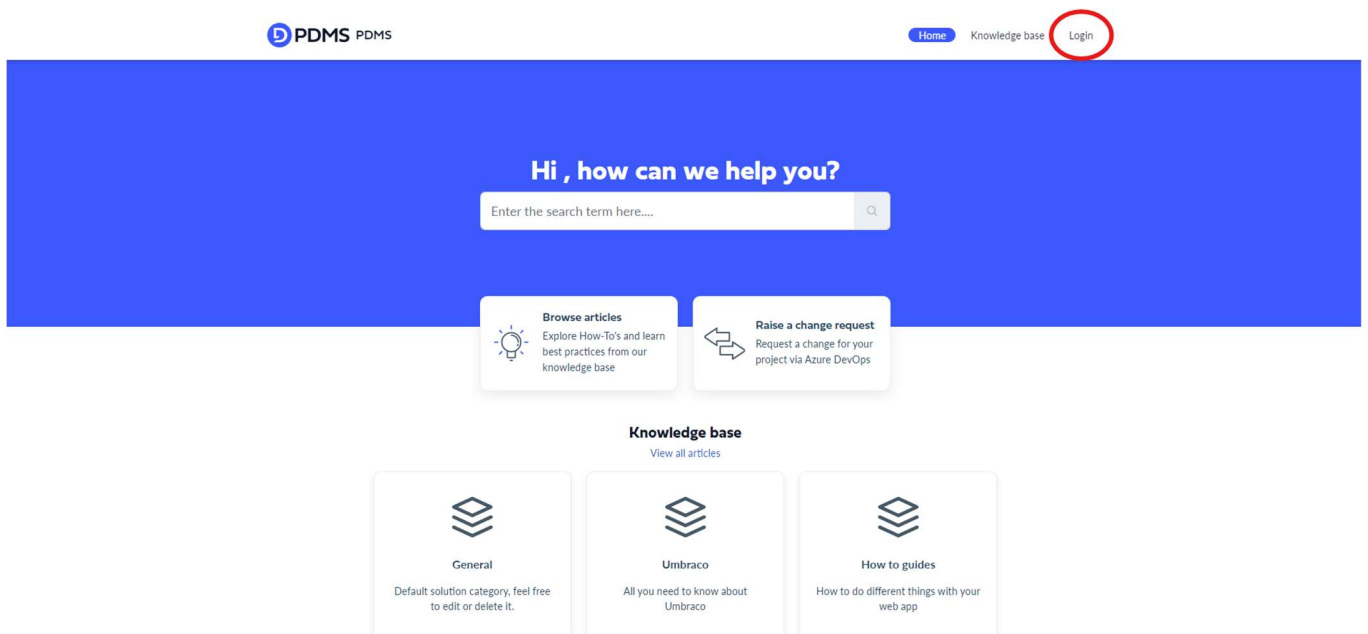
1 Accessing Your Portal

1.1 Navigate to your portal

1. Navigate to the **URL** (website address) provided by PDMS during registration or training.
2. If you are unsure of this address, please speak to a member of your **internal team**, the **PDMS team** or **email us** on portal.support@pdms.com for further information.

1.2 Logging in to your portal

1. Once you have successfully opened the portal in your browser of choice, navigate to the top right-hand corner of your screen and press **“Login”**.



1.3 Login using Single Sign-On

1. During training or registration, you will have received an **invitation**, from Microsoft, to **set-up an account** with PDMS.
 - a. If you did not receive an invitation, please contact the **PDMS team** on portal.support@pdms.com.
 - b. If you have received the invitation and have **not completed** the **set-up process**, please do so before continuing.
2. Click on **“Are you a customer? Login here”**, as shown in the below screenshot.

PDMS PDMS Home Knowledge base Login

Log in to support portal

Your e-mail address *

Password *

Remember me on this computer

Login

...or login using

Forgot your password?

Are you an agent? [Login here](#)

Are you a customer? [Login here](#)

