MAM Customer Portal
User Guide

1 Introduction

The **MAM Software** (MAM) Customer Portal allows users to log new Incidents with the Support Team and view the progress of Incidents.

Users must first register and be authorised to access the Customer Portal.

1.1 Portal Permissions

1.1.1 Incident Access

There are two options for user access:

- Users can access all Incidents and Requests
- Users can only access Incidents and Requests they have logged

1.1.2 Category Tags

Category Tags can be added to Incidents if desired.

There are two options for users when logging an Incident:

- Selecting a Category Tag is optional and the user can choose any available Category Tag
- Selecting a Category Tag is compulsory and users can be set up so they can log incidents using any, or only selected Category Tags

MAM will maintain the Category Tag configuration.

1.1.3 Default Portal Permissions

By default, users will be enabled to log and view all incidents and have access to any Category Tags.

> If you require user access restrictions and / or Category Tags to be used, please contact your MAM Customer Advice team.

2 New Users

Please contact your MAM Customer Advice team to set up new users on the customer portal.

We will require the following information:

- First Name (required)
- Last Name (required)
- Email address (required – this will be the portal login)
- Phone Number (required)
- Mobile Number
- Job Title
- Country

We also need to know

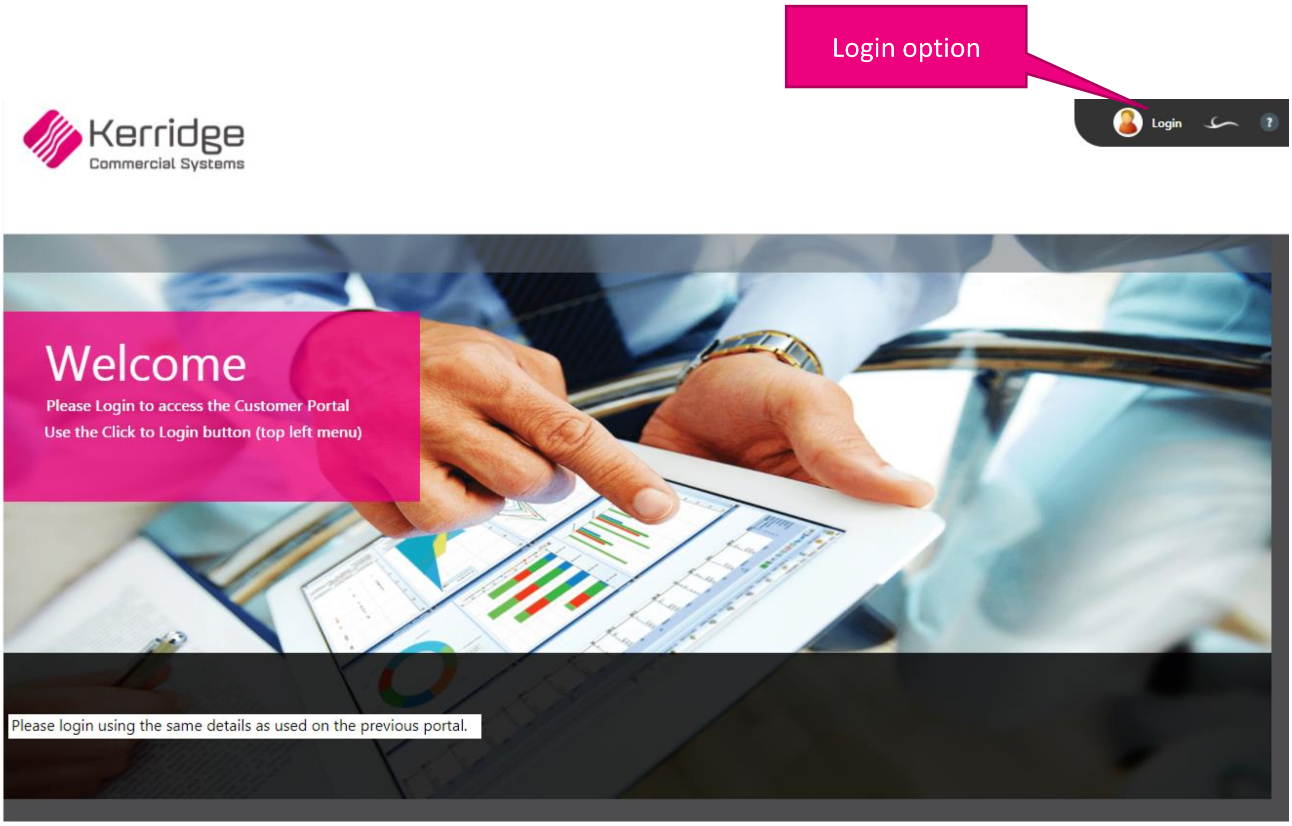
- If the user should be restricted to accessing only their own Incidents
- If the user must select a Category Tag when logging an Incident – the list of Tags the user should be able to log against must be provided

When the user has been set up, they will be contacted with their Portal Login Details.

3 Logging into the Customer Portal

The Customer Portal is accessed via the MAM Software Web site

Once you have registered and received your password you can log into the Customer Portal.



➢ Select **Login** from the top right of the form

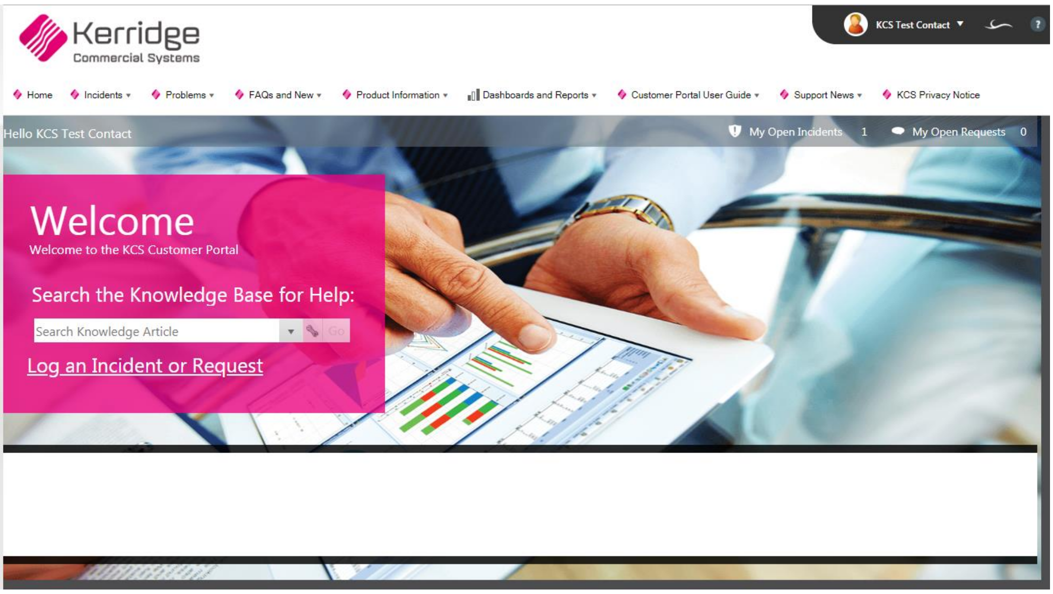
3.1 Forgotten Your Password

If you cannot recall your password, please contact your MAM Customer Advice team for assistance.

4 Customer Portal Functionality

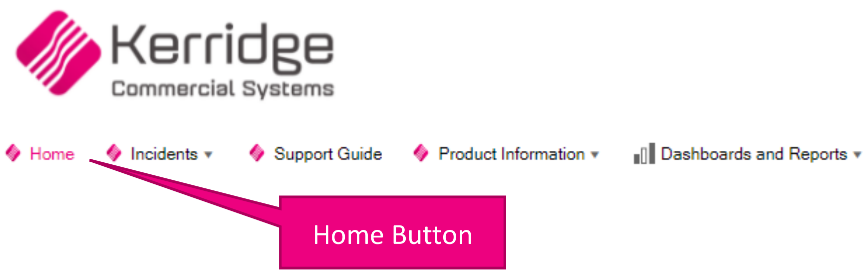
After logging into the Customer Portal, you will be presented with the available functions. These will depend on the Support Services you use, and will be updated periodically.

Descriptions of the main portal options are included in this guide.



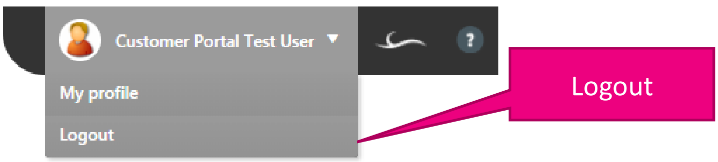
4.1 Basics

4.1.1 Home Page



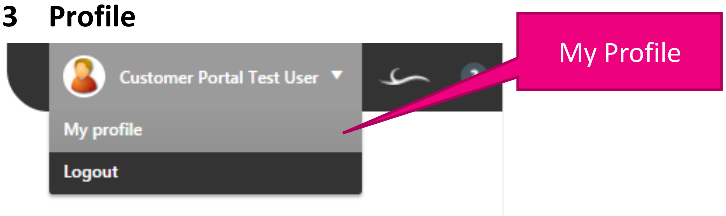
- ➢ Click on the Home button at any time to return to the home Page

4.1.2 Logging Out of the Portal



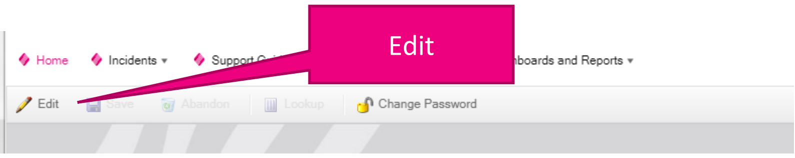
- ➢ Click on your name in the Top Right
- ➢ Choose **Logout**

4.1.3 Profile

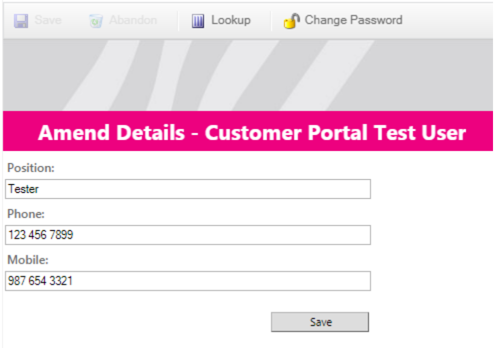


To access your Profile

- Click on your name in the Top Right
- Select **My Profile**
- Select **Edit** in the button bar to update your details

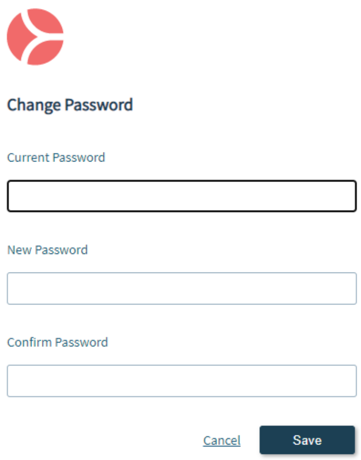


- Select the **Save button** at the bottom of the form to save the details



4.1.4 Change Password

This option allows you to change your Portal password



> Your password will need to be at least eight characters long with at least three of the following: uppercase letters, lowercase letters, numbers and symbols/punctuation marks.

