
ENTEGRATION ONLINE HELP DESK
USER DOCUMENTATION

Help

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I. Creating a New Account

You must create an account to use the Help Desk.

- a. Click "New User?" on the homepage
- b. Complete New User sign up form.
 - i. Enter a valid email address. If possible, you should use the email address provided by your employer.
 - ii. Create a password. Remember your password, as it will be required to login.
 - iii. Enter your First and Last name.
 - iv. Enter your Company Name. If your company is not an active Entegration client, you will be unable to sign up. If you feel your company has been omitted in error, please contact support@entegration.net
 - v. Enter a phone number. This will be your primary contact number. At least one contact number is required.
 - vi. Enter a cell phone number, if desired (not required).
 - vii. Click the Create Account button. Your information will be sent to Entegration for validation. You will receive an email to activate your account.
- c. Activating Your Account
 - i. Check the email address you provided at sign up. If you do not receive the validation email within a few minutes, check your SPAM folder. You may need to whitelist notify@quickbase.com to ensure emails from the Help Desk are not flagged as SPAM.
 - ii. Open the Verification email. Click to activate your Help Desk account.
 - iii. Once your account has been activated, you may continue to Login.

II. Logging In

You must login to use the Help Desk.

- a. Enter the E-Mail address you provided at sign up.
- b. Enter the password you created at sign up. Forgot your password? See "Resetting Your Password" section.
- c. Click Login.

III. Dashboard View

Entegration Help Desk

Entegration Help Desk [View Your Closed Cases](#)

Welcome to the Entegration Help Desk!

Your Profile:

User Name: **A**

Company Name: **C**

E-Mail Address: **D**

Phone Number: **B**

Cell Phone:

[Create a New Case](#) | [Edit Your Profile](#) | [Logout](#)

System Messages

There are no messages at this time.

Your Open Cases

Date Created	Case #	Entry Method	Type	Priority	Case Summary	Status	Assigned Rep
No cases found							

Powered by QuickBase

- a. Create a new Case
 - i. Click "Create a New Case"
 - ii. Your User Information will be filled in automatically.
 - iii. You will need to select a Type for the request. Types include:
 1. Technical Support Request
 2. User Access or Change Request
 - a. Add User
 - b. Modify User
 - c. Remove User
 - d. Other
 3. Website Change Request
 4. General Information Request
 5. Quote Request
 6. Billing Inquiry
 7. Other

Please try to match your request with a type provided accurately. This will help us route your case to the proper support representative.

iv. You will need to select a Priority for this request. Priorities include:

1. 1 – Low
2. 2
3. 3
4. 4
5. 5 – High

Please ensure your case is prioritized accurately. All cases, regardless of priority, will be treated by our staff with the highest possible priority.

v. You will need to provide details about your case in the "Complete Case" section.

Please describe your case as thoroughly as possible. The more information you can provide, the faster your case can be resolved. Relevant information may include an error message, computer name or number, alternative contact information, alternative office location, etc...

Do NOT use the "Back" button on your browser until your submit your Case.

vi. Sending Attachments

You may choose to send an attachment with your case to more accurately describe your request. Screen shots may be taken by pressing the "Print Screen" key on your keyboard, opening Paint, and choosing Paste. You can save this document and send it to us.

1. Choose the "Send Attachments" button. You must send attachments before you submit your case.
2. Your default E-Mail application will open. In most cases, this will be Outlook. Note that the TO: and SUBJECT: field will be pre-populated. Please do not change these fields.
3. Insert your attachment into the E-Mail and send.
4. Return to your Case to complete it.

vii. Submitting Your Case

1. Click the "Save" button to submit your case.
2. You will receive an E-Mail confirmation that your case has been received.
3. You will receive periodic updates via E-Mail as your case is updated.
4. The Assigned Rep will use the ticket to communicate with you if more information is required. You will need to return to the ticket to update it. See "Updating a Case"

viii. Updating a Case

1. You may need to return to your case to provide more information to the support representative. **Note: You can only update a case after it has been assigned to a support representative.**
2. Returning to the Dashboard, you'll notice the case is now listed in your "Open Cases" section.

Your Open Cases									
	Date Created	Case #	Entry Method	Type	Priority	Case Summary	Status	Assigned Rep	
EDIT	VIEW	03-18-2009 01:54 PM (EDT)	090085	Online Submission	Technical Support Request	3	test test test	Pending Review	

3. Click the blue "Edit" button to update your case.
4. The "Case Update" section will appear once your case has been assigned.

Case Update

Assigned Rep
Felicetta, Mike

Updates to this case will appear below.

Hint: Use the "Edit" button to update this case.

5. You may use the box provided to update your case.
6. The assigned support representative will also post notes here to share case updates with you.
7. It is important to check this section frequently, as the assigned support representative may use it to request more information from you.

8. As new information is posted here, you will be notified via E-Mail.
 9. After you update, be sure to SAVE your case.
- ix. Closing Your Case

Your case can only be closed by the assigned support representative. After your case has been assigned, you can use the "Case Update" section to post a note and have the case closed.

b. Viewing Your Closed Cases

After your case has been closed, it will be removed from your primary dashboard. To view your cases after they have been closed, find the "View Closed Case" link in the upper right hand corner of the dashboard. Click it to display your closed cases. Click it again to return to your open cases.

c. Editing Your Profile

From time to time it may be necessary to edit the information you provided at sign up.

Use the "Edit Your Profile" link to access this information. Here you can perform the following:

- i. Update First Name
- ii. Update Last Name
- iii. Update Phone Number
- iv. Update Cell Phone (if applicable)
- v. Update Password

Note that you cannot edit the email account with which you signed up. If you need to change your email address, you will need to create a new account.

d. Logging Out

When you are done using the site, please use the "Log Out" link to securely log out of the application. If you do not log out, it is possible your account could become compromised.

IV. Troubleshooting

a. Resetting Your Password

i. Forgotten Password

1. Access the "Forgot Password" link on the home page.

Your password will be emailed to the E-Mail address you provided at sign up.

ii. Change Password

1. Log into your account.
2. Access the "Edit Profile" section
3. Erase your current password and replace it with a new password.

b. Cookies

Your browser must support Cookies to use the Help Desk. If you receive an error message regarding Cookies, you may need to enable cookies.

In Internet Explorer 7:

1. Open Internet Explorer
2. Select the Tools Menu
3. Choose Internet Options
4. Choose the Privacy Tab
5. If "Custom" is displayed, choose the "Default" button
6. Move the slider to any level **except** "Block All Cookies"

In FireFox:

1. Click on the Tools menu
2. Click on Options
3. Click on the Privacy section on the left
4. Expand the Cookies section
5. Check the Enable cookies and Accept cookies normally checkboxes