

# Advantzware

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Manufacturing & Distribution  
Software for Packaging

## User Guide: Customer Portal



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## Document Overview

### Documentation Goals

This documentation is intended to provide instruction for *Using the Advantzware Customer Portal*.

### Documentation Disclaimers

- This document will teach the user how to access and navigate the different sections of the Customer Portal.
- Provide instructions for entering and updating a support ticket via the Customer Portal.

## Table of Contents

<b>Overview</b>	2
<b>Accessing the Customer Portal</b>	2
<b>Navigating the Customer Portal</b>	3
Home	3
My Area	4
Knowledge Base	5
<b>How To: Enter a Support Ticket</b>	6
Ticket Entry	7
Ticket Submission Fields	8
FAQ Suggestions	9
Ticket Notification Emails	10
Ticket Created Notification	10
Ticket Update Notification	11

## Overview

As part of your support maintenance, you have access to what is known as the ***“Customer Portal”*** for support of your Advantzware products. This is available for 24/7 access and should be used for submission, updating, and research of your Advantzware support tickets.

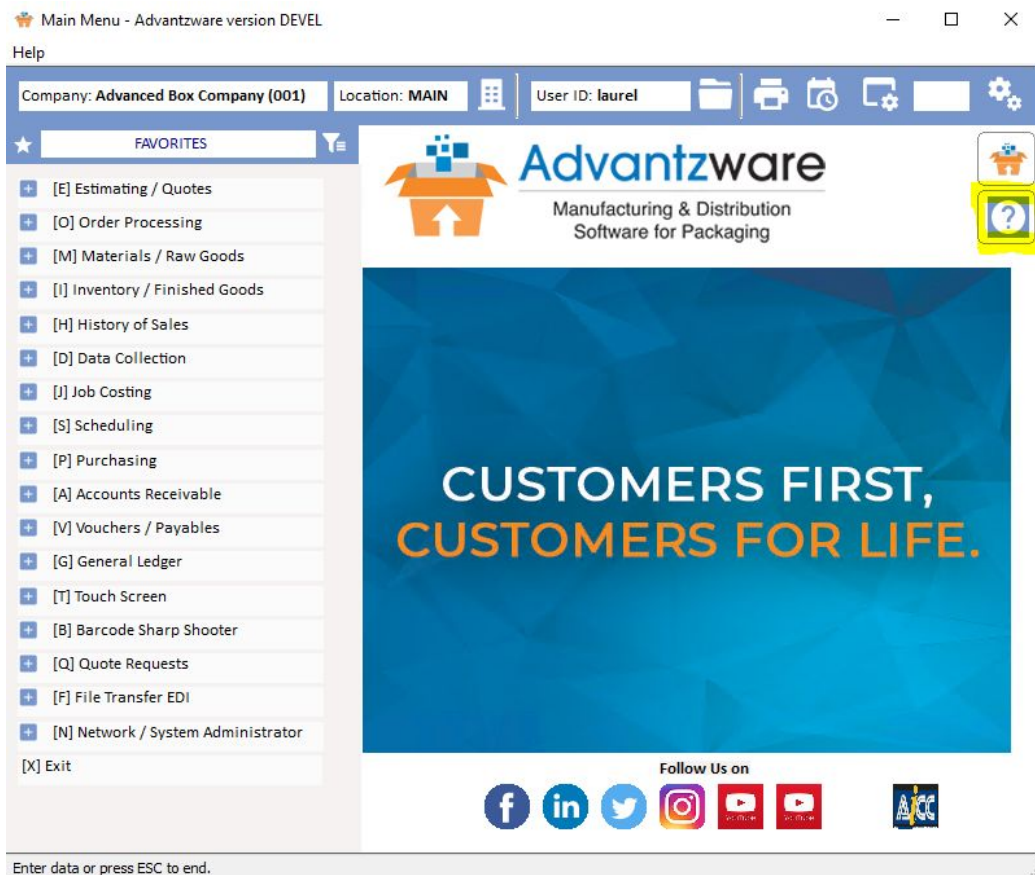
You also have access to our knowledgebase, where you will find numerous FAQ’s and official release notes for all publicly release versions of Advantzware. This creates one central place for you to be able to interact with *Advantzware Customer Support* and get further assistance for the Advantzware product family.