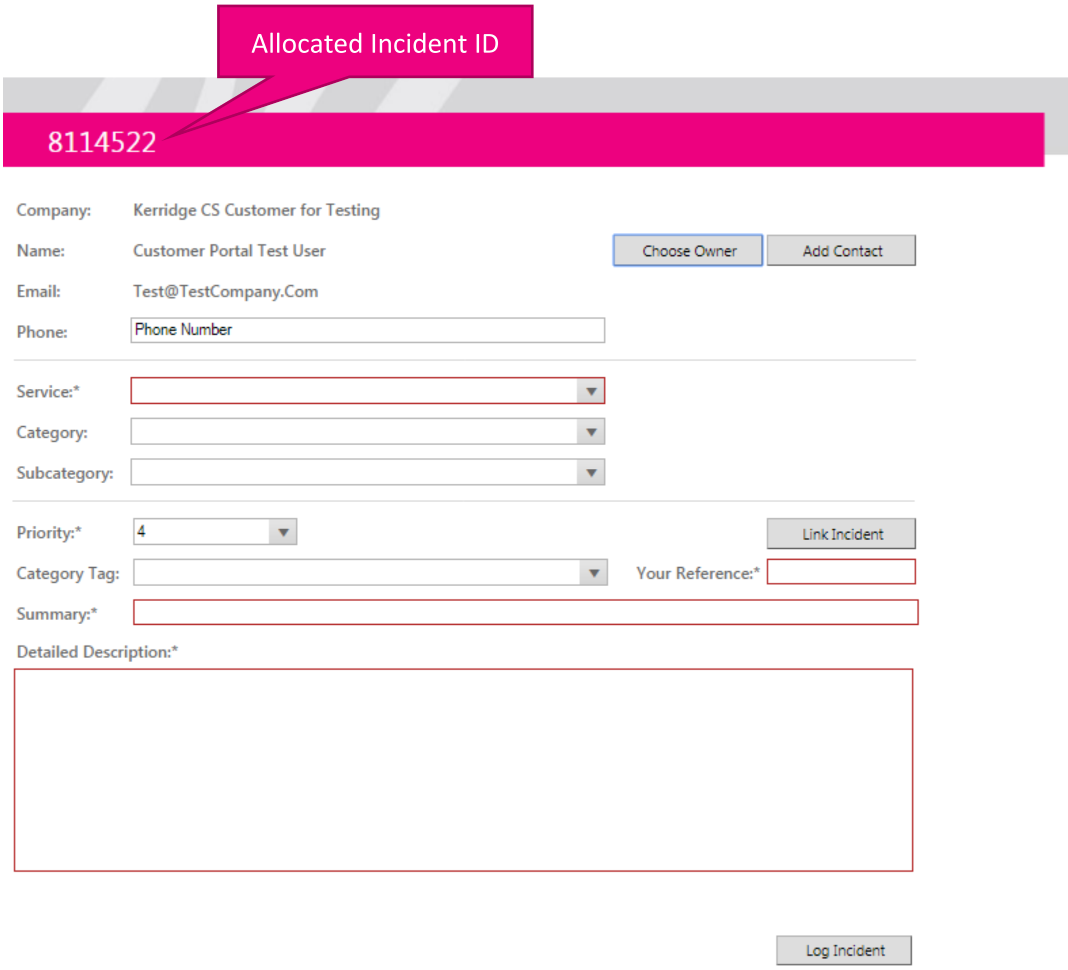
5 Logging an Incident

5.1 Summary

- Select **Log an Incident or Request** from the Home Screen

OR

- Click on **Incidents** in the menu bar and select **Log New Incident**



- The allocated Incident ID number is displayed at the top of the form.
- Compulsory fields are outlined in red, and the field labels appended with an asterisk. The compulsory columns that apply depend on the Services purchased from MAM and may vary from those shown on the example form above.

- Enter a Summary description in the **Summary** box
- Enter a full description in the **Detailed Description** box including for example: menu paths, affected branches, Account numbers, part numbers etc. - please provide a detailed and specific description.
- Complete all the compulsory fields, and select the **Log Incident / Request** to create the Incident

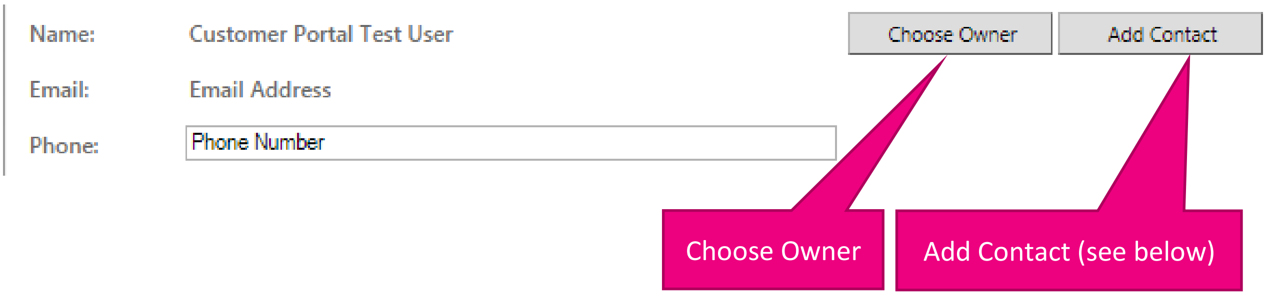
- See the following sections for full details on the options available when logging an Incident

5.2 Company and Contact Information

- If more than one **Company** is available, you will be able to select the required company via the **Another Company** button

5.2.1 Logging User (Owner) Information

- The details of the logging user (owner) are recorded in the **Name**, **Email** and **Phone** boxes. These default to your details as recorded in your profile
- If desired, you can provide an alternative phone number for this Incident by overtyping the existing phone number.



To Log an Incident on behalf of another contact at your Company, select the **Choose Owner** button

- You will be able to select another Portal-registered contact from the drop down list

> - If you change the Owner Information, this Incident will be considered as logged by the selected contact, not you.
> - Such Incidents will not be included in any **My Incident** type listings for you – they will be in the **My Incident** listings for the specified owner.

5.2.1.1 To Remove an Alternative Owner

To remove an alternate owner:

- Select the **Me** button to reset the Logging User Information.

5.2.2 Adding Contact Information

You can specify another person as the contact for this Incident whilst remaining the Incident Owner. This is free text and any user can be added as a contact

- Select the **Add Contact** button
- Complete the **Name**, **Email** and **Phone** boxes

> Please provide a valid email address to ensure the contact will receive email updates

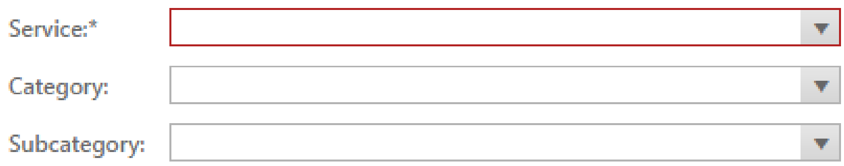
5.2.3 To Remove a Contact

To remove a contact once this has been added:

- Select the **Remove Contact** button

5.3 Service, Category and Subcategory

➢ Select the Service from the drop down list



The available services depend on the products and services purchased from MAM.

Category and Subcategory may or may not be compulsory.

- The values available to select in the Category drop down depend on the selected Service
- The values available to select in the Subcategory drop down depend on the selected Category

> - Please always complete the Category and Subcategory where possible, even if these are not compulsory
> - This assists us to triage the Incidents more efficiently and helps get the Incident to the most appropriate team more quickly

5.4 Priority

➢ Select the appropriate **Priority** from the drop down list

> - For high priority Incidents, please provide contextual information in the **Detailed Description**, for example the effect of the Incident on business operations – see below

5.5 Category Tag

If you wish to allocate a Category Tag, or this is required by your setup:

➢ Select the desired Category Tag from the drop down list

5.6 Link Incident

To link this Incident to a previously logged Incident:

➢ Select the **Link Incident** button
A list of available Incidents will be presented

➢ Select the Incident to link to

5.7 You Reference

If you wish to record your Reference for this Incident, or this is required by your setup:

➢ Enter this into the Your Reference box

5.8 Summary & Detailed Description

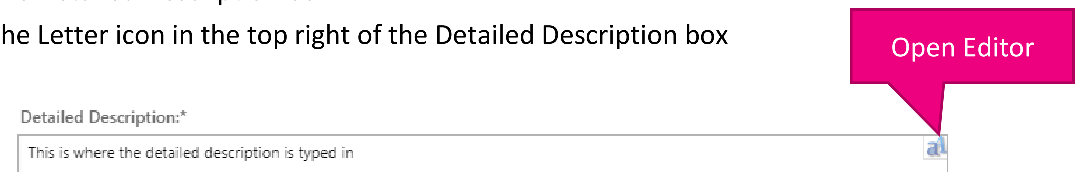
- Enter a Summary description in the Summary box
- Enter a full description in the Detailed Description box including for example: menu paths, affected branches, account numbers, part numbers etc.
  Please provide a detailed and specific description.