3. Input your **email address**.

PDMS Do it right

Sign in

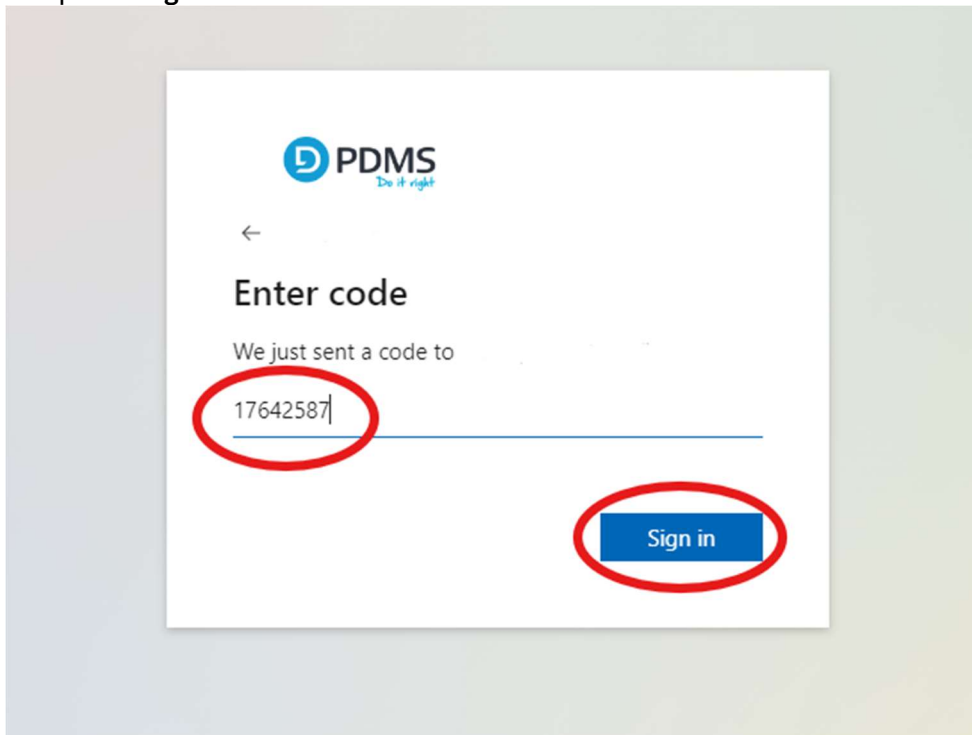
someone@example.com

[Can't access your account?](#)

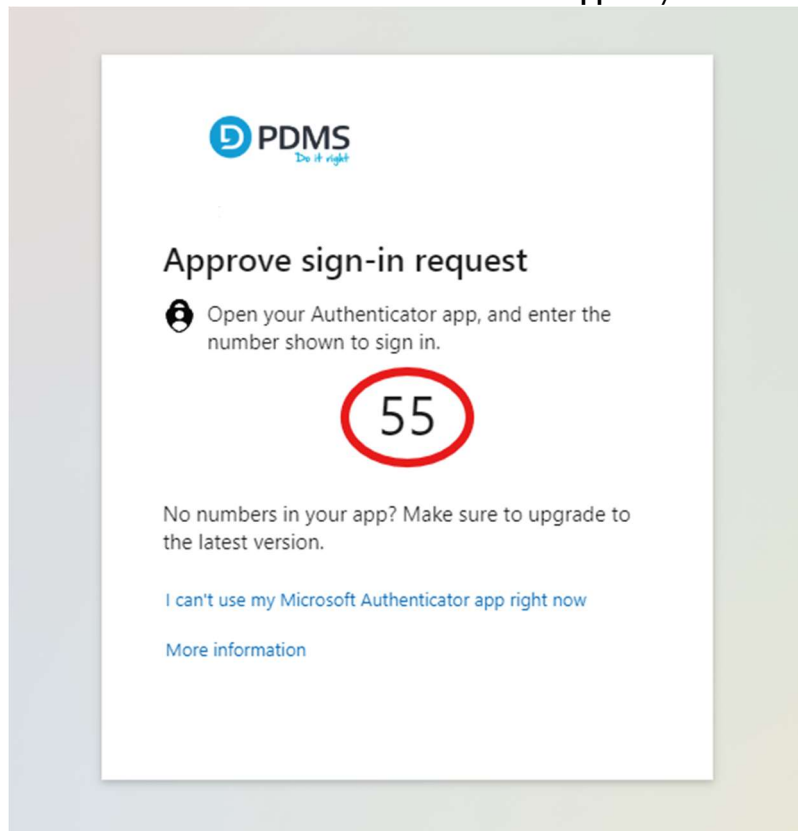
Back Next

Sign-in options

4. You do not need to enter a password, simply input the code sent to your email address and press **"Sign in"**.



5. **Input the code** shown on screen in the **Authenticator app** on your device

