Support Request System

User Guide

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Introduction

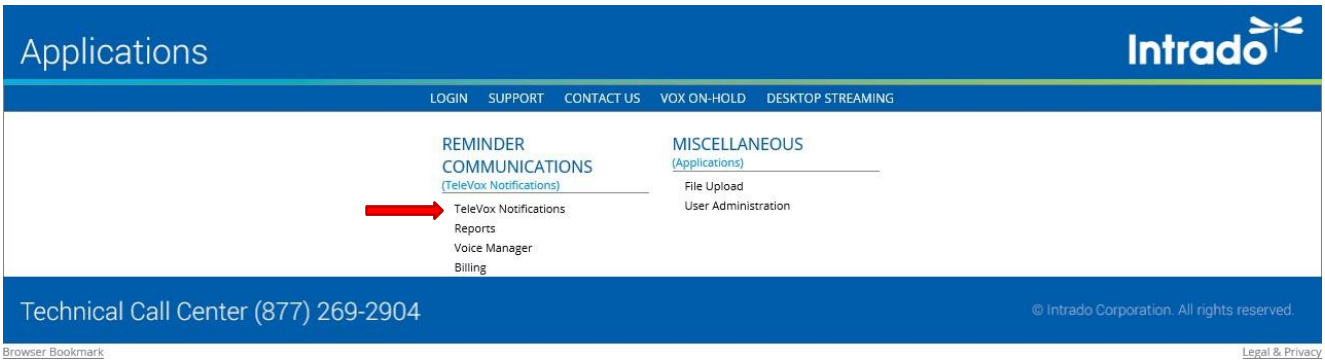
We are excited to provide you access to our online Customer Support Portal that will allow you to create and monitor the status of your support requests in real time 24/7. This guide will show you what to expect when you log in and how to create a support request using this new system.

Our system provides functionality to:

- Two-way communication between you and your Intrado support representatives.
- Quick alerts on your dashboard for important information on system updates or outages.
- Auto-fill capabilities retrieve a list of all account products and numbers associated with your log in for quicker ticket entry with multiple account products.
- Real-time updates to your ticket(s).
  *Requires a valid email address stored in your HouseCalls profile.
- View support ticket history up to 90 days.
- Access additional detail on your support request such as: when it was created, when it was resolved or closed, who submitted the request, how the request was submitted, current status, etc.