> - Example of details with insufficient information:
>   *'Invoice not printing correctly'*
> - Example of the same details with the level of information we need:
>   *'Every time any user at branch 2 prints a cash Invoice in SOP, the customer's name and address are printed in the wrong place – should be on the left not the right. e.g. see Invoice 12345 printed at branch 2 at 12.35 yesterday. Only started happening since last Friday.*
>   *I have allocated this priority 3 as we must have correct paperwork to give our customers'*

> - The text can be entered in the same way as in any standard word processing package: the arrow keys can be used to navigate the text, and there is automatic text wrap at the end of a line.
> - You can copy images directly into the Detailed Description

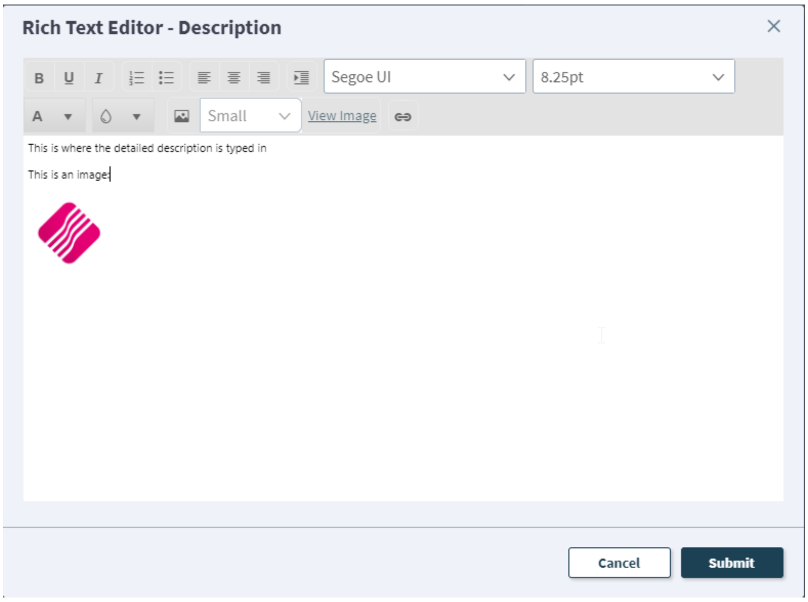
You open the Detailed Description in an expandable editor window if you wish:

- Click on the Detailed Description box
- Click on the Letter icon in the top right of the Detailed Description box



This will open the editor window

You can resize this if required by dragging the corner of the window

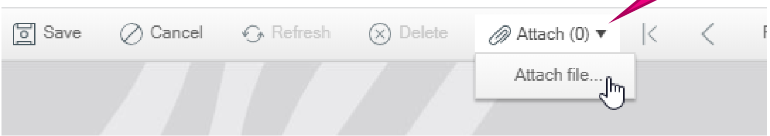


- Click on the **Submit button** to save and exit the Detailed Description editor

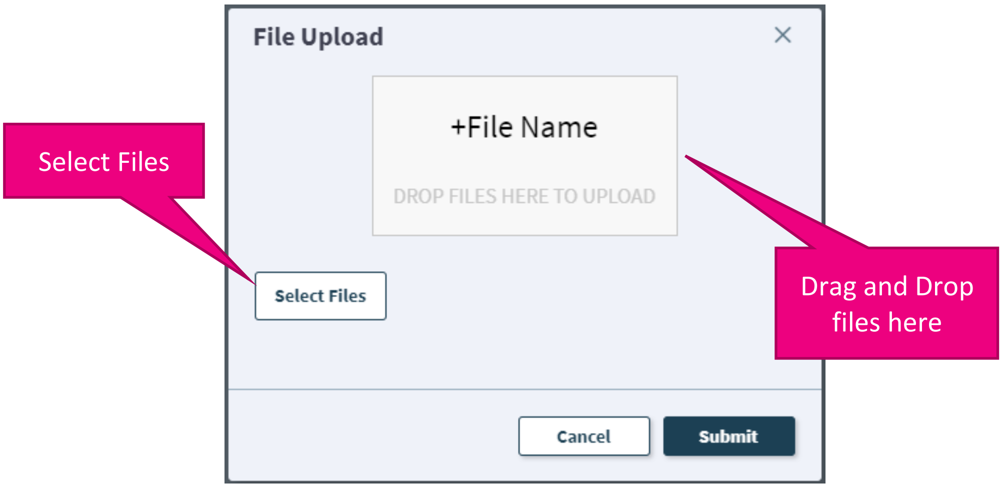
5.9 Attachments

To add an Attachment to the Incident

- Click on the **Paperclip** (Attach) button in the menu bar
- Select **Attach file …**



The File Upload form is displayed

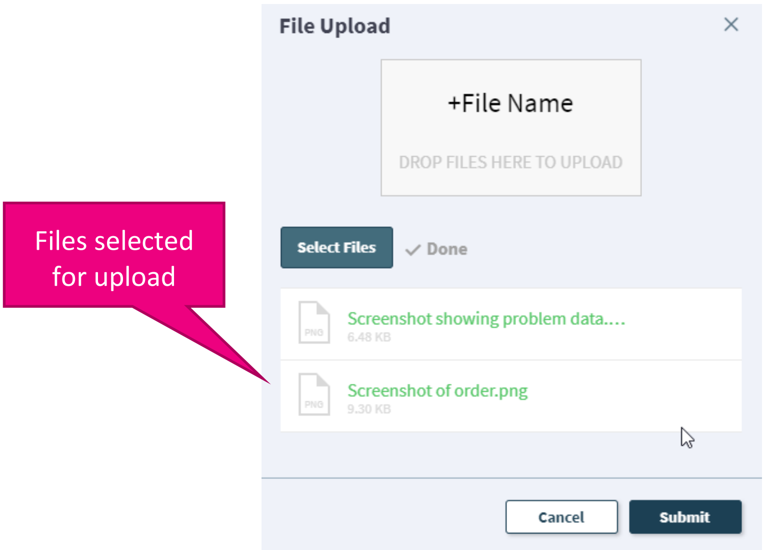


- Drag a file and drop it into the 'DROP FILES HERE TO UPLOAD' area

Or

- Click on **Select Files** to browse and find the file to upload

☝	You can add multiple attachments



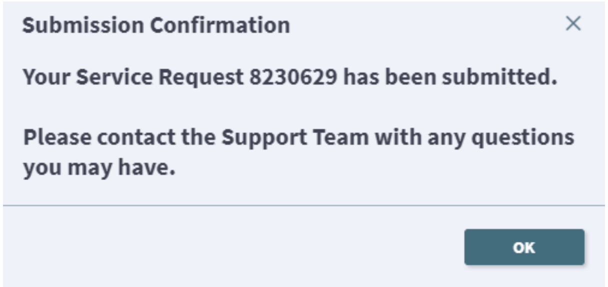
- Select the **Submit** button to add the attachment, or the **Cancel** button to exit without saving the attachment

> It is extremely important that the Detailed Description text be fully updated with the description of the Incident. Attachments should only be used to provide additional supporting information that cannot be recorded in the description.

- You can add multiple attachments
- You can view any attachments added via the **Paperclip** button
- You can add attachments to existing Incidents via the **Add Attachment** button

5.10 Log the Incident

- Click on the **Log Incident/Request** button at the bottom of the form to Log the Incident
- A confirmation message will be displayed

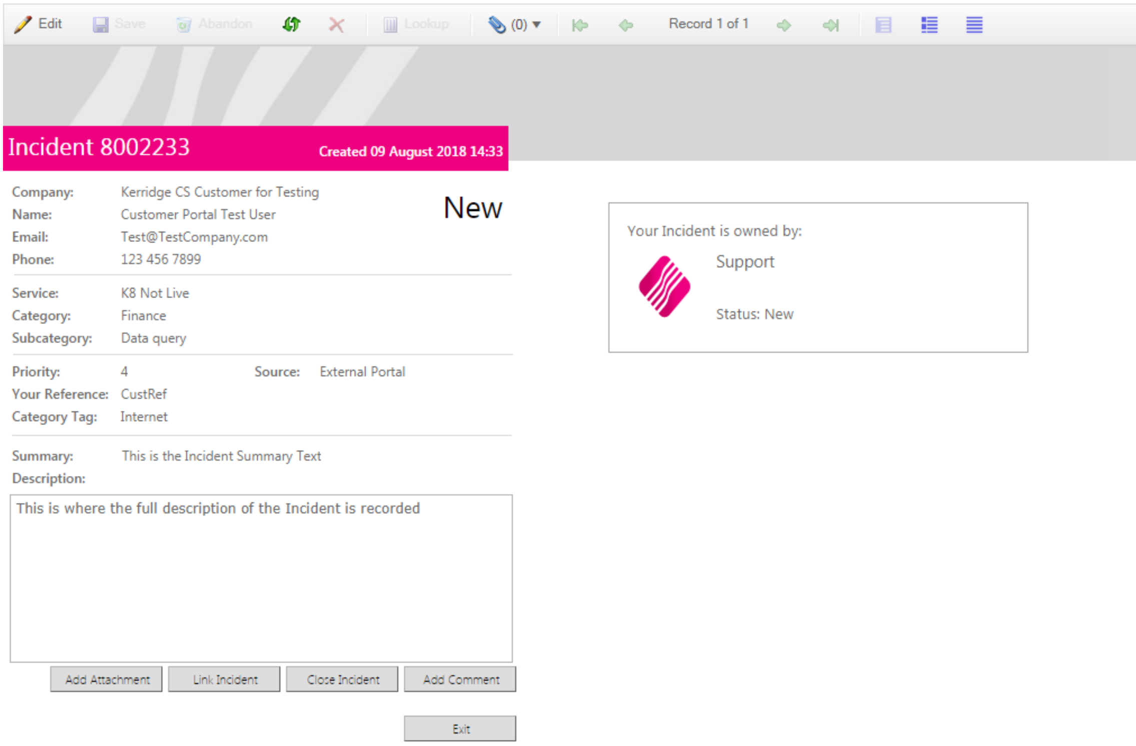


> If you do not receive a confirmation message with an Incident number, your incident may not have been logged – please check before trying to log it again.