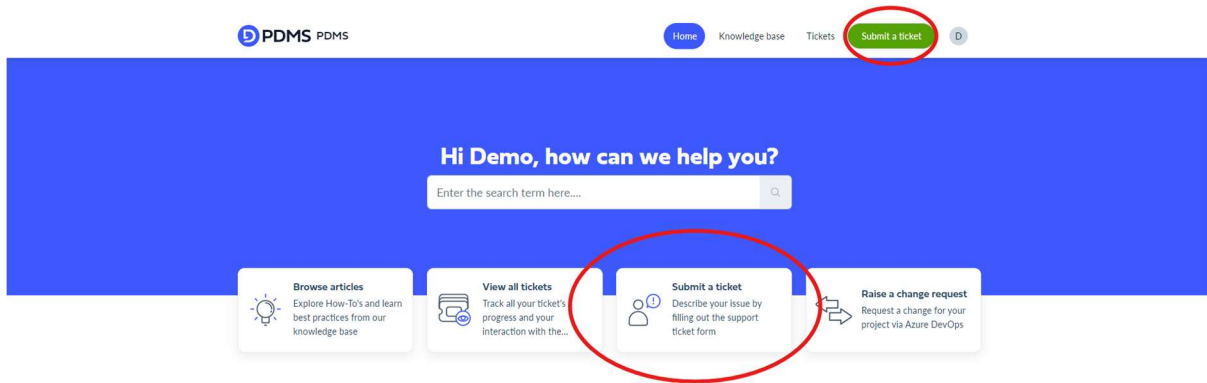


6. You will now be logged into the portal and will be shown the **homepage**.
 - a. If you are not shown the homepage automatically, simply click the **"Home"** button from the top of the screen.

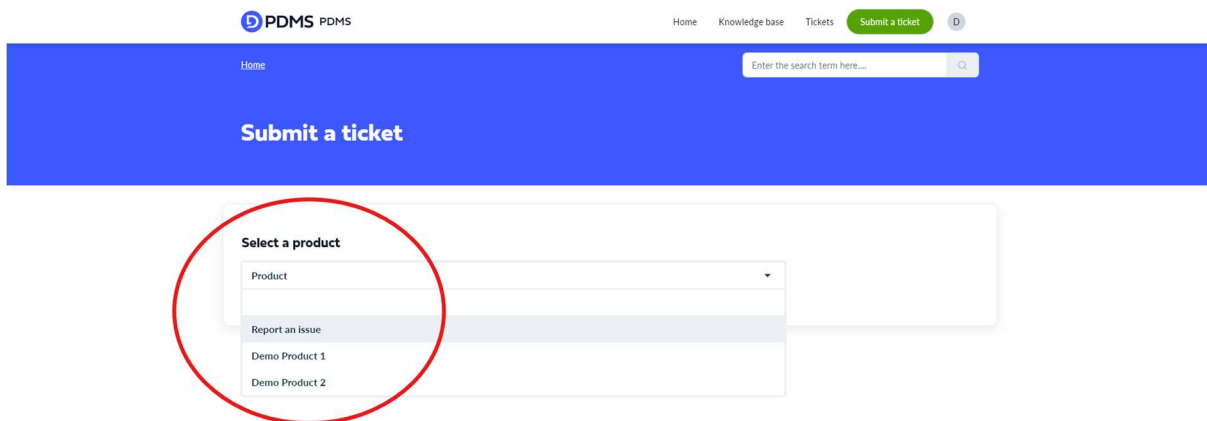
2 Portal Navigation

2.1 Raising a ticket

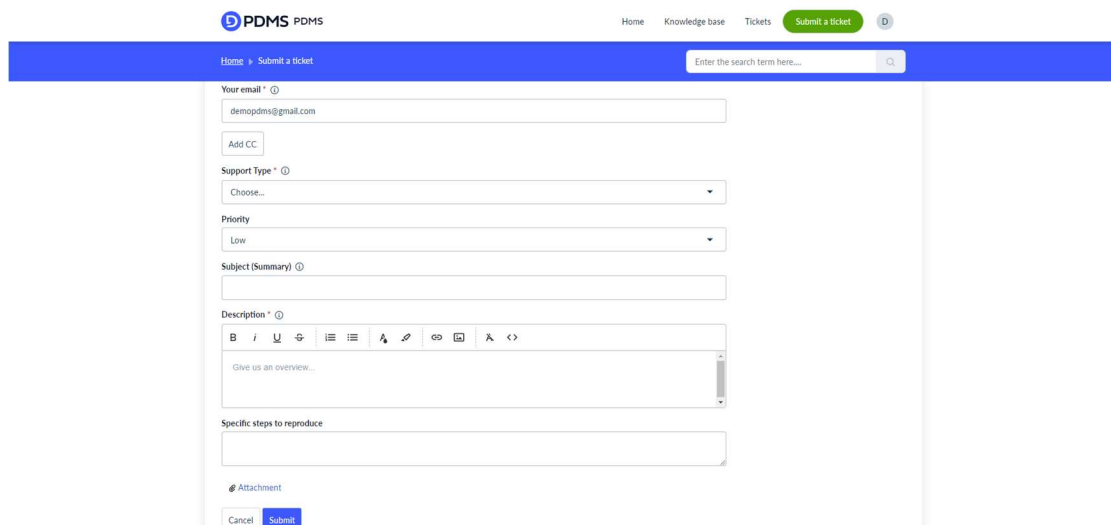
1. On your homepage, select the **“Submit a ticket”** option from the menu bar or the tile, as shown in the screenshot below.