## Accessing the Customer Portal

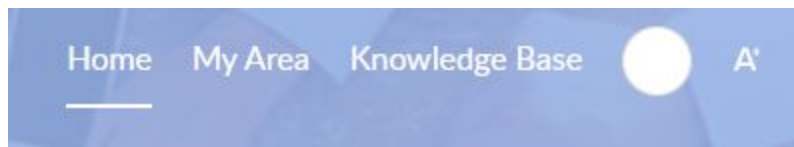
Initial access to the Customer Portal can be gained through by submitting a request to the Advantzware support email [help@advantzware.com](mailto:help@advantzware.com). Any email this address with a subject line of the email reading: ***“Customer Portal Access Request”*** will indicate your desire for an account to be established. A verification email will be sent for the request to the given email address that the email came from, with further verification steps.

Once an account has been established and verified, you can access the Customer Portal through the following link: <https://desk.zoho.com/portal/advantzware/home>.

Additionally, when you are within the Advantzware application you can access the Customer Portal, by clicking on the question mark icon in the upper right corner as shown below.



## Navigating the Customer Portal



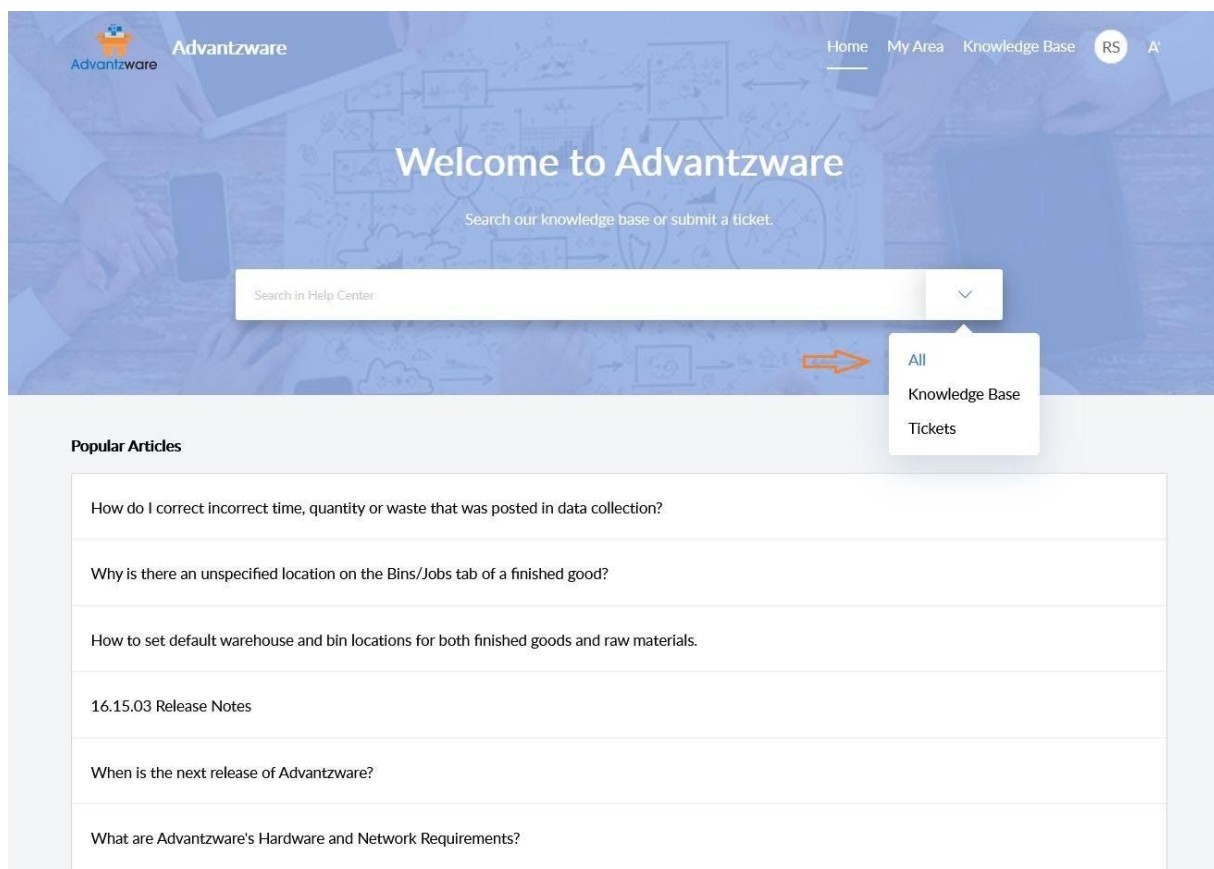
The Advantzware Customer Portal has four main areas which are separated into tabs. Each has a different function which includes the following abilities:

- Create new tickets.
- Research and view existing tickets.
- Access our extensive knowledge base.