> Depending on the Service, Category and Sub Category selected, the Incident may be recorded as a Service Request type Incident.

5.11 After Logging

After the Incident is logged, it will be displayed with options to add attachments, comments and links. See the next section for details on these functions.



6 Adding Information to Open Incidents

- You can only add information to open Incidents
- You can only add attachments to incidents you own. Note: If you do not own the incident, you are able to email an attachment to support@kerridgecs.com with the incident number included in the subject.

6.1 Add Attachments

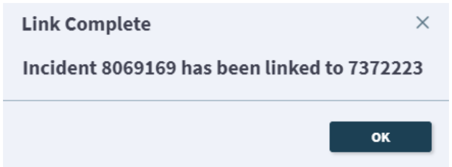
- Click on the **Add Attachment** button at the bottom of the form.

The File Upload form is displayed

See earlier section 'Attachments' for details on how to upload attachments to the incident.

6.2 Link Incident

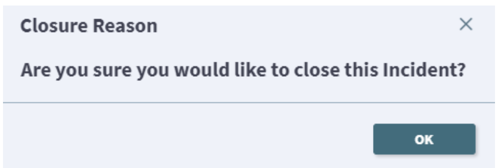
- Click on the **Link Incident** button at the bottom of the form to link the current Incident to another
- Select the Incident to be linked from the list
- A confirmation message will be displayed when the link has been completed



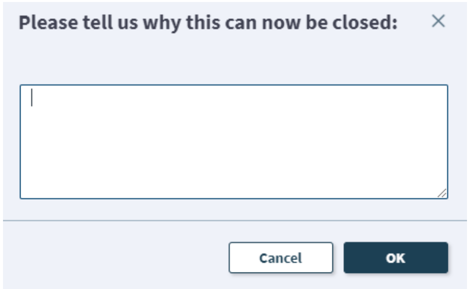
- Linked Incidents can be viewed on the Linked Incidents Tab – see later in this document

6.3 Close Incident and Close Request

- Click on the **Close Incident** or **Close Request** Button to advise us you wish to withdraw the Incident
- A confirmation message will be displayed



- Select or the **Cross** at the top right of the form to abandon, or select the **OK button** to proceed with the closure request
- Enter the reason the Incident is being closed



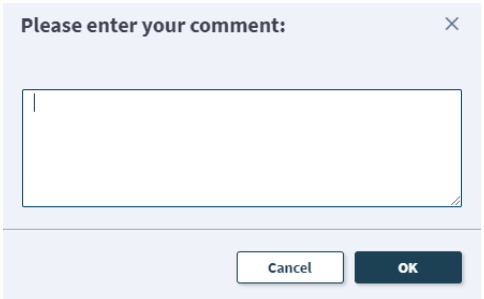
- Click on the **Cancel** button to exit the Close Incident option, or the **OK** button to confirm
- If you selected **OK** a Confirmation message will be displayed

> The Incident will not be automatically closed, but the Analyst working on the Incident will receive a notification to close the Incident.
> Depending on the nature of the Incident, the Analyst may need to record additional information or inform colleagues before the Incident can be closed.

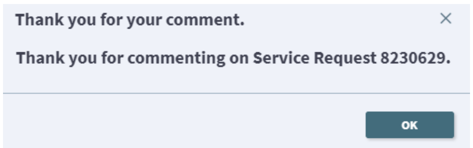
> The closure request can be viewed on the Comments tab – see later in this document for details on viewing Comments

6.4 Add Comment

- Click on the **Add Comment** button to provide more information or add a comment to the Incident
- Enter your comment



- Click on the **Cancel** button to leave the Comment option, or the **OK** button to save the Comment
- If you select **OK** a Confirmation message will be displayed

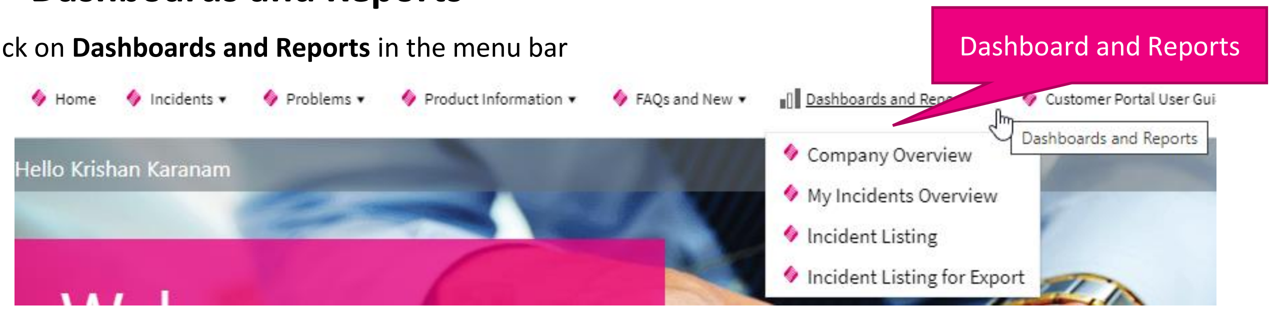


> The Analyst working on the Incident or the Team Leader of the owning team will receive a notification that a comment has been added to the Incident.

> Any comments added can be viewed on the Comments tab of the Incident – see later in this document for details on viewing Incidents

7 Dashboards and Reports

Click on **Dashboards and Reports** in the menu bar

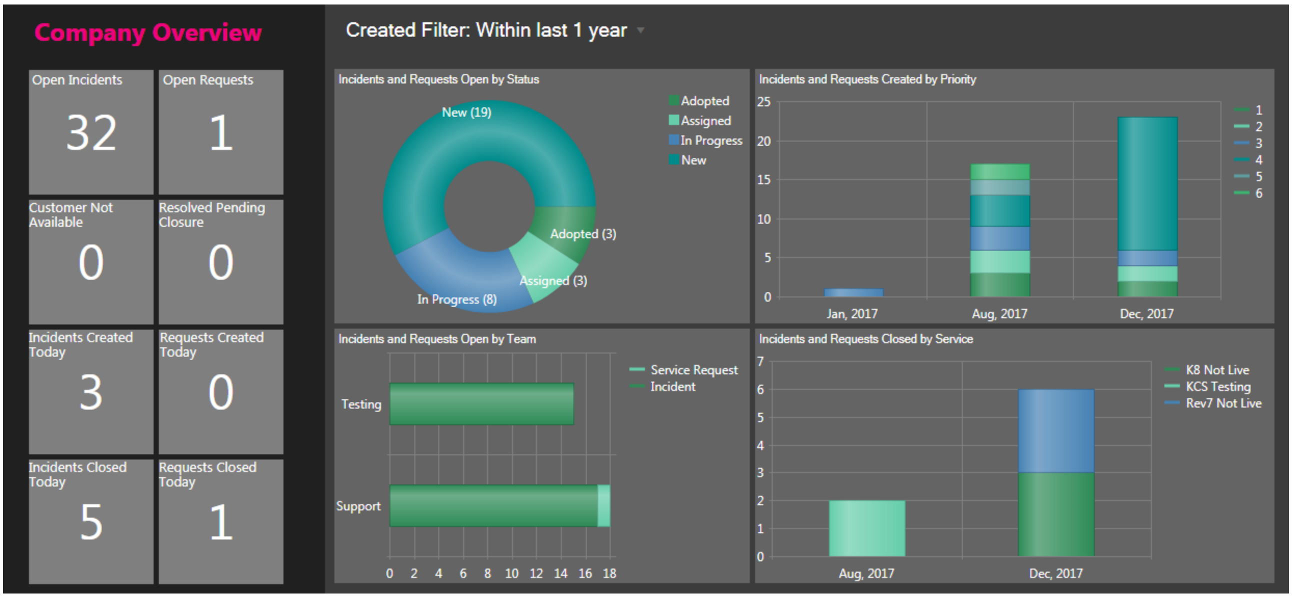


Depending on your permissions, you may not be able to see the Company Overview dashboard.

7.1 Dashboards

The **Company Overview** dashboard and **My Incidents Overview** dashboard present information in the same format.

- **Company Overview** summarises the Incidents for the whole Company
- **My Incidents Overview** summarises only Incidents you own



7.1.1 Incident Counts in the Left Pane

The grey square **Tiles** on the left are totals of the Incidents by various criteria:

- **Open Incidents** - Incidents of Type Incident currently open
- **Open Requests** - Incidents of Type Request currently open
- **Customer not available** - Open Incidents where we are waiting for the customer to return our call
- **Resolved Pending Closure** - Open Incidents awaiting closure confirmation
- **Incidents Created Today** - Incidents of Type Incident created Today
- **Requests Created Today** - Incidents of Type Request created Today
- **Incidents Closed Today** - Incidents of Type Incident closed Today
- **Requests Closed Today** - Incidents of Type Request closed Today

7.1.2 The Charts Pane

7.1.2.1 Charts

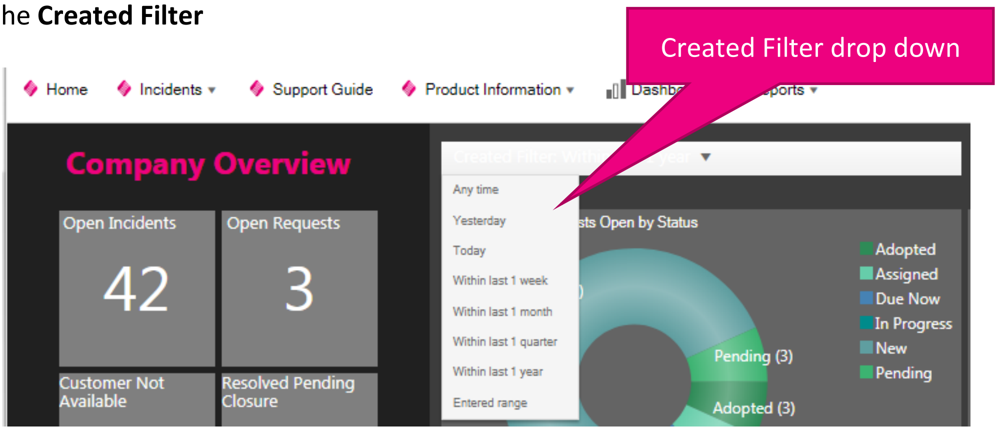
The four charts show Open Incidents by various criteria

- Incidents and Requests by Status
- Incidents and Requests Created by Priority by Month
- Incidents and Requests Open by Team
- Incidents and Requests Closed by Service by Month

7.1.2.2 Created Filter

The Created Filter allows the dashboard data to be restricted based on the creation date

➢ Click on the **Created Filter**



➢ Select the required create date range, or choose **Entered range** to specify your own dates

➢ The dashboard is updated to reflect the selected dates

7.1.3 Drilling into the Incidents from the Dashboards

You can drill into the Incidents on the Dashboards:

➢ Click on a number in a Tile in the left pane

➢ Click on a Chart element in the charts pane

The corresponding incidents are displayed

See later in this document for details on Incident Listing Formats

➢ Click on an Incident to display it

See later in this document for details on Viewing an Incident

7.2 Reports

> Depending on your permissions, you may not be able to see reports.