2. If a **“Product”** dropdown is shown, please select the product you are contacting us about.



3. Complete the **required form fields**, your form may look different depending on the product you selected, or your organisations requirements.



4. Select the **“Submit”** button once you have **completed the form**.

The screenshot shows the 'Submit a ticket' form in the PDMS portal. The form includes fields for 'Support Type', 'Priority', 'Subject (Summary)', and 'Description'. The 'Submit' button is circled in red, indicating the final step of the process.

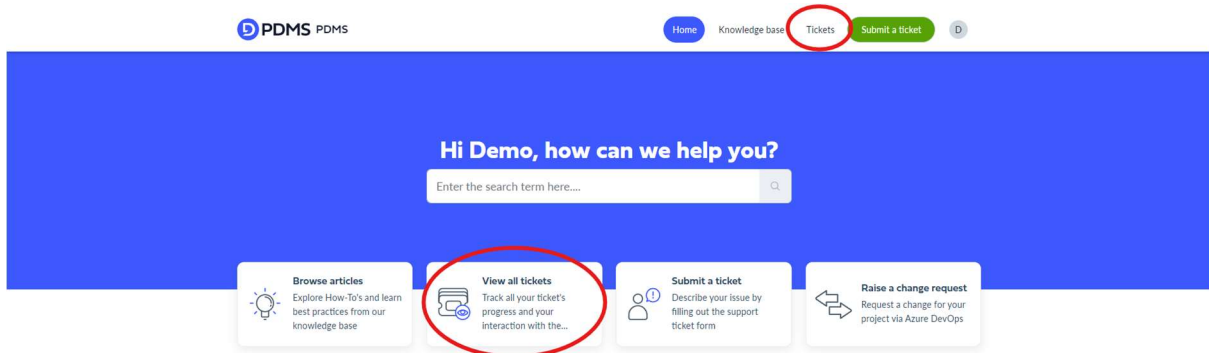
5. Confirm your **ticket** was **created**.

The screenshot shows the 'Tickets' page in the PDMS portal. A confirmation message, 'Your ticket has been created.', is displayed at the top of the content area and is circled in red. Below the message, the details of the newly created ticket are visible, including the title 'Test #37' and the creation time 'Created on Mon, 17 Jun, 2024 at 2:24 PM - via Portal'.

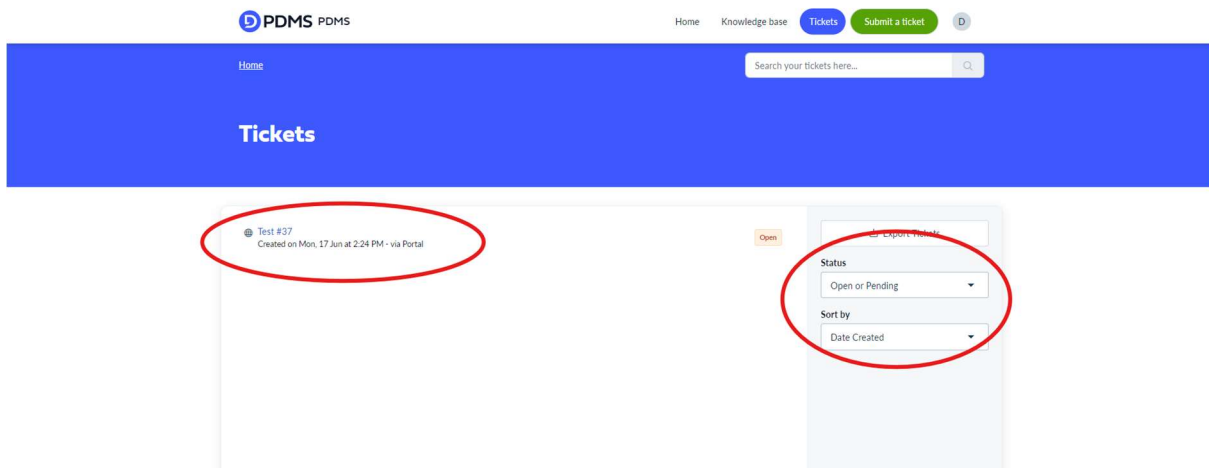
6. Once your ticket has been submitted, a member of the PDMS Customer Care team will be back in touch as soon as possible.
7. You will **receive an email** when your ticket has been responded to.