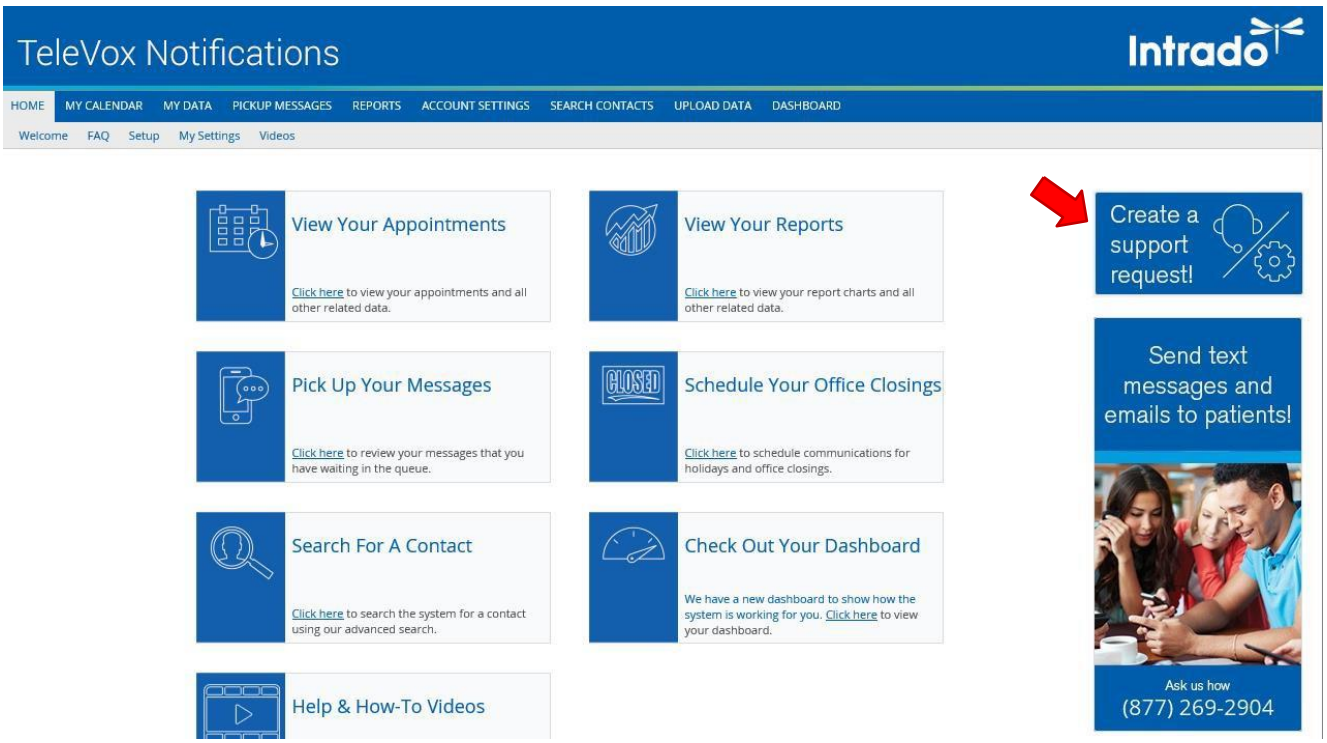
How to Access the Support Request System

Log in to your MyTeleVox account and select TeleVox Notifications.



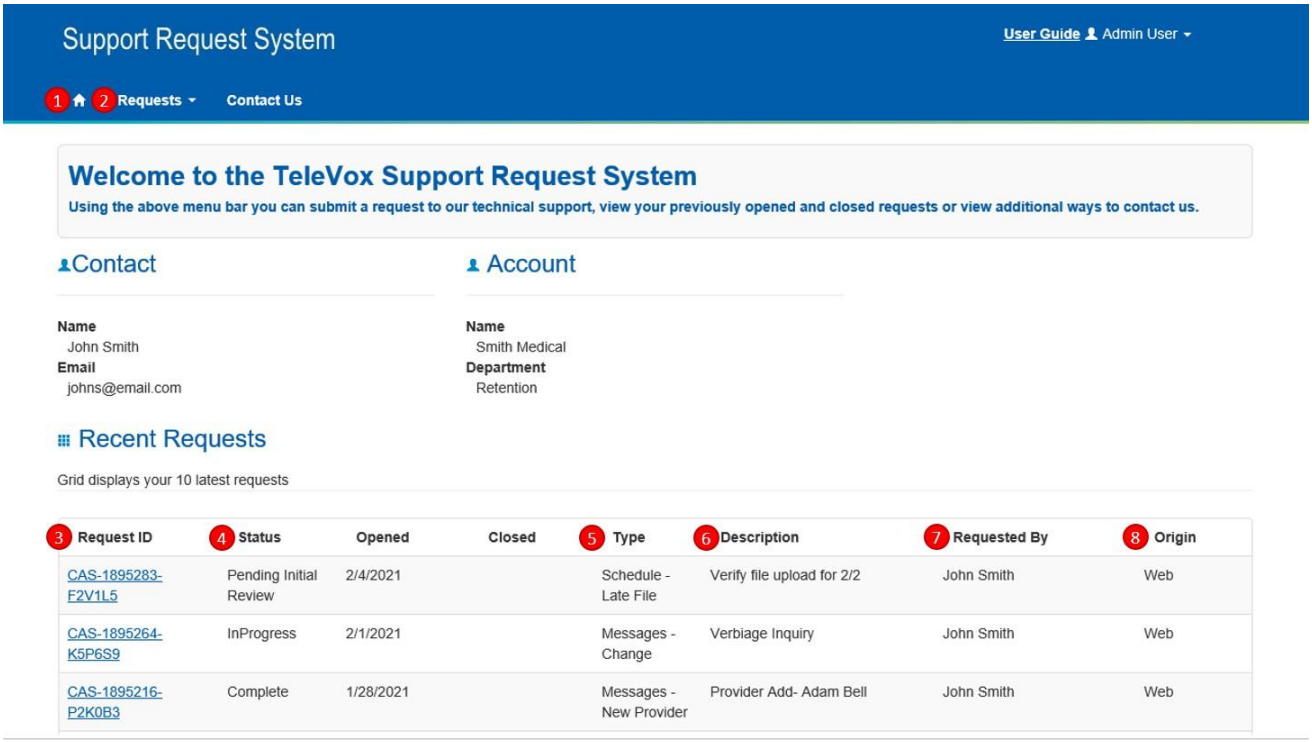
Once your TeleVox Notifications home screen is open, look for the 'Create a Support Request' button in the upper right corner of the screen.