This creates one central place for you to be able to interact with *Advantzware Customer Support* and get further assistance for the Advantzware product family.

### Home

This is the landing page once you log in to the Customer Portal. The most popular articles from the Knowledge Base are initially displayed for ease of use. You can use the search bar to search for a specific subject, keyword, or question.



## My Area

The “**My Area**” section displays your tickets. You can view open tickets, closed tickets, or tickets that are currently on hold in a list format. Additionally, you can view specific details by selecting a desired ticket from the list.

More information on how to interact with a ticket when viewing it’s details can be found in the “*Ticket Updates*” section. You can also view not only your tickets but those of other members of your team. Please Note: There is no way to disable this feature, as it is global.

You can also add a new ticket from within this area. For more information on ticket entry see the “*How To: Enter a Support Ticket*” section.

The screenshot shows the 'My Area' section of the Advantzware support portal. At the top, there is a navigation bar with 'Home', 'My Area', and 'Knowledge Base' links, along with a user profile icon. Below the navigation bar is a search bar labeled 'Search tickets' and an 'Add Ticket' button. The main content area is titled 'My Area' and features a filter section with 'Status' (Open (51), Closed (344), On Hold (3)) and 'Created By' (You, Team) dropdowns. Two orange arrows point to these dropdowns. The ticket list displays three items:

Ticket Title	ID	Status
+FG Item Button erases Index to FARM Tabs Vendor Cost Matrix	#93451	Passed Testing
Report output stream uniqueness	#91745	Queued For Development
Cannot close estimate calculation message window	#29293	Queued for Future Consideration

Each ticket entry includes a small icon, the department 'Customer Support - Advantzware', the time since creation (e.g., '15 days ago'), and the number of replies. On the right side, there is a 'Department(s)' filter with options for 'All Departments' and 'Customer Support - Advantzware'.

## Knowledge Base

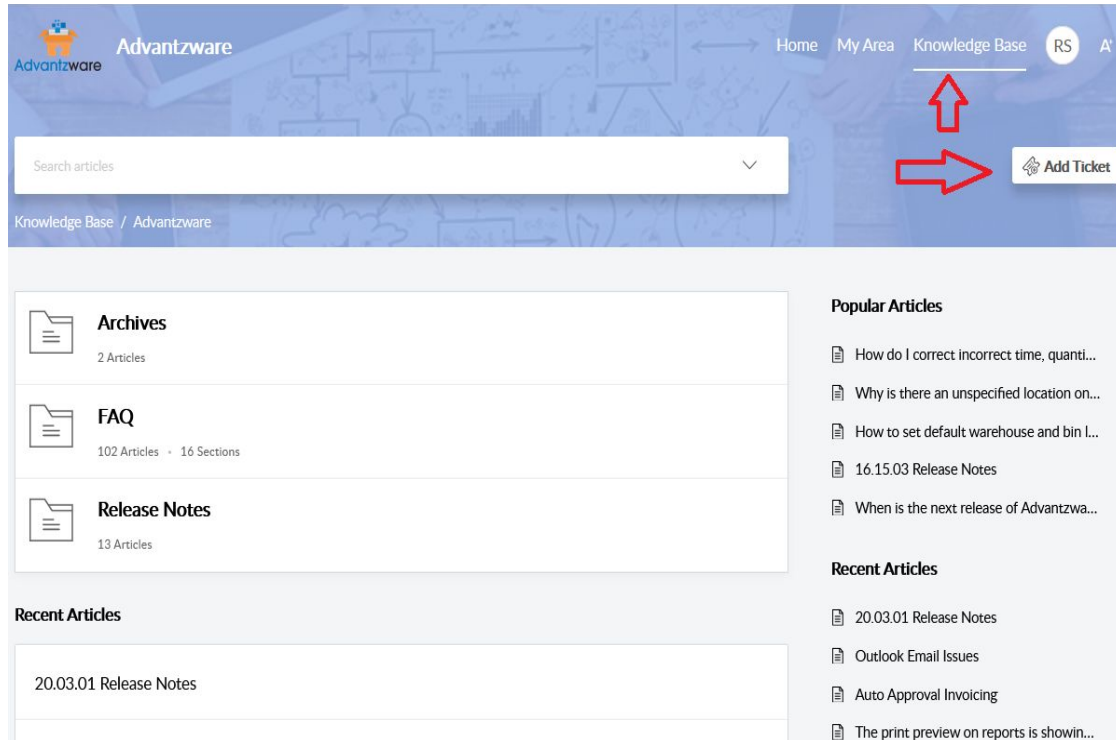
The **Knowledge Base** section is a repository for various elements of documentation. It has two sections, the **FAQ** and **Release Notes**. FAQ's will house articles that were created to assist with common questions or problems. The Release Notes section will house the release notes for the recent versions of software.