7.2.1 Incident Listing Report

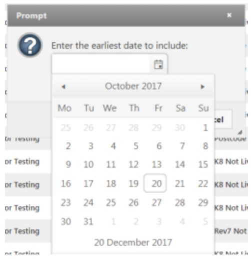
The Incident Listing report lists:

- All Incidents open at the time the report is run
- And, if required, you can also include incidents created in a specific date range
- And, if required, you can also include incidents closed in a specific date range

To run the report

- Select **Incident Listing** from the Dashboards and Reports menu
- Enter the earliest created date to include

> You can select the date via the calendar button at the end of the prompt



- Enter the latest created date to include – if you leave this blank, no additional created incidents will be included in the report output
- Enter the earliest closed date to include
- Enter the latest closed date to include – if you leave this blank, no additional closed incidents will be included in the report output

The system will take a few moments to prepare the report

Example report output:

Page 1 of 2 PDF

KCS Incident Listing

Kerridge CS Customer for Testing

Kerridge Commercial Systems

Summary:

Open Now | Closed

Category Tag	Service	Report Section	Grand Total Open Now	Grand Total Closed
Testing	KCS Testing	PSG	1	0
		Support	1	0
		Testing	1	0
	KCS Testing		3	0
	K8 Not Live	Support	14	0
	KCS Testing	Testing	14	0
	Postcode database	Support	3	0
Total			31	0
Grand Total			34	0

Open Incidents and Incidents closed or logged in date range. Type I = Incident, SR = Service Request **Total Incidents:** 34

Category Tag: No of Incidents: 31

Service: K8 Not Live No of Incidents: 14

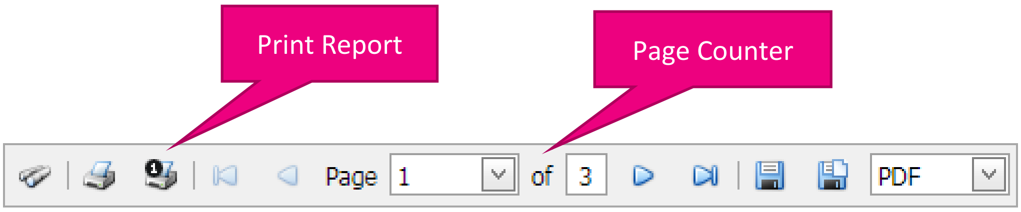
Report Section: Support **No of Incidents:** 14

Type	Incident	Customer Ref	Created	Priority	Contact	Short Description	Status	Pending Reason	Owned By
I	8103278	456W456	14-Dec-17	4	Customer Portal test	Incident for testing the Portal	New		
SR	8103279	243234	14-Dec-17	4	Customer PortalTest	Please install additional licences	New		
I	8103280	jhgjhgjh	14-Dec-17	4	Test User	I have a problem with my Report	New		
I	8103281	fsdfsdf	14-Dec-17	4	Test User	Overnight processing has generated an unfamiliar message	New		

The report is in two parts:

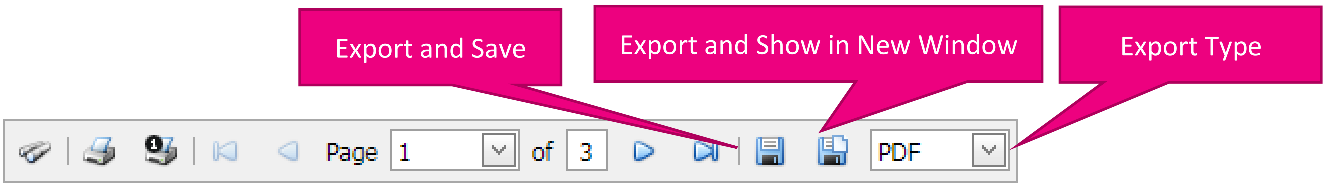
- The first part is the summary listing the number of Incidents at the time the report is run, and the number of Incidents closed in the specified date range, broken down by Category Tag, Service and Report Section
- The second part lists the Incidents in sections by Category Tag, Service and Report Section

7.2.1.1 Report Options



> If there is more than one page, the page navigation buttons on either side of the page counter will be enabled

7.2.1.2 Exporting the Report



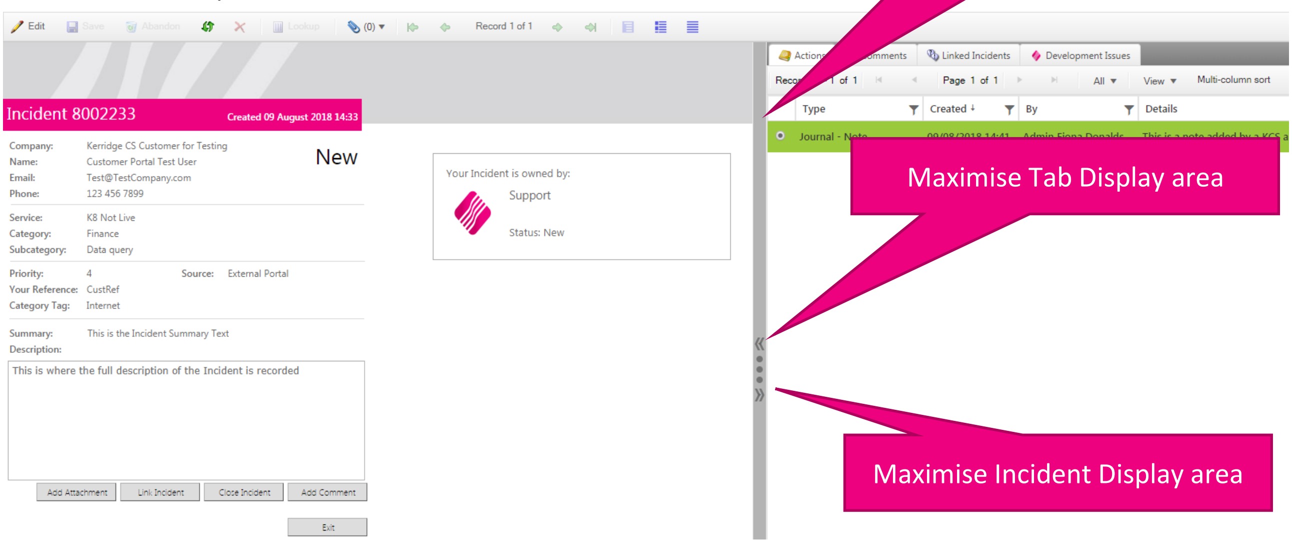
- Select the Export type
- Select Export and Show in new window to see the report on its own in a separate window
- Select Export and Save to save the exported report

> The exported report is shown in the status bar of the browser window

8 Viewing Incidents

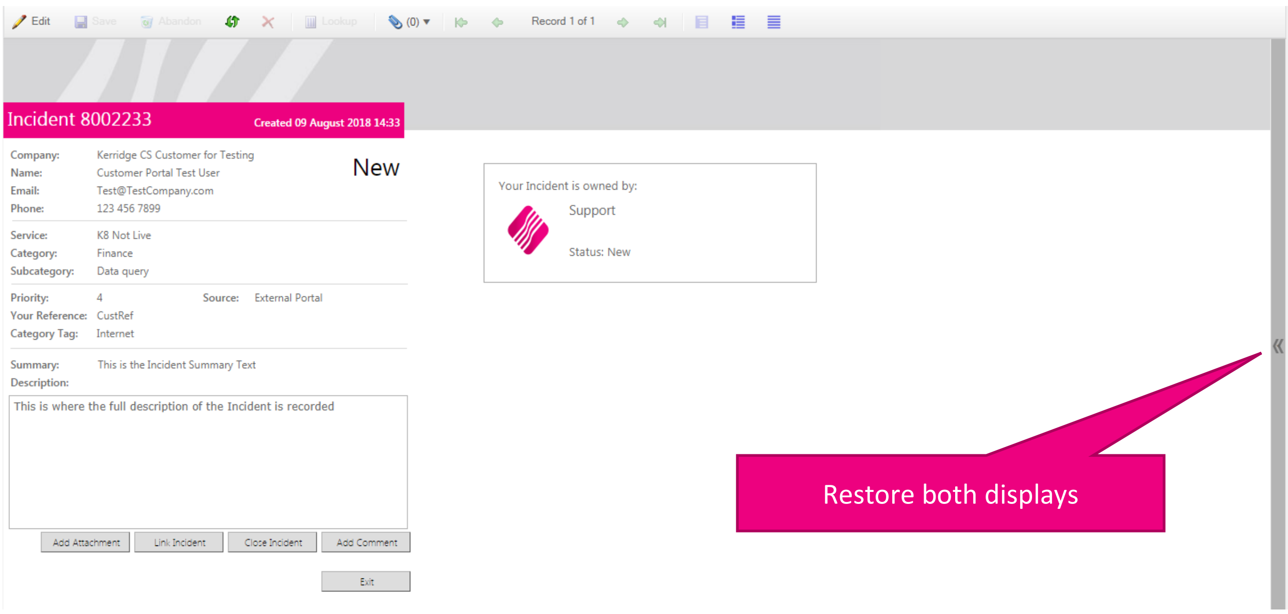
When you view an Incident, there are two parts to the display