***Quick Tip:** Clicking the support request button will open a separate window which could be blocked by your pop-up window settings. Be sure to add MyTeleVox.com to your allowed websites list for pop-up windows.



Support Request Dashboard

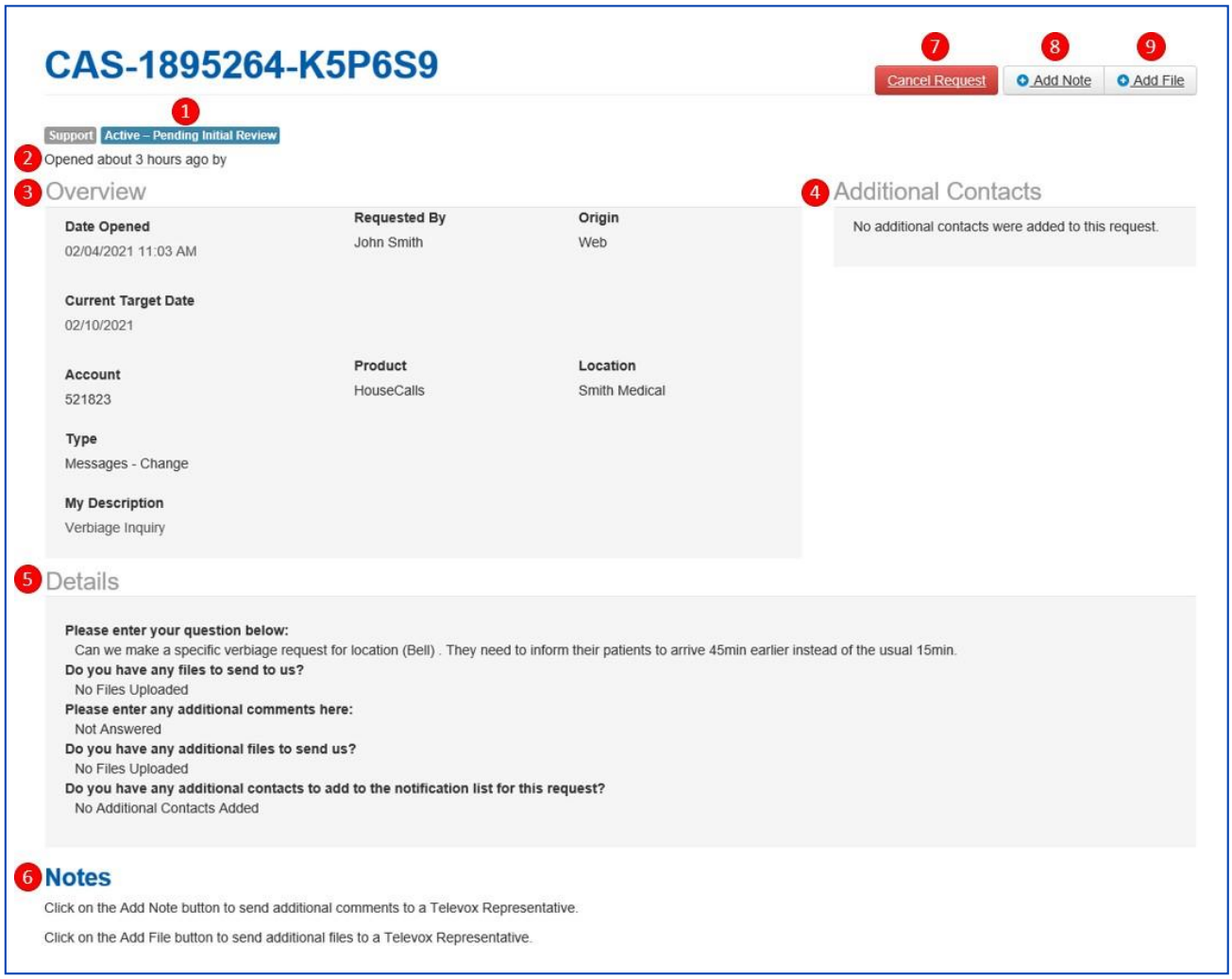
Upon opening the support request system, you will arrive at your portal dashboard. This page will show you a quick summary of your last 10 support requests sorted from newest to oldest with details on the status, subject, and creation of each.