If you cannot find an answer to your current question by searching this section, you have the ability to add a ticket in this area to ask your question of the *Advantzware Customer Support* team. For more information on ticket entry see the *"How To: Enter a Support Ticket"* section.

The screenshot displays the Advantzware Knowledge Base web application. The header features the Advantzware logo, navigation links for Home, My Area, Knowledge Base, and a user profile icon labeled 'RS'. A search bar with the placeholder 'Search articles' and a dropdown arrow is positioned on the left, while an 'Add Ticket' button is on the right. Below the header, the main content area is divided into two columns. The left column contains two large category tiles: 'FAQ' with 103 articles and 16 sections, and 'Release Notes' with 14 articles. Below these is a 'Recent Articles' section listing five items: '20.03.01 Release Notes', 'Outlook Email Issues', 'Auto Approval Invoicing', 'The print preview on reports is showing only a small area of a report', and '20.02.03 Release Notes'. The right column features a 'Popular Articles' section with four items: 'How do I correct incorrect time, quanti...', 'Why is there an unspecified location on...', 'How to set default warehouse and bin L...', and '16.15.03 Release Notes'. Below this is another 'Recent Articles' section with four items: '20.03.01 Release Notes', 'Outlook Email Issues', 'Auto Approval Invoicing', and '20.02.03 Release Notes'.

## How To: Enter a Support Ticket

To enter a ticket, utilize the **"Add Ticket"** button. You can find this icon either within the **My Area** or the **Knowledge Base** sections of the Portal. Once you select the button, the ticket submission form will appear.



## Ticket Entry

Below is the list of fields that can be completed as part of the ticket entry process. Please be as thoroughly descriptive as possible when submitting an issue. Provide any applicable artifacts such as:

- Screenshots of any errors or aspects of the system that are not working correctly.
- Examples that demonstrate the current issue.
- Detailed step-by-step actions that were taken in the system to produce the issue.

In most cases the issue-specific information is *critical* to resolving the issue. If not presented with such information, the support team will most likely inquire about those details as a first step.

Please Note: There is never too much information that you can provide in order to expedite reporting issues.

The screenshot shows the 'Submit a ticket' form in the Advantzware user interface. The form is titled 'Submit a ticket' and includes a 'Ticket Information' section. The fields are as follows:

- Priority**: A dropdown menu with '4 - Normal' selected.
- Category**: A dropdown menu with 'System Settings/Global' selected.
- Hot Key or Application**: A text input field.
- Reported in Version**: A dropdown menu with '-None-' selected.
- Subject**: A text input field.
- Description**: A rich text editor with a toolbar containing bold, italic, underline, link, unlink, list, and image icons, along with a font size dropdown set to 12. The text area is currently empty.

On the right side of the form, there is a 'Popular Articles' section with a list of links:

- When is the next release of Advantzwa...
- What are Advantzware's Hardware and ...
- How does Advantzware prioritize issue...
- What is Advantzware's policy on custo...
- What is the overall workflow of Advant...



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## Ticket Submission Fields

### Priority

This is the priority of the ticket you are submitting.

Please Note: This level will be adjusted after further review by the *Advantzware Customer Support* team. The definitions of each level are set forth in our response and resolution targets.