2.2 View an existing ticket

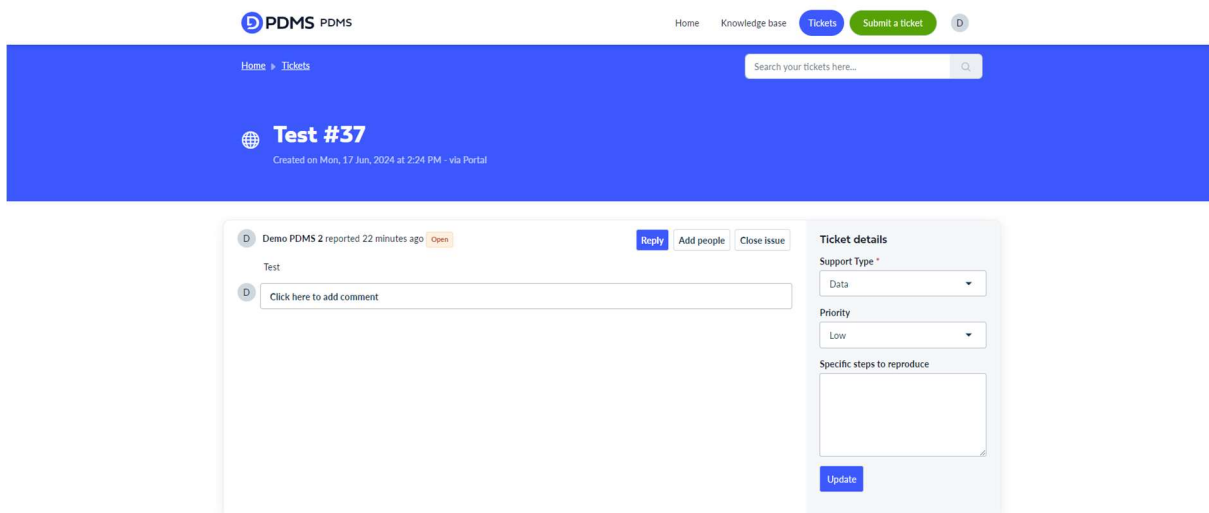
1. To view an **existing ticket** submitted by you or someone in your organisation, click **"Tickets"** or the **"View all tickets"** tile.



2. **Filter or sort** your tickets using the options on the right of the screen or simply select the ticket you wish to view from the **list view**.



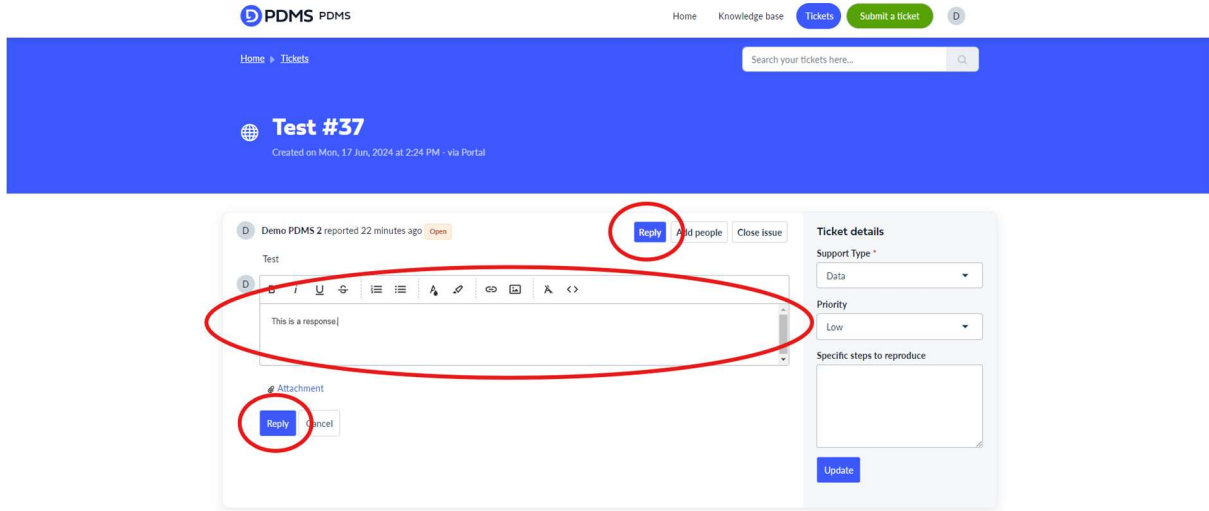
3. View your **ticket details**, update its **details**, or create a **response**.