1. Click the Home icon to return to your support dashboard wherever you are in the system.
2. View your open and closed request history up to 90 days or create a new request.
3. Click the id link to see all details of the request, add notes, upload supporting files, cancel your request, see contact information for all request associated contacts, etc.
4. Check the status of your ticket at a glance. Click here for an explanation of all statuses.
5. Quick description on what type of support is needed for each request. Click here for an explanation of all ticket types.
6. Description of your support request in your own words. This will show what the ticket creator enters at creation exactly.
7. If you are an additional contact but not the creator on a case it will still show in your Recent Requests list, quickly see who initiated the request.
8. Web indicates the request was made via the online portal. Phone indicates the request was taken over the phone and entered into the system by one of our support representatives. There are other origin options such as email or fax that will be populated according to the method in which the request creator originally began the support request.

Case Details Page

Clicking on a request id link from anywhere in the system will open the full details of your case so you can see all activity and information relating to that case.

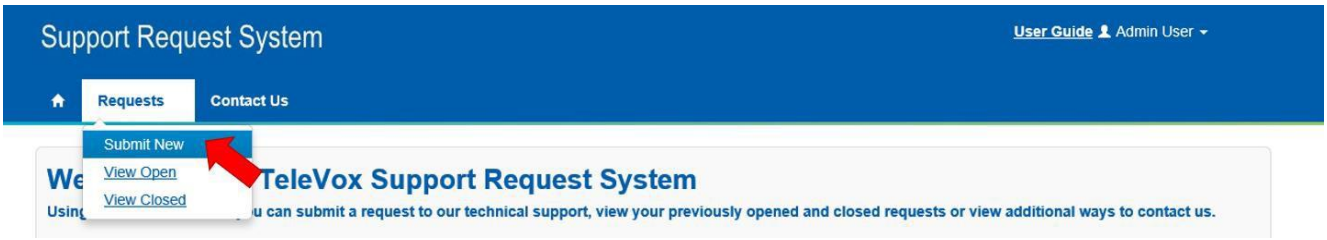


1. Where your ticket is in the support fulfillment process. Click here for status explanations.
2. How long the case has been open. Hover over dotted line to see the created date.
3. Quick information on the ticket
4. If additional contacts are listed, click on a contact name to see their email address and phone number.
5. See the answers submitted during ticket creation
6. This section will show in order of newest to oldest any notes and/or files submitted by the creator, additional contacts, or an Intrado support representative.
7. Should you determine your support request is no longer needed or is incorrect you and/or the additional contacts on your case may cancel the request. A cancelled case will show a 'Cancelled Request' status in your history.