- The right hand pane shows the main **Incident Details**
- The left hand pane shows the **Tabs** with related information



- ➢ Click on the pane divider and drag it to the left or right to rebalance the display areas
- ➢ Click on one of the chevrons in the pane divider to maximise the corresponding display area
- ➢ Click on the chevron button to restore both the display areas

For example, in the form below, the Incident display area has been maximised, click on the chevron to display the Tabs



8.1 Incident Tabs

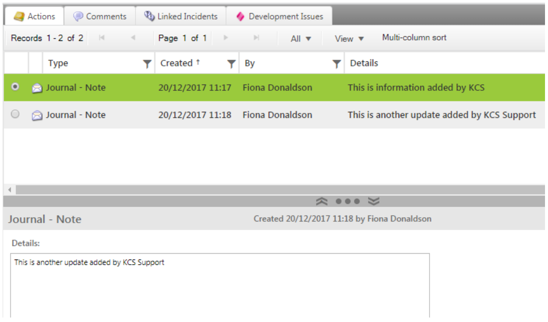
- **Actions Tab** - Shows the record of actions carried out by MAM personnel
- **Comments Tab** - Shows the comments added to the Incident via the Customer Portal
- **Linked Incidents** - Lists all the Incidents linked to the current Incident
- **Development Issues** - Lists the Development Issues related to this Incident

8.1.1 Tab View

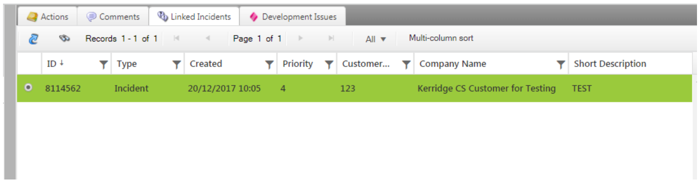
Depending on the Tab you have selected, the data may be displayed in a grid, or be presented in a split pane view with a grid in the top pane, and a form in the lower pane

- Actions Tabs – Horizontal Grid/Form
- Comments Tab – Horizontal Grid/Form
- Linked Incidents – Grid View
- Issue Integrations – Grid View

Horizontal Grid and Form View:

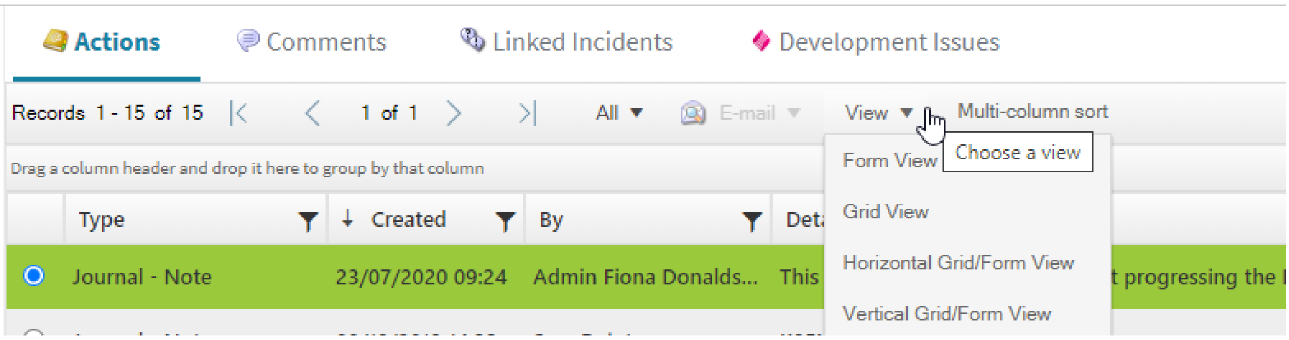


Grid View:

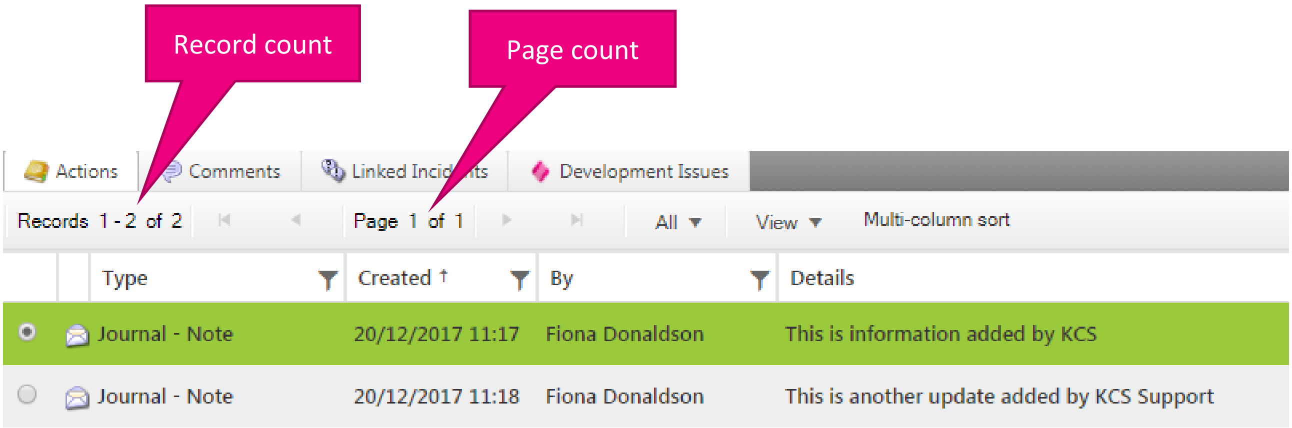


> The Horizontal Grid and Form View pane sizes can be adjusted by dragging the divider bar or using the chevron buttons

If desired, you can click on the **View** button to choose an alternative way to display the grid data



8.1.2 Grid Options

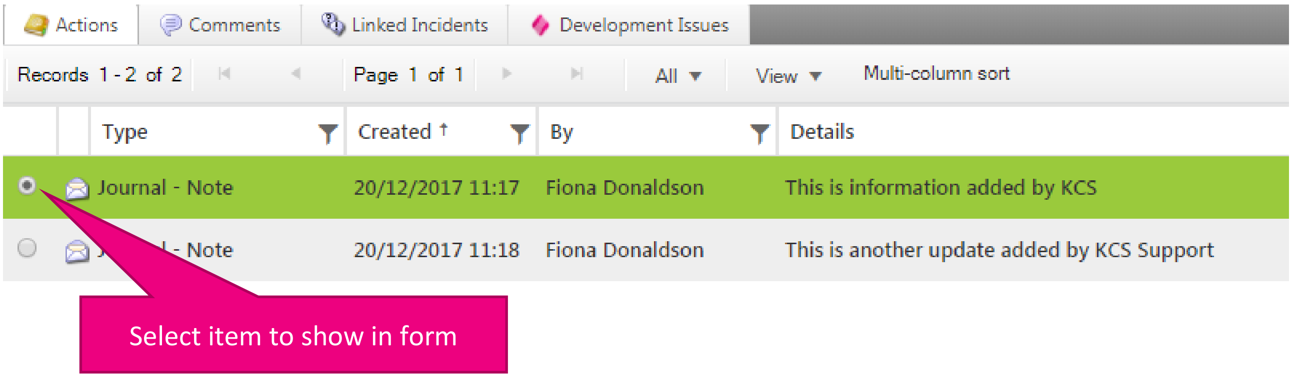


If there is more than one page the page navigation buttons on either side of the page counter will be enabled

8.1.2.1 Horizontal Grid and Form View

In the Horizontal Grid and Form View, click on the radio button at the start of the grid to show the details in the lower pane.

If you click on any other element of the row it will change the view to the Grid View

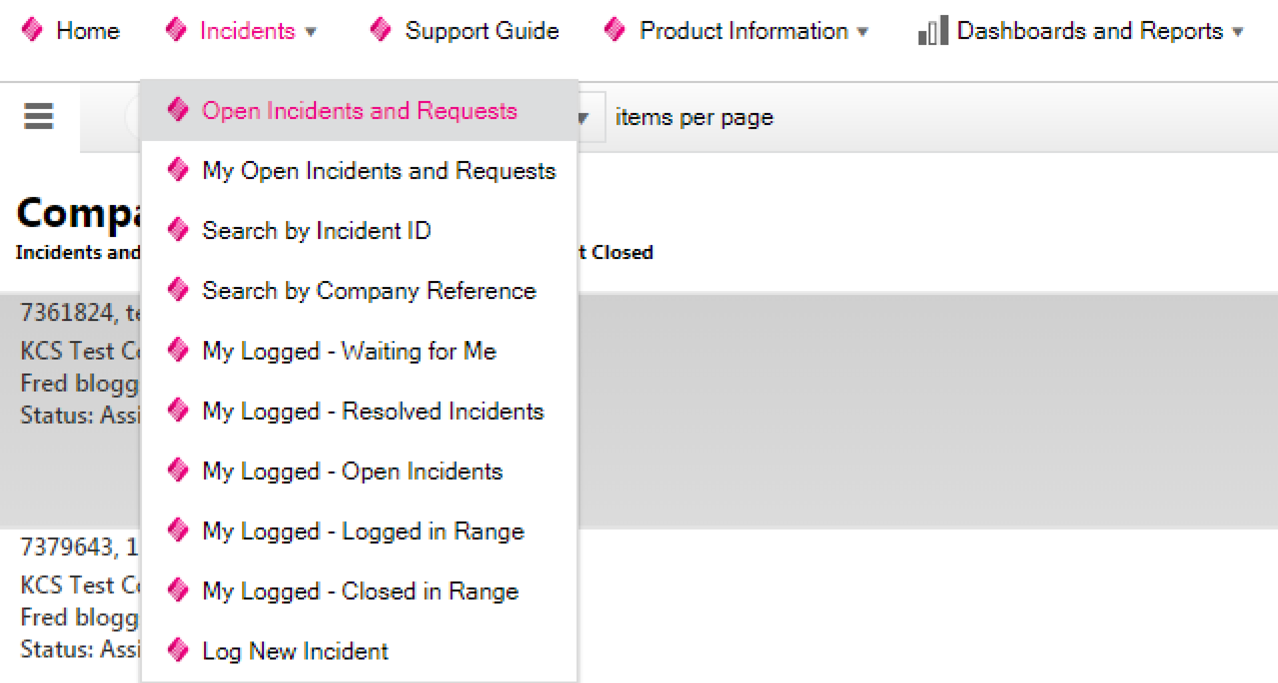


8.1.2.2 Multi-column Sort

See later section for details on Multi-column Sort

9 Searching for Incidents

In addition to using the dashboards to access incidents, there are search options available from the **Incidents** drop down menu