4. Having selected a ticket, you can take the following actions.
 - a. View your **ticket details**.
 - b. **Reply** to a ticket.
 - c. **Add others** to your ticket.
 - d. **Update** your ticket details.
 - e. **Close** your ticket.

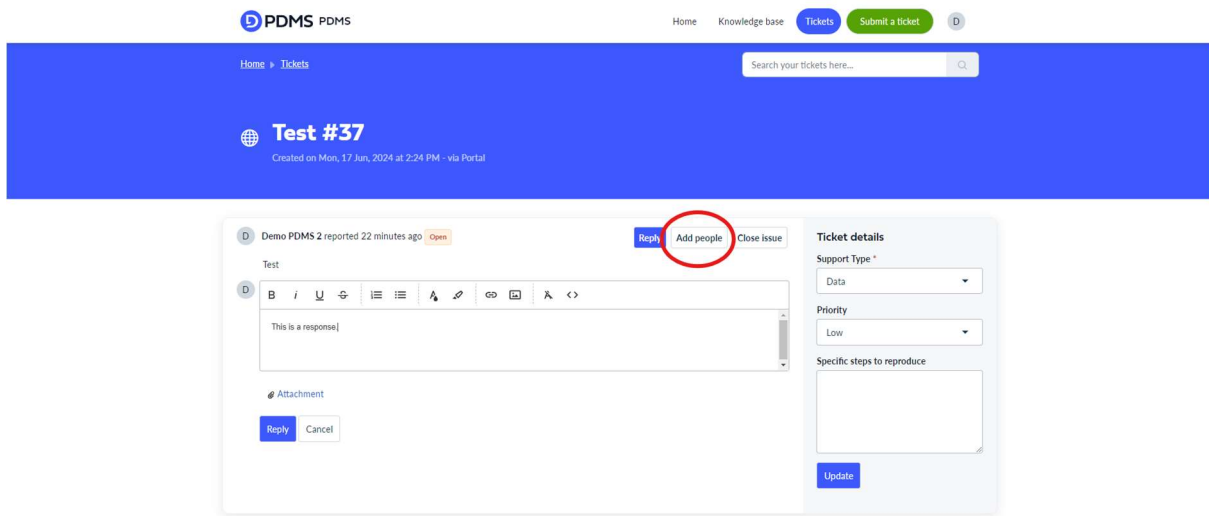
2.3 Reply to a ticket

1. To **reply** to a ticket, start typing in the **“Click here to add a comment”** box, or click **“Reply”**.
2. Once you have input your reply, press the **“Reply”** button below the text box.