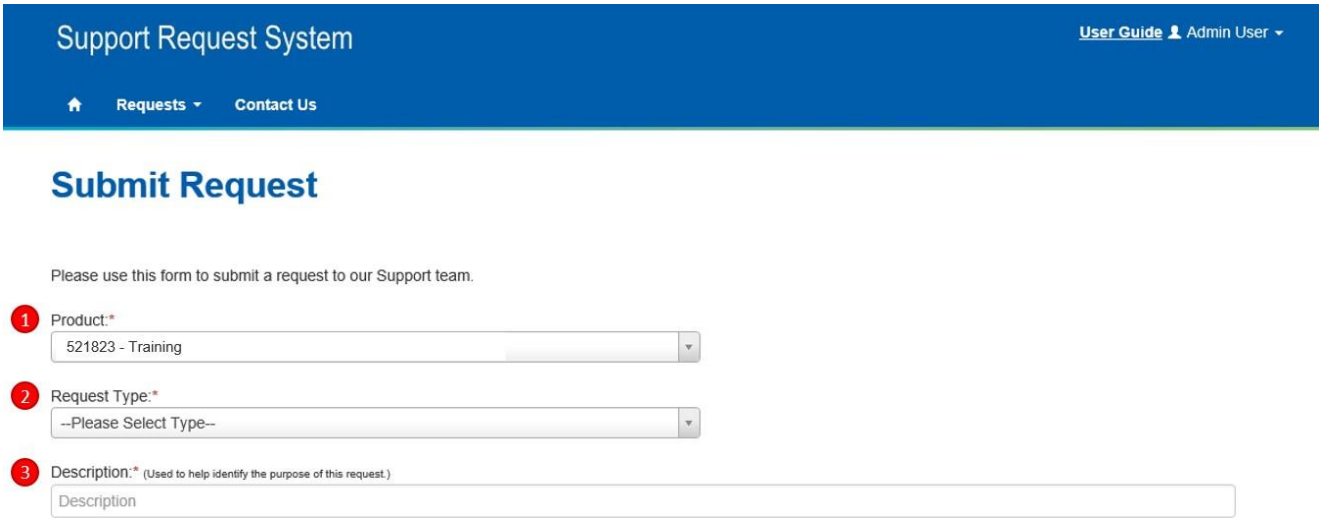
8. Opens an empty text box for you to enter any notes and save them on the case.
9. Opens a window for you to browse and upload any file from your computer. You will see a green notification at the top of the page if your file has been uploaded successfully as well as see the file listed in the notes section. The file can be no bigger than 5MB and must be one of these allowed file types: txt, csv, xlsx, xls, pdf, doc, docx, gif, png, jpeg, jpg

Creating a New Case

To create a new support request, select the drop down arrow beside 'Requests' in your tool bar and click on 'Submit New'.



You will be redirected to the first page of submitting a request.



1. Don't remember your Account Product Number? No problem, click the drop down arrow to see a list of your Account Product Numbers.
2. Select which question relates best to your support need.
3. Anything entered here will be shown on your Dashboard and Case Details Page and can be viewed by Intrado representatives as well as any additional contacts you add. This box has a character limit of 50 characters and once submitted the description cannot be changed.