### Category

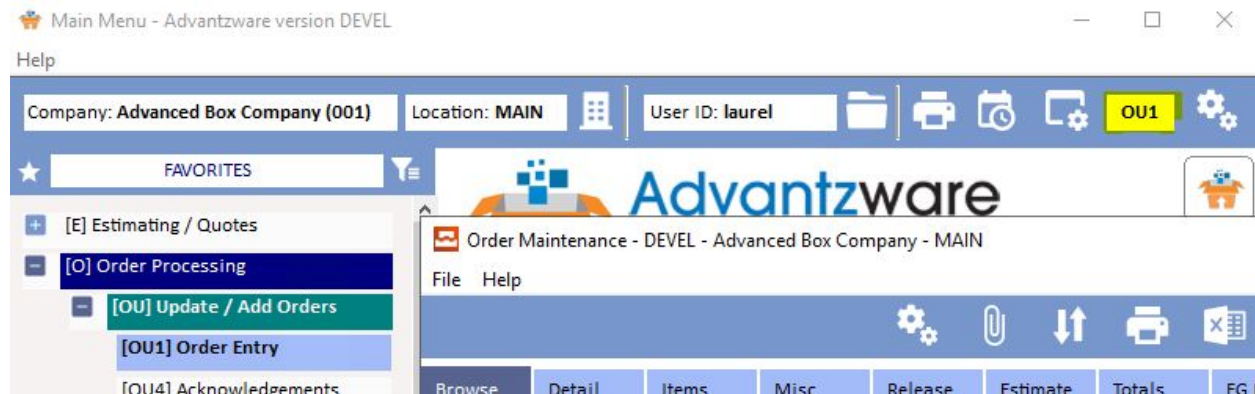
This is the area of the system in which you are currently experiencing the issue. (Example: Order Entry)

Category

order	x	▲
Order Entry		
Order Invoicing		

### Hot Key or Application

This is the menu navigation to get to the specific program in which you are currently experiencing the issue. If you are unsure of your current location, this is located in the upper right corner of the main menu, next to the gears icon. (Example: O-U-1)



### Reported in Version

This is the version of Advantzware or respective product in which the issue that is being reported is within. If you do not see your version in the list, you can leave this as is.

Reported in Version

20.03.01	▼
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### Subject

This field is used to briefly describe the problem at a high level. However, when attempting to expedite reporting your issue it is extremely helpful to make certain that this field is descriptive as well as brief. (Descriptive Example: Print Order Not Working in OU1)

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### Description

This section should be as detailed as possible when describing your current issue. It should reference any artifacts necessary to assist in troubleshooting, including example order numbers or estimate numbers.

This is also where you can provide screenshots and detail all the steps you took prior to noticing your current issue. Remember, you can never provide too many details or examples. The more descriptive you are in your report, the easier it is for the *Advantzware Customer Support* team to expedite the issue.

### Attachments

Each ticket can support up to 20 MB of attachments. Here, you can attach screenshots and example reports that can help detail your current issue.

### FAQ Suggestions

During ticket submission, when you type a value into the “*Subject*” field, applicable and list of applicable FAQ’s are displayed based off of the content entered. (Another reason be descriptive when entering your subject line.)

Quite frequently, your issue can easily be answered by one of these dynamically displayed FAQ’s, as well as others located in the ***Knowledge Base*** section of the Customer Portal. Be sure to check these for possible solutions.

The screenshot displays a ticket submission interface. At the top, there is a dropdown menu showing '20.03.01'. Below it is the 'Subject' field with a red asterisk, containing the text 'Order'. The 'Description' field is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, text color, background color, font size (set to 12), bulleted list, numbered list, indent, and image. To the right of the form is a sidebar titled 'Related articles' with a list of five links, each preceded by a document icon: 'How the sale rep code is determine on an Or...', 'Why is there no pop-up for Ship To when ent...', 'I am having performance issues within Estim...', 'Shipping and Invoicing Unassembled Sets', and 'Order Entry Price Matrix Rules'.

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## Ticket Notification Emails

Communications within the ticket system are sent through email. The emails received all provide a link to the Customer Portal where you can further interact with the ticket. For example, available interactions include adding comments or, if desired, closing the ticket.

### Ticket Created Notification

Once a new ticket has been submitted, you will receive an email notifying you that a ticket has been created and sent to the *Advantzware Customer Support* team. Within this email you will see two links, shown below:

Your ticket has been created with the ticket ID 37690 and subject "Testing ticket entry"

Ticket Description:

Test

Someone from our customer service team will review it and respond shortly.

Thank you from the Advantzware Support Team

Customers First, Customers for Life

[View ticket](#)

Advantzware Internal Access

[37690](#)

### View Ticket

This large green button will immediately navigate you to the Advantzware Customer Portal, where you can further interact with the ticket by adding comments or, if desired, closing the ticket.

### Internal Access Link

This second, unhighlighted, link at the very bottom of the email is for Advantzware Support internal access only and should not be used.

As the ticket is being processed there may be additional interactions or information needed from you for the issue. If that is the case, the *Advantzware Customer Support* team may contact you via email as exemplified below.



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## Customers First, Customers for Life

Page 11 of 11