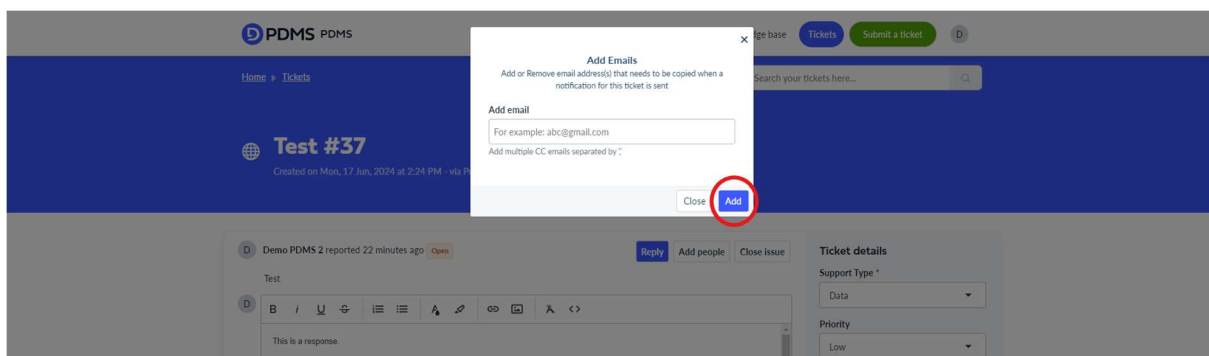


2.4 Add others to your ticket

1. Click the “Add People” button.

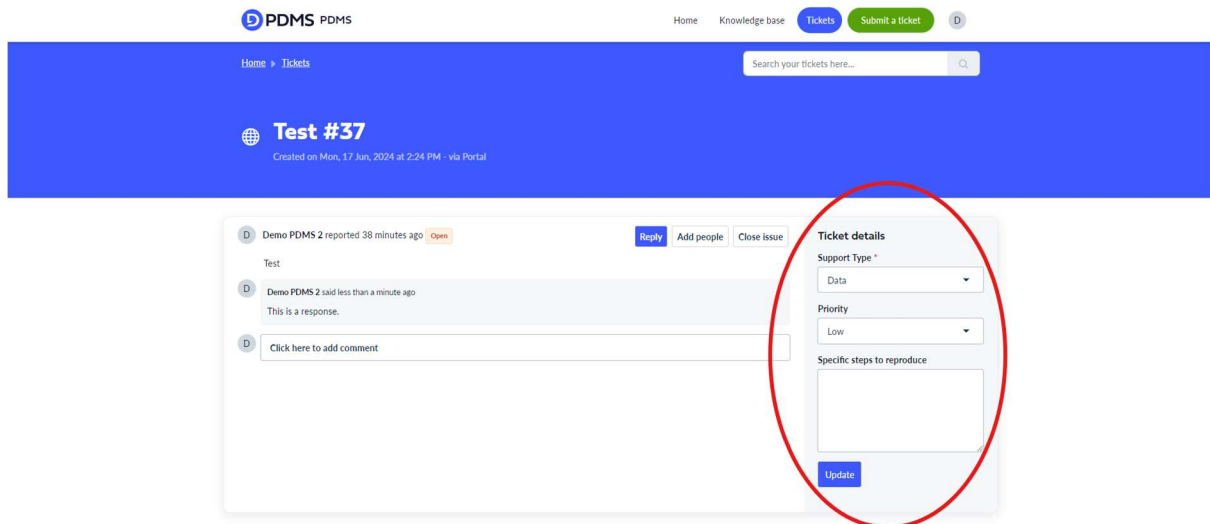


2. A **pop-up** will be displayed.
3. Input the **email address** of the person you wish to add to your ticket, for example someone else within your organisation.
4. Click “**Add**” to complete the process.



2.5 Update your ticket details

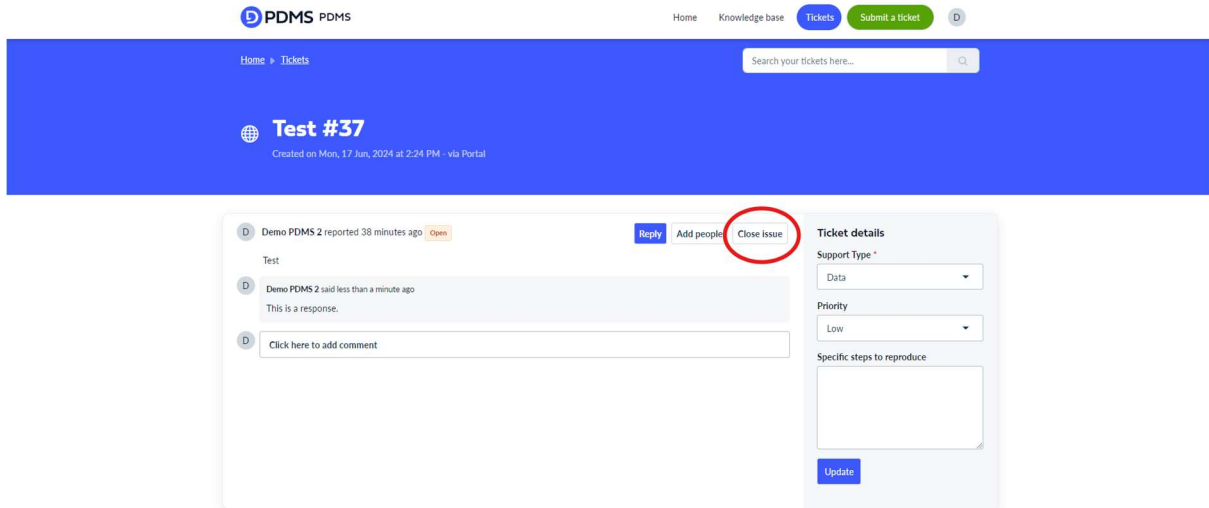
1. Under **“Ticket Details”** on the **right-hand side** of the page, you can **update** the key details of your ticket.
2. Updating the **“Support Type”** will change the type of support you need.
3. Updating the **“Priority”** will change the time it takes to respond to your ticket or the speed at which it is resolved.
4. Updating the **“Specific steps to reproduce”** will give us more information on how to replicate your ticket.
5. When you have made your desired changes, simply press the **“Update”** button.