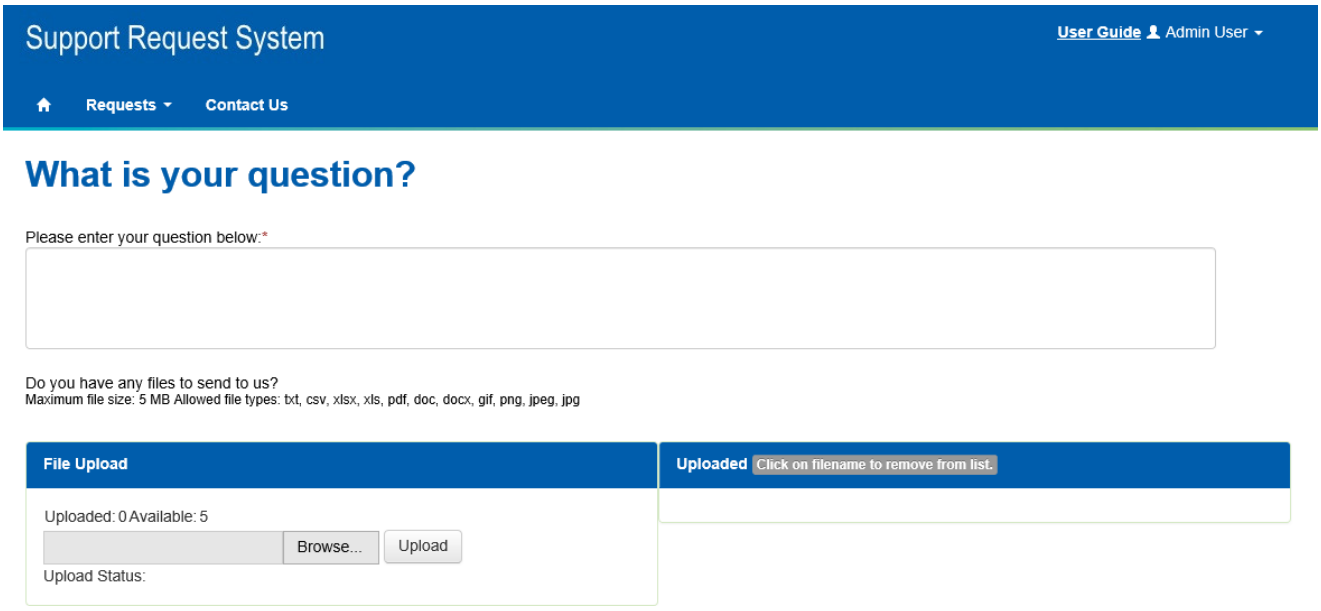
***Quick Tip:** You must submit a separate case for each location even if you have the same support request for multiple locations.
***Quick Tip:** You can only submit one request type at a time even if you are submitting for the same location.

Once you make your selections and click the 'Continue' button the system will walk you through submitting any additional information and/or documentation that may be needed to complete your request based on the Request Type you entered. All fields marked with a red asterisk (*) are required and you must enter in the information before proceeding to the next step. Click here to see the next pages for each request type.

***Quick Tip:** There is no auto save feature in creating a new request. If your computer times out or for some reason is turned off before you have completed and submitted a new request, you will have to start over.
***Quick Tip:** Once a ticket is submitted you are not able to change the details so check the request types and next steps list to be sure you have all the information you need before submitting your ticket.

Contacts and Files Page

The last two pages of creating a ticket will ask you if you would like to enter any additional files or contacts.



***Quick Tip:** You can upload a max of 5 files no more than 5MB each and the file(s) must be one of the following allowed file types: .txt, .csv, .xlsx, .xls, .doc, .docx, .gif, .png, .jpeg, .jpg
***Quick Tip:** You can add a max of 5 additional contacts to a case and also can remove anyone from a case at any point in the support process. Anyone added as an additional contact will

receive automated email updates on the case. Additional contacts will have access to see and do all the same activities as the creator on a case. You can add additional contacts after the ticket is created if you would like.