- Depending on your user permissions, you may not have access to all these options
- Options prefixed by **My** will return that only includes Incidents you own

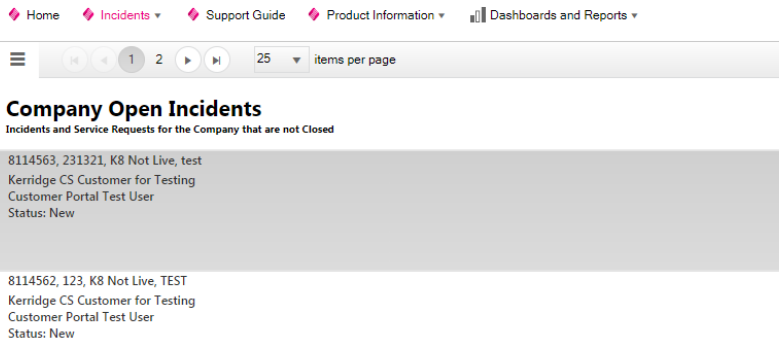
To use the search options

- Select the item from the drop down list
- Complete the prompts

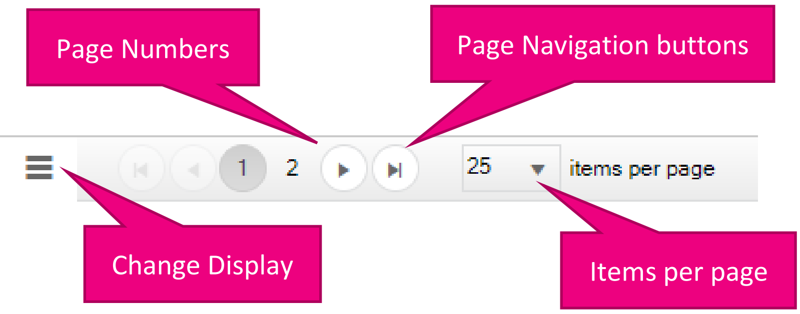
10 Grid and List View

10.1 List View

By default, multiple incidents will be displayed in **List View**

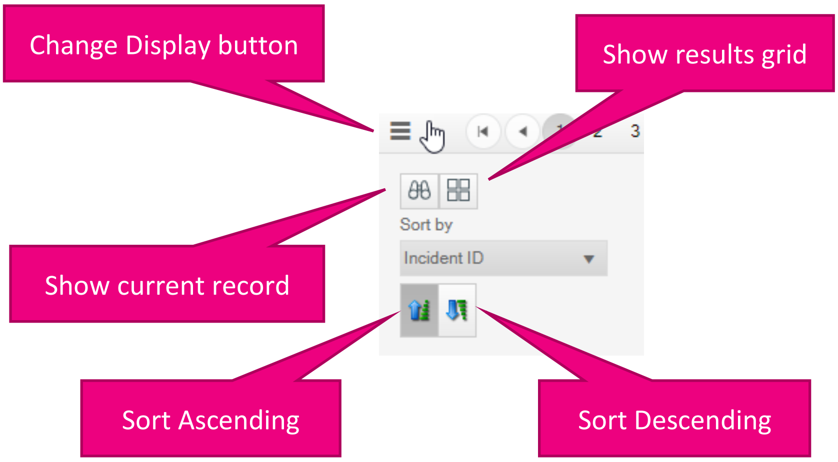


10.1.1 List Display Options



- If there are more than one page of results, Page numbers will be displayed along with the Page navigation buttons
- You can choose how many items to show per page using the **Items per page** option

10.1.2 Change Display Button Options



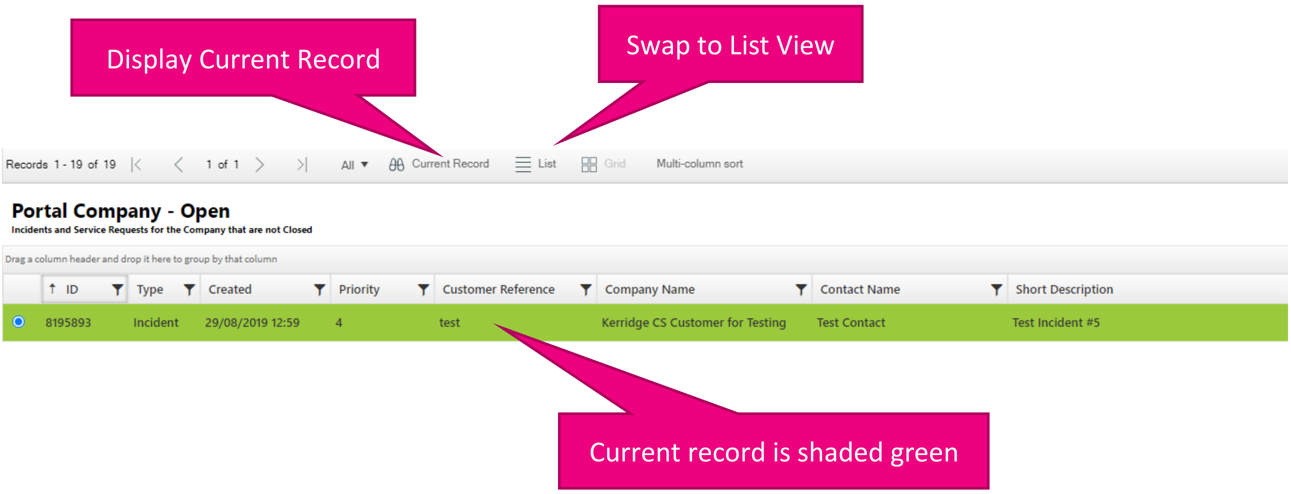
10.1.2.1 Swap to Grid results

➢ Click the Show results grid button to show the results in the Grid view rather than the List view

10.2 Grid View

> If there is more than one page, the page navigation buttons are shown on either side of the page counter

10.2.1 Display Options

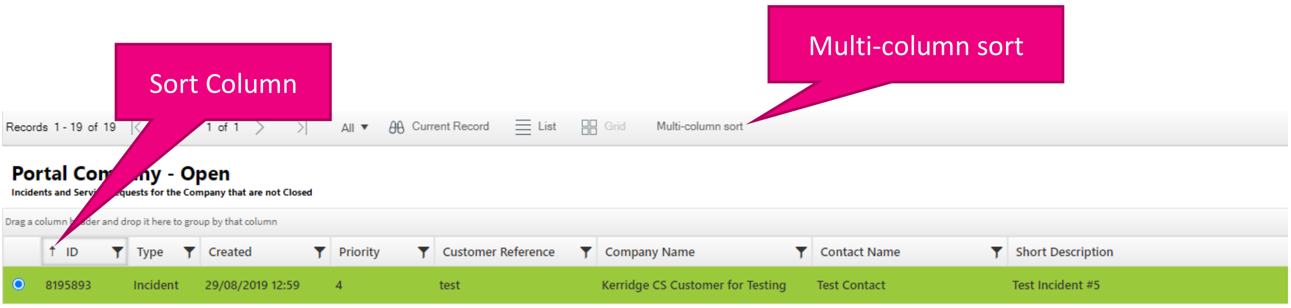


10.2.2 Sorting the Grid

Single Sort:

- Click on a column header to sort the grid results by that Column
- Click on the column header again to reverse the sort order

> The arrow by the column name indicates the sort order



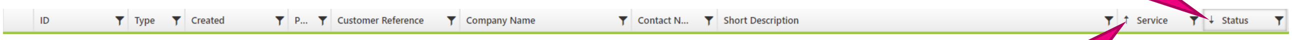
Multi-column sort:

Click on the **Multi-column sort** button to sort by more than one column

- ➢ Click on a column in the grid header to sort by that column
  - Click on the same column to reverse the sort order
  - Click on the same column to remove the column from the sort
- ➢ Click on other columns to sub-sort the gird as required
- ➢ Click on the **Multi-column sort** button to switch off the multi column report

The example below shows multi column sort in operation:

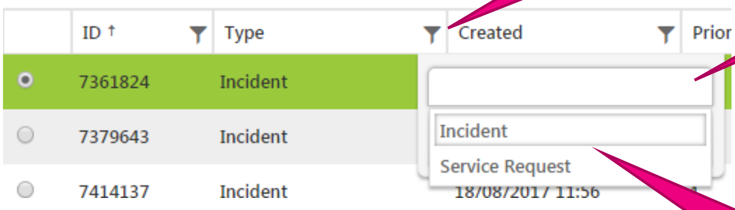
The incidents are sorted ascending by Service then descending by Status



10.2.3 Filtering the Grid

10.2.3.1 To Apply a Filter

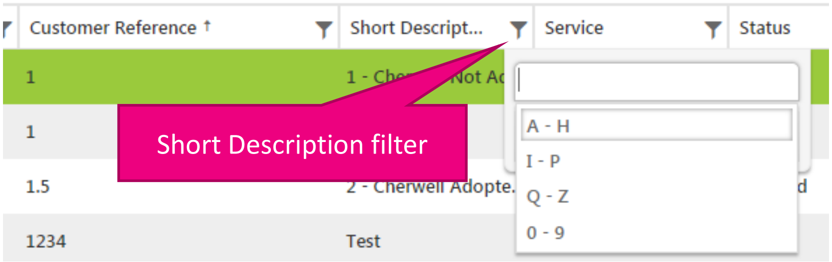
- ➢ Click on the Filter button (funnel) beside a column to apply a filter to that column
- ➢ Click in the filter box to apply a filter