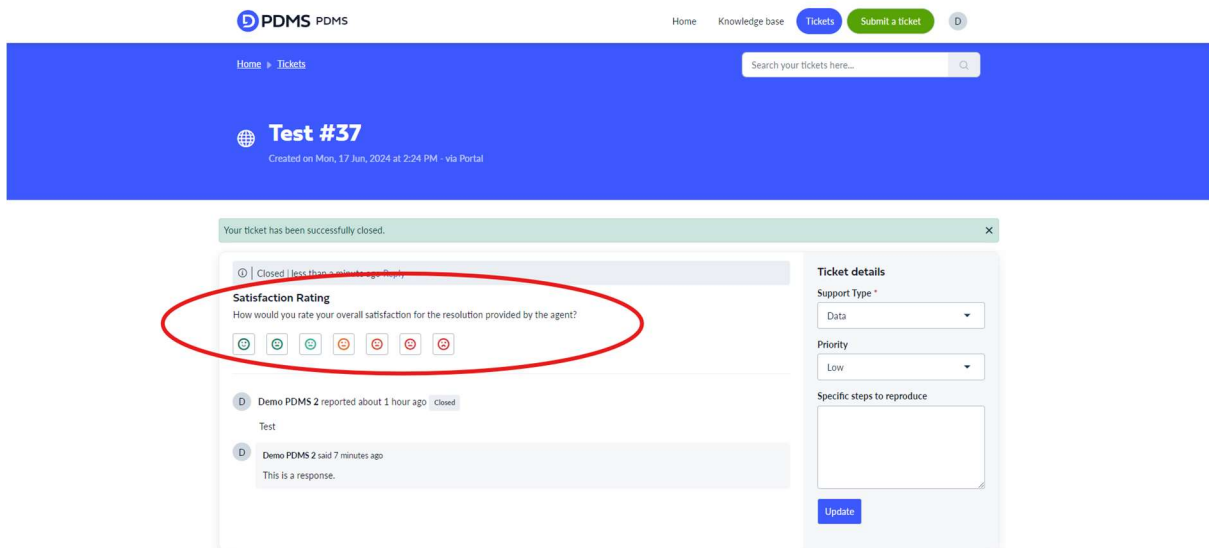
The screenshot displays a web interface for managing tickets. At the top, there is a navigation bar with the PDMS logo and links for Home, Knowledge base, Tickets, and Submit a ticket. Below this is a search bar for tickets. The main content area features a blue header for a ticket titled "Test #37", created on Mon, 17 Jun, 2024 at 2:24 PM via Portal. The ticket details panel on the right is circled in red and contains the following fields: "Support Type" (Data), "Priority" (Low), and "Specific steps to reproduce" (a text area). An "Update" button is positioned at the bottom of this panel. The main content area shows a list of comments from "Demo PDMS 2", including a report from 38 minutes ago and a response from less than a minute ago.

2.6 Close your ticket

1. If your issue has been **resolved** or you **no longer require** our assistance, you can **close** your ticket from within the portal.
2. Click on the **“Close issue”** button in the middle panel.



3. You can leave us a **satisfaction rating** when your ticket is closed.



2.7 Reopen a closed ticket

1. If your ticket has been **closed** (by you or the PDMS team), you can **reopen** it by creating a reply.
2. Navigate to the ticket by using the **filters** in the “**Tickets**” page, select “**Resolved or Closed**” from the “**Status**” dropdown.
3. Click on the ticket from the list.
4. Click on the “**Reply**” button.
5. Input your response.
6. The ticket will be **reopened**.

The screenshot displays the PDMS Tickets interface. At the top, there is a navigation bar with 'Home', 'Knowledge base', 'Tickets', and 'Submit a ticket' buttons. Below this is a search bar with the text 'Search your tickets here...'. The main content area shows a ticket titled 'Test #37' with a status of 'Closed' and a creation date of 'Mon, 17 Jun, 2024 at 2:24 PM - via Portal'. The ticket details section includes a 'Satisfaction Rating' section with a question 'How would you rate your overall satisfaction for the resolution provided by the agent?' and a row of seven rating buttons. Below this is a list of replies, with the most recent one from 'Demo PDMS 2' circled in red. The 'Ticket details' section on the right includes a 'Support Type' dropdown set to 'Data', a 'Priority' dropdown set to 'Low', and a 'Specific steps to reproduce' text area. An 'Update' button is located at the bottom right of the ticket details section.