***Quick Tip:** You can add an additional contact who is not within your organization and does not have access to your MyTeleVox account, such as a third party vendor or technician however that person will not be able to log in to view the case they will only receive the case updates to the email added for them.
***Quick Tip:** Uploaded files will only be viewable by Intrado support reps. Once you upload a file you will see a message confirming it was uploaded successfully and any user with access to your account will see the date, time, and title of your uploaded file but will not be able to open it.

Your Request has been submitted, what now?

Upon clicking 'Submit' on the final contacts and files page you will:

1. Be directed to a page showing a confirmation that your ticket was submitted successfully and the request id link to open the ticket details page.
2. You and any additional contacts on the case will receive an email containing: the Request ID Number, account product number, description, and date and time the ticket was created.
3. The ticket creator and additional contacts will receive email updates as the case progresses through the support fulfillment cycle. You may also log back in to see this and add any additional information along the way.
4. If at any point the ticket is canceled or once the request has been completed, you and additional case contacts will be notified via email.

***Quick Tip:** If the case creator or any contact added to a case has chosen to opt out of receiving TeleVox emails at some point in the past, an email will not be sent to them. If you would like to opt back in to receive emails again, please reach out to client support. If you chose not to opt back in you can simply log in to your MyTeleVox account and open the support system to check the status on any tickets.

Steps to Submit a Request:

Required Field
Step 1
- Select Product
- Enter a Description
- Select Request Type

Do you have questions about Schedules?
Step 2
- Please enter your question below including any specific examples
- Do you have any files to send to us?

Step 3
- Please enter any additional comments here.
- Do you have any additional files to send us?
- Do you have any additional contact to add to the notification list for this request?

Do you have a question about a Report?
Step 2
- Please enter name of the Report.

Step 3
- Please provide a detailed description of your question.

Step 4
- Please enter any additional comments here.
- Do you have any additional files to send us?
- Do you have any additional contacts to add to the notification list for this Report?

Do you have a general question?
Step 2
- Please enter your question below.
- Do you have any files to send to us?

Step 3
- Please enter any additional comments here.
- Do you have any additional files to send us?
- Do you have any additional contact to add to this notification list for this request?

Do you have questions about your data file?
Step 2
- Please type your question below

Step 3
- Please enter the name of the data file.

Step 4
- Please enter any additional comments here.

- Do you have any additional files to send us?

Would you like to make changes to your data file?

Step 2

- Please describe in detail what is changing about the data file.
- Will the time the data file is sent change?
- If yes, please select the new time (in your time zone) below.

Step 3

- Please enter the name of the data file.

Step 4

- Pleas enter any additional comments here
- Do you have any additional files to send us?

Would you like to add a new message?

Step 2

- Please enter the message script here.
- If you already type the script in another document, then you can attach the document here.

Step 3

- If there is an identifies in the existing data file (Example: Doctor, Location or Procedure) please enter the identifier here.
- If a new data file is required, enter the name of the file here.

Step 4

- Do we use an existing schedule? Which Schedule do we use?
- Do we create a new schedule? Please enter the new schedule here.

Step 5

- Please choose the date and time (in your time zone) to go live with new message.
- Please enter any additional comments about when the message goes live.

Step 6

- Please enter the names of the reports you would like.

Step 7

- Please enter any additional comments here.
- Do you have any additional files to send us?

Are you checking the status of a late file?

Step 2

- Please pick the appointment date that needs to be called.

Step 3

- Please select the date and time (in your time zone) when the calls should be made.

Step 4

- Please enter any additional comments here.
- Do you have any additional files to send us?

Are you having a problem uploading a data file?

Step 2

- Please describe in detail what is not operating as expected.

Step 3

- Please enter the name of the data file.

Step 4

- Please enter any additional comments here

Are you experience a problem with a message?

Step 2

- Please enter the message number or name to be changed.

Step 3

- Please describe the problem you are experienced with as much detail as possible
- Please provide any examples including client specific examples.

Would you like to make a change to an existing message?