- ➢ Click in the filter box to apply a filter

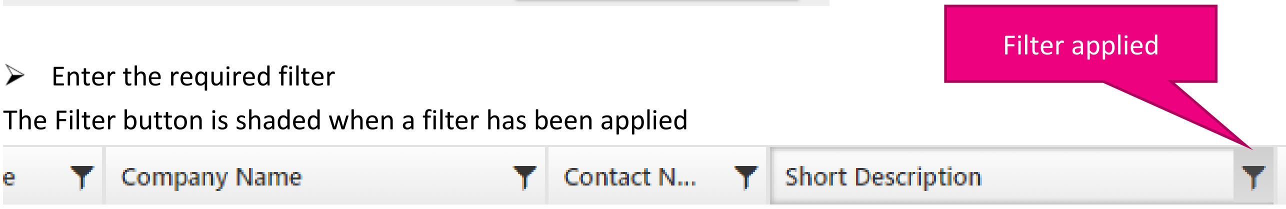
- If there are predefined possible values for the column, these will be presented for selection. For example above, there are only two possible values for Type: Incident and Service Request

- If the column is free text or numbers, selection ranges will be offered, for example:



➢ Enter the required filter

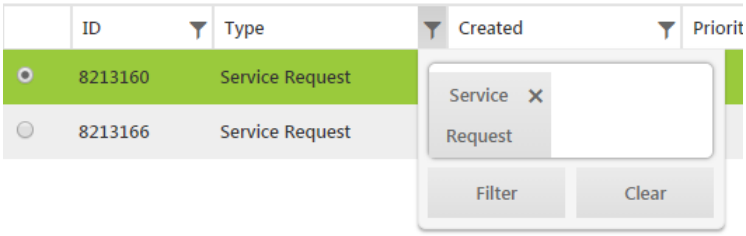
The Filter button is shaded when a filter has been applied



10.2.3.2 To remove a filter

➢ Click on the Filter button to remove the filter

➢ Select the **Clear** button or click on the cross to remove the filter



11 Trouble Shooting

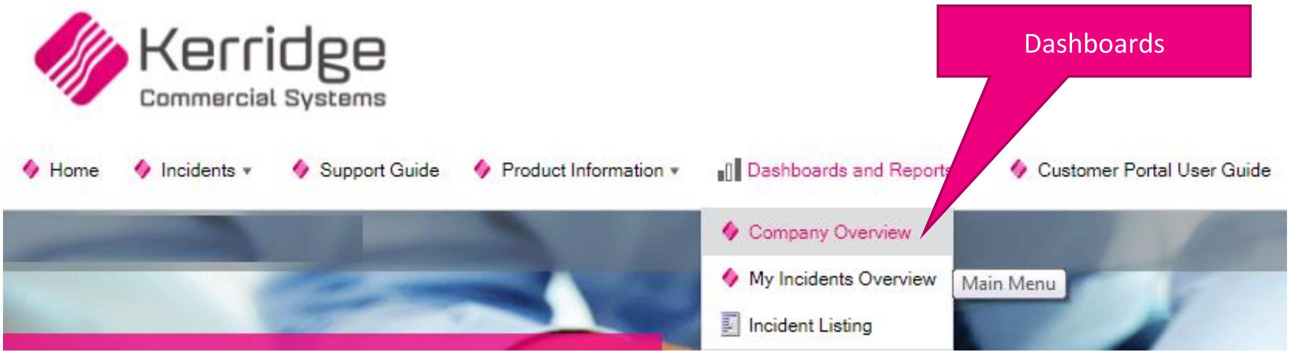
11.1 Cannot search for Incidents by ID or Customer Reference

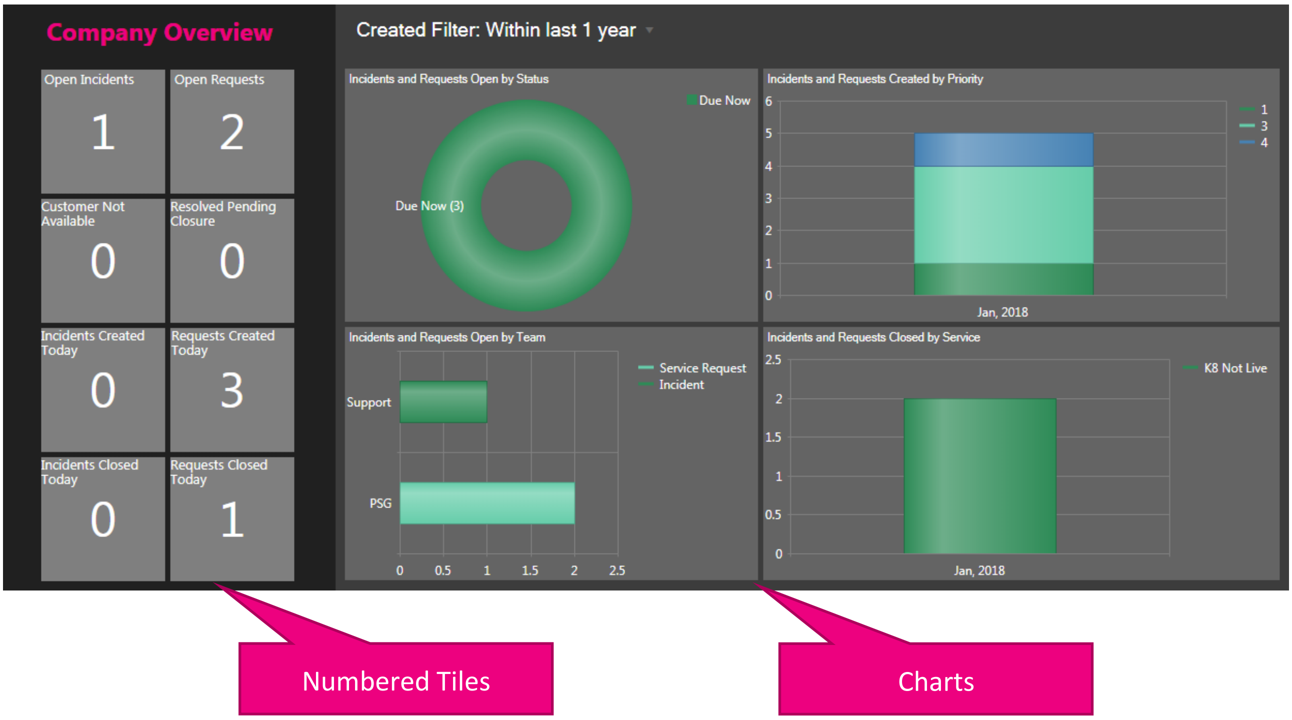
Some users are unable to search for an Incident via the Incident menu using Search by Incident ID or Search by Company Reference. In this case, we have found using Grid view instead of List View resolves the problem. By default users are set to using List View, once changed to Grid view it will be remembered and used unless changed back to List View

> You need to load some Incidents before you can change the View

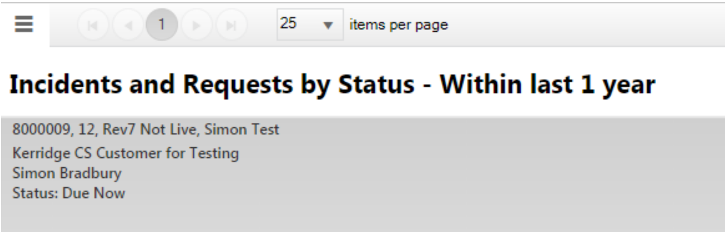
To load some Incidents, select

- **Dashboards and Reports**
- Select **Company Overview** or **My Incidents Overview**





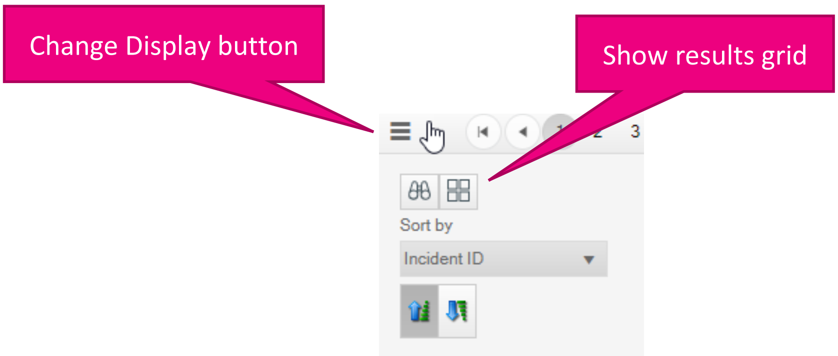
- Click on a numbered tile on the left, or any chart element to load the corresponding incidents



By default, the Incidents are displayed in List View

To switch to Grid View:

- Select the Change Display button (3 stripes)
- Then select the Show Results grid



See the Grid and List View section for further details these Views

11.2 Dates in the Grid and Search Prompts are in the wrong format

The date display format used in the portal grids and searches is controlled by your preferred Language setting in your browser. For example: for UK format dates (day/month/year), set the preferred language to **English UK,** for US format dates (month/day/year), set the preferred language to **English US**

You may find the links below helpful in understanding how to change your browser's preferred Language setting

- **Chrome:** https://support.google.com/chrome/answer/173424?co=GENIE.Platform%3DDesktop&hl=en (Section: Change the language of your Chrome Browser)
- **Firefox:** https://blog.mozilla.org/l10n/2019/04/02/changing-the-language-of-firefox-directly-from-the-browser/
- **Microsoft Edge:** https://docs.microsoft.com/en-us/deployedge/microsoft-edge-supported-languages

Please note:

You may need to use different help articles depending on the version of the browser you are using. If you have difficulties with this, please contact your Company's IT team, as this is not something MAM can resolve for you