Step 2

- Please enter the message number or name to be changed.
- DO you want us to put the change into production once completed?
- Do you want to receive a .wav file for you to approve before putting into production?

Step 3

- What do we change?
- What language is the message?

Are you requesting to change a schedule?

Step 2

- Please describe the changes needed to your schedule (call date, time of day, days out, filtering needs, messages, or notification types).

Step 3

- Please enter the name or describe the schedule that needs to be changed.

Website User Management question?

Step 2

- Please describe whether you want to add, edit or delete a user. Include the Username and email address. Also include which reports the user can access.

Definitions

In Progress – Request received, and work is in progress

Pending Customer Review – Request has been sent back to the client for further information or is pending approval to move forward

Pending TeleVox Review – Request received, and work is in progress

Pending Initial Review – Request received, pending assignment to a representative Request

Received – Request received, pending review of an onboarding specialist Cancelled Request–

Request has been cancelled and is no longer being worked

Cancelled Implementation – Implementation request has been cancelled and is no longer being worked

Sustained – Customer no longer wants to proceed with cancellation request Implemented –

Client account is now active

Resolved – Request has been completed and closed

FAQs

Q: Can I select more than one account product when creating a support request if it's the same request for each?
A: You must submit a separate case for each location even if you have the same support request for multiple locations.

Q: Can I select more than one request type if there are multiple requests for the same account product?
A: One request type per case is allowed for submission even if additional requests are needed for the same account product.

Q: Can I add an additional contact that was not formally associated with our Intrado account?
A: You may add any contacts you like inside or outside your organization. Keep in mind that any new contact added through the Ticketing Portal Additional Contacts feature will be added to your account contacts in our database to receive future portal and client communications.
Removing them from the additional contacts list will not remove them from our database.

Q: I am seeing an error message when I try to upload a file, what am I doing wrong?
A: Check to ensure your file is no larger than 5MB and has one of the following approved file extensions: txt, .csv, .xlsx, .xls, .doc, .docx, .gif, .png, .jpeg, .jpg

Q: I am the creator of a case or am listed as an additional contact on a case, why aren't I receiving the automated case updates emails?
A: Emails will not be sent to contacts that have previously requested to be removed from the TeleVox email list. You can simply log in to the portal on occasion to catch up on the progress, or you can call client support and request to be added back to our email list.

Q: Why does a case I opened over 90 days ago show on the closed request page?
A: The 90 day closed requests list is according to the date the case was closed not the date the case was opened.

Q: I was creating a new support request and got interrupted, when I returned to complete the request, the system had timed out and asked me to log back in. Is the request I started automatically saved somewhere on my account?
A: The Ticketing and Support Sites will time out after 20 minutes of no activity and will not save any unfinished work so be sure to complete your support request within 20 minutes or you may lose all the information input prior to time out.

Q: I have completed the fields needed for my support request, why am I still receiving an error when I try to move to the next step?

A: All fields marked with a red asterisk are required, if a field does not apply to you or the case simply input 'NA' for 'Not Applicable' to proceed to the next page.

Q: What time zone is used on scheduling screens?
A: Selecting a time of day within the support system will automatically select your time zone.

Q: I submitted a new request and realized I answered one of the details questions incorrectly. How can I change my answer?

A: Once a support request is submitted the details input to create it cannot be changed by a user or a TeleVox representative. If you notice an error in your request details, you can create a note about the error for other users and TeleVox support representatives to see.

Q: Can I attach a note to a case that just one contact needs to see?

A: The notes tool is a great way to communicate with both your colleagues and TeleVox support representatives however any note added to a case can be viewed by everyone who has access to the case.

Q: I uploaded a file, where do I find and open it?

A: Files uploaded to a case are only viewable by TeleVox representatives. Upon upload you will receive confirmation of a successful upload and you and users with access to the case will see the date, time, and file name at the bottom of the case details page however you will not be able to open it.